

# THE ECONOMIC IMPACT OF TRAVEL IN OREGON, 2021 (preliminary)

In 2021, the Oregon travel economy recovered much of what was lost in 2020. Strong demand for overnight accommodations and increased commodity prices led to large gains in visitor spending. Based on the U.S. Travel estimated impacts, Oregon is faring better than the U.S. recovering to 85% of 2019 travel spend compared to 78% for the U.S. (U.S. Travel).

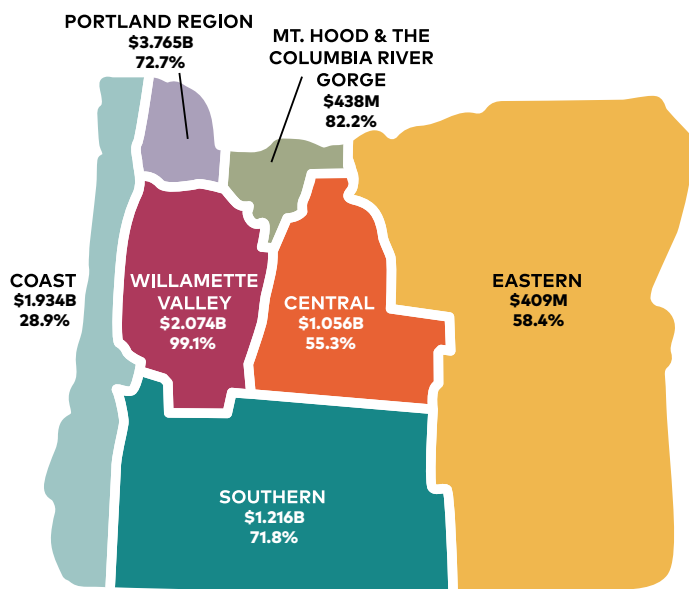
## Key Takeaways

- **64.8% Increase in Travel Spending**  
Travel spending in Oregon increased 64.8% from \$6.6 billion in 2020 to \$10.9 billion in 2021.
- **6,900 Jobs Gained**  
Direct travel-generated employment experienced a gain of approximately 6,900 jobs, a 7.3% increase in travel-generated employment compared to 2020.
- **13.2% Growth in Travel Earnings**  
Direct travel-generated earnings experienced a gain of \$408 million, a 13.2% increase compared to 2020.
- **25.2% Increase in Tax Revenue**  
Tax receipts generated by travel spending are up 25.2% compared to 2020. State and local taxes both experienced a strong recovery in 2021, growing 41.2% and 26.5% respectively.
- **Residents of Oregon accounted for 38% of visitor spending in Oregon in 2021.**  
U.S. residents of states other than Oregon accounted for approximately 60% while international visitors accounted for 2% of travel spending in the state.

Out-of-State visitors were approximately 64% of travel spending prior to the COVID-19 pandemic. In 2020 this share dropped to 42%.

- **The largest region in terms of travel impacts is the Portland Region.**  
In 2021 travel spending was \$3.8 billion, contributing 35% of the state total. Prior to 2020 the Portland Region accounted for 44% of travel spending in the state.

## Tourism Regions Direct Spending in 2021 and % Change Compared to 2020



Access the executive summary and full report at:  
[industry.traveloregon.com/2021EcImpactReport](https://industry.traveloregon.com/2021EcImpactReport)

These preliminary estimates for Oregon are subject to revision as more complete source data become available.



# The Economic Impact of Travel

## Oregon

2021p (Preliminary)

May 2022

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Travel Oregon



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# The Economic Impact of Travel in Oregon

2021p (Preliminary)

Travel Oregon

5/6/2022

## PRIMARY RESEARCH CONDUCTED BY

Dean Runyan Associates  
811 SW 11th Avenue Suite 920  
Portland, Oregon 97205

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# National Impacts

2021p

# National / Summary

## U.S. Travel Impacts 2021 Preliminary

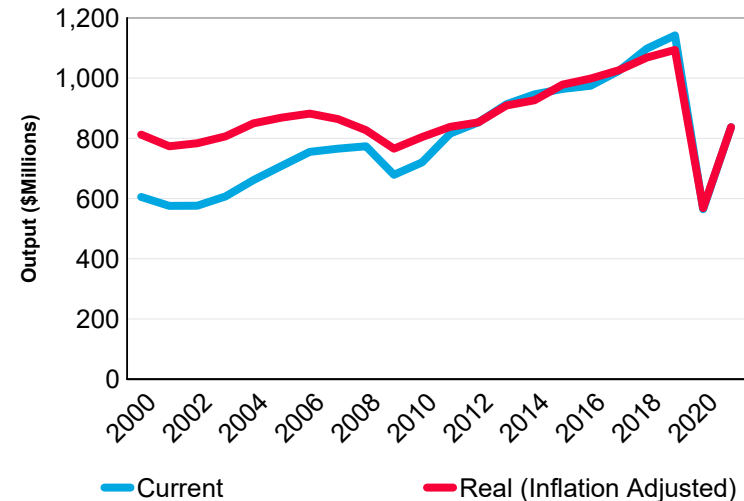
The COVID-19 pandemic brought economic disruption to almost all sectors of the U.S. economy in 2020, but few industries were as hard hit as travel. The combination of economic instability and health and safety measures in the U.S. led to a large reduction in the demand for such services. Total travel output decreased by 48% (-\$525B) in 2020, as compared to 2019 levels. In 2021 travel activity continued the recovery started in mid-late 2020, by the end of 2021 travel output increased approximately 48% (+\$268B) compared to 2020 levels. An additional \$256 billion is needed to reach 2019 levels of travel output.

At the time of this report, the Bureau of Economic Analysis (BEA) Tourism Satellite Account covered travel activity through 2020; all 2021 estimates have been made by Dean Runyan Associates.

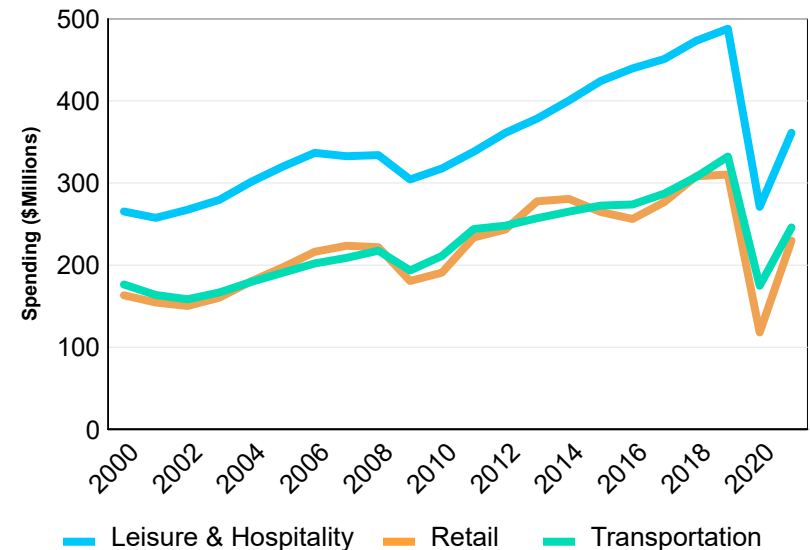
- Spending by resident and foreign visitors was \$837 billion in 2021 in current dollars. This represents a 48% increase over 2020. When adjusted for inflation (real dollars), spending increased by 47% from 2020 to 2021.
- Leisure & Hospitality, as a share of total spending, decreased to 43%, compared to 48% in 2020. The overall shift in total spending was influenced by the return to air travel, and price increases for gasoline.

The U.S. travel industry **expanded 48% (\$268B) in 2021**, after losing a combined \$525 billion in 2020.

### Direct Travel Output 2000-2021p

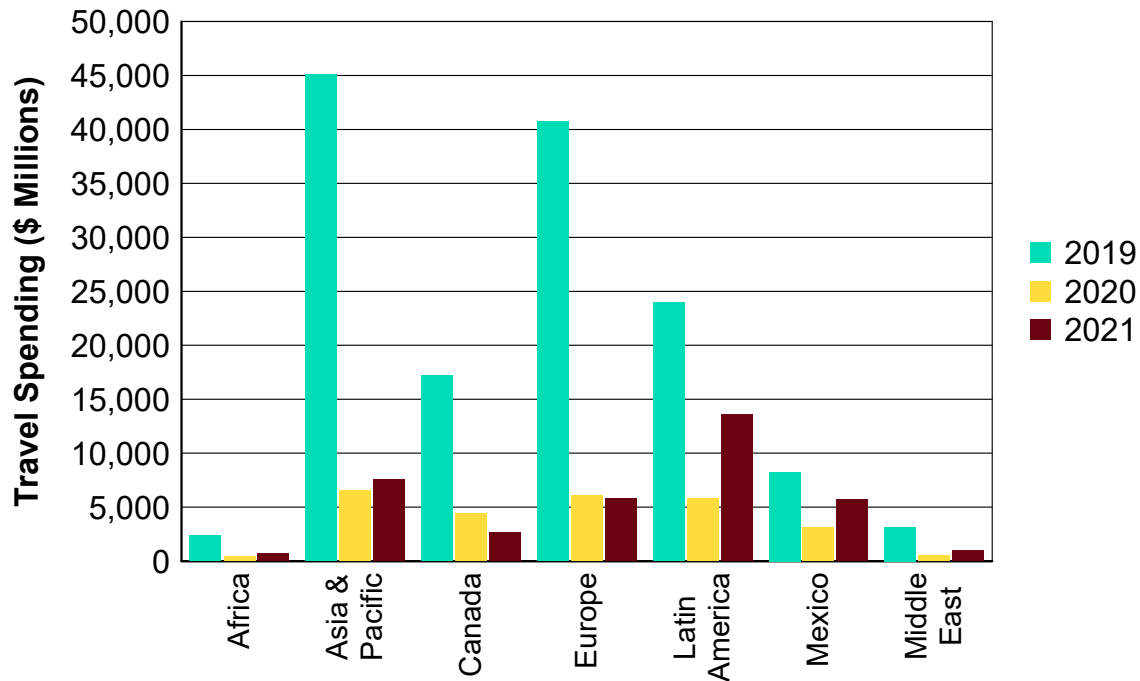


### Spending by Summary Commodity 2000-2021p



# National / Summary

## International Spending 2021p



International spending was up 38% in 2021.

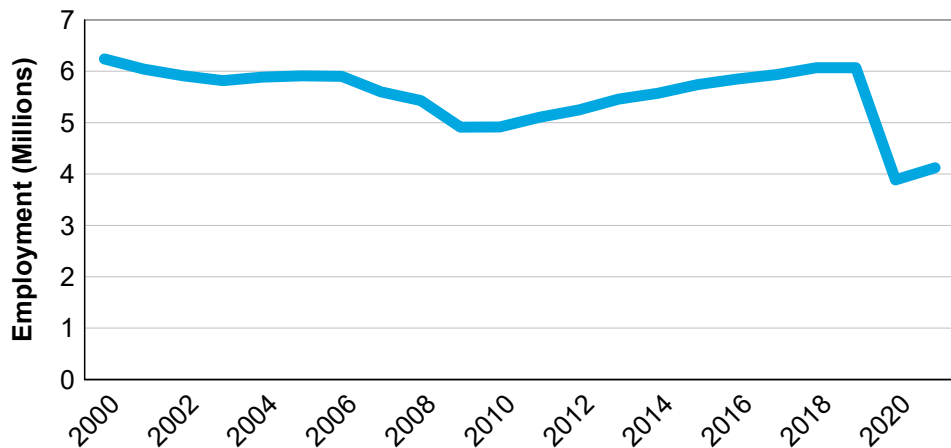
International markets are still slow to recover as COVID-19 restrictions were still prevalent throughout much of the globe in 2021. It should be noted that the first two months of 2020 were relatively normal, and that 2021 can show additional losses because of those two normal periods.

**Sources:** Dean Runyan Associates, Bureau of Economic Analysis



# National / Summary

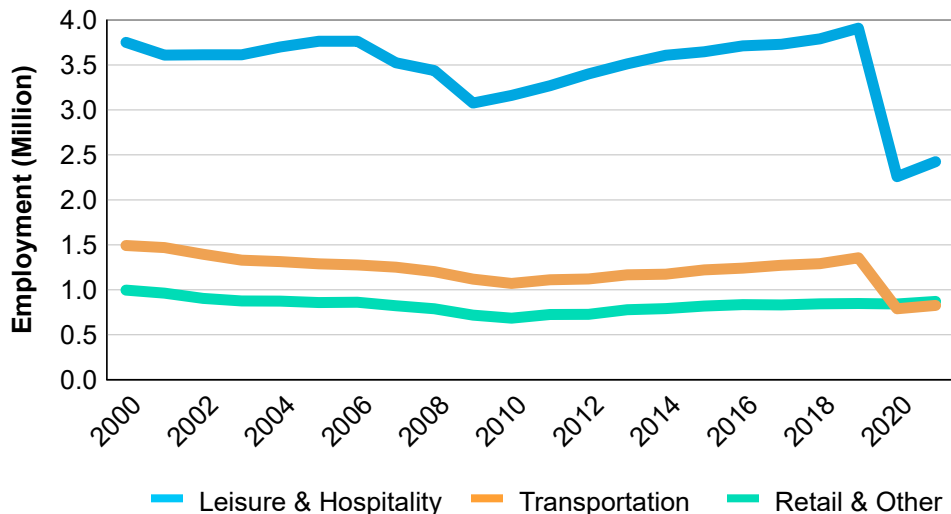
## U.S. Travel Industry Direct Employment



National employment in the travel industry recovered 230 thousand jobs in 2021 an increase of 7% over 2020. In 2020 travel industry employment decreased by 2.2 million jobs (-36% YOY).

Sources: Bureau of Economic Analysis, Dean Runyan Associates

## U.S. Travel Industry Employment by Sector



Leisure & Hospitality grew 7.4% in 2021 a gain of 166 thousand jobs. A complicated employment environment is preventing a quicker rebound compared to spending activity.

Sources: Bureau of Economic Analysis, Dean Runyan Associates



State Impacts

2021p

# Oregon / Summary

## Travel Impacts 2021p

Visitors traveling to and throughout Oregon represent an important component of the state's economy. Travel originating in domestic and international markets generates valuable business sales, payroll, employment and tax receipts for the state as well as for local jurisdictions. Further, many locations within Oregon serve as travel destinations in their own right, for both Oregon residents and out-of-state visitors. These areas accordingly consider travel and tourism a primary industry.

This report describes the direct economic impacts of travel to and through the State of Oregon and each of its 36 counties. This report also includes statewide estimates of spending by resident and non-resident visitors and the secondary employment and earnings impacts associated with travel spending. A primary objective of this research is to provide reliable, detailed estimates, which allow comparisons from year-to-year for the state and county levels.

Direct travel spending decreased by 48.5% in 2020, as compared to 2019 levels. In 2021 the Oregon travel economy recovered much of what was lost in 2020. Strong demand for overnight accommodations and increased commodity prices led to large gains in visitor spending. By the end of the year spending increased by 64% (+\$4.3 billion) compared to 2020 levels. An additional \$1.9 billion is need to reach 2019 levels of direct travel spending. Employment in 2021 continues to recover, but the rate of recovery is much reduced compared to the other impact categories. In 2020 24.7 thousand jobs were lost a decline of 21% compared to 2019. Over the course of 2021 the travel industry added 6.9 thousand jobs, to reach levels prior to the pandemic an additional 17.8 thousand jobs is needed.

Starting in 2021 we are including an estimate for Short Term Vacation Rentals (STVR) as the COVID-19 pandemic accerlerated STVR popularity as an alternative overnight option. Travel impact detail pages also include the annual percent change from 2019 to 2020 to provide perspective on the losses sustained in 2020 for comparison with 2021.

**Abbreviation Change:** In past reports short term rentals were referred to as "STR", this has been updated to "STVR" to reduce confusion with STR LLC. hotel performance reports.



**Spending, Employment, Earnings, and Taxes** are the key metrics to measure the economic impacts of travel.

### What are travel impacts?

**Travel impacts** measure the economic activity associated with the activity of travel within a region. As travel is a broad activity that encompasses many other activities (transportation, lodging, eating & drinking, recreational activities, etc.), it is necessary to make estimates for each of the composite elements of travel in order to arrive at a total number. Reporting on travel impacts allows decision-makers to benchmark the travel industry against other local industries, gain insight on the makeup of traveler activity in their region, and communicate clearly to stakeholders the relevance of the traveler economy to their region.

# Oregon / Summary

## Travel Impacts 2021p



### 64.8% Increase in Travel Spending

Travel spending in Oregon increased 64.8% from \$6.6 billion in 2020 to \$10.9 billion in 2021.



### 6,900 Jobs Gained

Direct travel-generated employment experienced a gain of approximately 6,900 jobs, a 7.3% increase in travel-generated employment compared to 2020.



### 13.2% Growth in Travel Earnings

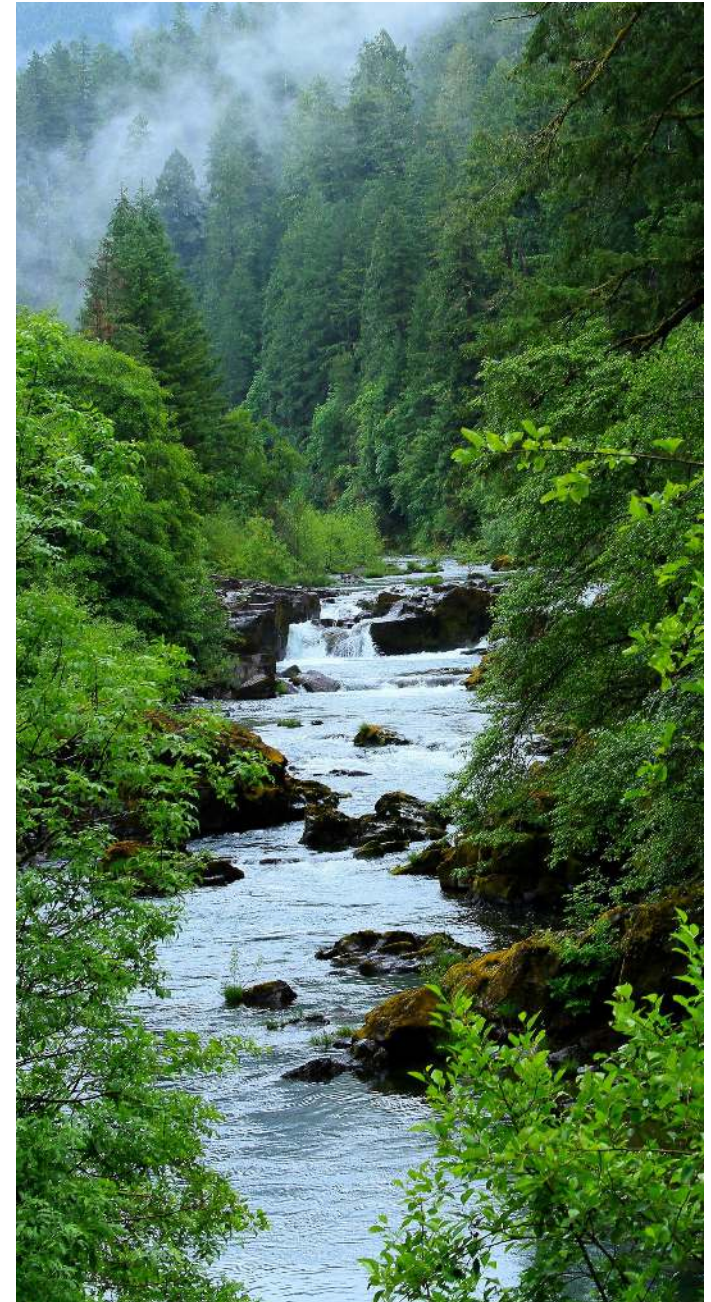
Direct travel-generated earnings experienced a gain of \$408 million, a 13.2% increase compared to 2020.



### 25.2% Increase in Tax Revenue

Tax receipts generated by travel spending are up 25.2% compared to 2020. State and local taxes both experienced a strong recovery in 2021, growing 41.2% and 26.5% respectively. This growth is primarily fueled by a strong rebound in accommodation sales.

Note: These estimates for Oregon are subject to revision when more complete or additional data becomes available.

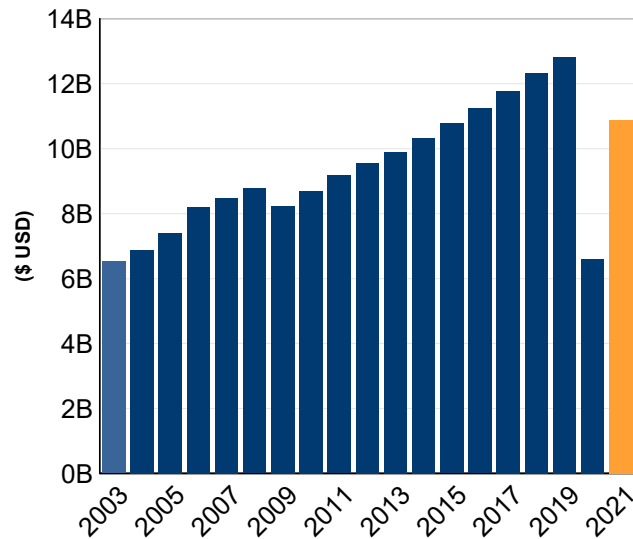




# Oregon / Spending

## Direct Travel Spending

Direct travel spending increased by \$4.3 billion in 2021.



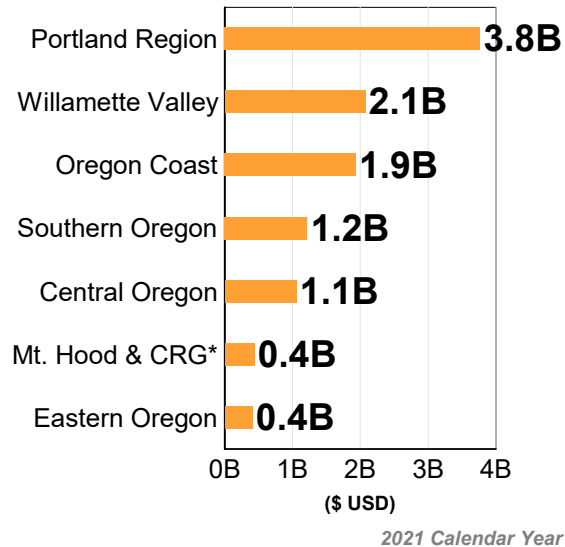
### Oregon Travel Spending

In 2021, travel spending grew to \$10.9 billion, a 64.8% increase from the prior year.

From 2003-2021, travel spending grew at an annual growth rate of 2.9%.



### Direct Travel Spending by Region



### Oregon Tourism Regions

The largest region in terms of travel impacts is the Portland Region. In 2021 travel spending was \$3.8 billion, contributing 35% of the state total. Prior to 2020 the Portland Region accounted for 44% of travel spending in the state.

\*Mt. Hood & Columbia River Gorge



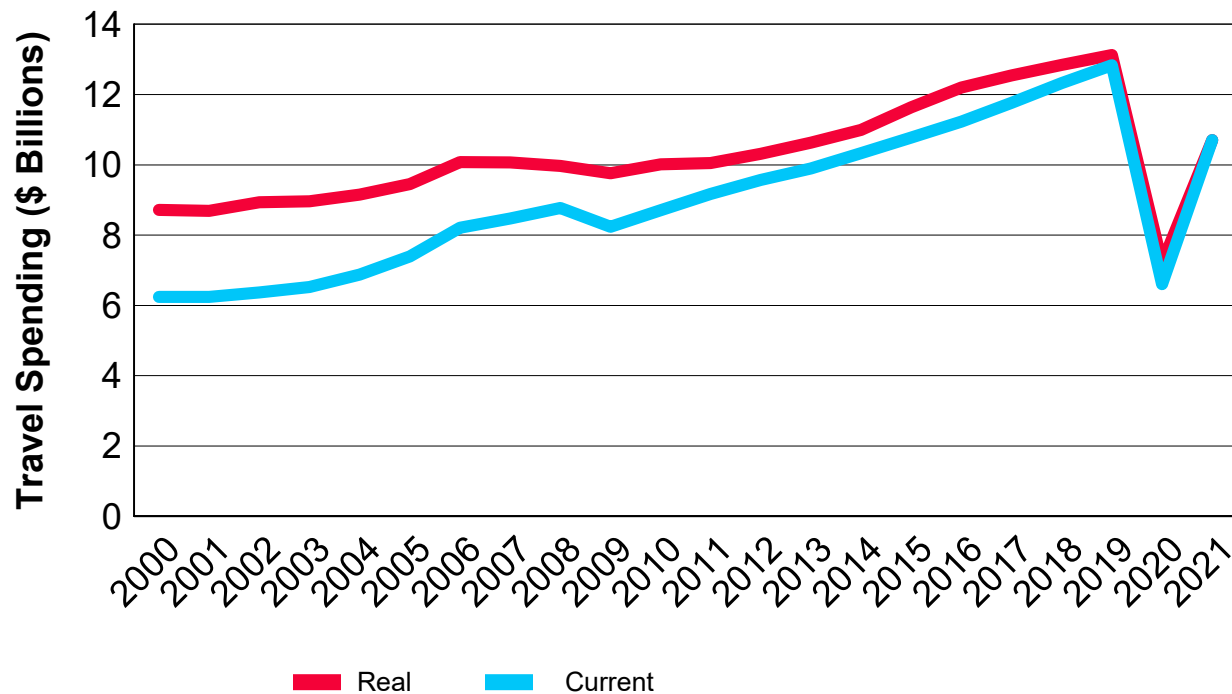
Destination + Other Travel =  
Direct Travel Spending

### What is direct travel spending?

**Direct travel spending** includes both destination spending and other spending. **Destination spending** refers to all spending on goods and services by visitors at the destination. **Other travel spending** refers to expenditures at travel arrangement companies located in Oregon, convention and trade show operations, and spending on air by residents to leave the state for travel elsewhere. These expenditures directly support the travel industry in Oregon but are not considered visitor spending in our methodology.

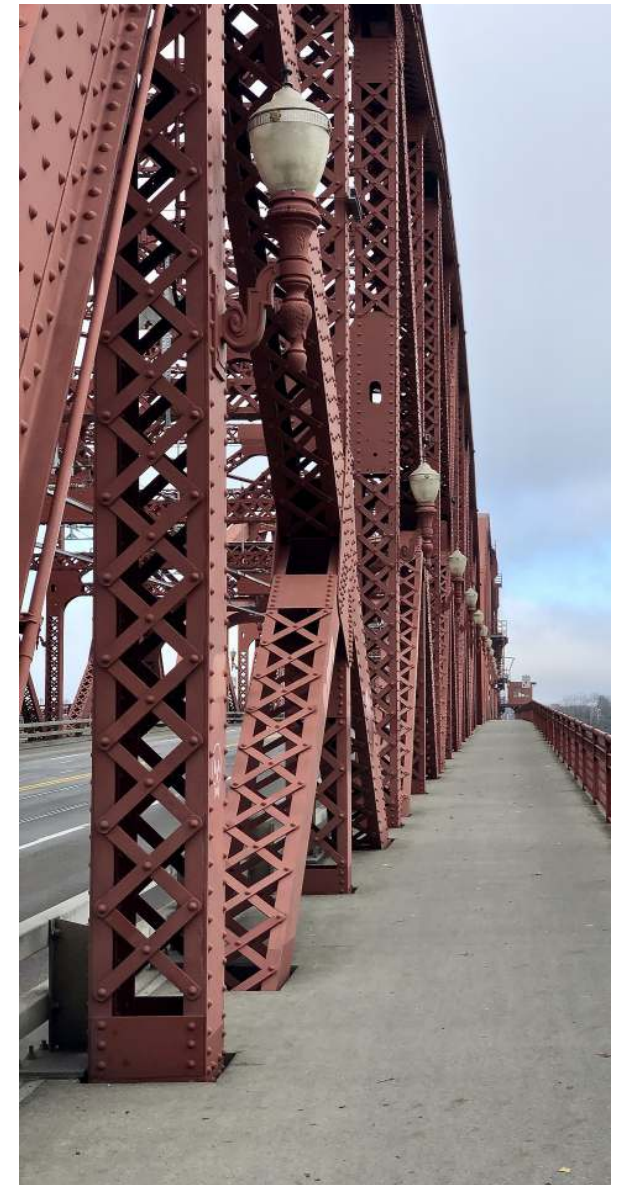
# Oregon / Spending

## Direct Spending / Real and Current Dollars



Adjusted for inflation the real dollar increase in 2021 travel spending is 51.5% compared to a 64.8% increase in current dollars year over year.

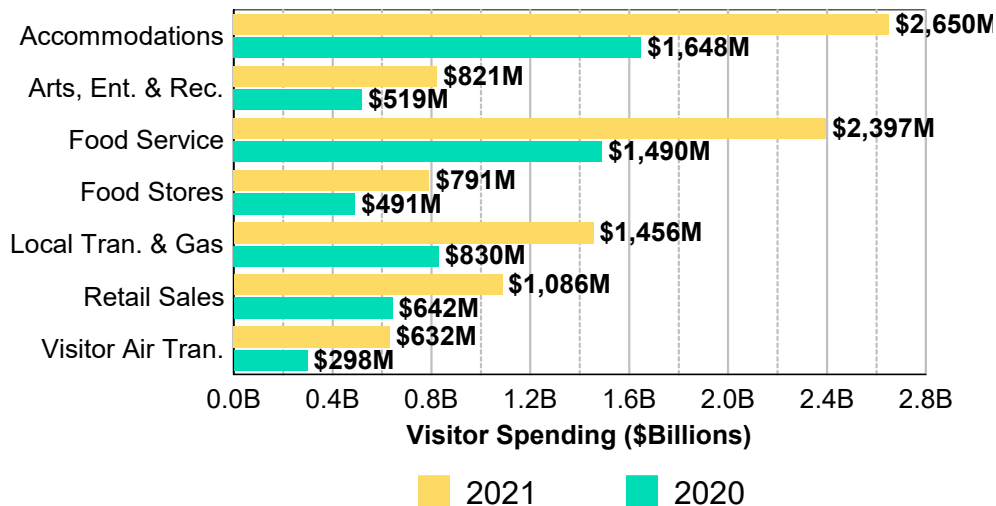
Sources: Bureau of Labor Statistics CPI, Dean Runyan Associates





# Oregon / Spending

## Visitor Spending by Commodity Purchased / Oregon

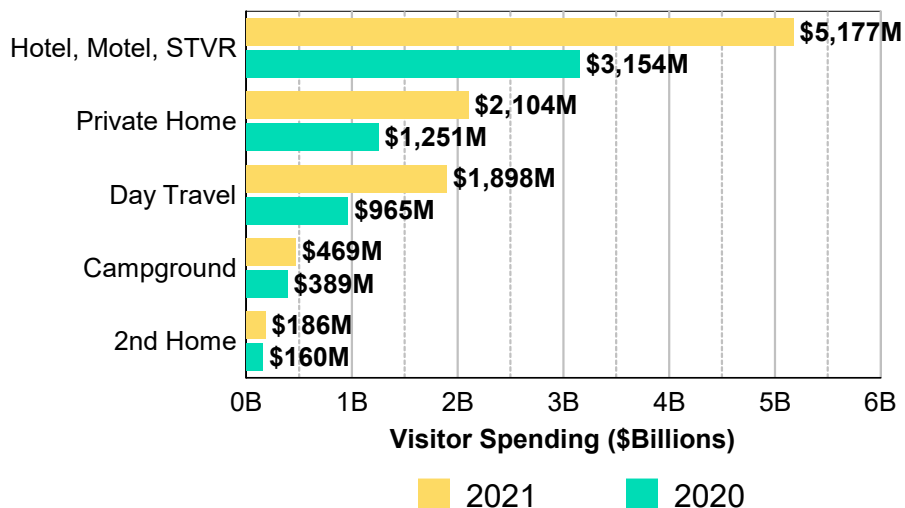


The largest gain occurred in accommodations, \$1 billion additional spending in 2021 compared to 2020, a increase of 60.8%.

Spending on food service grew by approximately \$900 million, an increase of 60.9%.

**Sources:** STR LLC., Oregon Department of Revenue, Dean Runyan Associates, Omnitrak Group, KeyData Dashboard

## Visitor Spending by Accommodation Type / Oregon



Visitors who stayed in a hotel, motel or short term vacation rental (STVR) spent \$2 billion in 2021, an decline of 64.1%.

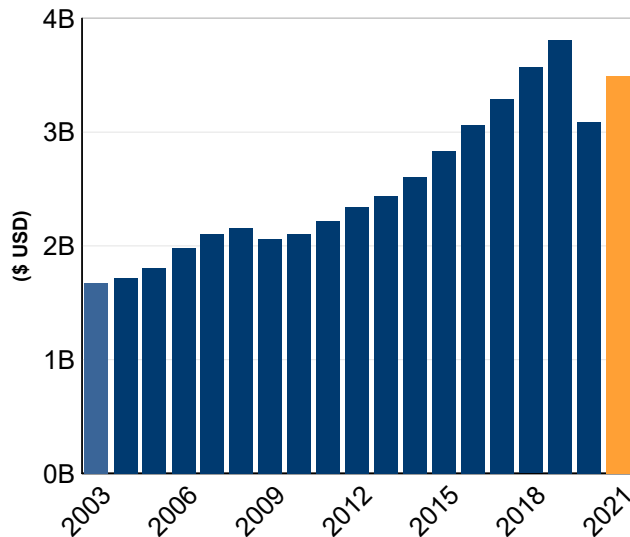
Visitors who stayed in a private home with friends and relative spent \$850 million in 2021, an increase of 68.1%.

**Sources:** Oregon Department of Revenue, Dean Runyan Associates, STR LLC., KeyData Dashboard, U.S. Census Bureau, Omnitrak Group

# Oregon / Earnings

## Direct Travel Earnings

**Direct travel earnings increased by \$408 million in 2021.**



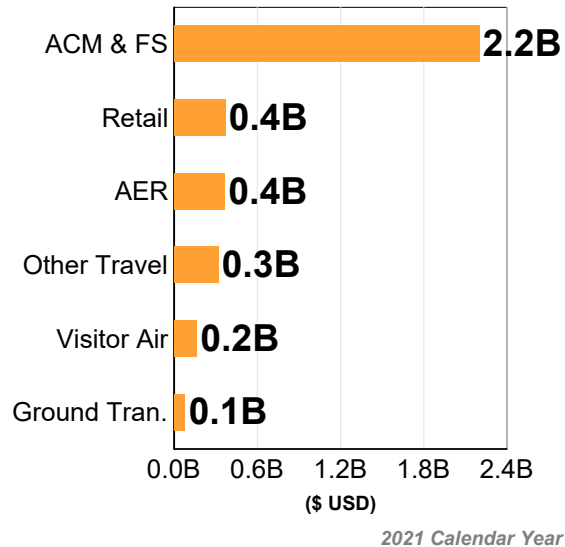
### Oregon Travel Earnings

In 2021, regional travel earnings grew to \$3.5 billion, a 13.2% increase from the prior year.

From 2003-2021, Oregon travel industry earnings grew at an annual growth rate of 4.2%.



### Travel Earnings by Industry



### Travel Industry Breakout

Accommodation and Food Services account for more than half (63%) of travel industry earnings. Arts, Entertainment, and Recreation accounts for 11%.

*Accommodation & Food Services (ACM & FS)*  
*Arts, Entertainment, Recreation (AER)*



$$\begin{aligned} &(\text{Revenue} - \text{Cost of Goods Sold} - \\ &\text{Expenses} - \text{Point of Sale Taxes}) \\ &= \\ &\text{Earnings} \end{aligned}$$

### What are direct travel-related earnings?

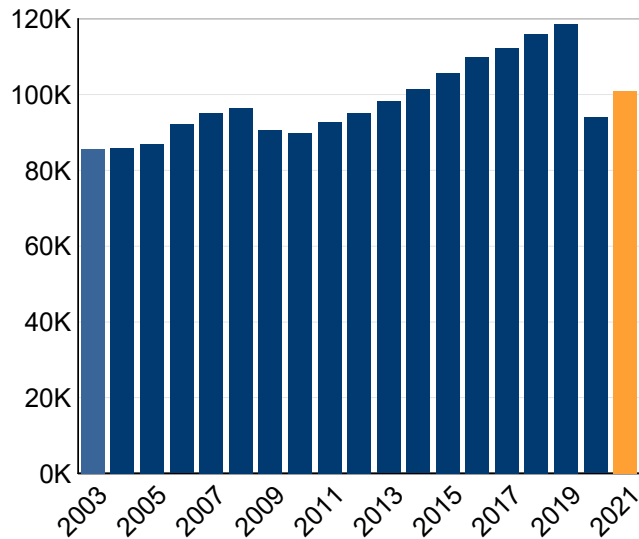
**Direct travel-related earnings** represent the total after-point of sale tax income from travel activity. It includes wage and salary disbursements, proprietor income, and other earned income or benefits.

Earnings are an important measure of the benefit of the travel industry that flow to proprietors and employees. Because the travel industry is highly labor intensive, much of travel-related earnings flow to workers in the form of wages as opposed to owners of capital and intellectual property assets.

# Oregon / Employment

## Direct Travel Industry Employment

**Direct employment increased by 6,900 jobs in 2021.**



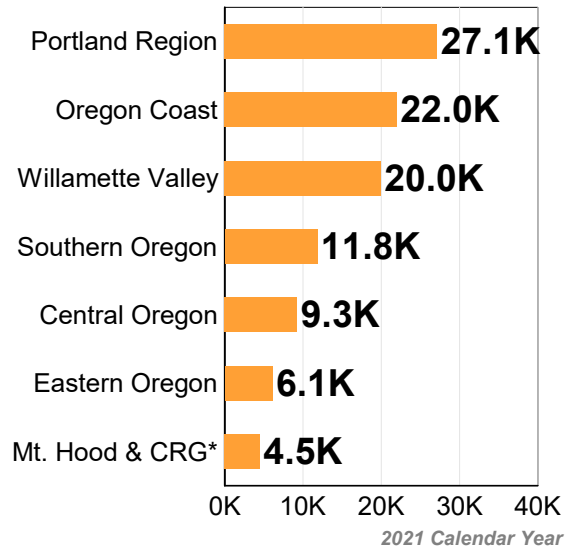
### Direct Travel Employment

In 2021, direct travel employment was approximately 100 thousand jobs, a 7.3% increase from the prior year.

From 2003-2021, travel employment grew at an annual growth rate of 0.9%.



### Direct Travel Industry Employment by Region



### Oregon Tourism Regions

The Portland Region makes up 27% of all travel jobs in the state. All regions continue to recover, no single area has gained back all the jobs lost in 2020.

\*Mt. Hood & Columbia River Gorge

### What is direct travel employment?

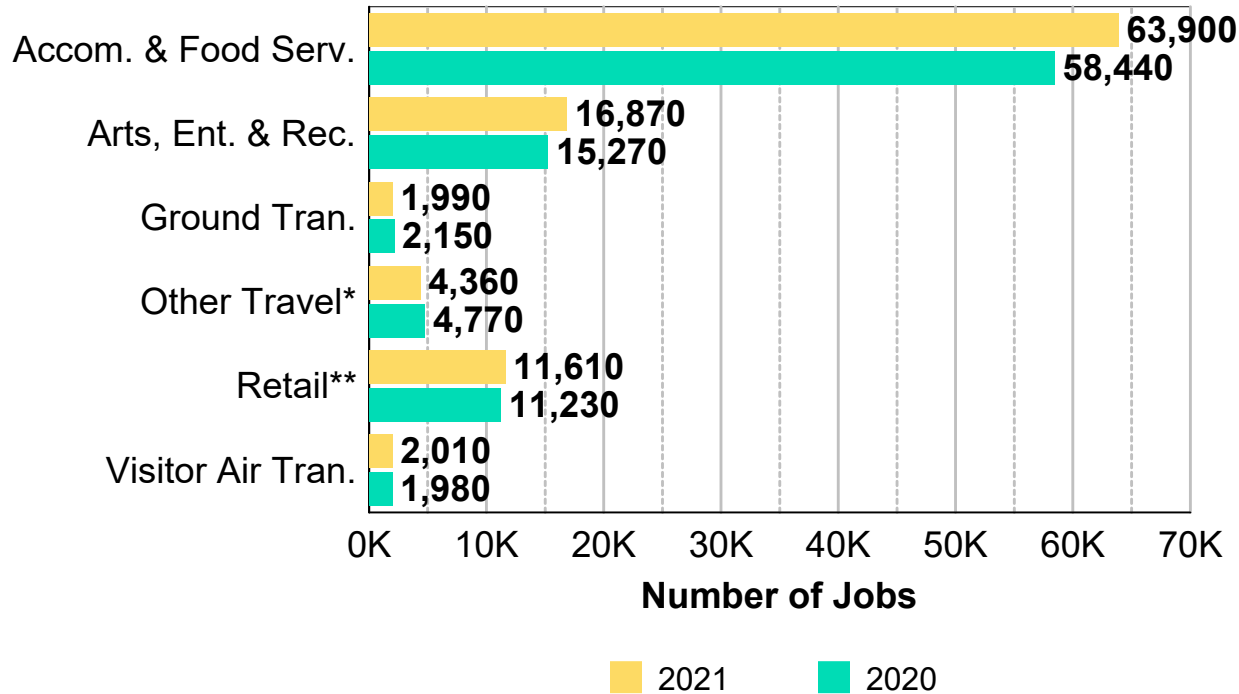
**Direct travel-related employment** refers to the total number of full and part-time jobs directly attributable to travel spending. A significant share of many industries' earnings come from travel-related spending. Part of these earnings are used to pay employees in the form of income and benefits. Based on average salaries for employees in the various travel-related industries in Oregon, a total employment number attributable to travel can be reached.



In 2021, every \$1 million in travel-related spending resulted in 9.3 jobs for the industry.

# Oregon / Employment

## Travel Industry Employment / Oregon

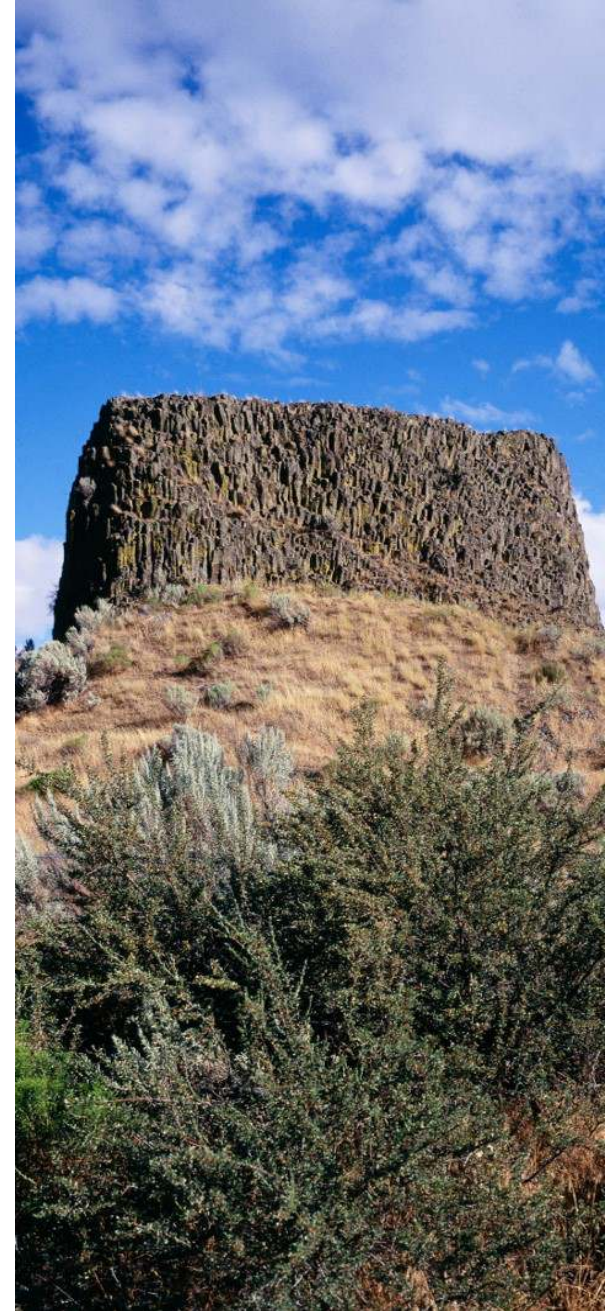


\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

\*\*Retail includes gasoline.

Total direct job gain is estimated at 6,890 jobs. Leisure & Hospitality grew by approximately 7,050 jobs in 2021, while all other travel industry employment, most notably in travel arrangement & convention services, lost 160 jobs.

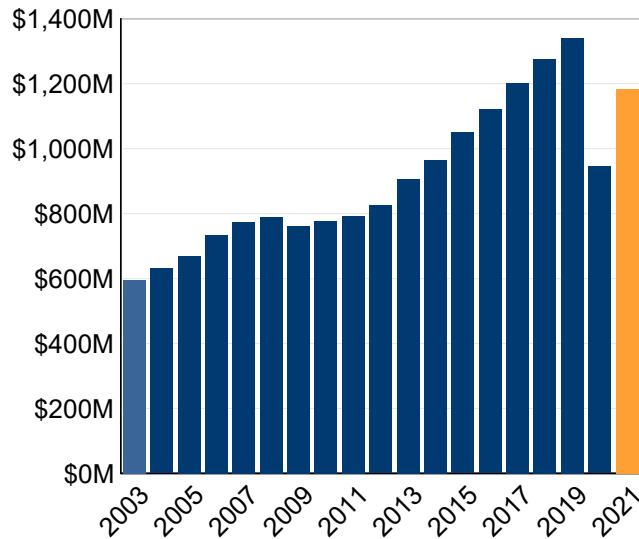
**Sources:** Bureau of Labor Statistics, Bureau of Economic Analysis, Dean Runyan Associates



# Oregon / Tax Receipts

## Direct Travel-Generated Tax Revenue

Direct tax revenue increased by \$1.9 billion in 2021.



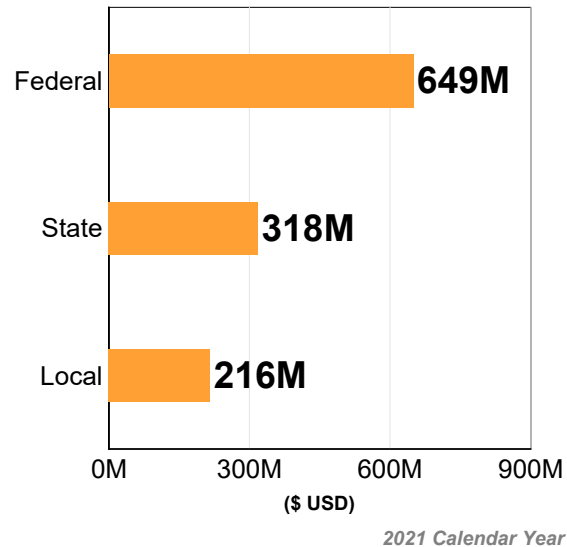
### Oregon Tax Receipts

In 2021, tax revenue increased to \$1.2 billion, a 25.2% increase from the prior year.

From 2003-2021, tax revenue grew at an annual growth rate of 3.9%.



### Direct Tax Revenue by Local and State



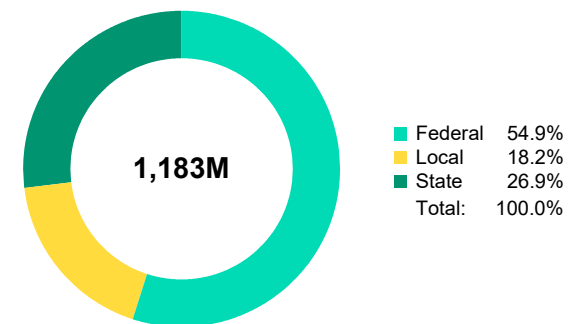
### State Taxes

State tax receipts account for 60% of travel-generated tax revenue (excluding Federal taxes). State tax receipts grew 26.5% compared to 2021.

### What are direct travel-generated tax receipts?

**Direct travel-generated tax receipts** include state and local taxes related to travel. **State taxes** include lodging taxes, motor fuel taxes, business and personal taxes paid by employees and proprietors of travel-related businesses. **Local taxes** primarily take the form of lodging taxes imposed by cities, counties, and other tax jurisdictions in Oregon. They also include any applicable local taxes on rental cars or food and beverage.

### Tax Receipts



2021 Calendar Year



# Oregon / Impacts

## Direct Travel Impacts 2003-2021p

|                                 | 2003  | 2014   | 2015   | 2016   | 2017   | 2018   | 2019   | 2020  | 2021   | Avg. Annual % Chg. |         |         |
|---------------------------------|-------|--------|--------|--------|--------|--------|--------|-------|--------|--------------------|---------|---------|
|                                 |       |        |        |        |        |        |        |       |        | 2020-21            | 2019-20 | 2003-21 |
| <b>Spending (\$Millions)</b>    |       |        |        |        |        |        |        |       |        |                    |         |         |
| Total (Current \$)              | 6,525 | 10,334 | 10,776 | 11,234 | 11,765 | 12,324 | 12,834 | 6,609 | 10,893 | 64.8%              | -48.5%  | 2.9%    |
| Other                           | 787   | 1,275  | 1,364  | 1,436  | 1,521  | 1,624  | 1,765  | 690   | 1,059  | 53.6%              | -60.9%  | 1.7%    |
| Visitor                         | 5,738 | 9,059  | 9,412  | 9,798  | 10,243 | 10,700 | 11,069 | 5,919 | 9,833  | 66.1%              | -46.5%  | 3.0%    |
| Non-transportation              | 4,470 | 6,711  | 7,199  | 7,620  | 7,897  | 8,115  | 8,427  | 4,791 | 7,746  | 61.7%              | -43.1%  | 3.1%    |
| Transportation                  | 1,268 | 2,348  | 2,213  | 2,178  | 2,347  | 2,585  | 2,643  | 1,128 | 2,087  | 85.0%              | -57.3%  | 2.8%    |
| <b>Earnings (\$Millions)</b>    |       |        |        |        |        |        |        |       |        |                    |         |         |
| Earnings (Current \$)           | 1,673 | 2,610  | 2,839  | 3,063  | 3,290  | 3,569  | 3,807  | 3,089 | 3,497  | 13.2%              | -18.9%  | 4.2%    |
| <b>Employment (000's)</b>       |       |        |        |        |        |        |        |       |        |                    |         |         |
| Employment                      | 85.6  | 101.2  | 105.5  | 109.8  | 112.2  | 116.0  | 118.5  | 93.8  | 100.7  | 7.3%               | -20.8%  | 0.9%    |
| <b>Tax Revenue (\$Millions)</b> |       |        |        |        |        |        |        |       |        |                    |         |         |
| Total (Current \$)              | 596   | 964    | 1,049  | 1,120  | 1,201  | 1,277  | 1,341  | 945   | 1,183  | 25.2%              | -29.5%  | 3.9%    |
| Local                           | 90    | 176    | 202    | 213    | 226    | 233    | 240    | 153   | 216    | 41.2%              | -36.3%  | 5.0%    |
| State                           | 152   | 249    | 264    | 283    | 323    | 341    | 357    | 252   | 318    | 26.5%              | -29.6%  | 4.2%    |
| Federal                         | 354   | 539    | 583    | 625    | 652    | 702    | 744    | 541   | 649    | 20.1%              | -27.3%  | 3.4%    |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.





# Oregon / Impacts Detailed

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014          | 2015          | 2016          | 2017          | 2018          | 2019          | 2020         | 2021          | 2020-21      | 2019-20       |
|--|--------------|--------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|---------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |               |               |               |               |               |               |              |               |              |               |
| Destination Spending   | 5,738        | 8,695        | 9,059         | 9,412         | 9,798         | 10,243        | 10,700        | 11,069        | 5,919        | 9,833         | 66.1%        | -46.5%        |
| Other Travel*  | 787          | 1,201        | 1,275         | 1,364         | 1,436         | 1,521         | 1,624         | 1,765         | 690          | 1,059         | 53.6%        | -60.9%        |
| <b>TOTAL</b>   | <b>6,525</b> | <b>9,896</b> | <b>10,334</b> | <b>10,776</b> | <b>11,234</b> | <b>11,765</b> | <b>12,324</b> | <b>12,834</b> | <b>6,609</b> | <b>10,893</b> | <b>64.8%</b> | <b>-48.5%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |               |               |               |               |               |               |              |               |              |               |
| Hotel, Motel, STVR**   | 2,479        | 4,258        | 4,518         | 4,806         | 5,089         | 5,376         | 5,607         | 5,810         | 3,154        | 5,177         | 64.1%        | -45.7%        |
| Hotel, Motel   |              |              |               |               |               |               |               |               |              | 4,068         |              |               |
| STVR   |              |              |               |               |               |               |               |               |              | 1,109         |              |               |
| Private Home   | 1,239        | 1,832        | 1,871         | 1,902         | 1,936         | 2,014         | 2,114         | 2,175         | 1,251        | 2,104         | 68.1%        | -42.5%        |
| Campground   | 351          | 441          | 445           | 445           | 454           | 459           | 481           | 501           | 389          | 469           | 20.6%        | -22.4%        |
| 2nd Home   | 124          | 177          | 180           | 178           | 178           | 185           | 194           | 198           | 160          | 186           | 16.0%        | -19.2%        |
| Day Travel   | 1,544        | 1,987        | 2,045         | 2,082         | 2,141         | 2,209         | 2,305         | 2,386         | 965          | 1,898         | 96.7%        | -59.5%        |
| <b>TOTAL</b>   | <b>5,738</b> | <b>8,695</b> | <b>9,059</b>  | <b>9,412</b>  | <b>9,798</b>  | <b>10,243</b> | <b>10,700</b> | <b>11,069</b> | <b>5,919</b> | <b>9,833</b>  | <b>66.1%</b> | <b>-46.5%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |               |               |               |               |               |               |              |               |              |               |
| Accommodations   | 977          | 1,664        | 1,808         | 2,039         | 2,218         | 2,346         | 2,378         | 2,448         | 1,648        | 2,650         | 60.8%        | -32.7%        |
| Food Service   | 1,321        | 2,067        | 2,178         | 2,329         | 2,490         | 2,606         | 2,734         | 2,891         | 1,490        | 2,397         | 60.9%        | -48.5%        |
| Food Stores  | 470          | 646          | 676           | 707           | 716           | 718           | 732           | 757           | 491          | 791           | 61.1%        | -35.1%        |
| Local Tran. & Gas  | 834          | 1,622        | 1,600         | 1,391         | 1,343         | 1,467         | 1,656         | 1,684         | 830          | 1,456         | 75.3%        | -50.7%        |
| Arts, Ent. & Rec.  | 807          | 951          | 979           | 1,020         | 1,061         | 1,082         | 1,109         | 1,140         | 519          | 821           | 58.3%        | -54.5%        |
| Retail Sales   | 896          | 1,050        | 1,070         | 1,104         | 1,135         | 1,146         | 1,162         | 1,190         | 642          | 1,086         | 69.1%        | -46.0%        |
| Visitor Air Tran.  | 433          | 695          | 748           | 821           | 836           | 880           | 929           | 959           | 298          | 632           | 112.0%       | -68.9%        |
| <b>TOTAL</b>   | <b>5,738</b> | <b>8,695</b> | <b>9,059</b>  | <b>9,412</b>  | <b>9,798</b>  | <b>10,243</b> | <b>10,700</b> | <b>11,069</b> | <b>5,919</b> | <b>9,833</b>  | <b>66.1%</b> | <b>-46.5%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Oregon / Impacts Detailed

## Direct Travel Impacts 2003-2021p

|   | 2003   | 2013   | 2014    | 2015    | 2016    | 2017    | 2018    | 2019    | 2020   | 2021    | 2020-21 | 2019-20 |
|---|--------|--------|---------|---------|---------|---------|---------|---------|--------|---------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |        |        |         |         |         |         |         |         |        |         |         |         |
| Accom. & Food Serv.   | 916    | 1,458  | 1,564   | 1,713   | 1,854   | 1,994   | 2,187   | 2,341   | 1,843  | 2,201   | 19.5%   | 19.5%   |
| Arts, Ent. & Rec.   | 238    | 298    | 311     | 327     | 345     | 360     | 383     | 407     | 322    | 366     | 13.6%   | 13.6%   |
| Retail**  | 187    | 241    | 252     | 267     | 282     | 295     | 311     | 323     | 342    | 369     | 8.0%    | 8.0%    |
| Ground Tran.  | 46     | 62     | 67      | 73      | 76      | 81      | 85      | 93      | 80     | 78      | -2.0%   | -2.0%   |
| Visitor Air Tran.   | 86     | 115    | 127     | 143     | 155     | 174     | 188     | 190     | 163    | 164     | 0.5%    | 0.5%    |
| Other Travel*   | 200    | 267    | 289     | 314     | 350     | 385     | 416     | 453     | 339    | 318     | -6.2%   | -6.2%   |
| <b>TOTAL</b>  | 1,673  | 2,440  | 2,610   | 2,839   | 3,063   | 3,290   | 3,569   | 3,807   | 3,089  | 3,497   | 13.2%   | 13.2%   |
| <b>Travel Industry Employment (Jobs)</b>                      |        |        |         |         |         |         |         |         |        |         |         |         |
| Accom. & Food Serv.   | 50,550 | 61,280 | 63,440  | 66,490  | 69,380  | 71,130  | 73,680  | 75,420  | 58,440 | 63,900  | 9.3%    | 9.3%    |
| Arts, Ent. & Rec.   | 16,550 | 17,710 | 18,070  | 18,400  | 19,090  | 19,430  | 20,010  | 20,580  | 15,270 | 16,870  | 10.5%   | 10.5%   |
| Retail**  | 9,440  | 10,220 | 10,450  | 10,770  | 10,980  | 11,190  | 11,360  | 11,420  | 11,230 | 11,610  | 3.3%    | 3.3%    |
| Ground Tran.  | 2,020  | 2,030  | 2,090   | 2,200   | 2,180   | 2,240   | 2,240   | 2,320   | 2,150  | 1,990   | -7.3%   | -7.3%   |
| Visitor Air Tran.   | 1,960  | 1,760  | 1,870   | 2,050   | 2,190   | 2,210   | 2,330   | 2,320   | 1,980  | 2,010   | 1.6%    | 1.6%    |
| Other Travel*   | 5,060  | 5,080  | 5,330   | 5,640   | 6,040   | 6,000   | 6,370   | 6,420   | 4,770  | 4,360   | -8.5%   | -8.5%   |
| <b>TOTAL</b>  | 85,590 | 98,080 | 101,250 | 105,550 | 109,850 | 112,190 | 115,980 | 118,480 | 93,840 | 100,730 | 7.3%    | 7.3%    |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |        |        |         |         |         |         |         |         |        |         |         |         |
| Local Tax Receipts  | 90     | 160    | 176     | 202     | 213     | 226     | 233     | 240     | 153    | 216     | 41.2%   | 41.2%   |
| State Tax Receipts  | 152    | 239    | 249     | 264     | 283     | 323     | 341     | 357     | 252    | 318     | 26.5%   | 26.5%   |
| <b>TOTAL</b>  | 242    | 398    | 425     | 466     | 496     | 549     | 574     | 598     | 404    | 534     | 32.0%   | 32.0%   |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

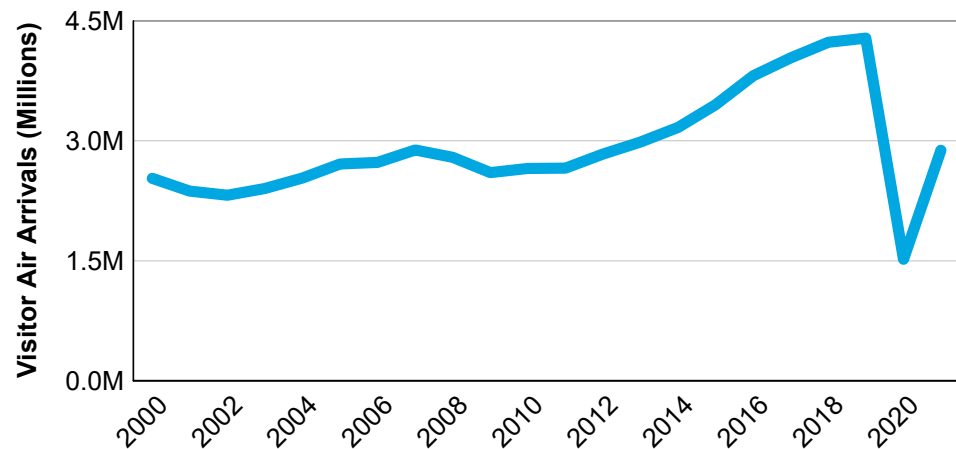
\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

\*\*Retail includes gasoline.



# Oregon / Visitor Volume

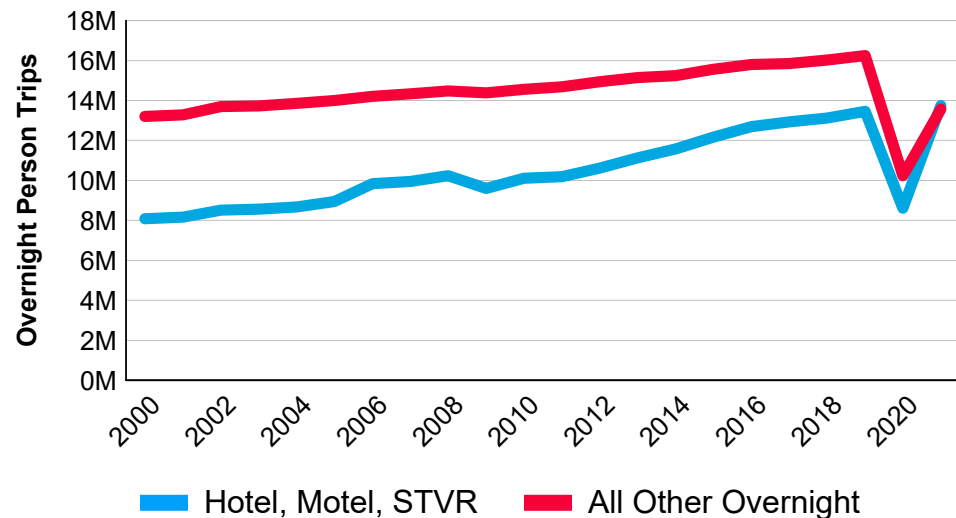
## Air Passenger Visitor Arrivals / U.S. Air Carriers



2.9 million domestic visitors traveled to Oregon by air in 2021. This is an increase of 89.5% from 2020 visitation of 1.5 million. To recover to the pre-pandemic level an additional 1.4 million visitors would need to travel by air.

**Sources:** Bureau of Transportation Statistics, Dean Runyan Associates

## Overnight Volume / Oregon



Overnight visitor volume increased 44.8% in 2021 compared to 2020. Visitors who stay in hotels, motels, or short term vacation rentals increased 59.4%. All other overnight visitors camping, stays with friends and family, and second home use grew 32.5%.

**Sources:** Oregon Department of Revenue, Dean Runyan Associates, Omnitrak Group, Oregon State Parks, STR LLC., KeyData Dashboard, AirDNA, U.S. Census Bureau

# Oregon / Visitor Volume

## Visitor Details 2021p

Overnight visitor volume for Oregon is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

## Average Expenditure for Overnight Visitors, 2021p

|                           | Person |       | Party |         | Party Size | Length of Stay |
|---------------------------|--------|-------|-------|---------|------------|----------------|
|                           | Day    | Trip  | Day   | Trip    |            |                |
| <b>Hotel, Motel, STVR</b> |        |       |       |         |            |                |
| All Modes                 | \$143  | \$377 | \$384 | \$1,016 | 2.7        | 2.6            |
| Air                       | \$199  | \$667 | \$422 | \$1,411 | 2.1        | 3.3            |
| Other                     | \$191  | \$446 | \$525 | \$1,224 | 2.7        | 2.3            |
| <b>Private Home</b>       |        |       |       |         |            |                |
| All Modes                 | \$47   | \$212 | \$98  | \$455   | 2.1        | 4.6            |
| Air                       | \$69   | \$486 | \$112 | \$787   | 1.6        | 7.1            |
| Other                     | \$39   | \$164 | \$88  | \$368   | 2.2        | 4.2            |
| <b>Other Overnight</b>    |        |       |       |         |            |                |
| All Modes                 | \$49   | \$180 | \$129 | \$470   | 2.6        | 3.7            |
| <b>All Overnight</b>      |        |       |       |         |            |                |
| All Modes                 | \$84   | \$291 | \$198 | \$714   | 2.4        | 3.6            |

## Overnight Visitor Volume, 2019-2021p

|                      | Person-Nights (Millions) |             |             | Party-Nights (Millions) |             |             |
|----------------------|--------------------------|-------------|-------------|-------------------------|-------------|-------------|
|                      | 2019                     | 2020        | 2021        | 2019                    | 2020        | 2021        |
| Hotel, Motel, STVR   | 33.2                     | 21.7        | 36.1        | 14.4                    | 8.4         | 13.5        |
| Private Home         | 44.6                     | 31.7        | 45.1        | 19.7                    | 14.5        | 21.5        |
| Other Overnight      | 17.7                     | 11.8        | 13.3        | 5.3                     | 4.5         | 5.1         |
| <b>All Overnight</b> | <b>95.6</b>              | <b>65.2</b> | <b>94.5</b> | <b>39.4</b>             | <b>27.5</b> | <b>40.0</b> |

|                      | Person-Trips (Millions) |             |             | Party-Trips (Millions) |            |             |
|----------------------|-------------------------|-------------|-------------|------------------------|------------|-------------|
|                      | 2019                    | 2020        | 2021        | 2019                   | 2020       | 2021        |
| Hotel, Motel, STVR   | 13.5                    | 8.6         | 13.7        | 5.8                    | 3.3        | 5.1         |
| Private Home         | 11.5                    | 7.0         | 9.9         | 4.9                    | 3.2        | 4.6         |
| Other Overnight      | 4.8                     | 3.2         | 3.6         | 1.4                    | 1.2        | 1.4         |
| <b>All Overnight</b> | <b>29.7</b>             | <b>18.9</b> | <b>27.3</b> | <b>12.1</b>            | <b>7.7</b> | <b>11.1</b> |

# Oregon / Traveler Origin

## Visitor Spending by Origin, 2021p

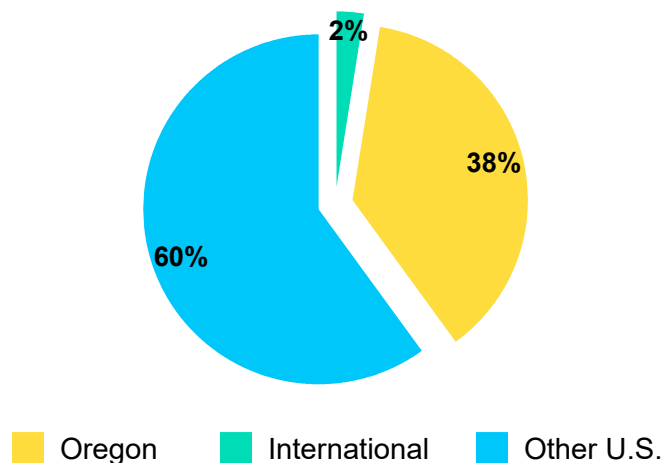
Residents of Oregon accounted for 38% of visitor spending in Oregon in 2021. U.S. residents of states other than Oregon accounted for approximately 60% while international visitors accounted for 2% of travel spending in the state.

Travel is considered an export industry because it brings an inflow of dollars from outside the state, region, or individual community. The greater the amount of out-of-state and international visitation the larger the net economic benefit is to the state as a whole.

Out-of-State visitors were approximately 64% of travel spending prior to the COVID-19 pandemic. In 2020 this share dropped to 42%.

International spending historically has been around 10% of travel spending in Oregon. The COVID-19 pandemic continues to depress international travel nationally and in the state of Oregon.

**Visitor Spending by Residence, 2021p**



Sources: BEA, NTTO, VisaVue, Dean Runyan Associates, Tourism Economics

## Visitor Spending by Residence, 2021p

| Origin                  | Spending (Billions) |
|-------------------------|---------------------|
| Oregon                  | \$4.1               |
| International           | \$0.3               |
| Other U.S.              | \$6.5               |
| <b>Visitor Spending</b> | <b>\$10.9</b>       |

## Visitor Spending by Top U.S. Origins, 2021p

| Origin                  | Spending (Billions) |
|-------------------------|---------------------|
| Washington              | \$2.0               |
| California              | \$1.6               |
| Idaho                   | \$0.3               |
| Arizona                 | \$0.3               |
| Texas                   | \$0.3               |
| Remaining*              | \$2.0               |
| <b>Visitor Spending</b> | <b>\$6.5</b>        |

Note: Excludes Oregon as an origin market.

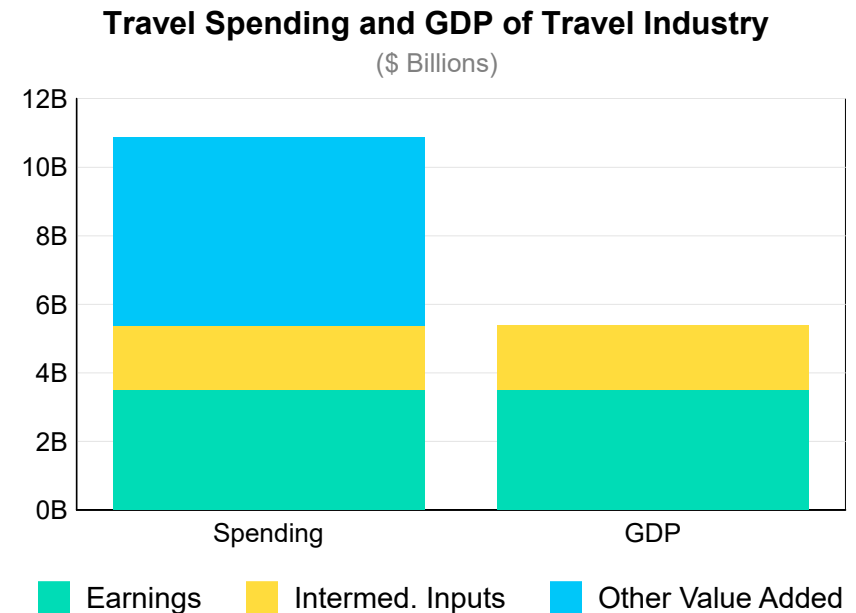
\*Remaining includes the other 44 U.S. states, District of Columbia, U.S. Virgin Islands, American Samoa, Guam, Puerto Rico, and the Northern Mariana Islands

# Oregon / GDP

## Travel Industry GDP, 2021p

Gross Domestic Product (GDP, also referred to as value-added) is a measure of economic activity that reflects the market value of the labor and capital used to produce goods and services. The GDP for a particular industry within a state excludes the intermediate inputs purchased by businesses from other firms in the production process. It includes payments to individuals in the form of earnings, indirect business taxes to government, and other payments to individuals and corporations. The relationship between travel spending and the GDP of the Oregon travel industry is shown to the right. Oregon travel industry GDP of \$5.4 billion represents approximately 2% of the total Oregon GDP.

The estimates represent only the direct impacts of travel spending. A portion of the inputs purchased by travel businesses in Oregon will be delivered by other Oregon firms that are not strictly part of the travel industry. Restaurants, for example, will purchase agricultural products from other Oregon businesses. These inputs are sometimes referred to as "indirect" effects.





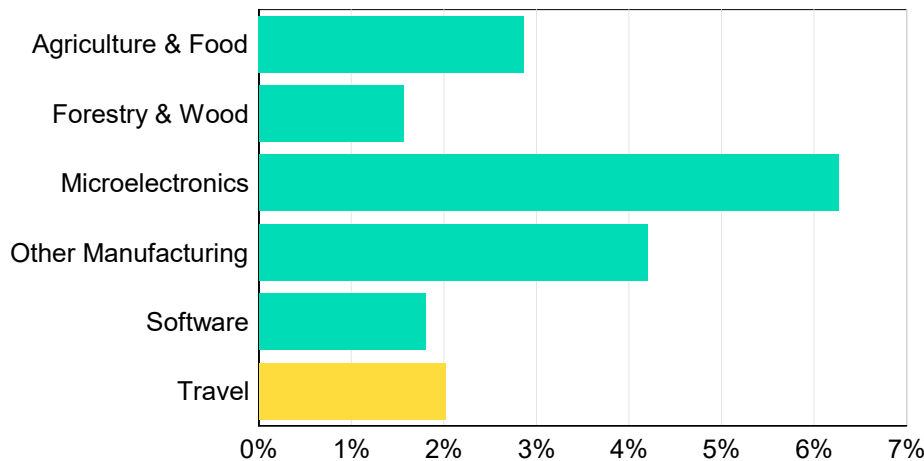
# Oregon / GDP

## Oregon Export-Oriented Industries, 2021p

Export-oriented industries are those industries that primarily market their products and services to other regions, states or nations. Agriculture, extractive industries such as logging, and manufacturing are the best examples of goods producing export industries. The travel industry is also an export-oriented industry because goods and services are sold to visitors, injecting money into the local economy, as do the exports of other industries.

### Oregon Gross Domestic Product

2021, Share of GDP for Selected Industries

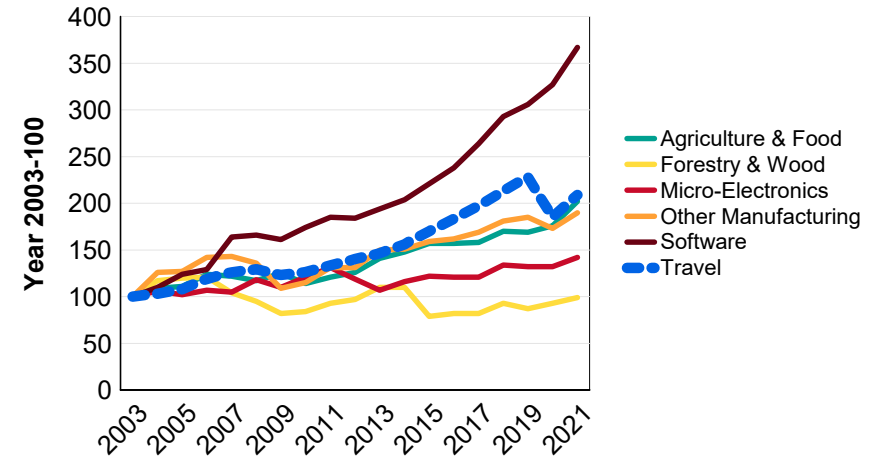


A comparison of the GDPs of the leading export-oriented industries in Oregon is shown for 2021. It should be noted that the largest industry, microelectronics, is concentrated in the urbanized areas of Oregon, primarily Washington County. The primary export-oriented industries in most rural counties are agriculture & food processing, forestry & wood products, and the travel industry. The travel industry is the fourth largest export oriented industry in Oregon making up 2% of Oregon's GDP.

Source: Dean Runyan Associates and Bureau of Economic Analysis. Other Manufacturing is not a distinct industry, shown for comparative purposes only. Most current data available is for 2021. GDP estimates by Dean Runyan Associates

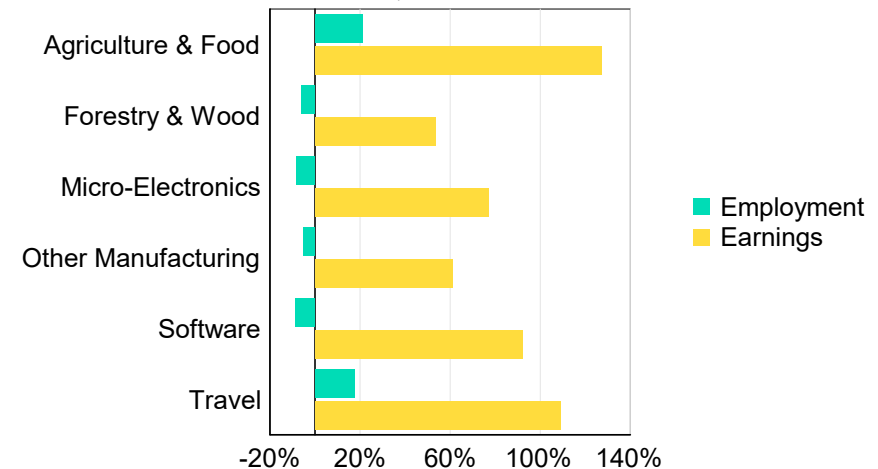
### Change in Oregon GDP

2003-2021, Selected Industries



### Change in Earnings and Employment

2003-2021, Selected Industries



## Oregon / Secondary Effects

Travel spending brings money into many Oregon communities in the form of business receipts. Portions of these receipts are spent within the state for labor and supplies. Employees, in turn, spend a portion of their earnings on goods and services in the state. This re-spending of travel-related revenues creates indirect and induced impacts.

**Direct** impacts represent effects attributable to traveler expenditures.

**Indirect** impacts represent effects associated with industries that supply goods and services to the direct businesses.

**Induced** impacts represent effects of purchases made by employees in both the direct and indirect businesses.

The impacts in this section are presented in eleven major industry groups. These industry groups are similar, but not identical to the business categories presented elsewhere in this report.

It should be emphasized that the estimates of indirect and induced impacts reported here apply to the entire state of Oregon and do not necessarily reflect economic patterns for individual counties, regions or sub-regions within the state. In general, geographic areas with lower levels of economic activity will have smaller secondary impacts within those same geographic boundaries.

### Largest Secondary Industries 2021p

**Professional Services** (10,290 jobs and \$676 million in earnings) A variety of administrative services (e.g., accounting and advertising) are utilized by travel businesses. Employees of these businesses also purchase professional services.

**Education & Health Services** (7,740 jobs and \$511 million in earnings) The secondary effects are primarily induced, such as employees of travel-related businesses use of medical services.

**Financial Activities** (6,210 jobs and \$310 million in earnings) Both businesses and individuals make use of banking and insurance institutions.

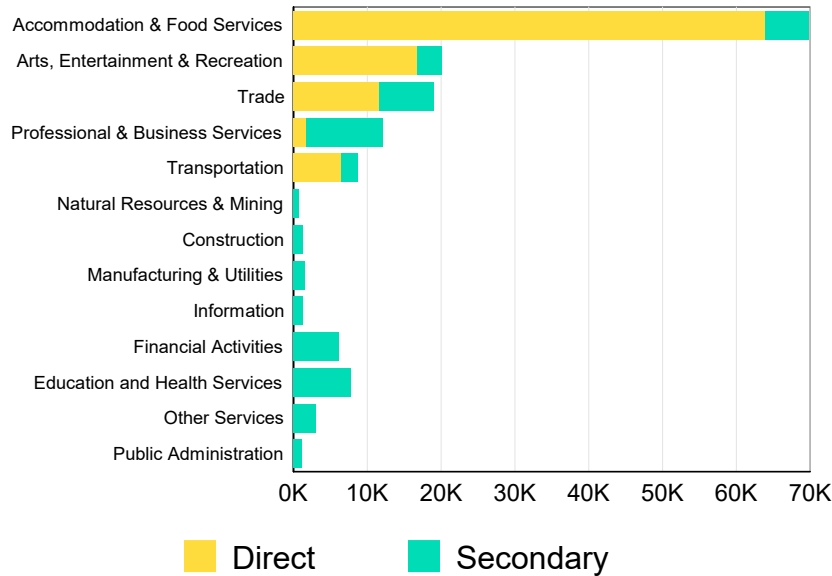
**Other Services** (3,100 jobs and \$175 million in earnings) Employees and travel businesses utilize a number of service providers such as repair shops, laundry, maintenance, and business services.



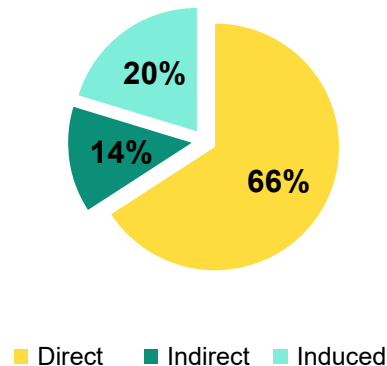
# Oregon / Secondary Effects

## Total Employment 2021p

Direct & Secondary Employment



Share of Total Employment



| Industry Group                   | Direct         | Secondary     |               |               | Grand Total    |
|----------------------------------|----------------|---------------|---------------|---------------|----------------|
|                                  |                | Indirect      | Induced       | Total         |                |
| Accommodation & Food Services    | 63,900         | 2,270         | 3,570         | 5,830         | 69,730         |
| Arts, Entertainment & Recreation | 16,870         | 2,160         | 1,120         | 3,280         | 20,150         |
| Trade                            | 11,610         | 770           | 6,590         | 7,360         | 18,970         |
| Transportation                   | 6,530          | 1,480         | 810           | 2,290         | 8,810          |
| Professional & Business Services | 1,840          | 7,220         | 3,070         | 10,290        | 12,130         |
| Natural Resources & Mining       | 0              | 440           | 340           | 780           | 780            |
| Construction                     | 0              | 660           | 640           | 1,290         | 1,290          |
| Manufacturing & Utilities        | 0              | 1,000         | 630           | 1,630         | 1,630          |
| Information                      | 0              | 880           | 490           | 1,370         | 1,370          |
| Financial Activities             | 0              | 2,830         | 3,380         | 6,210         | 6,210          |
| Education and Health Services    | 0              | 150           | 7,590         | 7,740         | 7,740          |
| Other Services                   | 0              | 840           | 2,260         | 3,100         | 3,100          |
| Public Administration            | 0              | 710           | 420           | 1,130         | 1,130          |
| <b>All Industries</b>            | <b>100,730</b> | <b>21,410</b> | <b>30,890</b> | <b>52,300</b> | <b>153,040</b> |

Values may not add to totals due to rounding.



**MOST DIRECT JOBS**  
Accommodation & Food Services

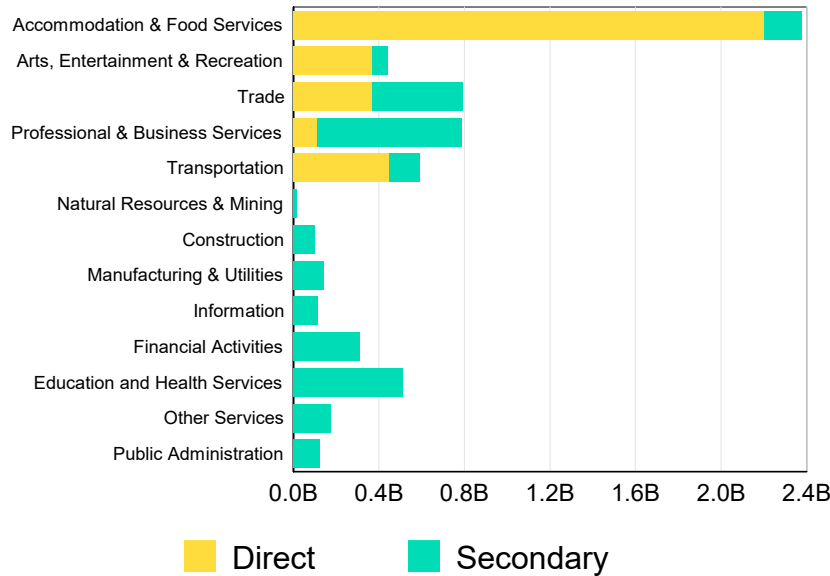


**MOST SECONDARY JOBS**  
Professional & Business Services

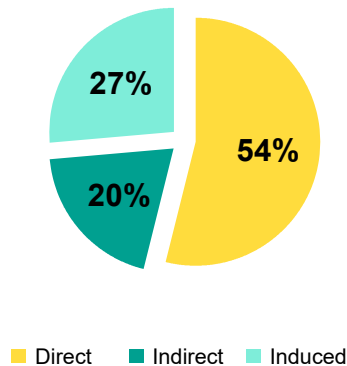
# Oregon / Secondary Effects

## Total Earnings 2021p

Direct & Secondary Earnings



Share of Total Earnings



| Industry Group                   | Direct       | Secondary    |              |              | Grand Total  |
|----------------------------------|--------------|--------------|--------------|--------------|--------------|
|                                  |              | Indirect     | Induced      | Total        |              |
| Accommodation & Food Services    | 2,201        | 68           | 108          | 176          | 2,377        |
| Transportation                   | 451          | 88           | 53           | 141          | 592          |
| Trade                            | 369          | 72           | 350          | 423          | 792          |
| Arts, Entertainment & Recreation | 366          | 48           | 28           | 75           | 442          |
| Professional & Business Services | 110          | 481          | 195          | 676          | 786          |
| Natural Resources & Mining       | 0            | 8            | 10           | 18           | 18           |
| Construction                     | 0            | 53           | 50           | 103          | 103          |
| Manufacturing & Utilities        | 0            | 90           | 55           | 145          | 145          |
| Information                      | 0            | 75           | 41           | 117          | 117          |
| Financial Activities             | 0            | 142          | 168          | 310          | 310          |
| Education and Health Services    | 0            | 5            | 506          | 511          | 511          |
| Other Services                   | 0            | 64           | 110          | 175          | 175          |
| Public Administration            | 0            | 78           | 45           | 123          | 123          |
| <b>All Industries</b>            | <b>3,497</b> | <b>1,272</b> | <b>1,721</b> | <b>2,993</b> | <b>6,490</b> |

Values may not add to totals due to rounding. Figures in \$Millions



**MOST DIRECT Earnings**  
Accommodation & Food Services



**MOST SECONDARY Earnings**  
Professional & Business Services



# Region Impacts

2021p

# Oregon / Tourism Regions

## Central Coast

West Douglas

West Lane

Lincoln

## Central Oregon

Crook

Deschutes

Jefferson

South Wasco

## Eastern Oregon

Baker

Gilliam

Grant

Harney

Malheur

Morrow

Sherman

Umatilla

Union

Wallowa

Wheeler

## Mt. Hood & Columbia River Gorge

East Clackamas

Hood River

East Multnomah

North Wasco

## North Coast

Clatsop

Tillamook

## Portland Region

West Clackamas

Columbia

West Multnomah

Washington

## South Coast

Coos

Curry

## Southern Oregon

East Douglas

Jackson

Josephine

Klamath

Lake

## Willamette Valley

Benton

South Clackamas

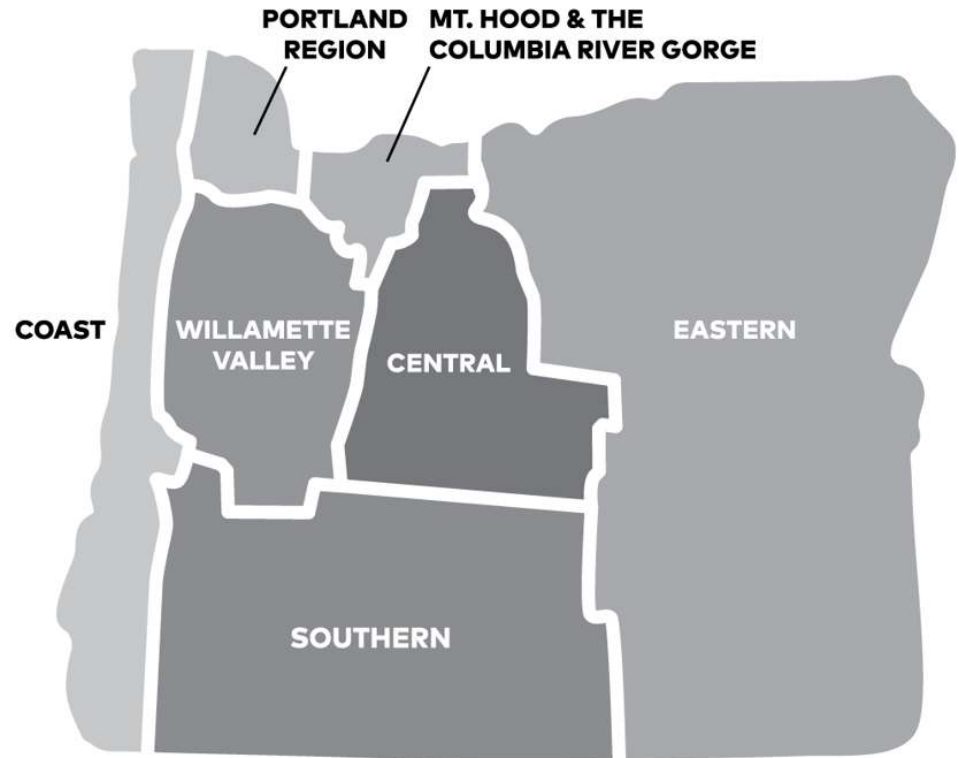
East Lane

Linn

Marion

Polk

Yamhill





# Region / Summary

## Direct Travel Impacts 2021p

|                   | Travel Spending     |                       |                        |                   |                         |                         |                         |
|-------------------|---------------------|-----------------------|------------------------|-------------------|-------------------------|-------------------------|-------------------------|
|                   | Total<br>(Millions) | Visitor<br>(Millions) | Earnings<br>(Millions) | Employ.<br>(Jobs) | Local Tax<br>(Millions) | State Tax<br>(Millions) | Total Tax<br>(Millions) |
| Willamette Valley | \$2,074             | \$1,859               | \$575                  | 19,970            | \$26                    | \$61                    | \$87                    |
| North Coast       | \$695               | \$691                 | \$314                  | 8,400             | \$19                    | \$24                    | \$42                    |
| Central Coast     | \$853               | \$827                 | \$264                  | 8,030             | \$21                    | \$24                    | \$44                    |
| South Coast       | \$386               | \$379                 | \$163                  | 5,460             | \$3                     | \$13                    | \$16                    |
| Oregon Coast      | \$1,934             | \$1,911               | \$743                  | 21,990            | \$42                    | \$61                    | \$103                   |
| Portland Region   | \$3,765             | \$2,875               | \$1,214                | 27,130            | \$88                    | \$105                   | \$193                   |
| Southern Oregon   | \$1,216             | \$1,128               | \$360                  | 11,840            | \$19                    | \$35                    | \$53                    |
| Central Oregon    | \$1,056             | \$986                 | \$308                  | 9,250             | \$25                    | \$30                    | \$55                    |
| Eastern Oregon    | \$409               | \$396                 | \$155                  | 6,130             | \$6                     | \$14                    | \$20                    |
| Mt. Hood & CRG*   | \$439               | \$423                 | \$142                  | 4,520             | \$10                    | \$13                    | \$23                    |

Note: Total Earnings includes wage and salary disbursements, other earned income and proprietor income. Employment includes payroll employees and proprietors.

The sum of visitor spending at the regional level will be less than the state due to the treatment of transportation between regions.

\*Mt. Hood & Columbia River Gorge



# Region / Summary

## Overnight Visitor Volume 2021p

|                                 | Nights     |            | Trips     |           |
|---------------------------------|------------|------------|-----------|-----------|
|                                 | Person     | Party      | Person    | Party     |
| Willamette Valley               | 20,887,470 | 8,617,410  | 6,403,500 | 2,563,910 |
| North Coast                     | 5,612,060  | 2,117,040  | 1,889,830 | 707,350   |
| Central Coast                   | 7,125,480  | 2,666,520  | 2,426,000 | 899,850   |
| South Coast                     | 3,998,230  | 1,524,810  | 1,385,860 | 520,340   |
| Oregon Coast                    | 16,735,770 | 6,308,370  | 5,520,600 | 2,059,710 |
| Portland Region                 | 24,987,320 | 12,437,000 | 7,250,130 | 3,423,060 |
| Southern Oregon                 | 12,821,780 | 5,125,420  | 3,980,350 | 1,547,860 |
| Central Oregon                  | 9,956,820  | 3,974,970  | 3,104,560 | 1,204,380 |
| Eastern Oregon                  | 5,150,130  | 1,998,540  | 1,894,480 | 723,190   |
| Mt. Hood & Columbia River Gorge | 3,995,660  | 1,575,680  | 1,301,640 | 499,730   |

Note: The sum of trips for regions will be greater than the state trip estimate because some travelers visit multiple destinations on a single trip within Oregon.

# Willamette Valley / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job                 | \$134,232 |
| Employee Earnings generated by \$100 Visitor Spending          | \$29      |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5       |
| Local & State Tax Revenues per County Household                | \$183     |
| Visitor Shares   |           |
| Travel Share of Total Employment (2021)                        | 3%        |
| Overnight Visitor Day Share of Resident Population**           | 5%        |

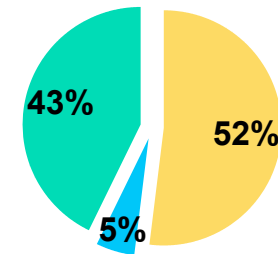
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

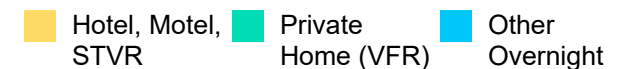
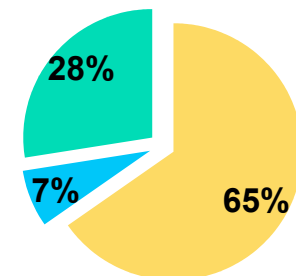
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Willamette Valley Region



### Oregon



# Willamette Valley / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                 | 2003    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019    | 2020    | 2021    | Avg. Annual % Chg. |         |
|---------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--------------------|---------|
|                                 |         |         |         |         |         |         |         |         |         |         | 2020-21            | 2003-21 |
| <b>Spending (\$Millions)</b>    |         |         |         |         |         |         |         |         |         |         |                    |         |
| Total (Current \$)              | 1,102.5 | 1,675.5 | 1,712.4 | 1,741.0 | 1,816.2 | 1,879.8 | 1,995.0 | 2,058.3 | 1,041.6 | 2,074.2 | ▲ 99.1%            | ▲ 3.6%  |
| Other                           | 100.2   | 221.6   | 226.2   | 219.9   | 234.9   | 251.5   | 284.6   | 286.7   | 159.8   | 215.3   | ▲ 34.7%            | ▲ 4.3%  |
| Visitor                         | 1,002.2 | 1,453.9 | 1,486.2 | 1,521.0 | 1,581.3 | 1,628.3 | 1,710.4 | 1,771.6 | 881.8   | 1,858.9 | ▲ 110.8%           | ▲ 3.5%  |
| <b>Earnings (\$Millions)</b>    |         |         |         |         |         |         |         |         |         |         |                    |         |
| Earnings (Current \$)           | 271.7   | 399.2   | 420.6   | 456.6   | 493.8   | 520.6   | 565.5   | 596.4   | 487.0   | 575.4   | ▲ 18.2%            | ▲ 4.3%  |
| <b>Employment (Jobs)</b>        |         |         |         |         |         |         |         |         |         |         |                    |         |
| Employment                      | 16,420  | 19,380  | 19,840  | 20,700  | 21,520  | 21,900  | 22,790  | 23,230  | 18,020  | 19,970  | ▲ 10.8%            | ▲ 1.1%  |
| <b>Tax Revenue (\$Millions)</b> |         |         |         |         |         |         |         |         |         |         |                    |         |
| Total (Current \$)              | 38.7    | 60.9    | 63.2    | 67.7    | 72.8    | 79.6    | 83.7    | 87.5    | 57.8    | 86.8    | ▲ 50.3%            | ▲ 4.6%  |
| Local                           | 8.7     | 14.8    | 16.1    | 18.2    | 19.9    | 20.4    | 21.2    | 22.6    | 14.7    | 26.0    | ▲ 76.4%            | ▲ 6.2%  |
| State                           | 30.0    | 46.1    | 47.1    | 49.5    | 52.9    | 59.2    | 62.5    | 64.9    | 43.0    | 60.9    | ▲ 41.4%            | ▲ 4.0%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Willamette Valley / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003           | 2013           | 2014           | 2015           | 2016           | 2017           | 2018           | 2019           | 2020           | 2021           | 2020-21       | 2019-20       |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|---------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |                |                |                |                |                |                |                |                |                |                |               |               |
| Destination Spending   | 1,002.2        | 1,453.9        | 1,486.2        | 1,521.0        | 1,581.3        | 1,628.3        | 1,710.4        | 1,771.6        | 881.8          | 1,858.9        | 110.8%        | -50.2%        |
| Other Travel*  | 100.2          | 221.6          | 226.2          | 219.9          | 234.9          | 251.5          | 284.6          | 286.7          | 159.8          | 215.3          | 34.7%         | -44.3%        |
| <b>TOTAL</b>   | <b>1,102.5</b> | <b>1,675.5</b> | <b>1,712.4</b> | <b>1,741.0</b> | <b>1,816.2</b> | <b>1,879.8</b> | <b>1,995.0</b> | <b>2,058.3</b> | <b>1,041.6</b> | <b>2,074.2</b> | <b>99.1%</b>  | <b>-49.4%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |                |                |                |                |                |                |                |                |                |                |               |               |
| Hotel, Motel, STVR**   | 304.6          | 519.3          | 541.6          | 568.6          | 609.2          | 627.8          | 658.1          | 685.5          | 317.2          | 703.7          | 121.9%        | -53.7%        |
| Hotel, Motel   |                |                |                |                |                |                |                |                |                | 601.6          |               |               |
| STVR   |                |                |                |                |                |                |                |                |                | 102.1          |               |               |
| Private Home   | 318.8          | 456.5          | 460.9          | 459.7          | 468.9          | 484.0          | 510.7          | 525.2          | 291.5          | 578.3          | 98.4%         | -44.5%        |
| Campground   | 42.4           | 55.4           | 56.0           | 56.3           | 57.5           | 58.1           | 60.8           | 63.4           | 50.9           | 56.3           | 10.8%         | -19.7%        |
| 2nd Home   | 9.0            | 14.1           | 14.3           | 14.2           | 14.3           | 14.8           | 15.4           | 15.8           | 12.9           | 14.7           | 13.6%         | -18.1%        |
| Day Travel   | 327.4          | 408.7          | 413.4          | 422.2          | 431.5          | 443.6          | 465.3          | 481.8          | 209.3          | 505.8          | 141.6%        | -56.6%        |
| <b>TOTAL</b>   | <b>1,002.2</b> | <b>1,453.9</b> | <b>1,486.2</b> | <b>1,521.0</b> | <b>1,581.3</b> | <b>1,628.3</b> | <b>1,710.4</b> | <b>1,771.6</b> | <b>881.8</b>   | <b>1,858.9</b> | <b>110.8%</b> | <b>-50.2%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |                |                |                |                |                |                |                |                |                |                |               |               |
| Accommodations   | 121.5          | 206.6          | 221.8          | 247.6          | 274.4          | 284.2          | 283.3          | 293.6          | 173.8          | 353.0          | 103.1%        | -40.8%        |
| Food Service   | 245.0          | 371.7          | 385.2          | 409.7          | 434.7          | 448.5          | 474.8          | 501.9          | 232.5          | 498.2          | 114.2%        | -53.7%        |
| Food Stores  | 102.8          | 143.8          | 148.8          | 155.3          | 156.6          | 156.3          | 160.4          | 165.6          | 99.4           | 190.7          | 91.9%         | -40.0%        |
| Local Tran. & Gas  | 130.7          | 256.3          | 249.1          | 210.0          | 203.2          | 219.5          | 254.1          | 258.5          | 110.7          | 245.1          | 121.3%        | -57.2%        |
| Arts, Ent. & Rec.  | 211.1          | 243.9          | 246.9          | 256.4          | 263.4          | 267.4          | 276.4          | 283.9          | 129.7          | 277.4          | 113.9%        | -54.3%        |
| Retail Sales   | 168.7          | 193.7          | 194.6          | 199.6          | 203.9          | 203.5          | 208.1          | 213.0          | 112.7          | 240.5          | 113.4%        | -47.1%        |
| Visitor Air Tran.  | 22.5           | 38.0           | 39.8           | 42.4           | 45.1           | 49.0           | 53.3           | 55.0           | 22.9           | 53.9           | 134.7%        | -58.3%        |
| <b>TOTAL</b>   | <b>1,002.2</b> | <b>1,453.9</b> | <b>1,486.2</b> | <b>1,521.0</b> | <b>1,581.3</b> | <b>1,628.3</b> | <b>1,710.4</b> | <b>1,771.6</b> | <b>881.8</b>   | <b>1,858.9</b> | <b>110.8%</b> | <b>-50.2%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.



# Willamette Valley / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003          | 2013          | 2014          | 2015          | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2020-21      | 2019-20       |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |               |               |               |               |               |               |               |               |               |               |              |               |
| Accom. & Food Serv.   | 150.6         | 233.0         | 248.0         | 272.4         | 295.5         | 314.8         | 342.7         | 364.6         | 290.0         | 360.4         | 24.3%        | -20.5%        |
| Arts, Ent. & Rec.   | 65.7          | 76.4          | 78.1          | 81.9          | 85.6          | 88.9          | 95.1          | 101.2         | 81.2          | 96.6          | 19.0%        | -19.8%        |
| Retail**  | 35.7          | 46.0          | 47.5          | 50.2          | 52.7          | 54.6          | 57.5          | 59.9          | 60.0          | 67.3          | 12.2%        | 0.1%          |
| Ground Tran.  | 5.6           | 7.0           | 7.5           | 8.1           | 8.7           | 9.0           | 9.7           | 10.6          | 7.4           | 9.2           | 24.6%        | -30.3%        |
| Visitor Air Tran.   | 1.3           | 1.5           | 1.7           | 1.9           | 2.1           | 2.3           | 2.5           | 2.6           | 2.5           | 2.5           | 1.7%         | -2.1%         |
| Other Travel*   | 12.8          | 35.3          | 37.8          | 42.2          | 49.3          | 51.0          | 57.9          | 57.5          | 45.8          | 39.4          | -14.2%       | -20.3%        |
| <b>TOTAL</b>  | <b>271.7</b>  | <b>399.2</b>  | <b>420.6</b>  | <b>456.6</b>  | <b>493.8</b>  | <b>520.6</b>  | <b>565.5</b>  | <b>596.4</b>  | <b>487.0</b>  | <b>575.4</b>  | <b>18.2%</b> | <b>-18.4%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |               |               |               |               |               |               |               |               |               |               |              |               |
| Accom. & Food Serv.   | 9,170         | 10,960        | 11,290        | 11,830        | 12,280        | 12,560        | 13,040        | 13,340        | 10,330        | 11,750        | 13.7%        | -22.6%        |
| Arts, Ent. & Rec.   | 4,550         | 5,030         | 5,090         | 5,210         | 5,440         | 5,530         | 5,780         | 5,960         | 4,320         | 4,850         | 12.5%        | -27.6%        |
| Retail**  | 1,880         | 2,050         | 2,070         | 2,130         | 2,150         | 2,180         | 2,210         | 2,240         | 2,070         | 2,210         | 6.7%         | -7.8%         |
| Ground Tran.  | 240           | 230           | 230           | 240           | 250           | 240           | 250           | 260           | 190           | 230           | 19.9%        | -26.1%        |
| Visitor Air Tran.   | 40            | 40            | 40            | 40            | 50            | 50            | 50            | 50            | 50            | 50            | 2.8%         | -3.2%         |
| Other Travel*   | 540           | 1,080         | 1,130         | 1,240         | 1,350         | 1,340         | 1,450         | 1,370         | 1,060         | 880           | -17.4%       | -22.5%        |
| <b>TOTAL</b>  | <b>16,420</b> | <b>19,380</b> | <b>19,840</b> | <b>20,700</b> | <b>21,520</b> | <b>21,900</b> | <b>22,790</b> | <b>23,230</b> | <b>18,020</b> | <b>19,970</b> | <b>10.8%</b> | <b>-22.4%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |               |               |               |               |               |               |               |               |               |               |              |               |
| Local Tax Receipts  | 8.7           | 14.8          | 16.1          | 18.2          | 19.9          | 20.4          | 21.2          | 22.6          | 14.7          | 26.0          | 76.4%        | -34.8%        |
| State Tax Receipts  | 30.0          | 46.1          | 47.1          | 49.5          | 52.9          | 59.2          | 62.5          | 64.9          | 43.0          | 60.9          | 41.4%        | -33.7%        |
| <b>TOTAL</b>  | <b>38.7</b>   | <b>60.9</b>   | <b>63.2</b>   | <b>67.7</b>   | <b>72.8</b>   | <b>79.6</b>   | <b>83.7</b>   | <b>87.5</b>   | <b>57.8</b>   | <b>86.8</b>   | <b>50.3%</b> | <b>-33.9%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Willamette Valley / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Willamette Valley region is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$125  | \$279 | \$340 | \$761 | 2.7        | 2.2            |
| Private Home       | \$42   | \$165 | \$96  | \$386 | 2.3        | 4.0            |
| Other Overnight    | \$51   | \$188 | \$136 | \$500 | 2.7        | 3.7            |
| All Overnight      | \$65   | \$211 | \$157 | \$528 | 2.4        | 3.4            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |            |            | Party-Nights |           |           |
|--------------------|---------------|------------|------------|--------------|-----------|-----------|
|                    | 2019          | 2020       | 2021       | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 4,902,930     | 2,461,820  | 5,609,050  | 2,050,620    | 953,420   | 2,071,650 |
| Private Home       | 13,836,700    | 7,752,800  | 13,896,000 | 5,516,320    | 3,279,090 | 6,024,560 |
| Other Overnight    | 1,971,570     | 1,299,380  | 1,382,420  | 582,890      | 489,850   | 521,200   |
| All Overnight      | 20,711,200    | 11,513,990 | 20,887,470 | 8,149,830    | 4,722,360 | 8,617,410 |

|                    | Person-Trips |           |           | Party-Trips |           |           |
|--------------------|--------------|-----------|-----------|-------------|-----------|-----------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020      | 2021      |
| Hotel, Motel, STVR | 2,311,010    | 1,080,830 | 2,524,220 | 957,700     | 407,810   | 925,320   |
| Private Home       | 4,080,050    | 1,972,040 | 3,501,870 | 1,603,620   | 831,350   | 1,496,470 |
| Other Overnight    | 525,700      | 354,740   | 377,410   | 155,370     | 133,580   | 142,120   |
| All Overnight      | 6,916,750    | 3,407,610 | 6,403,500 | 2,716,680   | 1,372,730 | 2,563,910 |

# North Coast / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job | \$132,452 |
|--|-----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$45 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$6 |
|--|-----|

|   |         |
|---|---------|
| Local & State Tax Revenues per County Household | \$1,455 |
|---|---------|

### Visitor Shares

|   |     |
|---|-----|
| Travel Share of Total Employment (2021) | 21% |
|---|-----|

|  |     |
|--|-----|
| Overnight Visitor Day Share of Resident Population** | 23% |
|--|-----|

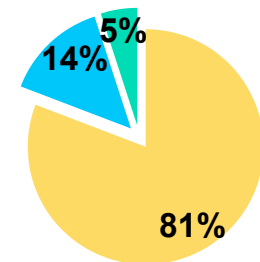
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

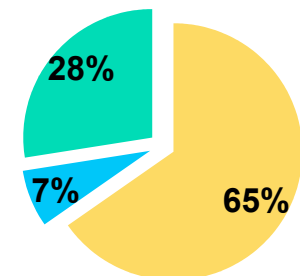
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### North Coast Region



### Oregon



Hotel, Motel, STVR Private Home (VFR) Other Overnight

# North Coast / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                 | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|---------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                 |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Millions)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)              | 446.6 | 680.2 | 737.3 | 768.3 | 778.0 | 793.8 | 824.7 | 850.7 | 595.7 | 695.2 | ▲ 16.7%            | ▲ 2.5%  |
| Other                           | 10.1  | 6.2   | 6.0   | 5.0   | 3.7   | 4.2   | 4.8   | 4.9   | 2.3   | 4.3   | ▲ 86.6%            | ▼ -4.7% |
| Visitor                         | 436.4 | 674.0 | 731.2 | 763.3 | 774.3 | 789.6 | 819.8 | 845.9 | 593.4 | 690.9 | ▲ 16.4%            | ▲ 2.6%  |
| <b>Earnings (\$Millions)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)           | 128.2 | 194.6 | 208.5 | 225.2 | 236.7 | 254.9 | 285.9 | 307.9 | 257.3 | 313.9 | ▲ 22.0%            | ▲ 5.1%  |
| <b>Employment (Jobs)</b>        |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                      | 6,480 | 7,340 | 7,620 | 7,980 | 8,180 | 8,430 | 8,800 | 9,180 | 7,490 | 8,400 | ▲ 12.2%            | ▲ 1.4%  |
| <b>Tax Revenue (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)              | 15.3  | 25.7  | 28.9  | 31.7  | 32.9  | 36.4  | 39.2  | 40.9  | 39.4  | 42.2  | ▲ 7.2%             | ▲ 5.8%  |
| Local                           | 5.5   | 9.5   | 11.6  | 13.3  | 13.7  | 14.4  | 15.5  | 16.1  | 18.7  | 18.7  | ▼ -0.1%            | ▲ 7.0%  |
| State                           | 9.8   | 16.2  | 17.3  | 18.4  | 19.2  | 22.0  | 23.7  | 24.9  | 20.7  | 23.6  | ▲ 13.8%            | ▲ 5.0%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# North Coast / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 436.4        | 674.0        | 731.2        | 763.3        | 774.3        | 789.6        | 819.8        | 845.9        | 593.4        | 690.9        | 16.4%        | -29.9%        |
| Other Travel*  | 10.1         | 6.2          | 6.0          | 5.0          | 3.7          | 4.2          | 4.8          | 4.9          | 2.3          | 4.3          | 86.6%        | -52.9%        |
| <b>TOTAL</b>   | <b>446.6</b> | <b>680.2</b> | <b>737.3</b> | <b>768.3</b> | <b>778.0</b> | <b>793.8</b> | <b>824.7</b> | <b>850.7</b> | <b>595.7</b> | <b>695.2</b> | <b>16.7%</b> | <b>-30.0%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 159.8        | 312.7        | 349.1        | 371.5        | 378.4        | 388.2        | 403.5        | 414.6        | 380.8        | 419.6        | 10.2%        | -8.1%         |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 235.8        |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 183.8        |              |               |
| Private Home   | 15.3         | 20.6         | 20.8         | 20.5         | 20.6         | 21.4         | 22.4         | 23.0         | 24.1         | 25.5         | 5.7%         | 4.9%          |
| Campground   | 47.0         | 55.8         | 56.6         | 57.6         | 59.1         | 59.5         | 62.0         | 64.6         | 38.4         | 44.9         | 17.0%        | -40.6%        |
| 2nd Home   | 20.9         | 27.0         | 27.6         | 27.7         | 27.9         | 29.0         | 30.0         | 30.8         | 25.3         | 29.1         | 15.0%        | -17.9%        |
| Day Travel   | 193.4        | 257.9        | 277.2        | 285.9        | 288.2        | 291.5        | 302.0        | 312.9        | 124.8        | 171.8        | 37.7%        | -60.1%        |
| <b>TOTAL</b>   | <b>436.4</b> | <b>674.0</b> | <b>731.2</b> | <b>763.3</b> | <b>774.3</b> | <b>789.6</b> | <b>819.8</b> | <b>845.9</b> | <b>593.4</b> | <b>690.9</b> | <b>16.4%</b> | <b>-29.9%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 83.2         | 149.8        | 164.7        | 182.4        | 190.3        | 197.9        | 204.0        | 207.2        | 241.6        | 282.2        | 16.8%        | 16.6%         |
| Food Service   | 119.5        | 196.4        | 217.9        | 233.1        | 240.5        | 245.7        | 256.5        | 270.4        | 148.5        | 162.5        | 9.4%         | -45.1%        |
| Food Stores  | 46.6         | 64.5         | 69.6         | 72.9         | 72.3         | 71.5         | 72.7         | 75.2         | 46.6         | 61.0         | 31.0%        | -38.0%        |
| Local Tran. & Gas  | 35.4         | 75.5         | 77.7         | 65.7         | 61.8         | 66.5         | 75.3         | 76.4         | 44.3         | 54.4         | 22.6%        | -42.0%        |
| Arts, Ent. & Rec.  | 69.8         | 90.2         | 97.3         | 101.5        | 102.2        | 102.0        | 104.1        | 106.9        | 52.0         | 57.0         | 9.7%         | -51.4%        |
| Retail Sales   | 81.9         | 97.7         | 104.2        | 107.6        | 107.3        | 106.1        | 107.3        | 109.8        | 60.3         | 73.7         | 22.2%        | -45.0%        |
| <b>TOTAL</b>   | <b>436.4</b> | <b>674.0</b> | <b>731.2</b> | <b>763.3</b> | <b>774.3</b> | <b>789.6</b> | <b>819.8</b> | <b>845.9</b> | <b>593.4</b> | <b>690.9</b> | <b>16.4%</b> | <b>-29.9%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.



# North Coast / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 85.8  | 143.7 | 153.7 | 167.2 | 176.7 | 193.3 | 220.6 | 239.3 | 192.2 | 239.1 | 24.4%   | -19.7%  |
| Arts, Ent. & Rec.   | 20.8  | 26.1  | 27.6  | 29.1  | 30.8  | 31.5  | 33.3  | 35.5  | 30.5  | 37.0  | 21.2%   | -14.0%  |
| Retail**  | 16.5  | 21.6  | 23.5  | 24.9  | 25.6  | 26.3  | 28.0  | 28.8  | 30.6  | 35.2  | 14.8%   | 6.3%    |
| Ground Tran.  | 1.7   | 2.6   | 3.0   | 3.2   | 3.4   | 3.6   | 3.7   | 4.0   | 3.6   | 2.2   | -38.7%  | -10.0%  |
| Other Travel*   | 3.4   | 0.6   | 0.7   | 0.7   | 0.2   | 0.2   | 0.2   | 0.3   | 0.3   | 0.4   | 51.5%   | 2.3%    |
| <b>TOTAL</b>  | 128.2 | 194.6 | 208.5 | 225.2 | 236.7 | 254.9 | 285.9 | 307.9 | 257.3 | 313.9 | 22.0%   | -16.4%  |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 4,290 | 5,080 | 5,250 | 5,560 | 5,780 | 6,030 | 6,400 | 6,700 | 5,270 | 5,930 | 12.6%   | -21.4%  |
| Arts, Ent. & Rec.   | 1,170 | 1,190 | 1,220 | 1,230 | 1,220 | 1,230 | 1,220 | 1,290 | 1,080 | 1,260 | 16.9%   | -16.8%  |
| Retail**  | 900   | 970   | 1,030 | 1,070 | 1,080 | 1,050 | 1,080 | 1,080 | 1,050 | 1,140 | 9.2%    | -3.2%   |
| Ground Tran.  | 70    | 80    | 90    | 90    | 90    | 90    | 90    | 100   | 90    | 50    | -42.5%  | -6.8%   |
| Other Travel*   | 60    | 20    | 20    | 30    | 10    | 10    | 10    | 10    | 10    | 20    | 38.1%   | -6.4%   |
| <b>TOTAL</b>  | 6,480 | 7,340 | 7,620 | 7,980 | 8,180 | 8,430 | 8,800 | 9,180 | 7,490 | 8,400 | 12.1%   | -18.4%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Local Tax Receipts  | 5.5   | 9.5   | 11.6  | 13.3  | 13.7  | 14.4  | 15.5  | 16.1  | 18.7  | 18.7  | -0.1%   | 16.2%   |
| State Tax Receipts  | 9.8   | 16.2  | 17.3  | 18.4  | 19.2  | 22.0  | 23.7  | 24.9  | 20.7  | 23.6  | 13.8%   | -16.7%  |
| <b>TOTAL</b>  | 15.3  | 25.7  | 28.9  | 31.7  | 32.9  | 36.4  | 39.2  | 40.9  | 39.4  | 42.2  | 7.2%    | -3.8%   |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# North Coast / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for North Coast region is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$137  | \$354 | \$382 | \$985 | 2.8        | 2.6            |
| Private Home       | \$30   | \$118 | \$71  | \$281 | 2.4        | 4.0            |
| Other Overnight    | \$44   | \$152 | \$112 | \$388 | 2.6        | 3.5            |
| All Overnight      | \$92   | \$275 | \$245 | \$734 | 2.7        | 3.0            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 3,178,760     | 2,873,770 | 3,059,950 | 1,299,260    | 1,057,380 | 1,097,150 |
| Private Home       | 783,530       | 853,660   | 856,670   | 302,620      | 357,170   | 358,770   |
| Other Overnight    | 2,646,090     | 1,560,820 | 1,695,440 | 802,960      | 609,400   | 661,130   |
| All Overnight      | 6,608,390     | 5,288,250 | 5,612,060 | 2,404,830    | 2,023,950 | 2,117,040 |

|                    | Person-Trips |           |           | Party-Trips |         |         |
|--------------------|--------------|-----------|-----------|-------------|---------|---------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 1,475,400    | 1,260,640 | 1,185,540 | 602,990     | 460,480 | 426,150 |
| Private Home       | 232,820      | 213,930   | 216,500   | 89,980      | 89,570  | 90,740  |
| Other Overnight    | 741,840      | 449,420   | 487,790   | 225,700     | 175,690 | 190,460 |
| All Overnight      | 2,450,060    | 1,923,990 | 1,889,830 | 918,680     | 725,740 | 707,350 |

# Central Coast / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job                 | \$174,571 |
| Employee Earnings generated by \$100 Visitor Spending          | \$31      |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5       |
| Local & State Tax Revenues per County Household                | \$1,463   |
| Visitor Shares   |           |
| Travel Share of Total Employment (2021)                        | 23%       |
| Overnight Visitor Day Share of Resident Population**           | 28%       |

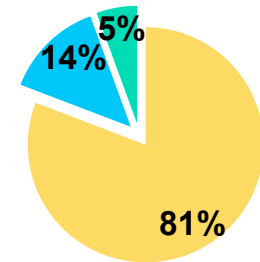
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

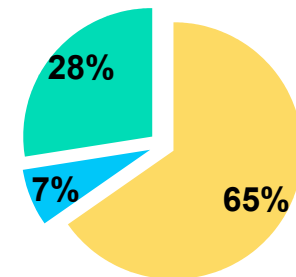
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Central Coast Region



### Oregon



Hotel, Motel, STVR Private Home (VFR) Other Overnight

# Central Coast / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                 | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|---------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                 |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Millions)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)              | 451.3 | 642.4 | 687.2 | 716.4 | 768.9 | 787.9 | 823.5 | 856.1 | 607.9 | 852.7 | ▲ 40.3%            | ▲ 3.6%  |
| Other                           | 9.5   | 21.9  | 22.7  | 24.1  | 27.5  | 28.5  | 33.7  | 33.0  | 28.3  | 25.8  | ▼ -8.8%            | ▲ 5.7%  |
| Visitor                         | 441.8 | 620.5 | 664.5 | 692.4 | 741.4 | 759.4 | 789.8 | 823.2 | 579.6 | 826.9 | ▲ 42.7%            | ▲ 3.5%  |
| <b>Earnings (\$Millions)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)           | 120.1 | 176.4 | 187.7 | 200.5 | 216.6 | 227.1 | 249.7 | 265.9 | 235.7 | 264.2 | ▲ 12.1%            | ▲ 4.5%  |
| <b>Employment (Jobs)</b>        |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                      | 6,860 | 8,070 | 8,330 | 8,440 | 8,780 | 8,850 | 9,220 | 9,440 | 7,790 | 8,030 | ▲ 3.1%             | ▲ 0.9%  |
| <b>Tax Revenue (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)              | 16.7  | 26.6  | 28.5  | 30.8  | 32.9  | 36.2  | 38.1  | 39.4  | 35.9  | 44.3  | ▲ 23.5%            | ▲ 5.6%  |
| Local                           | 6.8   | 10.9  | 11.9  | 13.3  | 14.0  | 14.7  | 15.2  | 15.4  | 15.9  | 20.5  | ▲ 29.4%            | ▲ 6.3%  |
| State                           | 9.9   | 15.6  | 16.6  | 17.5  | 19.0  | 21.5  | 22.9  | 24.1  | 20.0  | 23.8  | ▲ 18.9%            | ▲ 5.0%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Central Coast / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 441.8        | 620.5        | 664.5        | 692.4        | 741.4        | 759.4        | 789.8        | 823.2        | 579.6        | 826.9        | 42.7%        | -29.6%        |
| Other Travel*  | 9.5          | 21.9         | 22.7         | 24.1         | 27.5         | 28.5         | 33.7         | 33.0         | 28.3         | 25.8         | -8.8%        | -14.1%        |
| <b>TOTAL</b>   | <b>451.3</b> | <b>642.4</b> | <b>687.2</b> | <b>716.4</b> | <b>768.9</b> | <b>787.9</b> | <b>823.5</b> | <b>856.1</b> | <b>607.9</b> | <b>852.7</b> | <b>40.3%</b> | <b>-29.0%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 190.4        | 317.7        | 350.3        | 372.9        | 408.2        | 422.3        | 438.3        | 458.5        | 377.5        | 548.3        | 45.2%        | -17.7%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 341.1        |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 207.2        |              |               |
| Private Home   | 20.0         | 26.6         | 26.9         | 26.6         | 27.4         | 27.9         | 29.2         | 29.9         | 37.8         | 37.0         | -2.1%        | 26.2%         |
| Campground   | 57.9         | 68.7         | 69.6         | 70.9         | 72.8         | 73.2         | 76.2         | 79.4         | 53.4         | 64.0         | 19.8%        | -32.7%        |
| 2nd Home   | 20.7         | 27.6         | 28.2         | 28.4         | 28.6         | 29.7         | 30.8         | 31.6         | 25.7         | 29.5         | 14.7%        | -18.5%        |
| Day Travel   | 152.9        | 179.9        | 189.5        | 193.5        | 204.5        | 206.2        | 215.2        | 223.8        | 85.2         | 148.2        | 73.9%        | -61.9%        |
| <b>TOTAL</b>   | <b>441.8</b> | <b>620.5</b> | <b>664.5</b> | <b>692.4</b> | <b>741.4</b> | <b>759.4</b> | <b>789.8</b> | <b>823.2</b> | <b>579.6</b> | <b>826.9</b> | <b>42.7%</b> | <b>-29.6%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 96.0         | 151.0        | 163.8        | 181.3        | 191.9        | 201.2        | 204.2        | 210.8        | 215.4        | 337.2        | 56.6%        | 2.2%          |
| Food Service   | 106.9        | 162.4        | 178.3        | 190.6        | 212.5        | 217.7        | 229.2        | 244.2        | 146.7        | 185.5        | 26.4%        | -39.9%        |
| Food Stores  | 49.4         | 63.7         | 67.8         | 70.9         | 73.4         | 72.5         | 74.2         | 77.2         | 51.5         | 75.8         | 47.2%        | -33.3%        |
| Local Tran. & Gas  | 36.4         | 71.5         | 72.5         | 61.0         | 61.4         | 66.6         | 75.9         | 77.9         | 44.1         | 65.6         | 48.6%        | -43.4%        |
| Arts, Ent. & Rec.  | 74.0         | 85.3         | 90.9         | 94.6         | 102.6        | 102.6        | 105.6        | 109.4        | 60.9         | 77.1         | 26.4%        | -44.3%        |
| Retail Sales   | 79.1         | 86.7         | 91.1         | 93.9         | 99.6         | 98.7         | 100.6        | 103.7        | 60.9         | 85.7         | 40.7%        | -41.3%        |
| <b>TOTAL</b>   | <b>441.8</b> | <b>620.5</b> | <b>664.5</b> | <b>692.4</b> | <b>741.4</b> | <b>759.4</b> | <b>789.8</b> | <b>823.2</b> | <b>579.6</b> | <b>826.9</b> | <b>42.7%</b> | <b>-29.6%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Central Coast / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 78.7  | 123.2 | 131.5 | 140.6 | 151.3 | 160.1 | 177.0 | 189.8 | 163.4 | 195.6 | 19.7%   | -13.9%  |
| Arts, Ent. & Rec.   | 20.4  | 23.8  | 24.5  | 25.7  | 27.2  | 27.9  | 30.3  | 32.5  | 25.9  | 24.6  | -4.7%   | -20.5%  |
| Retail**  | 16.4  | 19.8  | 21.3  | 22.6  | 24.5  | 25.2  | 26.2  | 27.5  | 31.3  | 32.7  | 4.6%    | 13.8%   |
| Ground Tran.  | 1.6   | 2.3   | 2.5   | 2.7   | 3.2   | 3.3   | 3.5   | 3.8   | 3.7   | 1.7   | -52.7%  | -4.7%   |
| Other Travel*   | 3.1   | 7.4   | 7.8   | 8.8   | 10.4  | 10.7  | 12.7  | 12.3  | 11.5  | 9.6   | -16.3%  | -7.0%   |
| <b>TOTAL</b>  | 120.1 | 176.4 | 187.7 | 200.5 | 216.6 | 227.1 | 249.7 | 265.9 | 235.7 | 264.2 | 12.1%   | -11.4%  |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 4,380 | 5,320 | 5,490 | 5,590 | 5,790 | 5,880 | 6,120 | 6,330 | 5,150 | 5,570 | 8.1%    | -18.6%  |
| Arts, Ent. & Rec.   | 1,470 | 1,590 | 1,620 | 1,580 | 1,640 | 1,620 | 1,710 | 1,740 | 1,270 | 1,220 | -4.3%   | -27.0%  |
| Retail**  | 870   | 900   | 940   | 970   | 1,020 | 1,020 | 1,030 | 1,030 | 1,090 | 1,050 | -3.3%   | 5.8%    |
| Ground Tran.  | 70    | 70    | 80    | 80    | 90    | 90    | 90    | 90    | 90    | 40    | -55.6%  | -1.2%   |
| Other Travel*   | 80    | 190   | 200   | 220   | 250   | 250   | 270   | 250   | 190   | 160   | -19.1%  | -22.8%  |
| <b>TOTAL</b>  | 6,860 | 8,070 | 8,330 | 8,440 | 8,780 | 8,850 | 9,220 | 9,440 | 7,790 | 8,030 | 3.1%    | -17.5%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Local Tax Receipts  | 6.8   | 10.9  | 11.9  | 13.3  | 14.0  | 14.7  | 15.2  | 15.4  | 15.9  | 20.5  | 29.4%   | 3.2%    |
| State Tax Receipts  | 9.9   | 15.6  | 16.6  | 17.5  | 19.0  | 21.5  | 22.9  | 24.1  | 20.0  | 23.8  | 18.9%   | -16.8%  |
| <b>TOTAL</b>  | 16.7  | 26.6  | 28.5  | 30.8  | 32.9  | 36.2  | 38.1  | 39.4  | 35.9  | 44.3  | 23.5%   | -9.0%   |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.



# Central Coast / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Central Coast region is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$130  | \$329 | \$361 | \$915 | 2.8        | 2.5            |
| Private Home       | \$36   | \$144 | \$85  | \$345 | 2.4        | 4.0            |
| Other Overnight    | \$50   | \$186 | \$131 | \$483 | 2.6        | 3.7            |
| All Overnight      | \$95   | \$280 | \$255 | \$754 | 2.7        | 3.0            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 3,159,660     | 2,908,070 | 4,232,520 | 1,291,980    | 1,064,460 | 1,517,450 |
| Private Home       | 845,930       | 1,119,710 | 1,035,590 | 326,110      | 467,820   | 432,700   |
| Other Overnight    | 2,746,910     | 1,681,000 | 1,857,370 | 827,800      | 649,700   | 716,370   |
| All Overnight      | 6,752,510     | 5,708,780 | 7,125,480 | 2,445,890    | 2,181,980 | 2,666,520 |

|                    | Person-Trips |           |           | Party-Trips |         |         |
|--------------------|--------------|-----------|-----------|-------------|---------|---------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 1,443,940    | 1,311,410 | 1,666,620 | 590,400     | 477,300 | 599,020 |
| Private Home       | 246,960      | 276,970   | 256,300   | 95,260      | 115,780 | 107,150 |
| Other Overnight    | 730,600      | 455,040   | 503,080   | 220,010     | 175,560 | 193,690 |
| All Overnight      | 2,421,500    | 2,043,420 | 2,426,000 | 905,670     | 768,640 | 899,850 |

# South Coast / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job                 | \$107,452 |
| Employee Earnings generated by \$100 Visitor Spending          | \$43      |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$4       |
| Local & State Tax Revenues per County Household                | \$418     |
| Visitor Shares   |           |
| Travel Share of Total Employment (2021)                        | 13%       |
| Overnight Visitor Day Share of Resident Population**           | 12%       |

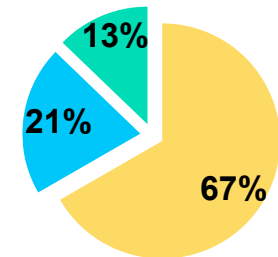
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

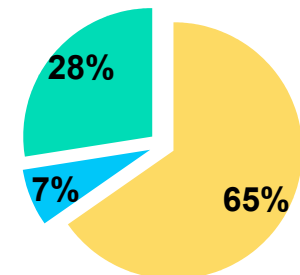
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### South Coast Region



### Oregon



Hotel, Motel, STVR Private Home (VFR) Other Overnight

# South Coast / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                 | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|---------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                 |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Millions)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)              | 282.2 | 365.8 | 376.2 | 387.1 | 395.9 | 403.6 | 416.1 | 431.5 | 296.3 | 385.7 | ▲ 30.2%            | ▲ 1.8%  |
| Other                           | 7.1   | 8.4   | 8.1   | 6.8   | 6.7   | 7.2   | 8.1   | 8.2   | 3.9   | 7.0   | ▲ 80.6%            | ▼ -0.1% |
| Visitor                         | 275.1 | 357.4 | 368.1 | 380.3 | 389.2 | 396.4 | 408.1 | 423.3 | 292.5 | 378.7 | ▲ 29.5%            | ▲ 1.8%  |
| <b>Earnings (\$Millions)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)           | 81.3  | 103.6 | 108.5 | 118.3 | 125.6 | 130.5 | 138.7 | 147.8 | 139.5 | 163.2 | ▲ 16.9%            | ▲ 3.9%  |
| <b>Employment (Jobs)</b>        |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                      | 5,080 | 4,810 | 4,810 | 5,050 | 5,300 | 5,330 | 5,430 | 5,560 | 5,010 | 5,460 | ▲ 9.1%             | ▲ 0.4%  |
| <b>Tax Revenue (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)              | 8.5   | 11.2  | 11.6  | 12.4  | 13.1  | 14.4  | 14.9  | 15.5  | 13.4  | 16.2  | ▲ 21.4%            | ▲ 3.6%  |
| Local                           | 1.7   | 1.7   | 1.8   | 2.0   | 2.0   | 2.1   | 2.2   | 2.2   | 2.2   | 2.8   | ▲ 28.4%            | ▲ 3.1%  |
| State                           | 6.9   | 9.5   | 9.9   | 10.4  | 11.0  | 12.2  | 12.7  | 13.3  | 11.2  | 13.4  | ▲ 19.9%            | ▲ 3.8%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# South Coast / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 275.1        | 357.4        | 368.1        | 380.3        | 389.2        | 396.4        | 408.1        | 423.3        | 292.5        | 378.7        | 29.5%        | -30.9%        |
| Other Travel*  | 7.1          | 8.4          | 8.1          | 6.8          | 6.7          | 7.2          | 8.1          | 8.2          | 3.9          | 7.0          | 80.6%        | -52.8%        |
| <b>TOTAL</b>   | <b>282.2</b> | <b>365.8</b> | <b>376.2</b> | <b>387.1</b> | <b>395.9</b> | <b>403.6</b> | <b>416.1</b> | <b>431.5</b> | <b>296.3</b> | <b>385.7</b> | <b>30.2%</b> | <b>-31.3%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 102.8        | 147.7        | 154.6        | 163.0        | 168.4        | 173.8        | 176.7        | 183.1        | 145.0        | 204.7        | 41.1%        | -20.8%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 170.7        |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 34.0         |              |               |
| Private Home   | 28.6         | 36.0         | 35.5         | 35.7         | 35.5         | 35.7         | 37.3         | 38.2         | 40.3         | 39.3         | -2.5%        | 5.5%          |
| Campground   | 42.7         | 52.5         | 53.1         | 53.9         | 55.3         | 55.7         | 58.0         | 60.5         | 49.8         | 55.7         | 11.8%        | -17.6%        |
| 2nd Home   | 5.9          | 7.1          | 7.2          | 7.3          | 7.3          | 7.5          | 7.7          | 7.9          | 6.4          | 7.4          | 15.0%        | -18.8%        |
| Day Travel   | 95.1         | 114.3        | 117.7        | 120.4        | 122.7        | 123.8        | 128.4        | 133.6        | 50.9         | 71.6         | 40.8%        | -61.9%        |
| <b>TOTAL</b>   | <b>275.1</b> | <b>357.4</b> | <b>368.1</b> | <b>380.3</b> | <b>389.2</b> | <b>396.4</b> | <b>408.1</b> | <b>423.3</b> | <b>292.5</b> | <b>378.7</b> | <b>29.5%</b> | <b>-30.9%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 53.4         | 71.3         | 74.1         | 81.9         | 86.7         | 90.5         | 89.0         | 91.2         | 89.8         | 124.7        | 38.9%        | -1.5%         |
| Food Service   | 69.4         | 96.6         | 102.1        | 108.7        | 113.7        | 116.0        | 121.0        | 128.3        | 75.9         | 92.8         | 22.2%        | -40.8%        |
| Food Stores  | 31.4         | 39.6         | 41.3         | 43.0         | 43.0         | 42.4         | 43.1         | 44.8         | 34.0         | 39.7         | 16.9%        | -24.1%        |
| Local Tran. & Gas  | 27.1         | 49.8         | 48.7         | 40.7         | 38.5         | 41.6         | 47.1         | 48.1         | 27.6         | 40.4         | 46.4%        | -42.6%        |
| Arts, Ent. & Rec.  | 48.7         | 52.5         | 54.1         | 56.0         | 57.4         | 57.3         | 58.4         | 60.3         | 33.3         | 39.2         | 17.6%        | -44.7%        |
| Retail Sales   | 41.9         | 43.9         | 44.7         | 45.9         | 46.3         | 45.7         | 46.2         | 47.4         | 30.4         | 37.0         | 21.8%        | -36.0%        |
| Visitor Air Tran.  | 3.1          | 3.7          | 3.0          | 4.0          | 3.6          | 3.1          | 3.2          | 3.3          | 1.5          | 4.9          | 226.2%       | -54.8%        |
| <b>TOTAL</b>   | <b>275.1</b> | <b>357.4</b> | <b>368.1</b> | <b>380.3</b> | <b>389.2</b> | <b>396.4</b> | <b>408.1</b> | <b>423.3</b> | <b>292.5</b> | <b>378.7</b> | <b>29.5%</b> | <b>-30.9%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# South Coast / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 53.3  | 71.0  | 75.3  | 83.1  | 88.9  | 92.4  | 99.9  | 107.2 | 98.3  | 119.8 | 21.8%   | -8.3%   |
| Arts, Ent. & Rec.   | 13.8  | 15.8  | 15.4  | 16.1  | 16.6  | 17.0  | 17.0  | 18.2  | 15.8  | 16.6  | 4.8%    | -13.0%  |
| Retail**  | 9.9   | 11.6  | 12.1  | 12.8  | 13.3  | 13.6  | 13.9  | 14.2  | 18.0  | 18.9  | 5.0%    | 26.9%   |
| Ground Tran.  | 1.1   | 1.4   | 1.5   | 1.6   | 1.7   | 1.8   | 1.9   | 2.1   | 2.0   | 2.5   | 26.4%   | -3.9%   |
| Visitor Air Tran.   | 1.4   | 2.7   | 2.8   | 3.3   | 3.6   | 3.9   | 4.4   | 4.3   | 4.2   | 4.2   | -1.4%   | -1.8%   |
| Other Travel*   | 1.8   | 1.2   | 1.4   | 1.3   | 1.5   | 1.8   | 1.7   | 1.9   | 1.2   | 1.3   | 5.0%    | -35.7%  |
| <b>TOTAL</b>  | 81.3  | 103.6 | 108.5 | 118.3 | 125.6 | 130.5 | 138.7 | 147.8 | 139.5 | 163.2 | 16.9%   | -5.6%   |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 3,080 | 2,970 | 2,990 | 3,170 | 3,340 | 3,410 | 3,480 | 3,620 | 3,150 | 3,490 | 10.8%   | -13.0%  |
| Arts, Ent. & Rec.   | 1,320 | 1,210 | 1,170 | 1,190 | 1,240 | 1,190 | 1,230 | 1,230 | 1,060 | 1,150 | 8.5%    | -14.1%  |
| Retail**  | 540   | 500   | 530   | 550   | 560   | 570   | 560   | 550   | 660   | 680   | 2.7%    | 18.6%   |
| Ground Tran.  | 50    | 40    | 50    | 50    | 50    | 50    | 50    | 50    | 50    | 60    | 18.6%   | -0.4%   |
| Visitor Air Tran.   | 40    | 50    | 50    | 60    | 60    | 60    | 60    | 60    | 60    | 60    | -0.4%   | -2.9%   |
| Other Travel*   | 70    | 40    | 40    | 40    | 50    | 50    | 50    | 50    | 30    | 40    | 3.6%    | -25.2%  |
| <b>TOTAL</b>  | 5,080 | 4,810 | 4,810 | 5,050 | 5,300 | 5,330 | 5,430 | 5,560 | 5,010 | 5,460 | 9.0%    | -9.9%   |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Local Tax Receipts  | 1.7   | 1.7   | 1.8   | 2.0   | 2.0   | 2.1   | 2.2   | 2.2   | 2.2   | 2.8   | 28.4%   | 0.2%    |
| State Tax Receipts  | 6.9   | 9.5   | 9.9   | 10.4  | 11.0  | 12.2  | 12.7  | 13.3  | 11.2  | 13.4  | 19.9%   | -16.2%  |
| <b>TOTAL</b>  | 8.5   | 11.2  | 11.6  | 12.4  | 13.1  | 14.4  | 14.9  | 15.5  | 13.4  | 16.2  | 21.4%   | -13.9%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# South Coast / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for South Coast region is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$114  | \$254 | \$315 | \$702 | 2.8        | 2.2            |
| Private Home       | \$37   | \$149 | \$87  | \$352 | 2.3        | 4.1            |
| Other Overnight    | \$56   | \$200 | \$150 | \$539 | 2.7        | 3.6            |
| All Overnight      | \$77   | \$222 | \$201 | \$590 | 2.6        | 2.9            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 1,599,450     | 1,387,100 | 1,799,460 | 655,380      | 507,130   | 650,540   |
| Private Home       | 1,063,870     | 1,251,780 | 1,063,740 | 414,990      | 524,150   | 452,680   |
| Other Overnight    | 1,621,740     | 1,067,220 | 1,135,030 | 472,900      | 396,370   | 421,580   |
| All Overnight      | 4,285,060     | 3,706,110 | 3,998,230 | 1,543,270    | 1,427,650 | 1,524,810 |

|                    | Person-Trips |           |           | Party-Trips |         |         |
|--------------------|--------------|-----------|-----------|-------------|---------|---------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 747,590      | 645,370   | 806,760   | 305,980     | 234,780 | 291,680 |
| Private Home       | 309,110      | 309,940   | 264,100   | 119,980     | 129,740 | 111,600 |
| Other Overnight    | 437,680      | 296,170   | 314,990   | 127,770     | 110,060 | 117,060 |
| All Overnight      | 1,494,380    | 1,251,480 | 1,385,860 | 553,720     | 474,580 | 520,340 |



# Portland Region / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job                 | \$187,383 |
| Employee Earnings generated by \$100 Visitor Spending          | \$33      |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$7       |
| Local & State Tax Revenues per County Household                | \$275     |
| Visitor Shares   |           |
| Travel Share of Total Employment (2021)                        | 2%        |
| Overnight Visitor Day Share of Resident Population**           | 4%        |

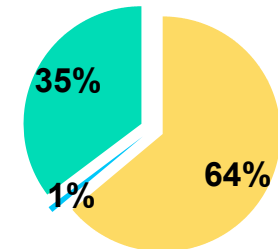
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

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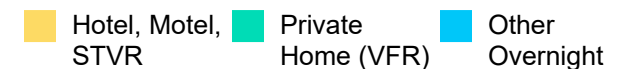
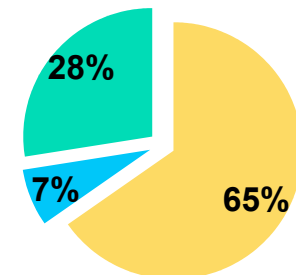
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Portland Region Region



### Oregon



# Portland Region / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                 | 2003    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019    | 2020    | 2021    | Avg. Annual % Chg. |         |
|---------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--------------------|---------|
|                                 |         |         |         |         |         |         |         |         |         |         | 2020-21            | 2003-21 |
| <b>Spending (\$Millions)</b>    |         |         |         |         |         |         |         |         |         |         |                    |         |
| Total (Current \$)              | 2,608.7 | 4,204.1 | 4,417.9 | 4,671.9 | 4,866.6 | 5,138.8 | 5,373.1 | 5,624.6 | 2,179.9 | 3,764.7 | ▲ 72.7%            | ▲ 2.1%  |
| Other                           | 709.9   | 1,086.5 | 1,142.1 | 1,181.4 | 1,222.9 | 1,298.2 | 1,375.7 | 1,514.6 | 535.6   | 890.1   | ▲ 66.2%            | ▲ 1.3%  |
| Visitor                         | 1,898.8 | 3,117.6 | 3,275.8 | 3,490.5 | 3,643.7 | 3,840.6 | 3,997.4 | 4,110.0 | 1,644.3 | 2,874.6 | ▲ 74.8%            | ▲ 2.3%  |
| <b>Earnings (\$Millions)</b>    |         |         |         |         |         |         |         |         |         |         |                    |         |
| Earnings (Current \$)           | 643.8   | 967.2   | 1,038.9 | 1,134.2 | 1,239.1 | 1,353.4 | 1,458.5 | 1,566.2 | 1,143.3 | 1,214.0 | ▲ 6.2%             | ▲ 3.6%  |
| <b>Employment (Jobs)</b>        |         |         |         |         |         |         |         |         |         |         |                    |         |
| Employment                      | 24,920  | 30,340  | 31,480  | 32,830  | 34,530  | 35,290  | 36,220  | 36,910  | 26,360  | 27,130  | ▲ 2.9%             | ▲ 0.5%  |
| <b>Tax Revenue (\$Millions)</b> |         |         |         |         |         |         |         |         |         |         |                    |         |
| Total (Current \$)              | 103.9   | 184.6   | 198.3   | 222.1   | 234.1   | 258.8   | 269.4   | 277.8   | 147.4   | 193.0   | ▲ 30.9%            | ▲ 3.5%  |
| Local                           | 48.9    | 94.9    | 104.4   | 121.6   | 125.2   | 133.8   | 137.2   | 138.9   | 61.2    | 88.2    | ▲ 44.1%            | ▲ 3.3%  |
| State                           | 55.0    | 89.7    | 93.9    | 100.5   | 108.9   | 125.0   | 132.1   | 138.9   | 86.2    | 104.8   | ▲ 21.6%            | ▲ 3.6%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Portland Region / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003           | 2013           | 2014           | 2015           | 2016           | 2017           | 2018           | 2019           | 2020           | 2021           | 2020-21      | 2019-20       |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |                |                |                |                |                |                |                |                |                |                |              |               |
| Destination Spending   | 1,898.8        | 3,117.6        | 3,275.8        | 3,490.5        | 3,643.7        | 3,840.6        | 3,997.4        | 4,110.0        | 1,644.3        | 2,874.6        | 74.8%        | -60.0%        |
| Other Travel*  | 709.9          | 1,086.5        | 1,142.1        | 1,181.4        | 1,222.9        | 1,298.2        | 1,375.7        | 1,514.6        | 535.6          | 890.1          | 66.2%        | -64.6%        |
| <b>TOTAL</b>   | <b>2,608.7</b> | <b>4,204.1</b> | <b>4,417.9</b> | <b>4,671.9</b> | <b>4,866.6</b> | <b>5,138.8</b> | <b>5,373.1</b> | <b>5,624.6</b> | <b>2,179.9</b> | <b>3,764.7</b> | <b>72.7%</b> | <b>-61.2%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |                |                |                |                |                |                |                |                |                |                |              |               |
| Hotel, Motel, STVR**   | 1,009.1        | 1,793.3        | 1,907.7        | 2,074.0        | 2,189.9        | 2,327.5        | 2,421.9        | 2,488.8        | 894.9          | 1,557.1        | 74.0%        | -64.0%        |
| Hotel, Motel   |                |                |                |                |                |                |                |                |                | 1,431.1        |              |               |
| STVR   |                |                |                |                |                |                |                |                |                | 126.0          |              |               |
| Private Home   | 547.6          | 833.0          | 866.3          | 902.0          | 919.7          | 955.8          | 996.8          | 1,024.2        | 507.3          | 859.1          | 69.3%        | -50.5%        |
| Campground   | 14.2           | 20.3           | 20.5           | 20.7           | 21.2           | 21.3           | 22.3           | 23.2           | 18.9           | 14.2           | -24.9%       | -18.7%        |
| 2nd Home   | 6.0            | 8.7            | 8.8            | 8.8            | 8.8            | 9.1            | 9.5            | 9.8            | 7.3            | 8.4            | 14.7%        | -24.9%        |
| Day Travel   | 321.9          | 462.4          | 472.5          | 485.1          | 504.1          | 526.9          | 546.9          | 564.0          | 215.8          | 435.8          | 101.9%       | -61.7%        |
| <b>TOTAL</b>   | <b>1,898.8</b> | <b>3,117.6</b> | <b>3,275.8</b> | <b>3,490.5</b> | <b>3,643.7</b> | <b>3,840.6</b> | <b>3,997.4</b> | <b>4,110.0</b> | <b>1,644.3</b> | <b>2,874.6</b> | <b>74.8%</b> | <b>-60.0%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |                |                |                |                |                |                |                |                |                |                |              |               |
| Accommodations   | 330.5          | 640.8          | 705.1          | 811.1          | 886.2          | 943.8          | 962.9          | 977.2          | 368.7          | 623.0          | 69.0%        | -62.3%        |
| Food Service   | 399.0          | 679.0          | 706.6          | 756.8          | 814.8          | 866.5          | 907.7          | 956.2          | 416.2          | 713.3          | 71.4%        | -56.5%        |
| Food Stores  | 85.1           | 128.8          | 134.2          | 141.1          | 144.3          | 146.8          | 148.8          | 153.1          | 87.1           | 147.9          | 69.7%        | -43.1%        |
| Local Tran. & Gas  | 285.3          | 523.0          | 529.2          | 497.9          | 483.7          | 523.0          | 573.1          | 580.3          | 284.9          | 463.5          | 62.7%        | -50.9%        |
| Arts, Ent. & Rec.  | 154.8          | 201.4          | 205.5          | 214.6          | 226.0          | 234.1          | 239.3          | 245.2          | 65.5           | 108.5          | 65.7%        | -73.3%        |
| Retail Sales   | 271.5          | 346.6          | 350.2          | 362.6          | 375.3          | 384.0          | 388.4          | 396.4          | 190.1          | 334.6          | 76.0%        | -52.0%        |
| Visitor Air Tran.  | 372.5          | 598.0          | 645.1          | 706.3          | 713.5          | 742.3          | 777.2          | 801.6          | 231.8          | 484.0          | 108.8%       | -71.1%        |
| <b>TOTAL</b>   | <b>1,898.8</b> | <b>3,117.6</b> | <b>3,275.8</b> | <b>3,490.5</b> | <b>3,643.7</b> | <b>3,840.6</b> | <b>3,997.4</b> | <b>4,110.0</b> | <b>1,644.3</b> | <b>2,874.6</b> | <b>74.8%</b> | <b>-60.0%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Portland Region / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003          | 2013          | 2014           | 2015           | 2016           | 2017           | 2018           | 2019           | 2020           | 2021           | 2020-21      | 2019-20       |
|---|---------------|---------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |               |               |                |                |                |                |                |                |                |                |              |               |
| Accom. & Food Serv.   | 270.3         | 477.6         | 510.6          | 558.6          | 615.0          | 665.4          | 725.9          | 780.9          | 523.1          | 599.2          | 14.6%        | -33.0%        |
| Arts, Ent. & Rec.   | 44.0          | 63.7          | 67.3           | 71.0           | 75.4           | 80.1           | 84.4           | 89.6           | 60.3           | 64.0           | 6.2%         | -32.7%        |
| Retail**  | 46.1          | 63.7          | 66.2           | 70.5           | 75.1           | 79.7           | 83.8           | 86.6           | 81.3           | 84.8           | 4.2%         | -6.1%         |
| Ground Tran.  | 29.1          | 39.0          | 42.0           | 46.2           | 47.2           | 50.7           | 52.4           | 57.0           | 49.8           | 48.0           | -3.5%        | -12.6%        |
| Visitor Air Tran.   | 81.0          | 107.8         | 119.0          | 134.2          | 144.9          | 162.9          | 175.2          | 177.3          | 151.4          | 152.3          | 0.6%         | -14.6%        |
| Other Travel*   | 173.4         | 215.4         | 233.7          | 253.7          | 281.5          | 314.6          | 336.8          | 374.8          | 277.4          | 265.6          | -4.2%        | -26.0%        |
| <b>TOTAL</b>  | <b>643.8</b>  | <b>967.2</b>  | <b>1,038.9</b> | <b>1,134.2</b> | <b>1,239.1</b> | <b>1,353.4</b> | <b>1,458.5</b> | <b>1,566.2</b> | <b>1,143.3</b> | <b>1,214.0</b> | <b>6.2%</b>  | <b>-27.0%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |               |               |                |                |                |                |                |                |                |                |              |               |
| Accom. & Food Serv.   | 13,470        | 18,650        | 19,360         | 20,160         | 21,280         | 21,780         | 22,360         | 22,770         | 15,390         | 16,260         | 5.7%         | -32.4%        |
| Arts, Ent. & Rec.   | 2,180         | 2,680         | 2,770          | 2,840          | 3,030          | 3,090          | 3,080          | 3,150          | 1,930          | 2,100          | 8.5%         | -38.6%        |
| Retail**  | 1,910         | 2,310         | 2,340          | 2,390          | 2,450          | 2,560          | 2,580          | 2,570          | 2,220          | 2,240          | 0.7%         | -13.5%        |
| Ground Tran.  | 1,270         | 1,300         | 1,340          | 1,420          | 1,360          | 1,410          | 1,400          | 1,450          | 1,380          | 1,250          | -9.3%        | -5.2%         |
| Visitor Air Tran.   | 1,810         | 1,600         | 1,690          | 1,860          | 1,980          | 2,000          | 2,110          | 2,100          | 1,770          | 1,800          | 1.6%         | -15.6%        |
| Other Travel*   | 4,280         | 3,800         | 3,980          | 4,160          | 4,430          | 4,440          | 4,690          | 4,870          | 3,660          | 3,480          | -4.9%        | -24.8%        |
| <b>TOTAL</b>  | <b>24,920</b> | <b>30,340</b> | <b>31,480</b>  | <b>32,830</b>  | <b>34,530</b>  | <b>35,290</b>  | <b>36,220</b>  | <b>36,910</b>  | <b>26,360</b>  | <b>27,130</b>  | <b>2.9%</b>  | <b>-28.6%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |               |               |                |                |                |                |                |                |                |                |              |               |
| Local Tax Receipts  | 48.9          | 94.9          | 104.4          | 121.6          | 125.2          | 133.8          | 137.2          | 138.9          | 61.2           | 88.2           | 44.1%        | -55.9%        |
| State Tax Receipts  | 55.0          | 89.7          | 93.9           | 100.5          | 108.9          | 125.0          | 132.1          | 138.9          | 86.2           | 104.8          | 21.6%        | -38.0%        |
| <b>TOTAL</b>  | <b>103.9</b>  | <b>184.6</b>  | <b>198.3</b>   | <b>222.1</b>   | <b>234.1</b>   | <b>258.8</b>   | <b>269.4</b>   | <b>277.8</b>   | <b>147.4</b>   | <b>193.0</b>   | <b>30.9%</b> | <b>-46.9%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Portland Region / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Portland Region region is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |         | Party Size | Length of Stay |
|--------------------|--------|-------|-------|---------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip    |            |                |
| Hotel, Motel, STVR | \$184  | \$463 | \$459 | \$1,161 | 2.5        | 2.5            |
| Private Home       | \$54   | \$228 | \$97  | \$423   | 1.8        | 4.4            |
| Other Overnight    | \$46   | \$184 | \$107 | \$427   | 2.3        | 4.0            |
| All Overnight      | \$98   | \$336 | \$196 | \$712   | 2.0        | 3.6            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |            |            | Party-Nights |           |            |
|--------------------|---------------|------------|------------|--------------|-----------|------------|
|                    | 2019          | 2020       | 2021       | 2019         | 2020      | 2021       |
| Hotel, Motel, STVR | 10,193,430    | 4,426,460  | 8,459,560  | 4,840,540    | 1,936,630 | 3,393,880  |
| Private Home       | 15,977,970    | 11,638,660 | 16,041,120 | 8,177,880    | 6,047,830 | 8,831,230  |
| Other Overnight    | 805,040       | 548,560    | 486,640    | 265,580      | 232,180   | 211,880    |
| All Overnight      | 26,976,440    | 16,613,680 | 24,987,320 | 13,283,990   | 8,216,630 | 12,437,000 |

|                    | Person-Trips |           |           | Party-Trips |           |           |
|--------------------|--------------|-----------|-----------|-------------|-----------|-----------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020      | 2021      |
| Hotel, Motel, STVR | 4,246,240    | 1,791,580 | 3,364,310 | 1,967,360   | 762,090   | 1,341,420 |
| Private Home       | 4,378,990    | 2,730,120 | 3,762,820 | 2,181,030   | 1,412,760 | 2,028,690 |
| Other Overnight    | 203,770      | 140,730   | 123,010   | 66,590      | 58,880    | 52,960    |
| All Overnight      | 8,829,010    | 4,662,430 | 7,250,130 | 4,214,970   | 2,233,730 | 3,423,060 |

# Southern Oregon / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

Amount of Visitor Spending that supports 1 Job \$142,379

Employee Earnings generated by \$100 Visitor Spending \$31

Local & State Tax Revenues generated by \$100 Visitor Spending \$5

Local & State Tax Revenues per County Household \$262

### Visitor Shares

Travel Share of Total Employment (2021) 5%

Overnight Visitor Day Share of Resident Population\*\* 7%

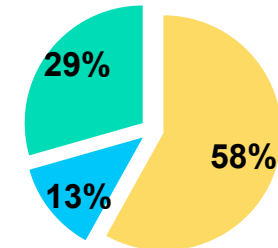
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

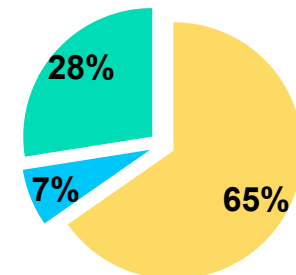
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Southern Oregon Region



### Oregon



Hotel, Motel, STVR Private Home (VFR) Other Overnight



# Southern Oregon / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                 | 2003   | 2013   | 2014   | 2015   | 2016    | 2017    | 2018    | 2019    | 2020   | 2021    | Avg. Annual % Chg. |         |
|---------------------------------|--------|--------|--------|--------|---------|---------|---------|---------|--------|---------|--------------------|---------|
|                                 |        |        |        |        |         |         |         |         |        |         | 2020-21            | 2003-21 |
| <b>Spending (\$Millions)</b>    |        |        |        |        |         |         |         |         |        |         |                    |         |
| Total (Current \$)              | 717.2  | 940.3  | 956.4  | 975.9  | 1,001.6 | 1,055.0 | 1,097.8 | 1,132.5 | 708.0  | 1,216.0 | ▲ 71.8%            | ▲ 3.0%  |
| Other                           | 54.6   | 89.8   | 90.1   | 87.7   | 84.5    | 93.9    | 103.0   | 105.4   | 45.4   | 87.9    | ▲ 93.6%            | ▲ 2.7%  |
| Visitor                         | 662.6  | 850.5  | 866.2  | 888.2  | 917.1   | 961.1   | 994.7   | 1,027.0 | 662.6  | 1,128.1 | ▲ 70.3%            | ▲ 3.0%  |
| <b>Earnings (\$Millions)</b>    |        |        |        |        |         |         |         |         |        |         |                    |         |
| Earnings (Current \$)           | 186.6  | 236.1  | 251.2  | 267.8  | 283.9   | 306.0   | 325.5   | 339.6   | 310.7  | 360.4   | ▲ 16.0%            | ▲ 3.7%  |
| <b>Employment (Jobs)</b>        |        |        |        |        |         |         |         |         |        |         |                    |         |
| Employment                      | 10,850 | 10,710 | 10,980 | 11,360 | 11,680  | 12,070  | 12,370  | 12,510  | 10,980 | 11,840  | ▲ 7.8%             | ▲ 0.5%  |
| <b>Tax Revenue (\$Millions)</b> |        |        |        |        |         |         |         |         |        |         |                    |         |
| Total (Current \$)              | 25.2   | 35.5   | 36.9   | 39.2   | 41.7    | 46.5    | 48.2    | 49.6    | 38.5   | 53.3    | ▲ 38.3%            | ▲ 4.3%  |
| Local                           | 6.9    | 10.3   | 11.2   | 12.4   | 13.4    | 14.2    | 14.7    | 15.0    | 12.1   | 18.5    | ▲ 52.3%            | ▲ 5.6%  |
| State                           | 18.3   | 25.2   | 25.8   | 26.8   | 28.3    | 32.2    | 33.5    | 34.5    | 26.4   | 34.8    | ▲ 31.9%            | ▲ 3.6%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Southern Oregon / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016           | 2017           | 2018           | 2019           | 2020         | 2021           | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|----------------|----------------|----------------|----------------|--------------|----------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |                |                |                |                |              |                |              |               |
| Destination Spending   | 662.6        | 850.5        | 866.2        | 888.2        | 917.1          | 961.1          | 994.7          | 1,027.0        | 662.6        | 1,128.1        | 70.3%        | -35.5%        |
| Other Travel*  | 54.6         | 89.8         | 90.1         | 87.7         | 84.5           | 93.9           | 103.0          | 105.4          | 45.4         | 87.9           | 93.6%        | -56.9%        |
| <b>TOTAL</b>   | <b>717.2</b> | <b>940.3</b> | <b>956.4</b> | <b>975.9</b> | <b>1,001.6</b> | <b>1,055.0</b> | <b>1,097.8</b> | <b>1,132.5</b> | <b>708.0</b> | <b>1,216.0</b> | <b>71.8%</b> | <b>-37.5%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |                |                |                |                |              |                |              |               |
| Hotel, Motel, STVR**   | 280.0        | 373.5        | 384.0        | 400.2        | 419.2          | 447.4          | 460.1          | 473.8          | 331.9        | 532.6          | 60.5%        | -29.9%        |
| Hotel, Motel   |              |              |              |              |                |                |                |                |              | 476.0          |              |               |
| STVR   |              |              |              |              |                |                |                |                |              | 56.6           |              |               |
| Private Home   | 156.8        | 215.1        | 217.2        | 219.6        | 223.6          | 232.2          | 242.5          | 250.5          | 149.2        | 269.8          | 80.8%        | -40.4%        |
| Campground   | 49.8         | 59.7         | 60.3         | 60.7         | 62.0           | 62.6           | 65.5           | 68.2           | 62.5         | 98.6           | 57.7%        | -8.4%         |
| 2nd Home   | 12.8         | 17.3         | 17.6         | 17.6         | 17.7           | 18.1           | 18.9           | 19.3           | 15.7         | 18.0           | 14.8%        | -19.0%        |
| Day Travel   | 163.3        | 184.9        | 187.1        | 190.1        | 194.6          | 200.7          | 207.9          | 215.2          | 103.3        | 209.2          | 102.5%       | -52.0%        |
| <b>TOTAL</b>   | <b>662.6</b> | <b>850.5</b> | <b>866.2</b> | <b>888.2</b> | <b>917.1</b>   | <b>961.1</b>   | <b>994.7</b>   | <b>1,027.0</b> | <b>662.6</b> | <b>1,128.1</b> | <b>70.3%</b> | <b>-35.5%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |                |                |                |                |              |                |              |               |
| Accommodations   | 118.0        | 148.4        | 156.6        | 171.8        | 183.7          | 194.3          | 192.3          | 195.4          | 162.6        | 264.3          | 62.5%        | -16.8%        |
| Food Service   | 162.0        | 218.5        | 225.8        | 239.1        | 252.4          | 265.4          | 275.4          | 290.8          | 192.7        | 319.4          | 65.8%        | -33.7%        |
| Food Stores  | 65.3         | 83.1         | 85.8         | 89.3         | 89.8           | 90.0           | 91.3           | 94.5           | 67.5         | 116.5          | 72.7%        | -28.6%        |
| Local Tran. & Gas  | 80.4         | 144.9        | 138.4        | 118.1        | 113.5          | 125.3          | 142.8          | 145.0          | 74.9         | 143.1          | 91.1%        | -48.4%        |
| Arts, Ent. & Rec.  | 106.6        | 111.7        | 113.0        | 116.6        | 120.3          | 122.9          | 125.0          | 128.4          | 66.8         | 109.9          | 64.5%        | -48.0%        |
| Retail Sales   | 106.9        | 111.4        | 111.5        | 114.2        | 115.9          | 117.3          | 118.0          | 120.8          | 75.5         | 133.3          | 76.5%        | -37.5%        |
| Visitor Air Tran.  | 23.5         | 32.5         | 35.1         | 39.1         | 41.5           | 45.9           | 50.0           | 52.0           | 22.6         | 41.6           | 83.9%        | -56.6%        |
| <b>TOTAL</b>   | <b>662.6</b> | <b>850.5</b> | <b>866.2</b> | <b>888.2</b> | <b>917.1</b>   | <b>961.1</b>   | <b>994.7</b>   | <b>1,027.0</b> | <b>662.6</b> | <b>1,128.1</b> | <b>70.3%</b> | <b>-35.5%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Southern Oregon / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018   | 2019   | 2020   | 2021   | 2020-21 | 2019-20 |
|---|--------|--------|--------|--------|--------|--------|--------|--------|--------|--------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |        |        |        |        |        |        |        |        |        |        |         |         |
| Accom. & Food Serv.   | 119.6  | 156.5  | 168.4  | 181.2  | 195.3  | 212.3  | 227.9  | 236.8  | 210.0  | 249.6  | 18.9%   | -11.3%  |
| Arts, Ent. & Rec.   | 32.3   | 36.6   | 38.1   | 39.6   | 41.2   | 43.1   | 45.0   | 47.9   | 41.0   | 46.4   | 13.3%   | -14.4%  |
| Retail**  | 23.7   | 27.6   | 28.4   | 30.0   | 31.3   | 32.8   | 34.4   | 35.7   | 42.7   | 46.5   | 9.0%    | 19.5%   |
| Ground Tran.  | 3.4    | 4.3    | 4.3    | 4.9    | 5.3    | 5.6    | 6.0    | 6.6    | 6.1    | 7.0    | 14.7%   | -7.0%   |
| Visitor Air Tran.   | 1.6    | 2.6    | 2.8    | 3.0    | 3.2    | 3.9    | 3.9    | 4.0    | 3.7    | 3.4    | -8.2%   | -7.6%   |
| Other Travel*   | 6.1    | 8.5    | 9.1    | 9.1    | 7.7    | 8.4    | 8.4    | 8.7    | 7.2    | 7.4    | 2.7%    | -16.8%  |
| <b>TOTAL</b>  | 186.6  | 236.1  | 251.2  | 267.8  | 283.9  | 306.0  | 325.5  | 339.6  | 310.7  | 360.4  | 16.0%   | -8.5%   |
| <b>Travel Industry Employment (Jobs)</b>                      |        |        |        |        |        |        |        |        |        |        |         |         |
| Accom. & Food Serv.   | 6,790  | 6,970  | 7,200  | 7,520  | 7,810  | 8,080  | 8,290  | 8,350  | 7,180  | 7,780  | 8.4%    | -14.0%  |
| Arts, Ent. & Rec.   | 2,390  | 2,130  | 2,150  | 2,160  | 2,210  | 2,300  | 2,350  | 2,430  | 1,970  | 2,150  | 9.3%    | -19.0%  |
| Retail**  | 1,210  | 1,170  | 1,180  | 1,230  | 1,240  | 1,270  | 1,300  | 1,300  | 1,440  | 1,490  | 3.8%    | 10.8%   |
| Ground Tran.  | 150    | 140    | 130    | 150    | 150    | 150    | 160    | 160    | 160    | 180    | 11.5%   | -1.5%   |
| Visitor Air Tran.   | 50     | 60     | 60     | 60     | 70     | 70     | 70     | 70     | 60     | 60     | -7.3%   | -8.7%   |
| Other Travel*   | 260    | 250    | 260    | 250    | 210    | 200    | 200    | 200    | 170    | 170    | -0.4%   | -14.1%  |
| <b>TOTAL</b>  | 10,850 | 10,710 | 10,980 | 11,360 | 11,680 | 12,070 | 12,370 | 12,510 | 10,980 | 11,840 | 7.8%    | -12.2%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |        |        |        |        |        |        |        |        |        |        |         |         |
| Local Tax Receipts  | 6.9    | 10.3   | 11.2   | 12.4   | 13.4   | 14.2   | 14.7   | 15.0   | 12.1   | 18.5   | 52.3%   | -19.3%  |
| State Tax Receipts  | 18.3   | 25.2   | 25.8   | 26.8   | 28.3   | 32.2   | 33.5   | 34.5   | 26.4   | 34.8   | 31.9%   | -23.7%  |
| <b>TOTAL</b>  | 25.2   | 35.5   | 36.9   | 39.2   | 41.7   | 46.5   | 48.2   | 49.6   | 38.5   | 53.3   | 38.3%   | -22.3%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Southern Oregon / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Southern Oregon region is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$123  | \$285 | \$335 | \$780 | 2.7        | 2.3            |
| Private Home       | \$45   | \$188 | \$104 | \$441 | 2.3        | 4.3            |
| Other Overnight    | \$47   | \$172 | \$125 | \$461 | 2.7        | 3.7            |
| All Overnight      | \$72   | \$231 | \$179 | \$594 | 2.5        | 3.3            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |            | Party-Nights |           |           |
|--------------------|---------------|-----------|------------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021       | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 3,656,860     | 2,873,520 | 4,329,920  | 1,534,770    | 1,075,230 | 1,590,220 |
| Private Home       | 5,964,510     | 3,663,780 | 5,988,790  | 2,401,940    | 1,545,780 | 2,601,440 |
| Other Overnight    | 2,402,220     | 1,768,060 | 2,503,080  | 711,460      | 665,190   | 933,760   |
| All Overnight      | 12,023,590    | 8,305,360 | 12,821,780 | 4,648,170    | 3,286,200 | 5,125,420 |

|                    | Person-Trips |           |           | Party-Trips |           |           |
|--------------------|--------------|-----------|-----------|-------------|-----------|-----------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020      | 2021      |
| Hotel, Motel, STVR | 1,646,980    | 1,280,610 | 1,868,420 | 684,860     | 473,200   | 683,080   |
| Private Home       | 1,671,050    | 877,340   | 1,433,010 | 659,330     | 368,190   | 611,950   |
| Other Overnight    | 632,820      | 477,260   | 678,920   | 187,140     | 179,160   | 252,820   |
| All Overnight      | 3,950,850    | 2,635,200 | 3,980,350 | 1,531,330   | 1,020,560 | 1,547,860 |

# Central Oregon / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job                 | \$175,973 |
| Employee Earnings generated by \$100 Visitor Spending          | \$31      |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$6       |
| Local & State Tax Revenues per County Household                | \$546     |
| Visitor Shares   |           |
| Travel Share of Total Employment (2021)                        | 6%        |
| Overnight Visitor Day Share of Resident Population**           | 11%       |

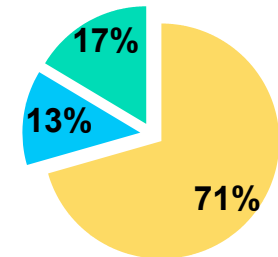
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

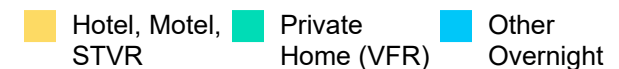
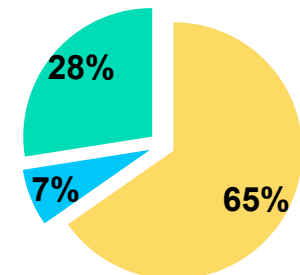
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Central Oregon Region



### Oregon



# Central Oregon / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                 | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019    | 2020  | 2021    | Avg. Annual % Chg. |         |
|---------------------------------|-------|-------|-------|-------|-------|-------|-------|---------|-------|---------|--------------------|---------|
|                                 |       |       |       |       |       |       |       |         |       |         | 2020-21            | 2003-21 |
| <b>Spending (\$Millions)</b>    |       |       |       |       |       |       |       |         |       |         |                    |         |
| Total (Current \$)              | 401.0 | 720.4 | 748.6 | 795.5 | 852.5 | 902.2 | 964.4 | 1,021.9 | 680.3 | 1,056.4 | ▲ 55.3%            | ▲ 5.5%  |
| Other                           | 25.8  | 54.0  | 56.5  | 59.5  | 63.2  | 71.6  | 84.5  | 86.7    | 38.0  | 70.0    | ▲ 83.9%            | ▲ 5.7%  |
| Visitor                         | 375.2 | 666.4 | 692.1 | 736.0 | 789.3 | 830.5 | 879.8 | 935.2   | 642.3 | 986.5   | ▲ 53.6%            | ▲ 5.5%  |
| <b>Earnings (\$Millions)</b>    |       |       |       |       |       |       |       |         |       |         |                    |         |
| Earnings (Current \$)           | 100.8 | 176.3 | 193.0 | 218.1 | 232.5 | 249.7 | 277.7 | 292.0   | 258.0 | 308.4   | ▲ 19.5%            | ▲ 6.4%  |
| <b>Employment (Jobs)</b>        |       |       |       |       |       |       |       |         |       |         |                    |         |
| Employment                      | 5,750 | 7,920 | 8,360 | 9,000 | 9,260 | 9,390 | 9,970 | 10,000  | 8,370 | 9,250   | ▲ 10.6%            | ▲ 2.7%  |
| <b>Tax Revenue (\$Millions)</b> |       |       |       |       |       |       |       |         |       |         |                    |         |
| Total (Current \$)              | 16.3  | 27.9  | 29.8  | 33.0  | 36.2  | 40.7  | 43.2  | 47.5    | 41.6  | 55.0    | ▲ 32.3%            | ▲ 7.0%  |
| Local                           | 6.9   | 10.2  | 11.0  | 12.5  | 14.1  | 15.0  | 15.6  | 18.2    | 18.3  | 25.2    | ▲ 37.7%            | ▲ 7.4%  |
| State                           | 9.4   | 17.8  | 18.8  | 20.5  | 22.1  | 25.7  | 27.7  | 29.3    | 23.3  | 29.9    | ▲ 28.1%            | ▲ 6.7%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.



# Central Oregon / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019           | 2020         | 2021           | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|----------------|--------------|----------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |                |              |                |              |               |
| Destination Spending   | 375.2        | 666.4        | 692.1        | 736.0        | 789.3        | 830.5        | 879.8        | 935.2          | 642.3        | 986.5          | 53.6%        | -31.3%        |
| Other Travel*  | 25.8         | 54.0         | 56.5         | 59.5         | 63.2         | 71.6         | 84.5         | 86.7           | 38.0         | 70.0           | 83.9%        | -56.1%        |
| <b>TOTAL</b>   | <b>401.0</b> | <b>720.4</b> | <b>748.6</b> | <b>795.5</b> | <b>852.5</b> | <b>902.2</b> | <b>964.4</b> | <b>1,021.9</b> | <b>680.3</b> | <b>1,056.4</b> | <b>55.3%</b> | <b>-33.4%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |                |              |                |              |               |
| Hotel, Motel, STVR**   | 173.0        | 358.1        | 377.8        | 411.0        | 451.7        | 476.5        | 505.0        | 544.1          | 383.4        | 618.8          | 61.4%        | -29.5%        |
| Hotel, Motel   |              |              |              |              |              |              |              |                |              | 360.5          |              |               |
| STVR   |              |              |              |              |              |              |              |                |              | 258.3          |              |               |
| Private Home   | 61.7         | 102.9        | 104.8        | 110.3        | 115.4        | 124.1        | 133.1        | 139.8          | 101.8        | 144.9          | 42.4%        | -27.2%        |
| Campground   | 39.2         | 47.5         | 48.0         | 48.5         | 49.6         | 50.1         | 52.3         | 54.6           | 52.8         | 65.0           | 23.2%        | -3.4%         |
| 2nd Home   | 29.3         | 45.2         | 46.1         | 46.2         | 46.5         | 48.8         | 50.7         | 51.9           | 42.2         | 48.5           | 15.1%        | -18.8%        |
| Day Travel   | 72.0         | 112.6        | 115.3        | 120.1        | 126.1        | 131.0        | 138.6        | 144.8          | 62.2         | 109.3          | 75.8%        | -57.1%        |
| <b>TOTAL</b>   | <b>375.2</b> | <b>666.4</b> | <b>692.1</b> | <b>736.0</b> | <b>789.3</b> | <b>830.5</b> | <b>879.8</b> | <b>935.2</b>   | <b>642.3</b> | <b>986.5</b>   | <b>53.6%</b> | <b>-31.3%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |                |              |                |              |               |
| Accommodations   | 88.9         | 166.4        | 179.7        | 203.4        | 227.5        | 239.9        | 246.7        | 270.5          | 250.5        | 399.8          | 59.6%        | -7.4%         |
| Food Service   | 90.6         | 173.1        | 181.5        | 197.2        | 214.8        | 224.9        | 240.4        | 258.0          | 141.6        | 200.8          | 41.8%        | -45.1%        |
| Food Stores  | 37.8         | 58.4         | 60.9         | 64.4         | 66.0         | 66.5         | 68.6         | 71.6           | 57.2         | 85.4           | 49.3%        | -20.0%        |
| Local Tran. & Gas  | 36.3         | 88.1         | 85.5         | 72.9         | 71.7         | 79.4         | 92.1         | 95.1           | 51.5         | 85.5           | 66.0%        | -45.9%        |
| Arts, Ent. & Rec.  | 53.7         | 77.1         | 79.2         | 83.7         | 88.8         | 90.9         | 94.8         | 97.6           | 61.4         | 78.2           | 27.3%        | -37.0%        |
| Retail Sales   | 57.2         | 80.2         | 81.4         | 85.2         | 88.9         | 90.1         | 92.9         | 96.6           | 61.3         | 90.4           | 47.3%        | -36.5%        |
| Visitor Air Tran.  | 10.8         | 23.2         | 23.9         | 29.3         | 31.6         | 38.8         | 44.2         | 45.8           | 18.7         | 46.4           | 148.0%       | -59.2%        |
| <b>TOTAL</b>   | <b>375.2</b> | <b>666.4</b> | <b>692.1</b> | <b>736.0</b> | <b>789.3</b> | <b>830.5</b> | <b>879.8</b> | <b>935.2</b>   | <b>642.3</b> | <b>986.5</b>   | <b>53.6%</b> | <b>-31.3%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Central Oregon / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019   | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|--------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |        |       |       |         |         |
| Accom. & Food Serv.   | 68.0  | 124.9 | 137.0 | 157.9 | 167.8 | 181.6 | 202.2 | 212.4  | 181.5 | 221.6 | 22.1%   | -14.6%  |
| Arts, Ent. & Rec.   | 15.8  | 25.8  | 29.0  | 31.0  | 32.4  | 34.0  | 38.6  | 41.1   | 33.2  | 40.8  | 22.9%   | -19.1%  |
| Retail**  | 12.4  | 18.7  | 19.5  | 20.9  | 22.4  | 23.5  | 25.1  | 26.2   | 32.7  | 35.6  | 8.9%    | 24.7%   |
| Ground Tran.  | 1.5   | 2.6   | 2.8   | 3.0   | 3.4   | 3.6   | 3.9   | 4.3    | 3.7   | 3.8   | 1.3%    | -12.4%  |
| Visitor Air Tran.   | 0.4   | 0.7   | 0.8   | 0.9   | 1.0   | 1.1   | 1.2   | 1.2    | 1.1   | 1.2   | 5.4%    | -6.6%   |
| Other Travel*   | 2.7   | 3.7   | 4.0   | 4.4   | 5.6   | 5.8   | 6.6   | 6.8    | 5.7   | 5.4   | -5.4%   | -15.5%  |
| <b>TOTAL</b>  | 100.8 | 176.3 | 193.0 | 218.1 | 232.5 | 249.7 | 277.7 | 292.0  | 258.0 | 308.4 | 19.5%   | -11.6%  |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |        |       |       |         |         |
| Accom. & Food Serv.   | 3,740 | 5,270 | 5,560 | 6,080 | 6,230 | 6,310 | 6,640 | 6,630  | 5,440 | 6,050 | 11.2%   | -17.9%  |
| Arts, Ent. & Rec.   | 1,180 | 1,630 | 1,760 | 1,840 | 1,890 | 1,930 | 2,120 | 2,160  | 1,610 | 1,850 | 14.8%   | -25.2%  |
| Retail**  | 640   | 810   | 830   | 860   | 870   | 880   | 920   | 920    | 1,050 | 1,100 | 4.3%    | 14.7%   |
| Ground Tran.  | 60    | 80    | 80    | 90    | 90    | 100   | 100   | 100    | 90    | 90    | -4.9%   | -9.3%   |
| Visitor Air Tran.   | 20    | 20    | 20    | 20    | 30    | 30    | 30    | 30     | 30    | 30    | 6.5%    | -7.7%   |
| Other Travel*   | 110   | 100   | 110   | 110   | 160   | 150   | 170   | 160    | 140   | 130   | -4.9%   | -15.2%  |
| <b>TOTAL</b>  | 5,750 | 7,920 | 8,360 | 9,000 | 9,260 | 9,390 | 9,970 | 10,000 | 8,370 | 9,250 | 10.5%   | -16.3%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |        |       |       |         |         |
| Local Tax Receipts  | 6.9   | 10.2  | 11.0  | 12.5  | 14.1  | 15.0  | 15.6  | 18.2   | 18.3  | 25.2  | 37.7%   | 0.5%    |
| State Tax Receipts  | 9.4   | 17.8  | 18.8  | 20.5  | 22.1  | 25.7  | 27.7  | 29.3   | 23.3  | 29.9  | 28.1%   | -20.4%  |
| <b>TOTAL</b>  | 16.3  | 27.9  | 29.8  | 33.0  | 36.2  | 40.7  | 43.2  | 47.5   | 41.6  | 55.0  | 32.3%   | -12.4%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Central Oregon / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Central Oregon region is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |         | Party Size | Length of Stay |
|--------------------|--------|-------|-------|---------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip    |            |                |
| Hotel, Motel, STVR | \$147  | \$380 | \$402 | \$1,044 | 2.7        | 2.6            |
| Private Home       | \$47   | \$192 | \$104 | \$437   | 2.2        | 4.2            |
| Other Overnight    | \$42   | \$157 | \$109 | \$406   | 2.6        | 3.7            |
| All Overnight      | \$88   | \$283 | \$221 | \$728   | 2.5        | 3.3            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 3,290,640     | 2,426,790 | 4,215,130 | 1,379,250    | 923,840   | 1,538,940 |
| Private Home       | 3,015,770     | 2,707,770 | 3,061,690 | 1,258,570    | 1,148,060 | 1,397,240 |
| Other Overnight    | 3,156,930     | 2,379,940 | 2,679,990 | 969,280      | 925,710   | 1,038,790 |
| All Overnight      | 9,463,350     | 7,514,500 | 9,956,820 | 3,607,100    | 2,997,610 | 3,974,970 |

|                    | Person-Trips |           |           | Party-Trips |         |           |
|--------------------|--------------|-----------|-----------|-------------|---------|-----------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021      |
| Hotel, Motel, STVR | 1,507,890    | 1,062,370 | 1,627,580 | 626,190     | 396,050 | 592,870   |
| Private Home       | 868,710      | 663,160   | 753,280   | 350,070     | 279,440 | 331,540   |
| Other Overnight    | 837,330      | 641,980   | 723,690   | 256,830     | 249,220 | 279,970   |
| All Overnight      | 3,213,930    | 2,367,510 | 3,104,560 | 1,233,090   | 924,710 | 1,204,380 |

# Eastern Oregon / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job                 | \$101,371 |
| Employee Earnings generated by \$100 Visitor Spending          | \$39      |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5       |
| Local & State Tax Revenues per County Household                | \$275     |
| Visitor Shares   |           |
| Travel Share of Total Employment (2021)                        | 6%        |
| Overnight Visitor Day Share of Resident Population**           | 7%        |

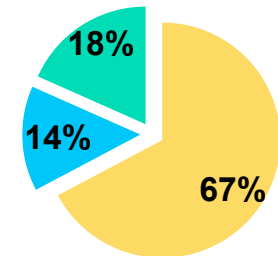
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

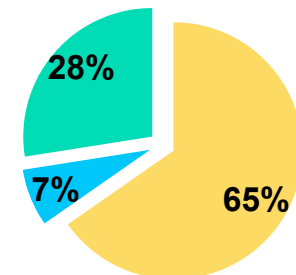
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Eastern Oregon Region



### Oregon



Hotel, Motel, STVR Private Home (VFR) Other Overnight

# Eastern Oregon / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                 | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|---------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                 |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Millions)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)              | 284.2 | 339.9 | 347.7 | 350.8 | 354.1 | 382.0 | 398.9 | 412.0 | 258.0 | 408.6 | ▲ 58.4%            | ▲ 2.0%  |
| Other                           | 9.6   | 15.6  | 15.2  | 12.1  | 11.5  | 13.9  | 15.4  | 16.3  | 7.6   | 13.0  | ▲ 70.7%            | ▲ 1.7%  |
| Visitor                         | 274.6 | 324.2 | 332.5 | 338.7 | 342.6 | 368.2 | 383.4 | 395.7 | 250.4 | 395.6 | ▲ 58.0%            | ▲ 2.0%  |
| <b>Earnings (\$Millions)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)           | 79.5  | 98.1  | 104.4 | 112.2 | 117.0 | 123.4 | 134.6 | 142.3 | 130.8 | 155.4 | ▲ 18.8%            | ▲ 3.8%  |
| <b>Employment (Jobs)</b>        |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                      | 5,630 | 5,380 | 5,500 | 5,640 | 5,750 | 5,960 | 6,180 | 6,340 | 5,520 | 6,130 | ▲ 10.9%            | ▲ 0.5%  |
| <b>Tax Revenue (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)              | 9.7   | 13.3  | 13.7  | 14.4  | 15.0  | 17.2  | 17.9  | 18.6  | 14.8  | 19.9  | ▲ 35.0%            | ▲ 4.1%  |
| Local                           | 2.2   | 3.4   | 3.6   | 3.9   | 4.1   | 4.6   | 4.7   | 4.9   | 4.2   | 6.1   | ▲ 45.1%            | ▲ 5.7%  |
| State                           | 7.5   | 9.9   | 10.1  | 10.5  | 10.9  | 12.5  | 13.2  | 13.7  | 10.6  | 13.9  | ▲ 31.0%            | ▲ 3.5%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Eastern Oregon / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 274.6        | 324.2        | 332.5        | 338.7        | 342.6        | 368.2        | 383.4        | 395.7        | 250.4        | 395.6        | 58.0%        | -36.7%        |
| Other Travel*  | 9.6          | 15.6         | 15.2         | 12.1         | 11.5         | 13.9         | 15.4         | 16.3         | 7.6          | 13.0         | 70.7%        | -53.2%        |
| <b>TOTAL</b>   | <b>284.2</b> | <b>339.9</b> | <b>347.7</b> | <b>350.8</b> | <b>354.1</b> | <b>382.0</b> | <b>398.9</b> | <b>412.0</b> | <b>258.0</b> | <b>408.6</b> | <b>58.4%</b> | <b>-37.4%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 109.8        | 140.5        | 146.6        | 153.0        | 156.0        | 173.7        | 181.0        | 187.9        | 121.6        | 220.1        | 81.0%        | -35.3%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 200.1        |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 20.0         |              |               |
| Private Home   | 40.1         | 52.7         | 53.2         | 51.9         | 51.5         | 54.1         | 56.2         | 57.0         | 48.1         | 60.2         | 25.2%        | -15.7%        |
| Campground   | 29.8         | 36.6         | 36.9         | 37.2         | 38.0         | 38.4         | 40.1         | 41.8         | 31.5         | 35.7         | 13.1%        | -24.5%        |
| 2nd Home   | 8.6          | 10.8         | 11.0         | 11.0         | 11.0         | 11.3         | 11.8         | 12.0         | 10.1         | 11.6         | 15.2%        | -16.5%        |
| Day Travel   | 86.3         | 83.6         | 84.7         | 85.7         | 86.0         | 90.7         | 94.4         | 97.0         | 39.1         | 68.1         | 73.9%        | -59.7%        |
| <b>TOTAL</b>   | <b>274.6</b> | <b>324.2</b> | <b>332.5</b> | <b>338.7</b> | <b>342.6</b> | <b>368.2</b> | <b>383.4</b> | <b>395.7</b> | <b>250.4</b> | <b>395.6</b> | <b>58.0%</b> | <b>-36.7%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 49.4         | 67.4         | 72.1         | 79.1         | 82.5         | 91.9         | 93.4         | 97.0         | 71.8         | 120.8        | 68.2%        | -26.0%        |
| Food Service   | 67.8         | 81.4         | 84.4         | 89.1         | 91.9         | 98.6         | 103.4        | 108.6        | 72.0         | 111.1        | 54.2%        | -33.7%        |
| Food Stores  | 31.1         | 36.4         | 37.7         | 39.0         | 38.7         | 39.3         | 39.9         | 41.0         | 26.6         | 35.8         | 34.7%        | -35.3%        |
| Local Tran. & Gas  | 30.7         | 51.5         | 49.3         | 40.8         | 38.2         | 43.0         | 49.1         | 49.7         | 26.1         | 47.1         | 80.7%        | -47.5%        |
| Arts, Ent. & Rec.  | 53.1         | 49.2         | 50.0         | 51.6         | 52.2         | 54.6         | 55.9         | 57.1         | 31.3         | 46.5         | 48.6%        | -45.2%        |
| Retail Sales   | 41.6         | 38.2         | 38.4         | 39.1         | 38.9         | 40.0         | 40.5         | 41.2         | 22.2         | 33.2         | 49.7%        | -46.2%        |
| Visitor Air Tran.  | 0.8          | 0.0          | 0.6          | 0.1          | 0.2          | 0.6          | 1.2          | 1.1          | 0.4          | 1.1          | 165.3%       | -61.2%        |
| <b>TOTAL</b>   | <b>274.6</b> | <b>324.2</b> | <b>332.5</b> | <b>338.7</b> | <b>342.6</b> | <b>368.2</b> | <b>383.4</b> | <b>395.7</b> | <b>250.4</b> | <b>395.6</b> | <b>58.0%</b> | <b>-36.7%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Eastern Oregon / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 51.9         | 69.0         | 73.5         | 79.9         | 83.0         | 87.1         | 97.1         | 102.7        | 92.6         | 112.1        | 21.1%        | -9.9%         |
| Arts, Ent. & Rec.   | 14.8         | 15.9         | 16.7         | 17.4         | 18.4         | 19.8         | 20.3         | 21.5         | 19.5         | 23.5         | 20.4%        | -9.4%         |
| Retail**  | 10.3         | 11.0         | 11.4         | 11.9         | 12.2         | 12.9         | 13.4         | 13.9         | 15.0         | 15.7         | 4.8%         | 7.9%          |
| Ground Tran.  | 1.4          | 1.5          | 1.6          | 1.7          | 1.8          | 2.0          | 2.1          | 2.3          | 2.0          | 2.4          | 20.2%        | -13.3%        |
| Visitor Air Tran.   | 0.2          | 0.0          | 0.4          | 0.2          | 0.5          | 0.2          | 0.4          | 0.3          | 0.3          | 0.5          | 60.0%        | 4.2%          |
| Other Travel*   | 1.0          | 0.7          | 0.9          | 1.1          | 1.0          | 1.4          | 1.3          | 1.6          | 1.4          | 1.2          | -12.8%       | -10.5%        |
| <b>TOTAL</b>  | <b>79.5</b>  | <b>98.1</b>  | <b>104.4</b> | <b>112.2</b> | <b>117.0</b> | <b>123.4</b> | <b>134.6</b> | <b>142.3</b> | <b>130.8</b> | <b>155.4</b> | <b>18.8%</b> | <b>-8.1%</b>  |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 3,330        | 3,310        | 3,390        | 3,520        | 3,600        | 3,710        | 3,930        | 4,000        | 3,450        | 3,840        | 11.2%        | -13.7%        |
| Arts, Ent. & Rec.   | 1,600        | 1,480        | 1,500        | 1,490        | 1,510        | 1,590        | 1,580        | 1,650        | 1,400        | 1,600        | 14.4%        | -15.5%        |
| Retail**  | 570          | 500          | 510          | 520          | 530          | 550          | 550          | 550          | 560          | 570          | 1.8%         | 1.3%          |
| Ground Tran.  | 60           | 50           | 50           | 50           | 50           | 50           | 50           | 50           | 50           | 50           | 12.9%        | -10.2%        |
| Visitor Air Tran.   | 10           | 0            | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 61.6%        | 3.0%          |
| Other Travel*   | 60           | 40           | 50           | 50           | 60           | 60           | 60           | 70           | 60           | 50           | -9.6%        | -11.2%        |
| <b>TOTAL</b>  | <b>5,630</b> | <b>5,380</b> | <b>5,500</b> | <b>5,640</b> | <b>5,750</b> | <b>5,960</b> | <b>6,180</b> | <b>6,340</b> | <b>5,520</b> | <b>6,130</b> | <b>11.1%</b> | <b>-12.9%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Local Tax Receipts  | 2.2          | 3.4          | 3.6          | 3.9          | 4.1          | 4.6          | 4.7          | 4.9          | 4.2          | 6.1          | 45.1%        | -14.1%        |
| State Tax Receipts  | 7.5          | 9.9          | 10.1         | 10.5         | 10.9         | 12.5         | 13.2         | 13.7         | 10.6         | 13.9         | 31.0%        | -22.9%        |
| <b>TOTAL</b>  | <b>9.7</b>   | <b>13.3</b>  | <b>13.7</b>  | <b>14.4</b>  | <b>15.0</b>  | <b>17.2</b>  | <b>17.9</b>  | <b>18.6</b>  | <b>14.8</b>  | <b>19.9</b>  | <b>35.0%</b> | <b>-20.6%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.



# Eastern Oregon / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Eastern Oregon region is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$102  | \$209 | \$282 | \$578 | 2.8        | 2.1            |
| Private Home       | \$31   | \$110 | \$72  | \$260 | 2.4        | 3.6            |
| Other Overnight    | \$46   | \$161 | \$122 | \$424 | 2.6        | 3.5            |
| All Overnight      | \$64   | \$173 | \$164 | \$453 | 2.6        | 2.8            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 1,751,010     | 1,228,030 | 2,167,260 | 714,010      | 446,420   | 780,840   |
| Private Home       | 1,948,850     | 1,660,330 | 1,961,920 | 760,270      | 703,160   | 830,820   |
| Other Overnight    | 1,474,930     | 953,290   | 1,020,950 | 438,030      | 361,300   | 386,880   |
| All Overnight      | 5,174,780     | 3,841,660 | 5,150,130 | 1,912,310    | 1,510,870 | 1,998,540 |

|                    | Person-Trips |           |           | Party-Trips |         |         |
|--------------------|--------------|-----------|-----------|-------------|---------|---------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 883,720      | 612,750   | 1,055,340 | 360,340     | 221,960 | 380,520 |
| Private Home       | 633,790      | 461,970   | 545,560   | 247,320     | 195,700 | 231,090 |
| Other Overnight    | 412,660      | 274,180   | 293,590   | 123,020     | 104,220 | 111,580 |
| All Overnight      | 1,930,170    | 1,348,900 | 1,894,480 | 730,680     | 521,880 | 723,190 |

# Mt. Hood & Columbia River Gorge / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job                 | \$148,613 |
| Employee Earnings generated by \$100 Visitor Spending          | \$33      |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5       |
| Local & State Tax Revenues per County Household                | \$592     |
| Visitor Shares   |           |
| Travel Share of Total Employment (2021)                        | 5%        |
| Overnight Visitor Day Share of Resident Population**           | 11%       |

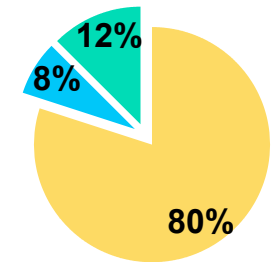
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

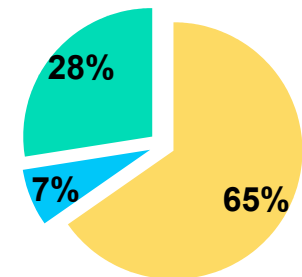
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Mt. Hood & Columbia River Gorge Region



### Oregon



■ Hotel, Motel, STVR
 ■ Private Home (VFR)
 ■ Other Overnight

# Mt. Hood & Columbia River Gorge / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                 | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|---------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                 |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Millions)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)              | 230.9 | 327.3 | 350.4 | 368.8 | 400.2 | 421.5 | 430.7 | 446.7 | 241.0 | 439.1 | ▲ 82.2%            | ▲ 3.6%  |
| Other                           | 11.1  | 17.0  | 17.3  | 16.4  | 17.2  | 15.5  | 17.1  | 17.6  | 13.1  | 15.6  | ▲ 19.5%            | ▲ 1.9%  |
| Visitor                         | 219.9 | 310.3 | 333.0 | 352.4 | 383.0 | 406.0 | 413.6 | 429.1 | 227.9 | 423.5 | ▲ 85.8%            | ▲ 3.7%  |
| <b>Earnings (\$Millions)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)           | 61.2  | 89.0  | 97.0  | 105.9 | 117.4 | 124.6 | 132.6 | 148.7 | 126.6 | 142.1 | ▲ 12.2%            | ▲ 4.8%  |
| <b>Employment (Jobs)</b>        |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                      | 3,590 | 4,130 | 4,320 | 4,550 | 4,850 | 4,970 | 5,000 | 5,300 | 4,290 | 4,520 | ▲ 5.3%             | ▲ 1.3%  |
| <b>Tax Revenue (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)              | 7.7   | 12.7  | 13.7  | 14.9  | 17.0  | 19.2  | 19.7  | 20.8  | 15.7  | 23.1  | ▲ 47.0%            | ▲ 6.3%  |
| Local                           | 2.3   | 4.1   | 4.6   | 5.1   | 6.3   | 6.8   | 6.8   | 6.9   | 5.6   | 9.9   | ▲ 78.1%            | ▲ 8.6%  |
| State                           | 5.5   | 8.6   | 9.1   | 9.8   | 10.8  | 12.4  | 12.9  | 13.8  | 10.1  | 13.2  | ▲ 29.9%            | ▲ 5.0%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Mt. Hood & Columbia River Gorge / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 219.9        | 310.3        | 333.0        | 352.4        | 383.0        | 406.0        | 413.6        | 429.1        | 227.9        | 423.5        | 85.8%        | -46.9%        |
| Other Travel*  | 11.1         | 17.0         | 17.3         | 16.4         | 17.2         | 15.5         | 17.1         | 17.6         | 13.1         | 15.6         | 19.5%        | -25.8%        |
| <b>TOTAL</b>   | <b>230.9</b> | <b>327.3</b> | <b>350.4</b> | <b>368.8</b> | <b>400.2</b> | <b>421.5</b> | <b>430.7</b> | <b>446.7</b> | <b>241.0</b> | <b>439.1</b> | <b>82.2%</b> | <b>-46.1%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 80.7         | 134.7        | 148.3        | 162.0        | 183.8        | 199.7        | 202.5        | 209.9        | 121.4        | 238.5        | 96.5%        | -42.1%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 131.7        |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 106.8        |              |               |
| Private Home   | 25.9         | 35.9         | 37.3         | 37.5         | 38.4         | 39.3         | 40.3         | 41.5         | 28.8         | 37.2         | 29.2%        | -30.5%        |
| Campground   | 14.3         | 20.6         | 20.8         | 21.0         | 21.6         | 21.8         | 22.7         | 23.6         | 17.9         | 14.5         | -19.1%       | -24.1%        |
| 2nd Home   | 5.5          | 7.7          | 7.9          | 7.9          | 7.9          | 8.1          | 8.5          | 8.7          | 7.1          | 8.1          | 14.7%        | -18.6%        |
| Day Travel   | 93.5         | 111.5        | 118.7        | 123.9        | 131.4        | 137.0        | 139.6        | 145.5        | 52.6         | 125.1        | 137.6%       | -63.8%        |
| <b>TOTAL</b>   | <b>219.9</b> | <b>310.3</b> | <b>333.0</b> | <b>352.4</b> | <b>383.0</b> | <b>406.0</b> | <b>413.6</b> | <b>429.1</b> | <b>227.9</b> | <b>423.5</b> | <b>85.8%</b> | <b>-46.9%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 35.4         | 62.6         | 70.2         | 80.4         | 94.5         | 102.0        | 102.3        | 105.0        | 74.0         | 145.2        | 96.1%        | -29.5%        |
| Food Service   | 61.0         | 88.4         | 96.2         | 104.6        | 114.7        | 122.3        | 125.4        | 132.8        | 63.6         | 113.1        | 77.7%        | -52.1%        |
| Food Stores  | 20.4         | 27.6         | 29.7         | 31.4         | 32.4         | 32.8         | 32.9         | 34.2         | 21.4         | 38.3         | 79.0%        | -37.4%        |
| Local Tran. & Gas  | 20.9         | 41.1         | 41.0         | 35.0         | 34.6         | 38.9         | 43.5         | 44.3         | 21.7         | 41.4         | 91.1%        | -51.1%        |
| Arts, Ent. & Rec.  | 34.9         | 39.3         | 42.2         | 44.7         | 47.8         | 49.7         | 49.7         | 51.3         | 18.1         | 27.7         | 52.5%        | -64.6%        |
| Retail Sales   | 47.3         | 51.3         | 53.8         | 56.3         | 59.0         | 60.3         | 59.9         | 61.5         | 29.0         | 57.9         | 99.4%        | -52.8%        |
| <b>TOTAL</b>   | <b>219.9</b> | <b>310.3</b> | <b>333.0</b> | <b>352.4</b> | <b>383.0</b> | <b>406.0</b> | <b>413.6</b> | <b>429.1</b> | <b>227.9</b> | <b>423.5</b> | <b>85.8%</b> | <b>-46.9%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Mt. Hood & Columbia River Gorge / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 38.1  | 59.7  | 65.6  | 72.3  | 80.8  | 86.9  | 93.7  | 107.5 | 91.3  | 103.7 | 13.6%   | -15.0%  |
| Arts, Ent. & Rec.   | 10.3  | 13.6  | 14.5  | 15.5  | 17.0  | 18.1  | 18.5  | 19.8  | 14.9  | 16.7  | 12.1%   | -25.0%  |
| Retail**  | 8.4   | 10.2  | 11.0  | 11.8  | 12.7  | 13.4  | 13.9  | 14.4  | 14.1  | 15.8  | 11.9%   | -2.3%   |
| Ground Tran.  | 0.9   | 1.2   | 1.4   | 1.5   | 1.7   | 1.9   | 1.9   | 2.1   | 1.7   | 1.5   | -11.7%  | -16.7%  |
| Other Travel*   | 3.5   | 4.3   | 4.6   | 4.8   | 5.3   | 4.3   | 4.6   | 4.9   | 4.6   | 4.4   | -3.4%   | -5.8%   |
| <b>TOTAL</b>  | 61.2  | 89.0  | 97.0  | 105.9 | 117.4 | 124.6 | 132.6 | 148.7 | 126.6 | 142.1 | 12.2%   | -14.9%  |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 2,320 | 2,760 | 2,910 | 3,060 | 3,270 | 3,370 | 3,410 | 3,670 | 3,070 | 3,220 | 4.8%    | -16.4%  |
| Arts, Ent. & Rec.   | 700   | 780   | 790   | 860   | 920   | 950   | 940   | 970   | 630   | 690   | 9.0%    | -34.5%  |
| Retail**  | 410   | 430   | 450   | 470   | 490   | 510   | 510   | 510   | 470   | 510   | 7.2%    | -8.1%   |
| Ground Tran.  | 40    | 40    | 40    | 40    | 50    | 50    | 50    | 50    | 40    | 40    | -17.1%  | -13.7%  |
| Other Travel*   | 110   | 110   | 110   | 110   | 120   | 90    | 100   | 100   | 70    | 70    | -4.2%   | -26.6%  |
| <b>TOTAL</b>  | 3,590 | 4,130 | 4,320 | 4,550 | 4,850 | 4,970 | 5,000 | 5,300 | 4,290 | 4,520 | 5.4%    | -19.1%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Local Tax Receipts  | 2.3   | 4.1   | 4.6   | 5.1   | 6.3   | 6.8   | 6.8   | 6.9   | 5.6   | 9.9   | 78.1%   | -19.9%  |
| State Tax Receipts  | 5.5   | 8.6   | 9.1   | 9.8   | 10.8  | 12.4  | 12.9  | 13.8  | 10.1  | 13.2  | 29.9%   | -26.8%  |
| <b>TOTAL</b>  | 7.7   | 12.7  | 13.7  | 14.9  | 17.0  | 19.2  | 19.7  | 20.8  | 15.7  | 23.1  | 47.0%   | -24.5%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Mt. Hood & Columbia River Gorge / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Mt. Hood & Columbia River Gorge region is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$105  | \$276 | \$286 | \$753 | 2.7        | 2.6            |
| Private Home       | \$31   | \$124 | \$68  | \$284 | 2.2        | 4.2            |
| Other Overnight    | \$45   | \$167 | \$116 | \$435 | 2.6        | 3.8            |
| All Overnight      | \$75   | \$229 | \$189 | \$597 | 2.5        | 3.2            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 1,501,790     | 1,072,840 | 2,275,520 | 653,470      | 420,290   | 835,360   |
| Private Home       | 1,210,330     | 1,073,200 | 1,212,600 | 506,070      | 453,650   | 544,830   |
| Other Overnight    | 884,900       | 574,270   | 507,540   | 264,290      | 219,060   | 195,500   |
| All Overnight      | 3,597,020     | 2,720,310 | 3,995,660 | 1,423,830    | 1,093,000 | 1,575,680 |

|                    | Person-Trips |         |           | Party-Trips |         |         |
|--------------------|--------------|---------|-----------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021      | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 691,610      | 492,440 | 865,720   | 294,050     | 187,070 | 316,660 |
| Private Home       | 351,320      | 265,650 | 300,650   | 141,740     | 111,800 | 131,120 |
| Other Overnight    | 232,580      | 153,900 | 135,260   | 69,350      | 58,550  | 51,950  |
| All Overnight      | 1,275,510    | 911,990 | 1,301,640 | 505,140     | 357,420 | 499,730 |

# Oregon Coast / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job                 | \$142,211 |
| Employee Earnings generated by \$100 Visitor Spending          | \$38      |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5       |
| Local & State Tax Revenues per County Household                | \$1,047   |
| Visitor Shares   |           |
| Travel Share of Total Employment (2021)                        | 19%       |
| Overnight Visitor Day Share of Resident Population**           | 20%       |

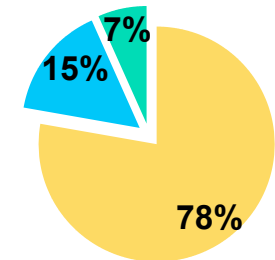
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

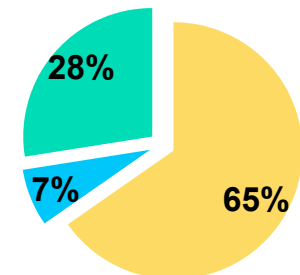
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Oregon Coast Region



### Oregon



■ Hotel, Motel, STVR
 ■ Private Home (VFR)
 ■ Other Overnight



# Oregon Coast / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                 | 2003    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019    | 2020    | 2021    | Avg. Annual % Chg. |         |
|---------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--------------------|---------|
|                                 |         |         |         |         |         |         |         |         |         |         | 2020-21            | 2003-21 |
| <b>Spending (\$Millions)</b>    |         |         |         |         |         |         |         |         |         |         |                    |         |
| Total (Current \$)              | 1,180.1 | 1,688.4 | 1,800.7 | 1,871.9 | 1,942.8 | 1,985.3 | 2,064.2 | 2,138.4 | 1,499.9 | 1,933.6 | ▲ 28.9%            | ▲ 2.8%  |
| Other                           | 17.9    | 19.2    | 20.4    | 22.7    | 25.4    | 26.0    | 30.5    | 29.8    | 26.8    | 22.8    | ▼ -14.9%           | ▲ 1.4%  |
| Visitor                         | 1,162.2 | 1,669.2 | 1,780.3 | 1,849.1 | 1,917.4 | 1,959.3 | 2,033.7 | 2,108.6 | 1,473.1 | 1,910.8 | ▲ 29.7%            | ▲ 2.8%  |
| <b>Earnings (\$Millions)</b>    |         |         |         |         |         |         |         |         |         |         |                    |         |
| Earnings (Current \$)           | 330.5   | 475.7   | 505.8   | 545.2   | 580.2   | 613.8   | 675.8   | 723.1   | 634.0   | 743.4   | ▲ 17.3%            | ▲ 4.6%  |
| <b>Employment (Jobs)</b>        |         |         |         |         |         |         |         |         |         |         |                    |         |
| Employment                      | 18,500  | 20,290  | 20,830  | 21,540  | 22,330  | 22,680  | 23,530  | 24,260  | 20,360  | 21,990  | ▲ 8.0%             | ▲ 1.0%  |
| <b>Tax Revenue (\$Millions)</b> |         |         |         |         |         |         |         |         |         |         |                    |         |
| Total (Current \$)              | 40.5    | 63.5    | 69.0    | 74.9    | 78.9    | 87.0    | 92.2    | 95.9    | 88.7    | 102.8   | ▲ 16.0%            | ▲ 5.3%  |
| Local                           | 13.9    | 22.1    | 25.3    | 28.6    | 29.8    | 31.3    | 32.8    | 33.7    | 36.8    | 42.0    | ▲ 14.4%            | ▲ 6.3%  |
| State                           | 26.6    | 41.4    | 43.7    | 46.3    | 49.1    | 55.7    | 59.4    | 62.3    | 51.9    | 60.8    | ▲ 17.1%            | ▲ 4.7%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Oregon Coast / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003           | 2013           | 2014           | 2015           | 2016           | 2017           | 2018           | 2019           | 2020           | 2021           | 2020-21      | 2019-20       |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |                |                |                |                |                |                |                |                |                |                |              |               |
| Destination Spending   | 1,162.2        | 1,669.2        | 1,780.3        | 1,849.1        | 1,917.4        | 1,959.3        | 2,033.7        | 2,108.6        | 1,473.1        | 1,910.8        | 29.7%        | -30.1%        |
| Other Travel*  | 17.9           | 19.2           | 20.4           | 22.7           | 25.4           | 26.0           | 30.5           | 29.8           | 26.8           | 22.8           | -14.9%       | -9.8%         |
| <b>TOTAL</b>   | <b>1,180.1</b> | <b>1,688.4</b> | <b>1,800.7</b> | <b>1,871.9</b> | <b>1,942.8</b> | <b>1,985.3</b> | <b>2,064.2</b> | <b>2,138.4</b> | <b>1,499.9</b> | <b>1,933.6</b> | <b>28.9%</b> | <b>-29.9%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |                |                |                |                |                |                |                |                |                |                |              |               |
| Hotel, Motel, STVR**   | 456.9          | 787.0          | 862.7          | 914.6          | 961.9          | 991.9          | 1,027.2        | 1,065.1        | 908.0          | 1,180.4        | 30.0%        | -14.7%        |
| Hotel, Motel   |                |                |                |                |                |                |                |                |                | 754.3          |              |               |
| STVR   |                |                |                |                |                |                |                |                |                | 426.1          |              |               |
| Private Home   | 64.4           | 84.0           | 83.9           | 83.4           | 84.1           | 85.6           | 89.5           | 91.8           | 102.8          | 102.8          | 0.0%         | 11.9%         |
| Campground   | 148.6          | 178.5          | 180.6          | 183.6          | 188.2          | 189.5          | 197.5          | 205.8          | 142.2          | 165.7          | 16.5%        | -30.9%        |
| 2nd Home   | 47.9           | 62.5           | 63.7           | 63.9           | 64.3           | 66.7           | 69.3           | 71.0           | 57.9           | 66.8           | 15.4%        | -18.5%        |
| Day Travel   | 444.5          | 557.2          | 589.3          | 603.7          | 619.0          | 625.6          | 650.2          | 674.9          | 262.2          | 395.1          | 50.6%        | -61.1%        |
| <b>TOTAL</b>   | <b>1,162.2</b> | <b>1,669.2</b> | <b>1,780.3</b> | <b>1,849.1</b> | <b>1,917.4</b> | <b>1,959.3</b> | <b>2,033.7</b> | <b>2,108.6</b> | <b>1,473.1</b> | <b>1,910.8</b> | <b>29.7%</b> | <b>-30.1%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |                |                |                |                |                |                |                |                |                |                |              |               |
| Accommodations   | 232.7          | 372.1          | 402.6          | 445.7          | 468.9          | 489.5          | 497.2          | 509.1          | 546.8          | 744.2          | 36.1%        | 7.4%          |
| Food Service   | 295.8          | 455.4          | 498.2          | 532.4          | 566.6          | 579.3          | 606.7          | 642.9          | 371.2          | 440.9          | 18.8%        | -42.3%        |
| Food Stores  | 127.5          | 167.8          | 178.7          | 186.7          | 188.7          | 186.3          | 190.0          | 197.2          | 132.1          | 176.6          | 33.7%        | -33.0%        |
| Local Tran. & Gas  | 107.8          | 214.0          | 215.4          | 180.7          | 174.2          | 188.7          | 214.4          | 218.6          | 123.7          | 174.5          | 41.1%        | -43.4%        |
| Arts, Ent. & Rec.  | 192.5          | 227.9          | 242.3          | 252.2          | 262.2          | 261.9          | 268.1          | 276.5          | 146.3          | 173.3          | 18.5%        | -47.1%        |
| Retail Sales   | 202.9          | 228.3          | 240.0          | 247.5          | 253.2          | 250.5          | 254.1          | 260.9          | 151.6          | 196.5          | 29.6%        | -41.9%        |
| Visitor Air Tran.  | 3.1            | 3.7            | 3.0            | 4.0            | 3.6            | 3.1            | 3.2            | 3.3            | 1.5            | 4.9            | 226.2%       | -54.8%        |
| <b>TOTAL</b>   | <b>1,162.2</b> | <b>1,669.2</b> | <b>1,780.3</b> | <b>1,849.1</b> | <b>1,917.4</b> | <b>1,959.3</b> | <b>2,033.7</b> | <b>2,108.6</b> | <b>1,473.1</b> | <b>1,910.8</b> | <b>29.7%</b> | <b>-30.1%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Oregon Coast / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003          | 2013          | 2014          | 2015          | 2016          | 2017          | 2018          | 2019          | 2020          | 2021          | 2020-21      | 2019-20       |
|---|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|---------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |               |               |               |               |               |               |               |               |               |               |              |               |
| Accom. & Food Serv.   | 217.7         | 337.8         | 360.5         | 391.0         | 416.9         | 445.8         | 497.5         | 536.2         | 453.9         | 554.4         | 22.1%        | -15.3%        |
| Arts, Ent. & Rec.   | 55.0          | 65.6          | 67.5          | 71.0          | 74.6          | 76.3          | 80.6          | 86.2          | 72.2          | 78.2          | 8.3%         | -16.2%        |
| Retail**  | 43.3          | 53.5          | 57.5          | 60.9          | 64.0          | 65.7          | 68.8          | 71.2          | 80.7          | 87.8          | 8.9%         | 13.3%         |
| Ground Tran.  | 4.3           | 6.3           | 7.0           | 7.5           | 8.3           | 8.7           | 9.1           | 9.9           | 9.3           | 6.5           | -30.2%       | -6.7%         |
| Visitor Air Tran.   | 1.4           | 2.7           | 2.8           | 3.3           | 3.6           | 3.9           | 4.4           | 4.3           | 4.2           | 4.2           | -1.4%        | -1.8%         |
| Other Travel*   | 8.7           | 9.7           | 10.5          | 11.5          | 12.8          | 13.3          | 15.4          | 15.2          | 13.7          | 12.3          | -10.0%       | -10.0%        |
| <b>TOTAL</b>  | <b>330.5</b>  | <b>475.7</b>  | <b>505.8</b>  | <b>545.2</b>  | <b>580.2</b>  | <b>613.8</b>  | <b>675.8</b>  | <b>723.1</b>  | <b>634.0</b>  | <b>743.4</b>  | <b>17.3%</b> | <b>-12.3%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |               |               |               |               |               |               |               |               |               |               |              |               |
| Accom. & Food Serv.   | 11,740        | 13,370        | 13,720        | 14,320        | 14,920        | 15,320        | 16,000        | 16,650        | 13,570        | 14,990        | 10.5%        | -18.5%        |
| Arts, Ent. & Rec.   | 3,950         | 3,990         | 4,010         | 4,000         | 4,090         | 4,050         | 4,170         | 4,260         | 3,400         | 3,620         | 6.4%         | -20.2%        |
| Retail**  | 2,340         | 2,410         | 2,540         | 2,620         | 2,690         | 2,680         | 2,700         | 2,700         | 2,830         | 2,920         | 3.1%         | 4.7%          |
| Ground Tran.  | 190           | 200           | 210           | 220           | 230           | 230           | 230           | 240           | 230           | 150           | -34.5%       | -3.3%         |
| Visitor Air Tran.   | 40            | 50            | 50            | 60            | 60            | 60            | 60            | 60            | 60            | 60            | -0.4%        | -2.9%         |
| Other Travel*   | 250           | 280           | 290           | 320           | 350           | 340           | 370           | 340           | 270           | 250           | -7.9%        | -20.3%        |
| <b>TOTAL</b>  | <b>18,500</b> | <b>20,290</b> | <b>20,830</b> | <b>21,540</b> | <b>22,330</b> | <b>22,680</b> | <b>23,530</b> | <b>24,260</b> | <b>20,360</b> | <b>21,990</b> | <b>8.0%</b>  | <b>-16.1%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |               |               |               |               |               |               |               |               |               |               |              |               |
| Local Tax Receipts  | 13.9          | 22.1          | 25.3          | 28.6          | 29.8          | 31.3          | 32.8          | 33.7          | 36.8          | 42.0          | 14.4%        | 9.2%          |
| State Tax Receipts  | 26.6          | 41.4          | 43.7          | 46.3          | 49.1          | 55.7          | 59.4          | 62.3          | 51.9          | 60.8          | 17.1%        | -16.6%        |
| <b>TOTAL</b>  | <b>40.5</b>   | <b>63.5</b>   | <b>69.0</b>   | <b>74.9</b>   | <b>78.9</b>   | <b>87.0</b>   | <b>92.2</b>   | <b>95.9</b>   | <b>88.7</b>   | <b>102.8</b>  | <b>16.0%</b> | <b>-7.6%</b>  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Oregon Coast / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Oregon Coast region is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$130  | \$336 | \$362 | \$933 | 2.8        | 2.6            |
| Private Home       | \$35   | \$147 | \$83  | \$351 | 2.4        | 4.2            |
| Other Overnight    | \$50   | \$178 | \$129 | \$464 | 2.6        | 3.6            |
| All Overnight      | \$91   | \$275 | \$240 | \$736 | 2.7        | 3.1            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |            |            | Party-Nights |           |           |
|--------------------|---------------|------------|------------|--------------|-----------|-----------|
|                    | 2019          | 2020       | 2021       | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 7,937,880     | 7,168,950  | 9,091,930  | 3,246,620    | 2,628,960 | 3,265,140 |
| Private Home       | 2,693,330     | 3,225,150  | 2,956,000  | 1,043,720    | 1,349,140 | 1,244,150 |
| Other Overnight    | 7,014,740     | 4,309,040  | 4,687,840  | 2,103,660    | 1,655,470 | 1,799,080 |
| All Overnight      | 17,645,950    | 14,703,140 | 16,735,770 | 6,393,990    | 5,633,570 | 6,308,370 |

|                    | Person-Trips |           |           | Party-Trips |           |           |
|--------------------|--------------|-----------|-----------|-------------|-----------|-----------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020      | 2021      |
| Hotel, Motel, STVR | 3,473,940    | 3,053,230 | 3,516,620 | 1,420,450   | 1,113,100 | 1,265,300 |
| Private Home       | 747,370      | 758,690   | 698,130   | 289,150     | 317,450   | 293,190   |
| Other Overnight    | 2,013,950    | 1,251,900 | 1,305,850 | 603,150     | 479,940   | 501,210   |
| All Overnight      | 6,235,260    | 5,063,810 | 5,520,600 | 2,312,750   | 1,910,480 | 2,059,710 |



# County Impacts

2021p

This section provides detailed county estimates, as well as a number of summary tables. In interpreting these estimates, readers are advised that:

- Monetary values are expressed in current dollars (no inflation adjustment).
- Estimates measure direct impacts only.
- Counties with small populations and economies are less reliable than estimates for more populous and economically diverse areas.
- Total employment provided by the Bureau of Economic Analysis is an estimate in itself and covers the total amount of jobs, not the number of residents that work.
- Clackamas, Douglas, Lane, Multnomah, and Wasco counties are split into multiple travel regions. This breakdown is provided only on the county summary tables.
- Gilliam and Sherman counties are combined into a single region in the detailed reporting due to their relative size and nature of travel activity in that area.

County level travel estimates utilize the best information available at the time of the report and are subject to revision. All job estimates presented reflect total count of jobs and are not modified to be full time equivalent. It is important to note that job growth could reflect a decrease in full time positions and an increase in part time. Spending and job growth are not in a 1:1 relationship, job gains will continue to lag behind spending during economic recovery.

In 2021 spending estimates for short term vacation rentals is broken out from our summary figure. These breakouts are subject to revision as more information becomes available regarding this type of lodging.

Visitor volume figures are presented in four measures, person-trips, person-nights, party-trips, and party-nights. These measures can move in different directions based on changes to estimated party size and length of stay. It should be stressed that direct travel spending is more reliable to the health of the travel industry than visitor volume. For these and other reasons, the measures provided in this section are general indicators that should be used in conjunction with other measures of local economic activity.

# County / Summary

## Direct Travel Impacts 2021p

|                 | Spending<br>(Millions) | Earnings<br>(Millions) | Employ.<br>(Jobs) | Local Tax<br>(000's) | State Tax<br>(000's) | Total Tax<br>(000's) |
|-----------------|------------------------|------------------------|-------------------|----------------------|----------------------|----------------------|
| Baker           | \$55.8                 | \$19.0                 | 810               | \$786                | \$1,778              | \$2,564              |
| Benton          | \$162.0                | \$37.7                 | 1,560             | \$3,529              | \$4,637              | \$8,165              |
| Clackamas       | \$523.8                | \$204.3                | 6,050             | \$4,340              | \$19,520             | \$23,860             |
| East Clackamas  | \$100.1                | \$37.8                 | 1,120             | \$850                | \$3,336              | \$4,186              |
| West Clackamas  | \$352.6                | \$139.9                | 4,080             | \$3,489              | \$13,149             | \$16,638             |
| South Clackamas | \$71.1                 | \$26.5                 | 850               | \$0                  | \$3,035              | \$3,035              |
| Clatsop         | \$492.5                | \$221.5                | 6,380             | \$12,369             | \$16,914             | \$29,283             |
| Columbia        | \$39.2                 | \$14.9                 | 670               | \$0                  | \$1,711              | \$1,711              |
| Coos            | \$228.3                | \$95.5                 | 3,290             | \$1,692              | \$8,462              | \$10,154             |
| Crook           | \$44.5                 | \$17.8                 | 690               | \$346                | \$1,526              | \$1,873              |
| Curry           | \$157.4                | \$67.6                 | 2,170             | \$1,153              | \$4,926              | \$6,078              |
| Deschutes       | \$909.7                | \$261.1                | 7,300             | \$22,788             | \$25,256             | \$48,044             |
| Douglas         | \$253.7                | \$88.1                 | 3,240             | \$2,184              | \$8,274              | \$10,458             |
| East Douglas    | \$206.8                | \$73.0                 | 2,690             | \$1,922              | \$6,959              | \$8,881              |
| West Douglas    | \$46.8                 | \$15.1                 | 550               | \$262                | \$1,315              | \$1,577              |
| Gilliam         | \$3.9                  | \$1.2                  | 50                | \$0                  | \$134                | \$134                |
| Grant           | \$13.1                 | \$3.4                  | 190               | \$125                | \$376                | \$501                |
| Harney          | \$19.2                 | \$8.5                  | 370               | \$373                | \$643                | \$1,015              |
| Hood River      | \$82.6                 | \$29.3                 | 870               | \$2,266              | \$2,912              | \$5,179              |
| Jackson         | \$625.3                | \$162.9                | 4,930             | \$11,583             | \$16,042             | \$27,625             |
| Jefferson       | \$90.5                 | \$23.9                 | 1,070             | \$2,041              | \$2,674              | \$4,715              |
| Josephine       | \$153.5                | \$59.4                 | 1,980             | \$1,868              | \$5,312              | \$7,181              |
| Klamath         | \$213.0                | \$60.9                 | 2,020             | \$2,924              | \$5,975              | \$8,899              |
| Lake            | \$17.4                 | \$4.1                  | 220               | \$204                | \$494                | \$698                |
| Lane            | \$1,050.3              | \$280.0                | 8,950             | \$15,833             | \$26,493             | \$42,327             |
| East Lane       | \$849.6                | \$235.1                | 7,530             | \$12,875             | \$22,273             | \$35,148             |
| West Lane       | \$200.8                | \$44.9                 | 1,420             | \$2,958              | \$4,220              | \$7,179              |
| Lincoln         | \$605.1                | \$204.2                | 6,060             | \$17,329             | \$18,255             | \$35,584             |
| Linn            | \$174.2                | \$45.9                 | 1,880             | \$2,620              | \$5,719              | \$8,339              |
| Malheur         | \$52.4                 | \$16.0                 | 600               | \$1,260              | \$1,634              | \$2,894              |



# County / Summary

## Direct Travel Impacts 2021p

|                | Spending<br>(Millions) | Earnings<br>(Millions) | Employ.<br>(Jobs) | Local Tax<br>(000's) | State Tax<br>(000's) | Total Tax<br>(000's) |
|----------------|------------------------|------------------------|-------------------|----------------------|----------------------|----------------------|
| Marion         | \$484.6                | \$121.4                | 4,180             | \$6,042              | \$15,007             | \$21,049             |
| Morrow         | \$13.9                 | \$5.4                  | 230               | \$5                  | \$561                | \$566                |
| Multnomah      | \$2,837.2              | \$844.7                | 16,650            | \$76,644             | \$68,080             | \$144,723            |
| East Multnomah | \$189.8                | \$40.1                 | 1,340             | \$5,127              | \$4,320              | \$9,447              |
| West Multnomah | \$2,647.4              | \$804.6                | 15,320            | \$71,517             | \$63,759             | \$135,277            |
| Polk           | \$191.7                | \$69.7                 | 2,500             | \$0                  | \$5,594              | \$5,594              |
| Sherman        | \$3.9                  | \$1.0                  | 30                | \$26                 | \$130                | \$156                |
| Tillamook      | \$202.7                | \$92.4                 | 2,020             | \$6,285              | \$6,671              | \$12,956             |
| Umatilla       | \$173.9                | \$65.1                 | 2,470             | \$2,251              | \$6,001              | \$8,253              |
| Union          | \$41.4                 | \$16.7                 | 610               | \$813                | \$1,364              | \$2,176              |
| Wallowa        | \$26.8                 | \$18.5                 | 730               | \$426                | \$1,130              | \$1,557              |
| Wasco          | \$78.3                 | \$40.5                 | 1,390             | \$1,672              | \$3,015              | \$4,687              |
| North Wasco    | \$66.6                 | \$34.9                 | 1,190             | \$1,672              | \$2,598              | \$4,270              |
| South Wasco    | \$11.7                 | \$5.6                  | 200               | \$0                  | \$417                | \$417                |
| Washington     | \$725.5                | \$254.6                | 7,070             | \$13,223             | \$26,183             | \$39,406             |
| Wheeler        | \$4.2                  | \$0.8                  | 40                | \$0                  | \$118                | \$118                |
| Yamhill        | \$140.9                | \$39.2                 | 1,460             | \$907                | \$4,611              | \$5,518              |

Note: Total Earnings includes wage and salary disbursements, other earned income and proprietor income. Employment includes payroll employees and proprietors.



# County / Summary

## Overnight Visitor Volume 2021p

|                 | Nights     |           | Trips     |           |
|-----------------|------------|-----------|-----------|-----------|
|                 | Person     | Party     | Person    | Party     |
| Baker           | 695,970    | 267,560   | 264,380   | 100,140   |
| Benton          | 1,708,380  | 675,900   | 722,390   | 280,480   |
| Clackamas       | 7,105,860  | 3,495,830 | 2,262,020 | 1,061,950 |
| Clatsop         | 3,592,170  | 1,348,430 | 1,491,150 | 553,310   |
| Columbia        | 672,420    | 327,700   | 201,090   | 96,190    |
| Coos            | 2,320,120  | 899,730   | 904,300   | 343,420   |
| Crook           | 623,600    | 243,690   | 253,210   | 97,740    |
| Curry           | 1,678,110  | 625,070   | 726,130   | 268,740   |
| Deschutes       | 7,896,210  | 3,185,150 | 2,833,080 | 1,105,170 |
| Douglas         | 2,607,450  | 1,012,370 | 974,100   | 372,340   |
| Gilliam/Sherman | 124,120    | 47,520    | 49,510    | 18,790    |
| Grant           | 220,530    | 85,760    | 87,330    | 33,650    |
| Harney          | 268,460    | 102,320   | 119,740   | 45,050    |
| Hood River      | 876,800    | 334,540   | 338,510   | 127,330   |
| Jackson         | 5,512,240  | 2,289,430 | 2,020,350 | 803,180   |
| Jefferson       | 1,197,670  | 455,650   | 477,940   | 180,640   |
| Josephine       | 1,956,170  | 771,850   | 695,330   | 269,630   |
| Klamath         | 2,926,240  | 1,116,970 | 1,052,990 | 397,510   |
| Lake            | 265,500    | 102,920   | 114,220   | 43,700    |
| Lane            | 8,629,390  | 3,580,870 | 3,058,460 | 1,222,010 |
| Lincoln         | 5,123,880  | 1,926,540 | 2,052,830 | 763,200   |
| Linn            | 2,117,760  | 848,990   | 838,230   | 330,780   |
| Malheur         | 708,280    | 275,760   | 324,230   | 123,740   |
| Marion          | 5,565,110  | 2,227,090 | 1,879,600 | 740,150   |
| Morrow          | 241,880    | 95,870    | 100,550   | 39,200    |
| Multnomah       | 12,481,970 | 5,883,020 | 4,629,180 | 2,062,780 |
| Polk            | 1,245,180  | 504,640   | 474,850   | 189,780   |
| Tillamook       | 2,019,890  | 768,610   | 732,170   | 278,860   |
| Umatilla        | 1,865,420  | 727,160   | 853,990   | 326,350   |
| Union           | 594,380    | 232,600   | 247,740   | 95,470    |

# County / Summary

## Overnight Visitor Volume 2021p

|            | Nights    |           | Trips     |           |
|------------|-----------|-----------|-----------|-----------|
|            | Person    | Party     | Person    | Party     |
| Wallowa    | 360,190   | 137,030   | 154,450   | 58,220    |
| Wasco      | 922,470   | 354,030   | 404,230   | 153,120   |
| Washington | 8,556,040 | 4,347,600 | 2,779,180 | 1,347,020 |
| Wheeler    | 70,890    | 26,960    | 26,880    | 10,190    |
| Yamhill    | 1,784,170 | 712,240   | 721,950   | 283,320   |

Note: The sum of trips for counties will be greater than the state trip estimate because some travelers visit multiple destinations on a single trip within Oregon.



# County / Earnings & Employment

## All Industry and Travel Earnings & Employment, 2021p

| County     | Earnings (\$M) |        |         |  | Employment (Jobs) |        |         |
|------------|----------------|--------|---------|--|-------------------|--------|---------|
|            | Total          | Travel | Percent |  | Total             | Travel | Percent |
| Baker      | 392.2          | 19.0   | 4.8%    |  | 8,670             | 810    | 9.4%    |
| Benton     | 3,229.6        | 37.7   | 1.2%    |  | 50,960            | 1,560  | 3.1%    |
| Clackamas  | 15,218.1       | 204.3  | 1.3%    |  | 234,760           | 6,050  | 2.6%    |
| Clatsop    | 1,410.2        | 221.5  | 15.7%   |  | 25,100            | 6,380  | 25.4%   |
| Columbia   | 883.2          | 14.9   | 1.7%    |  | 17,880            | 670    | 3.7%    |
| Coos       | 1,774.0        | 95.5   | 5.4%    |  | 31,540            | 3,290  | 10.4%   |
| Crook      | 688.5          | 17.8   | 2.6%    |  | 11,110            | 690    | 6.2%    |
| Curry      | 510.7          | 67.6   | 13.2%   |  | 10,620            | 2,170  | 20.5%   |
| Deschutes  | 8,235.2        | 261.1  | 3.2%    |  | 129,400           | 7,300  | 5.6%    |
| Douglas    | 2,840.2        | 88.1   | 3.1%    |  | 52,020            | 3,240  | 6.2%    |
| Gilliam    | 83.0           | 1.2    | 1.4%    |  | 1,300             | 50     | 4.0%    |
| Grant      | 186.3          | 3.4    | 1.8%    |  | 3,890             | 190    | 4.8%    |
| Harney     | 218.8          | 8.5    | 3.9%    |  | 4,380             | 370    | 8.4%    |
| Hood River | 1,010.0        | 29.3   | 2.9%    |  | 18,230            | 870    | 4.8%    |
| Jackson    | 7,263.1        | 162.9  | 2.2%    |  | 124,190           | 4,930  | 4.0%    |
| Jefferson  | 556.0          | 23.9   | 4.3%    |  | 9,750             | 1,070  | 11.0%   |
| Josephine  | 2,224.1        | 59.4   | 2.7%    |  | 41,300            | 1,980  | 4.8%    |
| Klamath    | 1,723.3        | 60.9   | 3.5%    |  | 30,960            | 2,020  | 6.5%    |
| Lake       | 222.0          | 4.1    | 1.9%    |  | 3,920             | 220    | 5.6%    |
| Lane       | 12,239.5       | 280.0  | 2.3%    |  | 207,540           | 8,950  | 4.3%    |
| Lincoln    | 1,436.2        | 204.2  | 14.2%   |  | 26,200            | 6,060  | 23.1%   |
| Linn       | 3,539.0        | 45.9   | 1.3%    |  | 63,130            | 1,880  | 3.0%    |
| Malheur    | 931.7          | 16.0   | 1.7%    |  | 17,080            | 600    | 3.5%    |
| Marion     | 13,440.0       | 121.4  | 0.9%    |  | 198,000           | 4,180  | 2.1%    |
| Morrow     | 674.5          | 5.4    | 0.8%    |  | 8,100             | 230    | 2.8%    |
| Multnomah  | 48,848.4       | 844.7  | 1.7%    |  | 633,670           | 16,650 | 2.6%    |
| Polk       | 1,552.1        | 69.7   | 4.5%    |  | 32,300            | 2,500  | 7.7%    |
| Sherman    | 104.9          | 1.0    | 0.9%    |  | 1,490             | 30     | 2.1%    |

# County / Earnings & Employment

## All Industry and Travel Earnings & Employment, 2021p

| County        | Earnings (\$M)   |                | Percent     |  | Employment (Jobs) |                | Percent     |
|---------------|------------------|----------------|-------------|--|-------------------|----------------|-------------|
|               | Total            | Travel         |             |  | Total             | Travel         |             |
| Tillamook     | 767.3            | 92.4           | 12.0%       |  | 14,200            | 2,020          | 14.2%       |
| Umatilla      | 2,385.6          | 65.1           | 2.7%        |  | 39,590            | 2,470          | 6.2%        |
| Union         | 754.1            | 16.7           | 2.2%        |  | 14,720            | 610            | 4.1%        |
| Wallowa       | 205.0            | 18.5           | 9.0%        |  | 5,140             | 730            | 14.1%       |
| Wasco         | 891.3            | 40.5           | 4.5%        |  | 14,920            | 1,390          | 9.3%        |
| Washington    | 35,494.7         | 254.6          | 0.7%        |  | 382,040           | 7,070          | 1.8%        |
| Wheeler       | 21.1             | 0.8            | 3.8%        |  | 770               | 40             | 5.2%        |
| Yamhill       | 2,816.9          | 39.2           | 1.4%        |  | 52,520            | 1,460          | 2.8%        |
| <b>Oregon</b> | <b>174,770.8</b> | <b>3,497.0</b> | <b>2.0%</b> |  | <b>2,521,360</b>  | <b>100,730</b> | <b>4.0%</b> |

Source: Bureau of Economic Analysis, Bureau of Labor Statistics, Dean Runyan Associates

Note: 2021 Total Employment & Earnings has been estimated by Dean Runyan Associates. Details may not add to totals due to rounding.



# Baker County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

Amount of Visitor Spending that supports 1 Job \$66,652

Employee Earnings generated by \$100 Visitor Spending \$35

Local & State Tax Revenues generated by \$100 Visitor Spending \$5

### Visitor Shares

Travel Share of Total Employment (2021) 9%

Overnight Visitor Day Share of Resident Population\*\* 12%

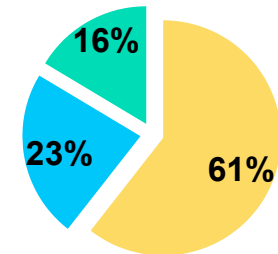
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

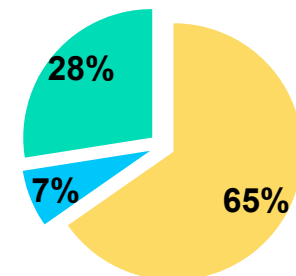
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Baker County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Baker County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 39.1 | 42.9 | 43.6 | 44.0 | 45.0 | 47.2 | 49.1 | 50.7 | 34.0 | 55.8 | ▲ 64.3%            | ▲ 2.0%  |
| Other                          | 1.4  | 2.6  | 2.5  | 2.0  | 1.9  | 2.0  | 2.3  | 2.4  | 1.1  | 2.1  | ▲ 86.6%            | ▲ 2.1%  |
| Visitor                        | 37.7 | 40.2 | 41.1 | 42.0 | 43.1 | 45.2 | 46.7 | 48.4 | 32.9 | 53.8 | ▲ 63.6%            | ▲ 2.0%  |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 10.3 | 11.9 | 12.3 | 12.9 | 13.7 | 15.0 | 15.6 | 16.5 | 15.8 | 19.0 | ▲ 20.6%            | ▲ 3.4%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 850  | 710  | 720  | 710  | 700  | 740  | 740  | 770  | 770  | 810  | ▲ 6.2%             | ▼ -0.3% |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 1.3  | 1.6  | 1.6  | 1.7  | 1.8  | 2.0  | 2.1  | 2.2  | 1.8  | 2.6  | ▲ 43.3%            | ▲ 4.0%  |
| Local                          | 0.3  | 0.4  | 0.4  | 0.4  | 0.5  | 0.5  | 0.5  | 0.6  | 0.5  | 0.8  | ▲ 65.1%            | ▲ 5.7%  |
| State                          | 1.0  | 1.2  | 1.2  | 1.2  | 1.3  | 1.5  | 1.6  | 1.6  | 1.3  | 1.8  | ▲ 35.4%            | ▲ 3.3%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.



# Baker County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003        | 2013        | 2014        | 2015        | 2016        | 2017        | 2018        | 2019        | 2020        | 2021        | 2020-21      | 2019-20       |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |             |             |             |             |             |             |             |             |             |             |              |               |
| Destination Spending   | 37.7        | 40.2        | 41.1        | 42.0        | 43.1        | 45.2        | 46.7        | 48.4        | 32.9        | 53.8        | 63.6%        | -32.1%        |
| Other Travel*  | 1.4         | 2.6         | 2.5         | 2.0         | 1.9         | 2.0         | 2.3         | 2.4         | 1.1         | 2.1         | 86.6%        | -53.1%        |
| <b>TOTAL</b>   | <b>39.1</b> | <b>42.9</b> | <b>43.6</b> | <b>44.0</b> | <b>45.0</b> | <b>47.2</b> | <b>49.1</b> | <b>50.7</b> | <b>34.0</b> | <b>55.8</b> | <b>64.3%</b> | <b>-33.0%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |             |             |             |             |             |             |             |             |             |             |              |               |
| Hotel, Motel, STVR**   | 11.9        | 14.1        | 14.5        | 15.2        | 15.9        | 17.3        | 17.9        | 18.7        | 13.2        | 26.7        | 102.1%       | -29.1%        |
| Hotel, Motel   |             |             |             |             |             |             |             |             |             | 23.8        |              |               |
| STVR   |             |             |             |             |             |             |             |             |             | 3.0         |              |               |
| Private Home   | 5.2         | 6.3         | 6.5         | 6.4         | 6.4         | 6.6         | 6.8         | 6.9         | 5.5         | 7.2         | 30.6%        | -19.3%        |
| Campground   | 6.0         | 6.1         | 6.2         | 6.3         | 6.4         | 6.5         | 6.7         | 7.0         | 5.9         | 6.9         | 17.0%        | -15.9%        |
| 2nd Home   | 2.4         | 3.0         | 3.0         | 3.1         | 3.1         | 3.1         | 3.2         | 3.3         | 2.8         | 3.2         | 14.3%        | -16.1%        |
| Day Travel   | 12.1        | 10.7        | 11.0        | 11.1        | 11.4        | 11.7        | 12.1        | 12.5        | 5.4         | 9.7         | 79.6%        | -56.8%        |
| <b>TOTAL</b>   | <b>37.7</b> | <b>40.2</b> | <b>41.1</b> | <b>42.0</b> | <b>43.1</b> | <b>45.2</b> | <b>46.7</b> | <b>48.4</b> | <b>32.9</b> | <b>53.8</b> | <b>63.6%</b> | <b>-32.1%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |             |             |             |             |             |             |             |             |             |             |              |               |
| Accommodations   | 5.9         | 7.4         | 7.6         | 8.3         | 8.9         | 9.7         | 9.9         | 10.2        | 8.3         | 15.1        | 81.2%        | -18.5%        |
| Food Service   | 10.1        | 11.2        | 11.6        | 12.3        | 12.8        | 13.5        | 14.1        | 14.8        | 10.3        | 16.6        | 61.2%        | -30.5%        |
| Food Stores  | 4.8         | 5.1         | 5.3         | 5.5         | 5.5         | 5.5         | 5.6         | 5.7         | 4.0         | 5.5         | 36.2%        | -30.2%        |
| Local Tran. & Gas  | 3.6         | 5.2         | 5.1         | 4.2         | 4.0         | 4.4         | 5.0         | 5.1         | 2.9         | 5.5         | 93.7%        | -44.2%        |
| Arts, Ent. & Rec.  | 6.1         | 5.3         | 5.4         | 5.5         | 5.7         | 5.8         | 5.9         | 6.0         | 3.8         | 5.6         | 46.0%        | -37.0%        |
| Retail Sales   | 7.1         | 6.0         | 6.1         | 6.2         | 6.2         | 6.3         | 6.3         | 6.5         | 3.6         | 5.6         | 55.0%        | -44.4%        |
| <b>TOTAL</b>   | <b>37.7</b> | <b>40.2</b> | <b>41.1</b> | <b>42.0</b> | <b>43.1</b> | <b>45.2</b> | <b>46.7</b> | <b>48.4</b> | <b>32.9</b> | <b>53.8</b> | <b>63.6%</b> | <b>-32.1%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Baker County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2020-21 | 2019-20 |
|---|------|------|------|------|------|------|------|------|------|------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |      |      |      |      |      |      |      |      |      |      |         |         |
| Accom. & Food Serv.   | 6.8  | 8.0  | 8.3  | 8.7  | 9.3  | 10.4 | 10.9 | 11.6 | 9.8  | 12.9 | 31.4%   | -15.4%  |
| Arts, Ent. & Rec.   | 1.7  | 2.1  | 2.1  | 2.2  | 2.3  | 2.4  | 2.4  | 2.6  | 3.4  | 3.3  | -1.0%   | 32.0%   |
| Retail**  | 1.6  | 1.6  | 1.6  | 1.7  | 1.8  | 1.8  | 1.9  | 1.9  | 2.2  | 2.4  | 7.9%    | 14.2%   |
| Ground Tran.  | 0.2  | 0.2  | 0.2  | 0.2  | 0.2  | 0.2  | 0.2  | 0.3  | 0.2  | 0.3  | 9.0%    | -10.0%  |
| Other Travel*   | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 1.1%    | 2.0%    |
| <b>TOTAL</b>  | 10.3 | 11.9 | 12.3 | 12.9 | 13.7 | 15.0 | 15.6 | 16.5 | 15.8 | 19.0 | 20.6%   | -4.4%   |
| <b>Travel Industry Employment (Jobs)</b>                      |      |      |      |      |      |      |      |      |      |      |         |         |
| Accom. & Food Serv.   | 450  | 400  | 400  | 400  | 390  | 420  | 440  | 450  | 370  | 440  | 19.3%   | -18.1%  |
| Arts, Ent. & Rec.   | 290  | 220  | 220  | 220  | 210  | 220  | 210  | 220  | 290  | 260  | -10.0%  | 33.3%   |
| Retail**  | 100  | 80   | 80   | 80   | 90   | 90   | 80   | 90   | 90   | 90   | 5.6%    | 4.5%    |
| Ground Tran.  | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 2.3%    | -6.8%   |
| Other Travel*   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | -4.1%   | -7.3%   |
| <b>TOTAL</b>  | 850  | 710  | 720  | 710  | 700  | 740  | 740  | 770  | 770  | 810  | 5.2%    | 0.0%    |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |      |      |      |      |      |      |      |      |      |      |         |         |
| Local Tax Receipts  | 0.3  | 0.4  | 0.4  | 0.4  | 0.5  | 0.5  | 0.5  | 0.6  | 0.5  | 0.8  | 65.1%   | -14.0%  |
| State Tax Receipts  | 1.0  | 1.2  | 1.2  | 1.2  | 1.3  | 1.5  | 1.6  | 1.6  | 1.3  | 1.8  | 35.4%   | -18.7%  |
| <b>TOTAL</b>  | 1.3  | 1.6  | 1.6  | 1.7  | 1.8  | 2.0  | 2.1  | 2.2  | 1.8  | 2.6  | 43.3%   | -17.5%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Baker County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Baker County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$98   | \$192 | \$272 | \$532 | 2.8        | 2.0            |
| Private Home       | \$35   | \$124 | \$84  | \$297 | 2.4        | 3.6            |
| Other Overnight    | \$47   | \$151 | \$122 | \$395 | 2.6        | 3.2            |
| All Overnight      | \$102  | \$268 | \$265 | \$707 | 2.6        | 2.7            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |         |         |
|--------------------|---------------|---------|---------|--------------|---------|---------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 179,660       | 137,470 | 272,180 | 73,490       | 50,310  | 98,330  |
| Private Home       | 207,110       | 169,760 | 208,120 | 79,480       | 70,660  | 86,620  |
| Other Overnight    | 285,650       | 196,530 | 215,670 | 86,000       | 75,390  | 82,610  |
| All Overnight      | 672,420       | 503,770 | 695,970 | 238,980      | 196,360 | 267,560 |

|                    | Person-Trips |         |         | Party-Trips |        |         |
|--------------------|--------------|---------|---------|-------------|--------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020   | 2021    |
| Hotel, Motel, STVR | 94,980       | 71,430  | 138,870 | 38,850      | 26,010 | 50,220  |
| Private Home       | 68,100       | 47,670  | 58,450  | 26,130      | 19,840 | 24,330  |
| Other Overnight    | 87,100       | 61,040  | 67,060  | 26,150      | 23,330 | 25,600  |
| All Overnight      | 250,180      | 180,140 | 264,380 | 91,140      | 69,180 | 100,140 |

# Benton County / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job                 | \$98,716 |
| Employee Earnings generated by \$100 Visitor Spending          | \$24     |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5      |
| Visitor Shares   |          |
| Travel Share of Total Employment (2021)                        | 3%       |
| Overnight Visitor Day Share of Resident Population**           | 5%       |

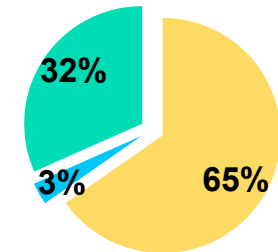
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

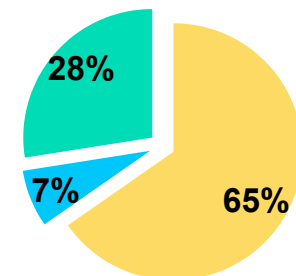
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Benton County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Benton County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 75.5  | 115.5 | 115.3 | 116.9 | 118.0 | 122.0 | 134.3 | 142.7 | 77.6  | 162.0 | ▲ 108.9%           | ▲ 4.3%  |
| Other                          | 9.3   | 15.8  | 15.4  | 13.0  | 13.2  | 14.5  | 15.2  | 15.7  | 8.1   | 13.5  | ▲ 66.0%            | ▲ 2.1%  |
| Visitor                        | 66.2  | 99.8  | 99.9  | 103.9 | 104.8 | 107.5 | 119.1 | 127.0 | 69.4  | 148.5 | ▲ 113.9%           | ▲ 4.6%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 19.7  | 28.0  | 30.5  | 31.7  | 34.1  | 35.8  | 38.3  | 40.6  | 32.3  | 37.7  | ▲ 16.5%            | ▲ 3.7%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 1,320 | 1,530 | 1,600 | 1,700 | 1,750 | 1,790 | 1,870 | 1,910 | 1,440 | 1,560 | ▲ 7.9%             | ▲ 0.9%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 3.0   | 4.9   | 5.0   | 5.3   | 5.6   | 6.1   | 6.6   | 7.4   | 4.9   | 8.2   | ▲ 68.1%            | ▲ 5.6%  |
| Local                          | 0.8   | 1.4   | 1.5   | 1.6   | 1.7   | 1.8   | 2.0   | 2.5   | 1.7   | 3.5   | ▲ 104.6%           | ▲ 8.8%  |
| State                          | 2.3   | 3.5   | 3.6   | 3.7   | 3.9   | 4.3   | 4.6   | 4.9   | 3.1   | 4.6   | ▲ 48.0%            | ▲ 4.1%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Benton County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003        | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020        | 2021         | 2020-21       | 2019-20       |
|--|-------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-------------|--------------|---------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |             |              |              |              |              |              |              |              |             |              |               |               |
| Destination Spending   | 66.2        | 99.8         | 99.9         | 103.9        | 104.8        | 107.5        | 119.1        | 127.0        | 69.4        | 148.5        | 113.9%        | -45.3%        |
| Other Travel*  | 9.3         | 15.8         | 15.4         | 13.0         | 13.2         | 14.5         | 15.2         | 15.7         | 8.1         | 13.5         | 66.0%         | -48.3%        |
| <b>TOTAL</b>   | <b>75.5</b> | <b>115.5</b> | <b>115.3</b> | <b>116.9</b> | <b>118.0</b> | <b>122.0</b> | <b>134.3</b> | <b>142.7</b> | <b>77.6</b> | <b>162.0</b> | <b>108.9%</b> | <b>-45.7%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |             |              |              |              |              |              |              |              |             |              |               |               |
| Hotel, Motel, STVR**   | 22.1        | 41.8         | 42.0         | 44.4         | 45.2         | 46.1         | 53.0         | 58.3         | 28.5        | 72.9         | 155.3%        | -51.0%        |
| Hotel, Motel   |             |              |              |              |              |              |              |              |             | 54.6         |               |               |
| STVR   |             |              |              |              |              |              |              |              |             | 18.3         |               |               |
| Private Home   | 20.3        | 27.7         | 27.7         | 28.2         | 28.2         | 29.2         | 31.2         | 31.9         | 21.8        | 35.2         | 61.5%         | -31.8%        |
| Campground   | 2.1         | 2.7          | 2.7          | 2.7          | 2.8          | 2.8          | 3.0          | 3.1          | 2.6         | 2.9          | 10.9%         | -15.4%        |
| 2nd Home   | 0.5         | 0.6          | 0.6          | 0.6          | 0.6          | 0.7          | 0.7          | 0.7          | 0.6         | 0.7          | 14.3%         | -18.5%        |
| Day Travel   | 21.2        | 27.0         | 27.0         | 27.9         | 28.0         | 28.6         | 31.2         | 33.0         | 15.9        | 36.9         | 132.0%        | -51.8%        |
| <b>TOTAL</b>   | <b>66.2</b> | <b>99.8</b>  | <b>99.9</b>  | <b>103.9</b> | <b>104.8</b> | <b>107.5</b> | <b>119.1</b> | <b>127.0</b> | <b>69.4</b> | <b>148.5</b> | <b>113.9%</b> | <b>-45.3%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |             |              |              |              |              |              |              |              |             |              |               |               |
| Accommodations   | 9.6         | 18.0         | 18.7         | 20.8         | 21.9         | 22.5         | 25.3         | 27.4         | 16.7        | 40.0         | 139.8%        | -39.1%        |
| Food Service   | 18.4        | 29.0         | 29.4         | 31.5         | 32.3         | 33.3         | 37.1         | 40.3         | 20.1        | 42.4         | 110.8%        | -50.0%        |
| Food Stores  | 7.3         | 10.2         | 10.5         | 11.0         | 10.8         | 10.9         | 11.5         | 12.0         | 8.0         | 14.8         | 84.5%         | -32.9%        |
| Local Tran. & Gas  | 6.5         | 13.7         | 12.8         | 10.9         | 10.1         | 10.9         | 13.3         | 14.0         | 5.8         | 14.4         | 148.0%        | -58.6%        |
| Arts, Ent. & Rec.  | 10.9        | 13.1         | 13.0         | 13.6         | 13.7         | 13.8         | 14.9         | 15.6         | 8.5         | 16.1         | 89.6%         | -45.6%        |
| Retail Sales   | 13.6        | 15.8         | 15.6         | 16.1         | 16.0         | 16.0         | 17.0         | 17.7         | 10.3        | 20.8         | 101.8%        | -41.9%        |
| <b>TOTAL</b>   | <b>66.2</b> | <b>99.8</b>  | <b>99.9</b>  | <b>103.9</b> | <b>104.8</b> | <b>107.5</b> | <b>119.1</b> | <b>127.0</b> | <b>69.4</b> | <b>148.5</b> | <b>113.9%</b> | <b>-45.3%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Benton County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 11.5  | 18.4  | 20.2  | 20.8  | 22.4  | 23.6  | 26.5  | 27.8  | 21.0  | 24.7  | 17.5%   | -24.4%  |
| Arts, Ent. & Rec.   | 3.7   | 4.4   | 4.9   | 5.2   | 5.5   | 5.7   | 5.4   | 5.9   | 4.4   | 5.3   | 19.3%   | -24.5%  |
| Retail**  | 2.7   | 3.5   | 3.6   | 3.8   | 3.9   | 4.0   | 4.3   | 4.5   | 4.9   | 5.5   | 14.1%   | 8.3%    |
| Ground Tran.  | 0.3   | 0.5   | 0.5   | 0.6   | 0.6   | 0.6   | 0.7   | 0.8   | 0.5   | 0.6   | 16.3%   | -32.7%  |
| Other Travel*   | 1.4   | 1.2   | 1.3   | 1.4   | 1.8   | 1.9   | 1.5   | 1.6   | 1.5   | 1.5   | 1.3%    | -10.0%  |
| <b>TOTAL</b>  | 19.7  | 28.0  | 30.5  | 31.7  | 34.1  | 35.8  | 38.3  | 40.6  | 32.3  | 37.7  | 16.5%   | -20.4%  |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 730   | 880   | 940   | 960   | 990   | 1,000 | 1,060 | 1,060 | 790   | 840   | 6.9%    | -25.4%  |
| Arts, Ent. & Rec.   | 350   | 420   | 430   | 500   | 510   | 530   | 560   | 590   | 410   | 450   | 9.7%    | -31.4%  |
| Retail**  | 160   | 170   | 170   | 170   | 170   | 170   | 180   | 180   | 180   | 200   | 10.5%   | -1.3%   |
| Ground Tran.  | 10    | 20    | 20    | 20    | 20    | 20    | 20    | 20    | 10    | 10    | 9.2%    | -30.3%  |
| Other Travel*   | 70    | 50    | 50    | 50    | 70    | 70    | 50    | 60    | 50    | 50    | -0.5%   | -9.5%   |
| <b>TOTAL</b>  | 1,320 | 1,530 | 1,600 | 1,700 | 1,750 | 1,790 | 1,870 | 1,910 | 1,440 | 1,560 | 8.3%    | -24.6%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Local Tax Receipts  | 0.8   | 1.4   | 1.5   | 1.6   | 1.7   | 1.8   | 2.0   | 2.5   | 1.7   | 3.5   | 104.6%  | -32.3%  |
| State Tax Receipts  | 2.3   | 3.5   | 3.6   | 3.7   | 3.9   | 4.3   | 4.6   | 4.9   | 3.1   | 4.6   | 48.0%   | -35.7%  |
| <b>TOTAL</b>  | 3.0   | 4.9   | 5.0   | 5.3   | 5.6   | 6.1   | 6.6   | 7.4   | 4.9   | 8.2   | 68.1%   | -34.5%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.



# Benton County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Benton County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$103  | \$188 | \$288 | \$522 | 2.8        | 1.8            |
| Private Home       | \$37   | \$113 | \$88  | \$266 | 2.4        | 3.0            |
| Other Overnight    | \$55   | \$160 | \$146 | \$426 | 2.7        | 2.9            |
| All Overnight      | \$108  | \$255 | \$273 | \$658 | 2.5        | 2.4            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |           | Party-Nights |         |         |
|--------------------|---------------|---------|-----------|--------------|---------|---------|
|                    | 2019          | 2020    | 2021      | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 541,160       | 273,820 | 704,350   | 220,590      | 101,400 | 253,050 |
| Private Home       | 946,570       | 618,690 | 939,080   | 369,980      | 262,530 | 398,480 |
| Other Overnight    | 89,660        | 61,050  | 64,950    | 26,420       | 22,900  | 24,370  |
| All Overnight      | 1,577,390     | 953,560 | 1,708,380 | 616,990      | 386,830 | 675,900 |

|                    | Person-Trips |         |         | Party-Trips |         |         |
|--------------------|--------------|---------|---------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 325,350      | 154,370 | 387,830 | 132,620     | 56,480  | 139,560 |
| Private Home       | 368,210      | 205,800 | 312,380 | 143,920     | 87,330  | 132,550 |
| Other Overnight    | 29,790       | 20,850  | 22,190  | 8,820       | 7,860   | 8,360   |
| All Overnight      | 723,350      | 381,020 | 722,390 | 285,360     | 151,660 | 280,480 |

# Clackamas County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$78,050 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$43 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 3% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 5% |
|--|----|

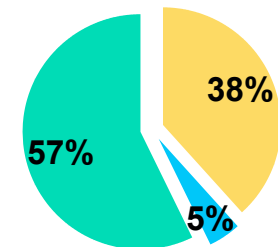
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

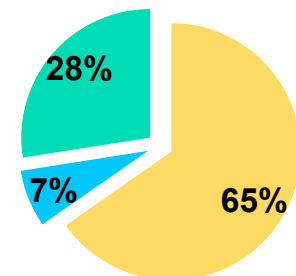
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Clackamas County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Clackamas County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 344.6 | 533.1 | 551.6 | 563.0 | 596.0 | 611.3 | 625.6 | 638.6 | 267.1 | 523.8 | ▲ 96.1%            | ▲ 2.4%  |
| Other                          | 38.1  | 88.9  | 89.2  | 78.4  | 83.1  | 80.6  | 88.2  | 89.9  | 49.1  | 72.9  | ▲ 48.5%            | ▲ 3.7%  |
| Visitor                        | 306.5 | 444.2 | 462.4 | 484.6 | 512.9 | 530.7 | 537.4 | 548.7 | 218.0 | 450.9 | ▲ 106.8%           | ▲ 2.2%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 88.5  | 134.5 | 142.9 | 154.1 | 166.6 | 175.0 | 189.7 | 225.7 | 175.9 | 204.3 | ▲ 16.1%            | ▲ 4.8%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 4,710 | 5,630 | 5,820 | 6,010 | 6,270 | 6,430 | 6,580 | 7,360 | 5,560 | 6,050 | ▲ 8.8%             | ▲ 1.4%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 11.3  | 19.6  | 20.5  | 22.1  | 23.8  | 26.2  | 26.9  | 28.8  | 17.2  | 23.9  | ▲ 38.5%            | ▲ 4.2%  |
| Local                          | 2.0   | 4.3   | 4.6   | 5.4   | 5.9   | 6.2   | 6.0   | 6.0   | 2.9   | 4.3   | ▲ 49.7%            | ▲ 4.3%  |
| State                          | 9.2   | 15.4  | 15.8  | 16.7  | 17.9  | 20.1  | 20.9  | 22.8  | 14.3  | 19.5  | ▲ 36.2%            | ▲ 4.2%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Clackamas County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21       | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |               |               |
| Destination Spending   | 306.5        | 444.2        | 462.4        | 484.6        | 512.9        | 530.7        | 537.4        | 548.7        | 218.0        | 450.9        | 106.8%        | -60.3%        |
| Other Travel*  | 38.1         | 88.9         | 89.2         | 78.4         | 83.1         | 80.6         | 88.2         | 89.9         | 49.1         | 72.9         | 48.5%         | -45.4%        |
| <b>TOTAL</b>   | <b>344.6</b> | <b>533.1</b> | <b>551.6</b> | <b>563.0</b> | <b>596.0</b> | <b>611.3</b> | <b>625.6</b> | <b>638.6</b> | <b>267.1</b> | <b>523.8</b> | <b>96.1%</b>  | <b>-58.2%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |               |               |
| Hotel, Motel, STVR**   | 95.7         | 160.1        | 169.6        | 184.6        | 202.5        | 212.1        | 210.6        | 212.6        | 65.5         | 126.9        | 93.7%         | -69.2%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 106.2        |               |               |
| STVR   |              |              |              |              |              |              |              |              |              | 20.7         |               |               |
| Private Home   | 113.4        | 157.8        | 162.6        | 165.5        | 170.4        | 175.3        | 180.9        | 186.0        | 86.7         | 189.9        | 119.1%        | -53.4%        |
| Campground   | 7.9          | 12.8         | 12.9         | 13.2         | 13.5         | 13.6         | 14.2         | 14.8         | 12.3         | 7.8          | -36.8%        | -16.7%        |
| 2nd Home   | 5.4          | 7.4          | 7.5          | 7.6          | 7.6          | 7.9          | 8.2          | 8.4          | 6.7          | 7.7          | 14.3%         | -19.8%        |
| Day Travel   | 84.2         | 106.2        | 109.8        | 113.8        | 118.8        | 121.7        | 123.6        | 126.9        | 46.8         | 118.7        | 153.6%        | -63.1%        |
| <b>TOTAL</b>   | <b>306.5</b> | <b>444.2</b> | <b>462.4</b> | <b>484.6</b> | <b>512.9</b> | <b>530.7</b> | <b>537.4</b> | <b>548.7</b> | <b>218.0</b> | <b>450.9</b> | <b>106.8%</b> | <b>-60.3%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |               |               |
| Accommodations   | 41.7         | 73.7         | 79.5         | 90.9         | 101.8        | 106.2        | 103.9        | 103.8        | 44.2         | 70.7         | 60.1%         | -57.4%        |
| Food Service   | 89.3         | 137.2        | 144.7        | 154.6        | 165.9        | 173.1        | 177.2        | 184.8        | 70.4         | 154.6        | 119.5%        | -61.9%        |
| Food Stores  | 24.2         | 35.1         | 36.9         | 38.7         | 39.3         | 39.4         | 39.6         | 40.6         | 21.5         | 40.4         | 87.9%         | -47.1%        |
| Local Tran. & Gas  | 30.9         | 57.4         | 57.0         | 51.0         | 50.9         | 55.3         | 60.2         | 60.6         | 21.8         | 52.2         | 139.3%        | -64.0%        |
| Arts, Ent. & Rec.  | 41.3         | 49.3         | 50.9         | 53.1         | 55.7         | 56.6         | 56.9         | 57.8         | 16.8         | 33.7         | 100.2%        | -70.9%        |
| Retail Sales   | 79.0         | 91.5         | 93.5         | 96.5         | 99.4         | 100.0        | 99.5         | 100.9        | 43.3         | 99.4         | 129.5%        | -57.1%        |
| <b>TOTAL</b>   | <b>306.5</b> | <b>444.2</b> | <b>462.4</b> | <b>484.6</b> | <b>512.9</b> | <b>530.7</b> | <b>537.4</b> | <b>548.7</b> | <b>218.0</b> | <b>450.9</b> | <b>106.8%</b> | <b>-60.3%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Clackamas County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 53.8         | 84.0         | 89.2         | 97.5         | 103.7        | 113.3        | 126.3        | 159.0        | 124.3        | 147.8        | 18.9%        | -21.8%        |
| Arts, Ent. & Rec.   | 12.4         | 17.6         | 18.7         | 19.7         | 21.3         | 22.2         | 23.0         | 24.3         | 18.9         | 22.5         | 19.0%        | -22.3%        |
| Retail**  | 12.2         | 15.5         | 16.3         | 17.3         | 18.4         | 19.2         | 19.7         | 20.4         | 17.0         | 18.5         | 8.8%         | -16.7%        |
| Ground Tran.  | 3.3          | 4.7          | 5.0          | 5.3          | 5.9          | 6.4          | 6.5          | 7.0          | 3.9          | 4.2          | 8.3%         | -44.8%        |
| Other Travel*   | 6.7          | 12.8         | 13.7         | 14.3         | 17.2         | 13.9         | 14.1         | 15.1         | 11.9         | 11.3         | -4.8%        | -20.9%        |
| <b>TOTAL</b>  | <b>88.5</b>  | <b>134.5</b> | <b>142.9</b> | <b>154.1</b> | <b>166.6</b> | <b>175.0</b> | <b>189.7</b> | <b>225.7</b> | <b>175.9</b> | <b>204.3</b> | <b>16.1%</b> | <b>-22.1%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 2,860        | 3,450        | 3,570        | 3,740        | 3,880        | 4,060        | 4,230        | 5,000        | 3,850        | 4,200        | 9.1%         | -23.0%        |
| Arts, Ent. & Rec.   | 920          | 1,070        | 1,100        | 1,140        | 1,210        | 1,220        | 1,210        | 1,190        | 840          | 980          | 16.5%        | -29.3%        |
| Retail**  | 520          | 600          | 610          | 600          | 620          | 640          | 630          | 640          | 490          | 500          | 3.8%         | -24.0%        |
| Ground Tran.  | 140          | 150          | 150          | 160          | 160          | 170          | 160          | 170          | 100          | 100          | 1.7%         | -42.8%        |
| Other Travel*   | 260          | 370          | 390          | 390          | 410          | 340          | 350          | 360          | 300          | 270          | -7.3%        | -19.0%        |
| <b>TOTAL</b>  | <b>4,710</b> | <b>5,630</b> | <b>5,820</b> | <b>6,010</b> | <b>6,270</b> | <b>6,430</b> | <b>6,580</b> | <b>7,360</b> | <b>5,560</b> | <b>6,050</b> | <b>8.8%</b>  | <b>-24.5%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Local Tax Receipts  | 2.0          | 4.3          | 4.6          | 5.4          | 5.9          | 6.2          | 6.0          | 6.0          | 2.9          | 4.3          | 49.7%        | -51.6%        |
| State Tax Receipts  | 9.2          | 15.4         | 15.8         | 16.7         | 17.9         | 20.1         | 20.9         | 22.8         | 14.3         | 19.5         | 36.2%        | -37.2%        |
| <b>TOTAL</b>  | <b>11.3</b>  | <b>19.6</b>  | <b>20.5</b>  | <b>22.1</b>  | <b>23.8</b>  | <b>26.2</b>  | <b>26.9</b>  | <b>28.8</b>  | <b>17.2</b>  | <b>23.9</b>  | <b>38.5%</b> | <b>-40.2%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Clackamas County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Clackamas County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$94   | \$193 | \$234 | \$490 | 2.5        | 2.1            |
| Private Home       | \$35   | \$127 | \$68  | \$250 | 1.9        | 3.7            |
| Other Overnight    | \$43   | \$143 | \$107 | \$356 | 2.5        | 3.3            |
| All Overnight      | \$65   | \$203 | \$131 | \$432 | 2.0        | 3.3            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 1,475,970     | 641,310   | 1,349,530 | 696,550      | 283,140   | 541,750   |
| Private Home       | 5,345,610     | 2,780,420 | 5,397,850 | 2,588,330    | 1,371,880 | 2,809,460 |
| Other Overnight    | 639,720       | 441,450   | 358,490   | 197,500      | 173,860   | 144,620   |
| All Overnight      | 7,461,300     | 3,863,180 | 7,105,860 | 3,482,380    | 1,828,890 | 3,495,830 |

|                    | Person-Trips |           |           | Party-Trips |         |           |
|--------------------|--------------|-----------|-----------|-------------|---------|-----------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021      |
| Hotel, Motel, STVR | 744,030      | 303,180   | 656,240   | 339,790     | 127,510 | 258,870   |
| Private Home       | 1,733,820    | 771,360   | 1,497,500 | 812,980     | 377,670 | 759,640   |
| Other Overnight    | 193,440      | 135,640   | 108,290   | 59,460      | 53,120  | 43,440    |
| All Overnight      | 2,671,280    | 1,210,180 | 2,262,020 | 1,212,230   | 558,300 | 1,061,950 |

# Clatsop County / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job                 | \$76,637 |
| Employee Earnings generated by \$100 Visitor Spending          | \$45     |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$6      |
| Visitor Shares   |          |
| Travel Share of Total Employment (2021)                        | 25%      |
| Overnight Visitor Day Share of Resident Population**           | 24%      |

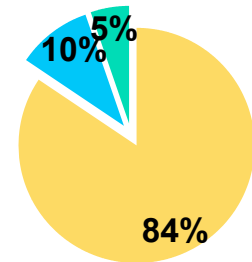
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

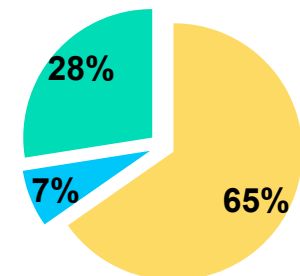
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Clatsop County



### Oregon



■ Hotel, Motel, STR
 ■ Private Home (VFR)
 ■ Other Overnight



# Clatsop County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 317.6 | 467.4 | 516.4 | 539.1 | 550.6 | 561.1 | 582.9 | 601.3 | 482.0 | 492.5 | ▲ 2.2%             | ▲ 2.5%  |
| Other                          | 10.6  | 7.1   | 7.0   | 5.8   | 4.5   | 5.0   | 5.8   | 5.9   | 2.8   | 5.1   | ▲ 86.6%            | ▼ -4.0% |
| Visitor                        | 307.0 | 460.2 | 509.4 | 533.3 | 546.1 | 556.1 | 577.2 | 595.5 | 479.3 | 487.4 | ▲ 1.7%             | ▲ 2.6%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 92.1  | 134.4 | 142.3 | 156.8 | 164.4 | 177.7 | 203.0 | 215.7 | 185.8 | 221.5 | ▲ 19.2%            | ▲ 5.0%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 4,760 | 5,280 | 5,470 | 5,800 | 5,990 | 6,210 | 6,620 | 6,830 | 5,790 | 6,380 | ▲ 10.3%            | ▲ 1.6%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 12.0  | 19.8  | 21.6  | 23.7  | 24.5  | 27.0  | 28.8  | 29.6  | 30.3  | 29.3  | ▼ -3.5%            | ▲ 5.1%  |
| Local                          | 4.9   | 8.3   | 9.3   | 10.5  | 10.7  | 11.1  | 11.5  | 11.6  | 14.4  | 12.4  | ▼ -14.1%           | ▲ 5.3%  |
| State                          | 7.1   | 11.5  | 12.3  | 13.2  | 13.8  | 15.9  | 17.3  | 18.0  | 15.9  | 16.9  | ▲ 6.1%             | ▲ 5.0%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Clatsop County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21     | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|-------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |             |               |
| Destination Spending   | 307.0        | 460.2        | 509.4        | 533.3        | 546.1        | 556.1        | 577.2        | 595.5        | 479.3        | 487.4        | 1.7%        | -19.5%        |
| Other Travel*  | 10.6         | 7.1          | 7.0          | 5.8          | 4.5          | 5.0          | 5.8          | 5.9          | 2.8          | 5.1          | 86.6%       | -52.9%        |
| <b>TOTAL</b>   | <b>317.6</b> | <b>467.4</b> | <b>516.4</b> | <b>539.1</b> | <b>550.6</b> | <b>561.1</b> | <b>582.9</b> | <b>601.3</b> | <b>482.0</b> | <b>492.5</b> | <b>2.2%</b> | <b>-19.8%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |             |               |
| Hotel, Motel, STVR**   | 133.8        | 238.7        | 270.5        | 287.4        | 295.2        | 302.7        | 314.8        | 323.6        | 328.7        | 305.4        | -7.1%       | 1.6%          |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 223.4        |             |               |
| STVR   |              |              |              |              |              |              |              |              |              | 82.0         |             |               |
| Private Home   | 11.4         | 15.2         | 15.4         | 15.2         | 15.4         | 15.8         | 16.5         | 17.0         | 19.3         | 19.3         | -0.1%       | 13.6%         |
| Campground   | 20.8         | 23.9         | 24.2         | 24.7         | 25.4         | 25.5         | 26.6         | 27.7         | 18.1         | 22.3         | 22.8%       | -34.6%        |
| 2nd Home   | 10.7         | 13.7         | 14.0         | 14.1         | 14.2         | 14.7         | 15.2         | 15.6         | 12.7         | 14.5         | 14.3%       | -18.5%        |
| Day Travel   | 130.2        | 168.8        | 185.3        | 191.9        | 195.9        | 197.4        | 204.1        | 211.6        | 100.4        | 125.9        | 25.4%       | -52.5%        |
| <b>TOTAL</b>   | <b>307.0</b> | <b>460.2</b> | <b>509.4</b> | <b>533.3</b> | <b>546.1</b> | <b>556.1</b> | <b>577.2</b> | <b>595.5</b> | <b>479.3</b> | <b>487.4</b> | <b>1.7%</b> | <b>-19.5%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |             |               |
| Accommodations   | 65.8         | 109.6        | 122.6        | 136.1        | 141.3        | 146.8        | 151.5        | 153.8        | 193.6        | 191.3        | -1.2%       | 25.9%         |
| Food Service   | 85.3         | 137.0        | 155.0        | 166.3        | 173.9        | 177.1        | 184.7        | 194.8        | 125.6        | 122.8        | -2.2%       | -35.5%        |
| Food Stores  | 27.7         | 37.9         | 41.6         | 43.7         | 43.8         | 43.2         | 43.9         | 45.4         | 31.8         | 37.9         | 19.4%       | -30.0%        |
| Local Tran. & Gas  | 24.4         | 52.2         | 55.0         | 46.6         | 44.2         | 47.4         | 53.5         | 54.3         | 36.2         | 38.7         | 6.9%        | -33.3%        |
| Arts, Ent. & Rec.  | 46.8         | 56.9         | 62.6         | 65.5         | 67.1         | 66.8         | 68.2         | 70.0         | 42.3         | 42.3         | -0.2%       | -39.5%        |
| Retail Sales   | 56.9         | 66.7         | 72.5         | 75.1         | 75.8         | 74.7         | 75.5         | 77.2         | 49.7         | 54.3         | 9.2%        | -35.6%        |
| <b>TOTAL</b>   | <b>307.0</b> | <b>460.2</b> | <b>509.4</b> | <b>533.3</b> | <b>546.1</b> | <b>556.1</b> | <b>577.2</b> | <b>595.5</b> | <b>479.3</b> | <b>487.4</b> | <b>1.7%</b> | <b>-19.5%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Clatsop County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 62.4  | 100.5 | 105.7 | 118.0 | 123.9 | 136.3 | 158.2 | 168.6 | 136.9 | 167.3 | 22.2%   | -18.8%  |
| Arts, Ent. & Rec.   | 14.5  | 17.9  | 18.8  | 19.8  | 21.0  | 21.5  | 23.4  | 24.9  | 22.0  | 25.6  | 16.0%   | -11.6%  |
| Retail**  | 10.6  | 13.6  | 15.1  | 16.1  | 16.8  | 17.1  | 18.5  | 18.9  | 23.4  | 26.3  | 12.1%   | 23.7%   |
| Ground Tran.  | 1.2   | 1.8   | 2.1   | 2.2   | 2.4   | 2.5   | 2.6   | 2.8   | 3.1   | 1.8   | -42.7%  | 8.1%    |
| Other Travel*   | 3.4   | 0.7   | 0.7   | 0.7   | 0.2   | 0.2   | 0.3   | 0.3   | 0.3   | 0.6   | 85.0%   | 2.4%    |
| <b>TOTAL</b>  | 92.1  | 134.4 | 142.3 | 156.8 | 164.4 | 177.7 | 203.0 | 215.7 | 185.8 | 221.5 | 19.2%   | -13.9%  |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 3,310 | 3,810 | 3,910 | 4,190 | 4,380 | 4,630 | 4,980 | 5,190 | 4,150 | 4,610 | 11.0%   | -20.0%  |
| Arts, Ent. & Rec.   | 790   | 810   | 840   | 860   | 850   | 850   | 880   | 880   | 770   | 890   | 14.8%   | -12.1%  |
| Retail**  | 540   | 580   | 630   | 660   | 680   | 660   | 680   | 680   | 770   | 820   | 6.2%    | 13.2%   |
| Ground Tran.  | 50    | 60    | 60    | 60    | 70    | 70    | 70    | 70    | 80    | 40    | -46.2%  | 12.1%   |
| Other Travel*   | 70    | 30    | 30    | 30    | 10    | 10    | 10    | 10    | 10    | 20    | 68.9%   | -5.9%   |
| <b>TOTAL</b>  | 4,760 | 5,280 | 5,470 | 5,800 | 5,990 | 6,210 | 6,620 | 6,830 | 5,790 | 6,380 | 10.2%   | -15.2%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Local Tax Receipts  | 4.9   | 8.3   | 9.3   | 10.5  | 10.7  | 11.1  | 11.5  | 11.6  | 14.4  | 12.4  | -14.1%  | 24.6%   |
| State Tax Receipts  | 7.1   | 11.5  | 12.3  | 13.2  | 13.8  | 15.9  | 17.3  | 18.0  | 15.9  | 16.9  | 6.1%    | -11.5%  |
| <b>TOTAL</b>  | 12.0  | 19.8  | 21.6  | 23.7  | 24.5  | 27.0  | 28.8  | 29.6  | 30.3  | 29.3  | -3.5%   | 2.6%    |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Clatsop County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Clatsop County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |         | Party Size | Length of Stay |
|--------------------|--------|-------|-------|---------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip    |            |                |
| Hotel, Motel, STVR | \$134  | \$276 | \$371 | \$766   | 2.8        | 2.1            |
| Private Home       | \$33   | \$118 | \$79  | \$283   | 2.4        | 3.6            |
| Other Overnight    | \$51   | \$166 | \$130 | \$427   | 2.6        | 3.3            |
| All Overnight      | \$186  | \$447 | \$495 | \$1,205 | 2.7        | 2.4            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 2,417,030     | 2,616,950 | 2,285,260 | 988,760      | 956,500   | 822,750   |
| Private Home       | 513,180       | 622,990   | 583,830   | 196,950      | 259,290   | 242,990   |
| Other Overnight    | 1,050,280     | 647,820   | 723,080   | 320,670      | 254,090   | 282,680   |
| All Overnight      | 3,980,490     | 3,887,750 | 3,592,170 | 1,506,380    | 1,469,880 | 1,348,430 |

|                    | Person-Trips |           |           | Party-Trips |         |         |
|--------------------|--------------|-----------|-----------|-------------|---------|---------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 1,277,810    | 1,364,130 | 1,106,060 | 522,730     | 496,360 | 398,950 |
| Private Home       | 168,740      | 174,950   | 163,950   | 64,760      | 72,810  | 68,240  |
| Other Overnight    | 317,690      | 197,580   | 221,140   | 96,720      | 77,210  | 86,130  |
| All Overnight      | 1,764,240    | 1,736,670 | 1,491,150 | 684,200     | 646,380 | 553,310 |

# Columbia County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$50,089 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$44 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 4% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 3% |
|--|----|

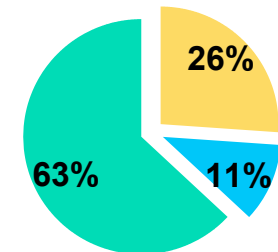
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

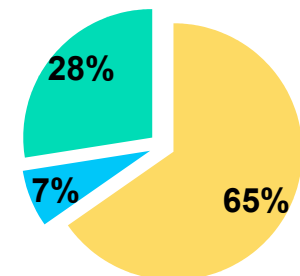
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Columbia County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Columbia County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 25.8 | 36.4 | 38.4 | 36.9 | 37.3 | 39.3 | 41.5 | 42.7 | 25.0 | 39.2 | ▲ 56.6%            | ▲ 2.3%  |
| Other                          | 4.0  | 8.0  | 7.7  | 6.1  | 5.9  | 6.6  | 7.6  | 7.7  | 3.6  | 6.7  | ▲ 86.6%            | ▲ 3.0%  |
| Visitor                        | 21.8 | 28.3 | 30.7 | 30.8 | 31.5 | 32.7 | 33.9 | 35.0 | 21.4 | 32.5 | ▲ 51.5%            | ▲ 2.2%  |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 5.8  | 9.2  | 10.0 | 10.6 | 11.4 | 12.9 | 13.8 | 14.5 | 12.5 | 14.9 | ▲ 19.0%            | ▲ 5.3%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 440  | 560  | 580  | 610  | 630  | 680  | 700  | 740  | 580  | 670  | ▲ 15.0%            | ▲ 2.4%  |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 0.9  | 1.3  | 1.4  | 1.4  | 1.5  | 1.7  | 1.8  | 1.8  | 1.3  | 1.7  | ▲ 32.8%            | ▲ 3.8%  |
| State                          | 0.9  | 1.3  | 1.4  | 1.4  | 1.5  | 1.7  | 1.8  | 1.8  | 1.3  | 1.7  | ▲ 32.8%            | ▲ 3.8%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Columbia County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003        | 2013        | 2014        | 2015        | 2016        | 2017        | 2018        | 2019        | 2020        | 2021        | 2020-21      | 2019-20       |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |             |             |             |             |             |             |             |             |             |             |              |               |
| Destination Spending   | 21.8        | 28.3        | 30.7        | 30.8        | 31.5        | 32.7        | 33.9        | 35.0        | 21.4        | 32.5        | 51.5%        | -38.8%        |
| Other Travel*  | 4.0         | 8.0         | 7.7         | 6.1         | 5.9         | 6.6         | 7.6         | 7.7         | 3.6         | 6.7         | 86.6%        | -53.5%        |
| <b>TOTAL</b>   | <b>25.8</b> | <b>36.4</b> | <b>38.4</b> | <b>36.9</b> | <b>37.3</b> | <b>39.3</b> | <b>41.5</b> | <b>42.7</b> | <b>25.0</b> | <b>39.2</b> | <b>56.6%</b> | <b>-41.4%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |             |             |             |             |             |             |             |             |             |             |              |               |
| Hotel, Motel, STVR**   | 4.0         | 3.5         | 4.4         | 4.8         | 5.0         | 5.2         | 5.3         | 5.5         | 5.6         | 6.0         | 7.5%         | 0.8%          |
| Hotel, Motel   |             |             |             |             |             |             |             |             |             | 4.6         |              |               |
| STVR   |             |             |             |             |             |             |             |             |             | 1.4         |              |               |
| Private Home   | 8.8         | 11.9        | 12.7        | 12.4        | 12.6        | 13.1        | 13.7        | 14.1        | 8.6         | 14.4        | 67.0%        | -38.7%        |
| Campground   | 0.7         | 2.5         | 2.5         | 2.6         | 2.7         | 2.7         | 2.8         | 2.9         | 1.8         | 2.1         | 11.6%        | -36.6%        |
| 2nd Home   | 0.3         | 0.4         | 0.5         | 0.5         | 0.5         | 0.5         | 0.5         | 0.5         | 0.4         | 0.5         | 14.9%        | -21.9%        |
| Day Travel   | 8.0         | 10.0        | 10.6        | 10.6        | 10.8        | 11.2        | 11.6        | 12.0        | 5.0         | 9.6         | 91.3%        | -58.3%        |
| <b>TOTAL</b>   | <b>21.8</b> | <b>28.3</b> | <b>30.7</b> | <b>30.8</b> | <b>31.5</b> | <b>32.7</b> | <b>33.9</b> | <b>35.0</b> | <b>21.4</b> | <b>32.5</b> | <b>51.5%</b> | <b>-38.8%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |             |             |             |             |             |             |             |             |             |             |              |               |
| Accommodations   | 2.0         | 2.2         | 2.7         | 3.1         | 3.2         | 3.3         | 3.4         | 3.5         | 3.7         | 3.8         | 2.7%         | 5.0%          |
| Food Service   | 6.3         | 8.8         | 9.6         | 9.8         | 10.3        | 10.8        | 11.4        | 11.9        | 7.0         | 11.0        | 58.2%        | -41.7%        |
| Food Stores  | 3.6         | 5.2         | 5.7         | 5.7         | 5.8         | 5.8         | 5.9         | 6.1         | 3.9         | 6.2         | 56.8%        | -35.7%        |
| Local Tran. & Gas  | 2.0         | 3.6         | 3.6         | 3.0         | 2.9         | 3.2         | 3.6         | 3.6         | 2.1         | 3.7         | 81.3%        | -43.0%        |
| Arts, Ent. & Rec.  | 3.4         | 3.7         | 4.0         | 4.0         | 4.1         | 4.2         | 4.3         | 4.4         | 1.7         | 2.4         | 44.9%        | -62.5%        |
| Retail Sales   | 4.5         | 4.9         | 5.2         | 5.1         | 5.2         | 5.3         | 5.3         | 5.4         | 3.2         | 5.4         | 70.8%        | -41.9%        |
| <b>TOTAL</b>   | <b>21.8</b> | <b>28.3</b> | <b>30.7</b> | <b>30.8</b> | <b>31.5</b> | <b>32.7</b> | <b>33.9</b> | <b>35.0</b> | <b>21.4</b> | <b>32.5</b> | <b>51.5%</b> | <b>-38.8%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.



# Columbia County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003       | 2013       | 2014        | 2015        | 2016        | 2017        | 2018        | 2019        | 2020        | 2021        | 2020-21      | 2019-20       |
|---|------------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |            |            |             |             |             |             |             |             |             |             |              |               |
| Accom. & Food Serv.   | 3.3        | 6.1        | 6.7         | 7.3         | 8.0         | 9.4         | 10.2        | 10.8        | 8.9         | 11.0        | 23.4%        | -16.8%        |
| Arts, Ent. & Rec.   | 1.1        | 1.2        | 1.3         | 1.3         | 1.2         | 1.3         | 1.3         | 1.3         | 0.9         | 1.0         | 15.5%        | -34.2%        |
| Retail**  | 1.0        | 1.3        | 1.5         | 1.5         | 1.5         | 1.6         | 1.7         | 1.7         | 2.0         | 2.1         | 7.1%         | 12.1%         |
| Ground Tran.  | 0.2        | 0.2        | 0.2         | 0.2         | 0.2         | 0.2         | 0.3         | 0.3         | 0.3         | 0.3         | 2.0%         | -6.0%         |
| Other Travel*   | 0.2        | 0.3        | 0.3         | 0.3         | 0.3         | 0.3         | 0.4         | 0.4         | 0.4         | 0.4         | 0.8%         | 1.2%          |
| <b>TOTAL</b>  | <b>5.8</b> | <b>9.2</b> | <b>10.0</b> | <b>10.6</b> | <b>11.4</b> | <b>12.9</b> | <b>13.8</b> | <b>14.5</b> | <b>12.5</b> | <b>14.9</b> | <b>19.0%</b> | <b>-14.2%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |            |            |             |             |             |             |             |             |             |             |              |               |
| Accom. & Food Serv.   | 240        | 340        | 350         | 370         | 390         | 420         | 430         | 440         | 360         | 420         | 17.0%        | -19.8%        |
| Arts, Ent. & Rec.   | 120        | 140        | 140         | 140         | 150         | 170         | 170         | 190         | 130         | 150         | 17.7%        | -35.3%        |
| Retail**  | 60         | 60         | 70          | 70          | 70          | 70          | 70          | 70          | 70          | 80          | 6.8%         | 5.2%          |
| Ground Tran.  | 10         | 10         | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 10          | -4.3%        | -2.5%         |
| Other Travel*   | 20         | 20         | 20          | 20          | 20          | 20          | 20          | 20          | 20          | 20          | 0.1%         | -8.0%         |
| <b>TOTAL</b>  | <b>440</b> | <b>560</b> | <b>580</b>  | <b>610</b>  | <b>630</b>  | <b>680</b>  | <b>700</b>  | <b>740</b>  | <b>580</b>  | <b>670</b>  | <b>15.5%</b> | <b>-21.6%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |            |            |             |             |             |             |             |             |             |             |              |               |
| State Tax Receipts  | 0.9        | 1.3        | 1.4         | 1.4         | 1.5         | 1.7         | 1.8         | 1.8         | 1.3         | 1.7         | 32.8%        | -29.3%        |
| <b>TOTAL</b>  | <b>0.9</b> | <b>1.3</b> | <b>1.4</b>  | <b>1.4</b>  | <b>1.5</b>  | <b>1.7</b>  | <b>1.8</b>  | <b>1.8</b>  | <b>1.3</b>  | <b>1.7</b>  | <b>32.8%</b> | <b>-29.3%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Columbia County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Columbia County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$82   | \$177 | \$221 | \$478 | 2.7        | 2.2            |
| Private Home       | \$27   | \$96  | \$52  | \$188 | 2.0        | 3.6            |
| Other Overnight    | \$44   | \$143 | \$111 | \$361 | 2.5        | 3.3            |
| All Overnight      | \$43   | \$144 | \$88  | \$300 | 2.1        | 3.4            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |         |         |
|--------------------|---------------|---------|---------|--------------|---------|---------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 53,330        | 66,810  | 73,240  | 22,460       | 25,810  | 27,020  |
| Private Home       | 544,420       | 348,090 | 542,780 | 256,580      | 178,360 | 278,120 |
| Other Overnight    | 96,630        | 53,010  | 56,400  | 29,700       | 21,200  | 22,560  |
| All Overnight      | 694,380       | 467,910 | 672,420 | 308,740      | 225,370 | 327,700 |

|                    | Person-Trips |         |         | Party-Trips |        |        |
|--------------------|--------------|---------|---------|-------------|--------|--------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020   | 2021   |
| Hotel, Motel, STVR | 26,130       | 31,690  | 33,790  | 11,010      | 12,040 | 12,500 |
| Private Home       | 175,540      | 96,060  | 149,790 | 82,730      | 49,220 | 76,750 |
| Other Overnight    | 29,560       | 16,450  | 17,510  | 9,030       | 6,520  | 6,930  |
| All Overnight      | 231,230      | 144,210 | 201,090 | 102,760     | 67,780 | 96,190 |

# Coos County / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job                 | \$68,513 |
| Employee Earnings generated by \$100 Visitor Spending          | \$41     |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5      |
| Visitor Shares   |          |
| Travel Share of Total Employment (2021)                        | 10%      |
| Overnight Visitor Day Share of Resident Population**           | 10%      |

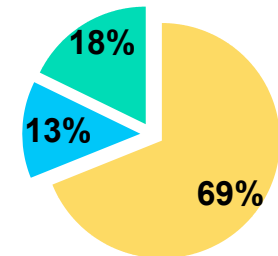
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

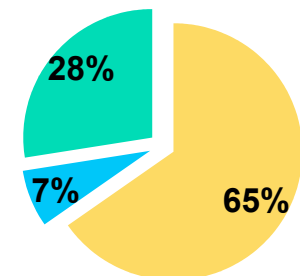
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Coos County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Coos County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 180.5 | 243.9 | 252.6 | 260.1 | 265.5 | 271.0 | 277.8 | 288.5 | 184.6 | 228.3 | ▲ 23.7%            | ▲ 1.3%  |
| Other                          | 8.9   | 11.7  | 11.2  | 9.4   | 9.1   | 9.8   | 11.1  | 11.3  | 5.3   | 9.6   | ▲ 82.2%            | ▲ 0.4%  |
| Visitor                        | 171.5 | 232.2 | 241.3 | 250.8 | 256.4 | 261.2 | 266.7 | 277.3 | 179.3 | 218.6 | ▲ 22.0%            | ▲ 1.4%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 48.3  | 63.5  | 66.6  | 72.0  | 76.5  | 79.2  | 84.4  | 90.0  | 82.9  | 95.5  | ▲ 15.2%            | ▲ 3.9%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 3,110 | 3,010 | 3,030 | 3,140 | 3,290 | 3,290 | 3,320 | 3,360 | 2,980 | 3,290 | ▲ 10.3%            | ▲ 0.3%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 5.7   | 7.6   | 7.9   | 8.5   | 8.9   | 9.8   | 10.1  | 10.6  | 8.6   | 10.2  | ▲ 17.7%            | ▲ 3.3%  |
| Local                          | 1.2   | 1.2   | 1.2   | 1.4   | 1.4   | 1.5   | 1.5   | 1.5   | 1.4   | 1.7   | ▲ 22.2%            | ▲ 2.0%  |
| State                          | 4.5   | 6.5   | 6.7   | 7.1   | 7.5   | 8.3   | 8.6   | 9.0   | 7.2   | 8.5   | ▲ 16.8%            | ▲ 3.6%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Coos County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |       |       |       |       |       |       |       |       |       |       |         |         |
| Destination Spending   | 171.5 | 232.2 | 241.3 | 250.8 | 256.4 | 261.2 | 266.7 | 277.3 | 179.3 | 218.6 | 22.0%   | -35.3%  |
| Other Travel*  | 8.9   | 11.7  | 11.2  | 9.4   | 9.1   | 9.8   | 11.1  | 11.3  | 5.3   | 9.6   | 82.2%   | -53.0%  |
| <b>TOTAL</b>   | 180.5 | 243.9 | 252.6 | 260.1 | 265.5 | 271.0 | 277.8 | 288.5 | 184.6 | 228.3 | 23.7%   | -36.0%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Hotel, Motel, STVR**   | 66.2  | 102.1 | 108.3 | 115.0 | 118.8 | 122.5 | 122.9 | 127.9 | 92.1  | 118.4 | 28.6%   | -28.0%  |
| Hotel, Motel   |       |       |       |       |       |       |       |       |       | 101.6 |         |         |
| STVR   |       |       |       |       |       |       |       |       |       | 16.7  |         |         |
| Private Home   | 22.7  | 28.1  | 27.7  | 28.0  | 27.8  | 27.9  | 29.0  | 29.9  | 31.8  | 30.8  | -3.2%   | 6.6%    |
| Campground   | 17.0  | 20.3  | 20.6  | 20.9  | 21.5  | 21.6  | 22.5  | 23.5  | 17.3  | 19.2  | 11.3%   | -26.4%  |
| 2nd Home   | 2.9   | 3.5   | 3.5   | 3.6   | 3.6   | 3.7   | 3.8   | 3.9   | 3.2   | 3.6   | 14.3%   | -18.5%  |
| Day Travel   | 62.8  | 78.3  | 81.2  | 83.3  | 84.8  | 85.6  | 88.4  | 92.2  | 34.9  | 46.6  | 33.4%   | -62.1%  |
| <b>TOTAL</b>   | 171.5 | 232.2 | 241.3 | 250.8 | 256.4 | 261.2 | 266.7 | 277.3 | 179.3 | 218.6 | 22.0%   | -35.3%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |       |       |       |       |       |       |       |       |       |       |         |         |
| Accommodations   | 33.3  | 47.6  | 50.1  | 55.5  | 58.8  | 61.5  | 59.1  | 60.8  | 53.8  | 69.7  | 29.4%   | -11.4%  |
| Food Service   | 43.8  | 64.1  | 68.4  | 72.8  | 76.0  | 77.7  | 80.8  | 85.8  | 48.2  | 55.3  | 14.8%   | -43.9%  |
| Food Stores  | 17.8  | 23.0  | 24.1  | 25.1  | 25.1  | 24.7  | 25.1  | 26.1  | 18.6  | 21.0  | 12.6%   | -28.6%  |
| Local Tran. & Gas  | 15.1  | 29.1  | 28.9  | 24.4  | 23.0  | 24.8  | 27.9  | 28.6  | 16.1  | 21.2  | 31.8%   | -43.7%  |
| Arts, Ent. & Rec.  | 33.3  | 37.0  | 38.4  | 39.8  | 40.7  | 40.6  | 41.4  | 42.8  | 21.9  | 24.9  | 13.4%   | -48.7%  |
| Retail Sales   | 25.2  | 27.6  | 28.3  | 29.1  | 29.2  | 28.9  | 29.1  | 30.0  | 19.1  | 21.7  | 13.6%   | -36.1%  |
| Visitor Air Tran.  | 3.1   | 3.7   | 3.0   | 4.0   | 3.6   | 3.1   | 3.2   | 3.3   | 1.5   | 4.9   | 226.2%  | -54.8%  |
| <b>TOTAL</b>   | 171.5 | 232.2 | 241.3 | 250.8 | 256.4 | 261.2 | 266.7 | 277.3 | 179.3 | 218.6 | 22.0%   | -35.3%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Coos County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 29.8         | 40.4         | 42.6         | 46.5         | 49.6         | 51.2         | 55.7         | 60.1         | 54.2         | 64.9         | 19.8%        | -9.7%         |
| Arts, Ent. & Rec.   | 8.8          | 11.3         | 11.4         | 12.0         | 12.5         | 12.8         | 12.8         | 13.8         | 11.5         | 12.2         | 6.4%         | -16.3%        |
| Retail**  | 5.6          | 6.8          | 7.2          | 7.6          | 7.9          | 8.0          | 8.2          | 8.4          | 10.3         | 10.8         | 4.9%         | 22.8%         |
| Ground Tran.  | 0.7          | 1.0          | 1.1          | 1.1          | 1.2          | 1.3          | 1.4          | 1.5          | 1.4          | 2.0          | 43.1%        | -6.9%         |
| Other Travel*   | 3.3          | 4.0          | 4.3          | 4.8          | 5.2          | 5.8          | 6.2          | 6.3          | 5.5          | 5.6          | 0.8%         | -11.9%        |
| <b>TOTAL</b>  | <b>48.3</b>  | <b>63.5</b>  | <b>66.6</b>  | <b>72.0</b>  | <b>76.5</b>  | <b>79.2</b>  | <b>84.4</b>  | <b>90.0</b>  | <b>82.9</b>  | <b>95.5</b>  | <b>15.2%</b> | <b>-7.8%</b>  |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 1,820        | 1,740        | 1,770        | 1,860        | 1,950        | 2,000        | 2,030        | 2,110        | 1,820        | 1,990        | 9.1%         | -13.5%        |
| Arts, Ent. & Rec.   | 860          | 850          | 820          | 830          | 860          | 820          | 820          | 800          | 670          | 790          | 18.2%        | -15.5%        |
| Retail**  | 290          | 300          | 310          | 320          | 330          | 330          | 320          | 310          | 360          | 360          | 1.2%         | 13.7%         |
| Ground Tran.  | 30           | 30           | 30           | 30           | 30           | 30           | 30           | 40           | 30           | 50           | 34.3%        | -3.5%         |
| Other Travel*   | 110          | 90           | 90           | 100          | 110          | 110          | 120          | 110          | 100          | 100          | 2.5%         | -12.1%        |
| <b>TOTAL</b>  | <b>3,110</b> | <b>3,010</b> | <b>3,030</b> | <b>3,140</b> | <b>3,290</b> | <b>3,290</b> | <b>3,320</b> | <b>3,360</b> | <b>2,980</b> | <b>3,290</b> | <b>10.4%</b> | <b>-11.3%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Local Tax Receipts  | 1.2          | 1.2          | 1.2          | 1.4          | 1.4          | 1.5          | 1.5          | 1.5          | 1.4          | 1.7          | 22.2%        | -9.4%         |
| State Tax Receipts  | 4.5          | 6.5          | 6.7          | 7.1          | 7.5          | 8.3          | 8.6          | 9.0          | 7.2          | 8.5          | 16.8%        | -19.9%        |
| <b>TOTAL</b>  | <b>5.7</b>   | <b>7.6</b>   | <b>7.9</b>   | <b>8.5</b>   | <b>8.9</b>   | <b>9.8</b>   | <b>10.1</b>  | <b>10.6</b>  | <b>8.6</b>   | <b>10.2</b>  | <b>17.7%</b> | <b>-18.4%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Coos County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Coos County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                      | Person       |              | Party        |              | Party Size | Length of Stay |
|----------------------|--------------|--------------|--------------|--------------|------------|----------------|
|                      | Day          | Trip         | Day          | Trip         |            |                |
| Hotel, Motel, STVR   | \$113        | \$223        | \$311        | \$614        | 2.8        | 2.0            |
| Private Home         | \$37         | \$132        | \$87         | \$312        | 2.3        | 3.6            |
| Other Overnight      | \$52         | \$164        | \$139        | \$439        | 2.7        | 3.2            |
| <b>All Overnight</b> | <b>\$125</b> | <b>\$321</b> | <b>\$323</b> | <b>\$846</b> | <b>2.6</b> | <b>2.6</b>     |

### Overnight Visitor Volume, 2019-2021

|                      | Person-Nights    |                  |                  | Party-Nights   |                |                |
|----------------------|------------------|------------------|------------------|----------------|----------------|----------------|
|                      | 2019             | 2020             | 2021             | 2019           | 2020           | 2021           |
| Hotel, Motel, STVR   | 1,131,570        | 897,720          | 1,047,610        | 464,660        | 328,680        | 380,320        |
| Private Home         | 833,630          | 998,770          | 832,380          | 325,000        | 416,790        | 354,510        |
| Other Overnight      | 685,610          | 413,760          | 440,130          | 201,040        | 155,010        | 164,900        |
| <b>All Overnight</b> | <b>2,650,810</b> | <b>2,310,240</b> | <b>2,320,120</b> | <b>990,700</b> | <b>900,480</b> | <b>899,730</b> |

|                      | Person-Trips     |                |                | Party-Trips    |                |                |
|----------------------|------------------|----------------|----------------|----------------|----------------|----------------|
|                      | 2019             | 2020           | 2021           | 2019           | 2020           | 2021           |
| Hotel, Motel, STVR   | 598,230          | 470,910        | 531,290        | 245,320        | 171,610        | 192,750        |
| Private Home         | 274,100          | 280,480        | 233,750        | 106,140        | 116,920        | 98,630         |
| Other Overnight      | 212,140          | 130,920        | 139,260        | 62,100         | 48,920         | 52,040         |
| <b>All Overnight</b> | <b>1,084,470</b> | <b>882,310</b> | <b>904,300</b> | <b>413,560</b> | <b>337,450</b> | <b>343,420</b> |



# Crook County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

Amount of Visitor Spending that supports 1 Job \$61,300

Employee Earnings generated by \$100 Visitor Spending \$42

Local & State Tax Revenues generated by \$100 Visitor Spending \$5

### Visitor Shares

Travel Share of Total Employment (2021) 6%

Overnight Visitor Day Share of Resident Population\*\* 7%

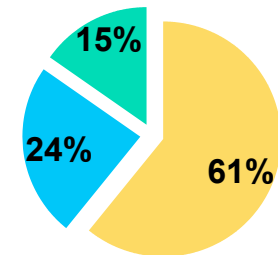
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

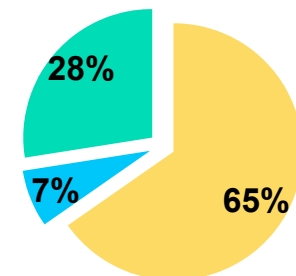
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Crook County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Crook County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 20.9 | 40.4 | 40.3 | 42.1 | 44.2 | 45.9 | 48.9 | 52.8 | 36.9 | 44.5 | ▲ 20.4%            | ▲ 4.3%  |
| Other                          | 1.8  | 3.4  | 3.3  | 2.7  | 2.6  | 2.9  | 3.5  | 3.5  | 1.7  | 3.1  | ▲ 86.6%            | ▲ 3.2%  |
| Visitor                        | 19.2 | 37.0 | 37.1 | 39.4 | 41.6 | 43.0 | 45.4 | 49.3 | 35.3 | 41.4 | ▲ 17.3%            | ▲ 4.4%  |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 5.6  | 9.8  | 10.6 | 12.2 | 13.0 | 13.8 | 15.6 | 16.7 | 15.7 | 17.8 | ▲ 13.1%            | ▲ 6.6%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 400  | 490  | 510  | 570  | 580  | 580  | 680  | 710  | 680  | 690  | ▲ 0.8%             | ▲ 3.0%  |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 0.8  | 1.2  | 1.3  | 1.4  | 1.5  | 1.7  | 1.8  | 2.0  | 1.6  | 1.9  | ▲ 13.5%            | ▲ 4.7%  |
| Local                          | 0.3  | 0.2  | 0.2  | 0.3  | 0.3  | 0.3  | 0.3  | 0.4  | 0.3  | 0.3  | ▲ 2.1%             | ▲ 1.8%  |
| State                          | 0.6  | 1.0  | 1.0  | 1.1  | 1.2  | 1.4  | 1.5  | 1.6  | 1.3  | 1.5  | ▲ 16.4%            | ▲ 5.6%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Crook County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2020-21 | 2019-20 |
|--|------|------|------|------|------|------|------|------|------|------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |      |      |      |      |      |      |      |      |      |      |         |         |
| Destination Spending   | 19.2 | 37.0 | 37.1 | 39.4 | 41.6 | 43.0 | 45.4 | 49.3 | 35.3 | 41.4 | 17.3%   | -28.4%  |
| Other Travel*  | 1.8  | 3.4  | 3.3  | 2.7  | 2.6  | 2.9  | 3.5  | 3.5  | 1.7  | 3.1  | 86.6%   | -52.4%  |
| <b>TOTAL</b>   | 20.9 | 40.4 | 40.3 | 42.1 | 44.2 | 45.9 | 48.9 | 52.8 | 36.9 | 44.5 | 20.4%   | -30.0%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |      |      |      |      |      |      |      |      |      |      |         |         |
| Hotel, Motel, STVR**   | 3.8  | 16.3 | 16.4 | 18.0 | 19.5 | 20.4 | 21.8 | 24.4 | 19.2 | 21.4 | 11.0%   | -21.1%  |
| Hotel, Motel   |      |      |      |      |      |      |      |      |      | 16.6 |         |         |
| STVR   |      |      |      |      |      |      |      |      |      | 4.7  |         |         |
| Private Home   | 3.2  | 4.3  | 4.2  | 4.4  | 4.6  | 4.7  | 5.0  | 5.2  | 4.2  | 5.4  | 28.3%   | -19.7%  |
| Campground   | 5.6  | 6.7  | 6.8  | 6.9  | 7.1  | 7.1  | 7.4  | 7.8  | 6.0  | 6.7  | 11.4%   | -22.2%  |
| 2nd Home   | 1.1  | 1.4  | 1.5  | 1.5  | 1.5  | 1.6  | 1.6  | 1.7  | 1.4  | 1.6  | 14.7%   | -17.0%  |
| Day Travel   | 5.4  | 8.2  | 8.2  | 8.6  | 8.9  | 9.2  | 9.7  | 10.2 | 4.4  | 6.3  | 43.3%   | -56.9%  |
| <b>TOTAL</b>   | 19.2 | 37.0 | 37.1 | 39.4 | 41.6 | 43.0 | 45.4 | 49.3 | 35.3 | 41.4 | 17.3%   | -28.4%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |      |      |      |      |      |      |      |      |      |      |         |         |
| Accommodations   | 3.0  | 9.0  | 9.2  | 10.4 | 11.4 | 12.0 | 12.6 | 14.4 | 13.0 | 14.9 | 14.6%   | -9.3%   |
| Food Service   | 4.8  | 9.6  | 9.7  | 10.5 | 11.2 | 11.6 | 12.5 | 13.5 | 8.0  | 9.4  | 17.0%   | -40.8%  |
| Food Stores  | 3.5  | 5.0  | 5.1  | 5.4  | 5.5  | 5.5  | 5.7  | 6.0  | 4.5  | 5.4  | 19.9%   | -24.0%  |
| Local Tran. & Gas  | 1.5  | 3.5  | 3.3  | 2.8  | 2.8  | 3.0  | 3.5  | 3.6  | 2.2  | 3.0  | 35.3%   | -38.5%  |
| Arts, Ent. & Rec.  | 3.1  | 5.5  | 5.4  | 5.8  | 6.1  | 6.1  | 6.4  | 6.8  | 4.4  | 4.7  | 6.9%    | -36.0%  |
| Retail Sales   | 3.2  | 4.3  | 4.3  | 4.5  | 4.6  | 4.6  | 4.8  | 5.0  | 3.1  | 3.9  | 27.2%   | -37.7%  |
| <b>TOTAL</b>   | 19.2 | 37.0 | 37.1 | 39.4 | 41.6 | 43.0 | 45.4 | 49.3 | 35.3 | 41.4 | 17.3%   | -28.4%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Crook County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003       | 2013       | 2014        | 2015        | 2016        | 2017        | 2018        | 2019        | 2020        | 2021        | 2020-21      | 2019-20       |
|---|------------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |            |            |             |             |             |             |             |             |             |             |              |               |
| Accom. & Food Serv.   | 3.7        | 6.5        | 7.1         | 8.4         | 9.1         | 9.7         | 10.5        | 11.1        | 10.2        | 12.4        | 20.8%        | -7.8%         |
| Arts, Ent. & Rec.   | 0.9        | 1.9        | 2.0         | 2.2         | 2.3         | 2.4         | 3.3         | 3.6         | 3.1         | 3.0         | -3.5%        | -13.9%        |
| Retail**  | 0.8        | 1.2        | 1.2         | 1.3         | 1.3         | 1.4         | 1.5         | 1.5         | 1.9         | 2.0         | 2.4%         | 26.5%         |
| Ground Tran.  | 0.1        | 0.2        | 0.2         | 0.2         | 0.2         | 0.2         | 0.3         | 0.3         | 0.3         | 0.2         | -27.0%       | -2.4%         |
| Other Travel*   | 0.1        | 0.1        | 0.1         | 0.1         | 0.1         | 0.1         | 0.2         | 0.2         | 0.2         | 0.2         | 34.1%        | 3.5%          |
| <b>TOTAL</b>  | <b>5.6</b> | <b>9.8</b> | <b>10.6</b> | <b>12.2</b> | <b>13.0</b> | <b>13.8</b> | <b>15.6</b> | <b>16.7</b> | <b>15.7</b> | <b>17.8</b> | <b>13.1%</b> | <b>-5.7%</b>  |
| <b>Travel Industry Employment (Jobs)</b>                      |            |            |             |             |             |             |             |             |             |             |              |               |
| Accom. & Food Serv.   | 210        | 240        | 250         | 290         | 300         | 310         | 330         | 330         | 300         | 340         | 12.3%        | -9.5%         |
| Arts, Ent. & Rec.   | 140        | 190        | 190         | 210         | 210         | 200         | 270         | 310         | 290         | 260         | -11.5%       | -4.3%         |
| Retail**  | 40         | 50         | 50          | 60          | 60          | 60          | 60          | 60          | 70          | 70          | 2.3%         | 18.0%         |
| Ground Tran.  | 0          | 10         | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 0           | -31.5%       | 1.2%          |
| Other Travel*   | 10         | 10         | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 30.0%        | 4.4%          |
| <b>TOTAL</b>  | <b>400</b> | <b>490</b> | <b>510</b>  | <b>570</b>  | <b>580</b>  | <b>580</b>  | <b>680</b>  | <b>710</b>  | <b>680</b>  | <b>690</b>  | <b>1.5%</b>  | <b>-4.2%</b>  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |            |            |             |             |             |             |             |             |             |             |              |               |
| Local Tax Receipts  | 0.3        | 0.2        | 0.2         | 0.3         | 0.3         | 0.3         | 0.3         | 0.4         | 0.3         | 0.3         | 2.1%         | -6.4%         |
| State Tax Receipts  | 0.6        | 1.0        | 1.0         | 1.1         | 1.2         | 1.4         | 1.5         | 1.6         | 1.3         | 1.5         | 16.4%        | -19.1%        |
| <b>TOTAL</b>  | <b>0.8</b> | <b>1.2</b> | <b>1.3</b>  | <b>1.4</b>  | <b>1.5</b>  | <b>1.7</b>  | <b>1.8</b>  | <b>2.0</b>  | <b>1.6</b>  | <b>1.9</b>  | <b>13.5%</b> | <b>-16.8%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Crook County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Crook County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$114  | \$202 | \$316 | \$561 | 2.8        | 1.8            |
| Private Home       | \$22   | \$66  | \$51  | \$155 | 2.4        | 3.0            |
| Other Overnight    | \$44   | \$127 | \$116 | \$334 | 2.6        | 2.9            |
| All Overnight      | \$90   | \$223 | \$231 | \$577 | 2.6        | 2.5            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |         |         |
|--------------------|---------------|---------|---------|--------------|---------|---------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 218,610       | 187,270 | 187,940 | 89,110       | 68,280  | 67,580  |
| Private Home       | 243,780       | 205,420 | 246,280 | 95,290       | 87,170  | 104,510 |
| Other Overnight    | 274,360       | 177,970 | 189,390 | 81,310       | 67,280  | 71,600  |
| All Overnight      | 736,750       | 570,660 | 623,600 | 265,710      | 222,730 | 243,690 |

|                    | Person-Trips |         |         | Party-Trips |        |        |
|--------------------|--------------|---------|---------|-------------|--------|--------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020   | 2021   |
| Hotel, Motel, STVR | 131,430      | 110,340 | 105,760 | 53,570      | 40,030 | 38,080 |
| Private Home       | 94,830       | 68,330  | 81,920  | 37,070      | 28,990 | 34,760 |
| Other Overnight    | 92,110       | 61,570  | 65,520  | 27,450      | 23,390 | 24,890 |
| All Overnight      | 318,370      | 240,240 | 253,210 | 118,090     | 92,410 | 97,740 |

# Curry County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$71,353 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$44 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$4 |
|--|-----|

### Visitor Shares

|   |     |
|---|-----|
| Travel Share of Total Employment (2021) | 20% |
|---|-----|

|  |     |
|--|-----|
| Overnight Visitor Day Share of Resident Population** | 20% |
|--|-----|

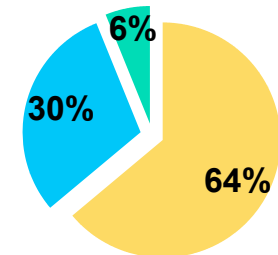
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

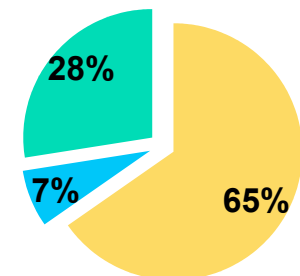
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Curry County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Curry County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 101.8 | 121.9 | 123.6 | 127.0 | 130.4 | 132.6 | 138.3 | 143.0 | 111.8 | 157.4 | ▲ 40.9%            | ▲ 2.5%  |
| Other                          | 1.9   | 3.6   | 3.5   | 2.8   | 2.6   | 2.9   | 3.3   | 3.4   | 1.6   | 2.9   | ▲ 86.6%            | ▲ 2.5%  |
| Visitor                        | 99.9  | 118.3 | 120.2 | 124.2 | 127.8 | 129.7 | 135.0 | 139.6 | 110.2 | 154.5 | ▲ 40.2%            | ▲ 2.5%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 33.0  | 40.2  | 41.9  | 46.3  | 49.1  | 51.2  | 54.4  | 57.8  | 56.6  | 67.6  | ▲ 19.5%            | ▲ 4.1%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 1,970 | 1,800 | 1,790 | 1,910 | 2,010 | 2,040 | 2,120 | 2,200 | 2,020 | 2,170 | ▲ 7.4%             | ▲ 0.5%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 2.8   | 3.6   | 3.7   | 4.0   | 4.2   | 4.6   | 4.8   | 5.0   | 4.7   | 6.1   | ▲ 28.0%            | ▲ 4.4%  |
| Local                          | 0.5   | 0.5   | 0.5   | 0.6   | 0.6   | 0.7   | 0.7   | 0.7   | 0.8   | 1.2   | ▲ 38.9%            | ▲ 5.2%  |
| State                          | 2.4   | 3.1   | 3.1   | 3.4   | 3.6   | 3.9   | 4.1   | 4.3   | 3.9   | 4.9   | ▲ 25.7%            | ▲ 4.2%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.



# Curry County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |       |       |       |       |       |       |       |       |       |       |         |         |
| Destination Spending   | 99.9  | 118.3 | 120.2 | 124.2 | 127.8 | 129.7 | 135.0 | 139.6 | 110.2 | 154.5 | 40.2%   | -21.1%  |
| Other Travel*  | 1.9   | 3.6   | 3.5   | 2.8   | 2.6   | 2.9   | 3.3   | 3.4   | 1.6   | 2.9   | 86.6%   | -53.2%  |
| <b>TOTAL</b>   | 101.8 | 121.9 | 123.6 | 127.0 | 130.4 | 132.6 | 138.3 | 143.0 | 111.8 | 157.4 | 40.9%   | -21.8%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Hotel, Motel, STVR**   | 34.9  | 42.0  | 42.8  | 45.2  | 46.9  | 48.3  | 50.4  | 51.8  | 51.4  | 83.2  | 62.0%   | -0.9%   |
| Hotel, Motel   |       |       |       |       |       |       |       |       |       | 66.1  |         |         |
| STVR   |       |       |       |       |       |       |       |       |       | 17.1  |         |         |
| Private Home   | 5.5   | 7.1   | 7.1   | 7.2   | 7.2   | 7.3   | 7.6   | 7.8   | 8.0   | 7.8   | -2.5%   | 2.9%    |
| Campground   | 25.3  | 31.3  | 31.7  | 32.4  | 33.2  | 33.4  | 34.8  | 36.3  | 32.2  | 35.8  | 11.3%   | -11.3%  |
| 2nd Home   | 2.9   | 3.5   | 3.6   | 3.6   | 3.6   | 3.7   | 3.8   | 3.9   | 3.2   | 3.6   | 14.3%   | -18.5%  |
| Day Travel   | 31.4  | 34.3  | 34.9  | 35.9  | 36.8  | 37.0  | 38.4  | 39.9  | 15.5  | 24.1  | 55.3%   | -61.1%  |
| <b>TOTAL</b>   | 99.9  | 118.3 | 120.2 | 124.2 | 127.8 | 129.7 | 135.0 | 139.6 | 110.2 | 154.5 | 40.2%   | -21.1%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |       |       |       |       |       |       |       |       |       |       |         |         |
| Accommodations   | 20.2  | 23.7  | 24.0  | 26.3  | 27.8  | 29.0  | 29.8  | 30.4  | 35.9  | 55.0  | 53.2%   | 18.1%   |
| Food Service   | 25.6  | 32.4  | 33.7  | 35.8  | 37.6  | 38.3  | 40.2  | 42.4  | 27.8  | 37.6  | 35.2%   | -34.6%  |
| Food Stores  | 13.6  | 16.6  | 17.2  | 17.9  | 18.0  | 17.6  | 18.0  | 18.7  | 15.4  | 18.8  | 22.1%   | -17.9%  |
| Local Tran. & Gas  | 8.3   | 13.8  | 13.2  | 11.1  | 10.5  | 11.3  | 12.9  | 13.1  | 8.5   | 13.5  | 59.8%   | -35.1%  |
| Arts, Ent. & Rec.  | 15.5  | 15.4  | 15.7  | 16.2  | 16.7  | 16.6  | 17.0  | 17.5  | 11.4  | 14.4  | 25.7%   | -34.8%  |
| Retail Sales   | 16.8  | 16.3  | 16.4  | 16.9  | 17.1  | 16.8  | 17.1  | 17.5  | 11.2  | 15.3  | 35.9%   | -35.6%  |
| <b>TOTAL</b>   | 99.9  | 118.3 | 120.2 | 124.2 | 127.8 | 129.7 | 135.0 | 139.6 | 110.2 | 154.5 | 40.2%   | -21.1%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Curry County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20      |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |              |
| Accom. & Food Serv.   | 23.5         | 30.6         | 32.7         | 36.6         | 39.3         | 41.2         | 44.2         | 47.1         | 44.1         | 54.8         | 24.3%        | -6.4%        |
| Arts, Ent. & Rec.   | 5.0          | 4.5          | 3.9          | 4.1          | 4.1          | 4.1          | 4.1          | 4.4          | 4.3          | 4.3          | 0.8%         | -2.8%        |
| Retail**  | 4.1          | 4.5          | 4.7          | 4.9          | 5.1          | 5.2          | 5.4          | 5.6          | 7.5          | 7.8          | 4.2%         | 34.0%        |
| Ground Tran.  | 0.4          | 0.4          | 0.4          | 0.5          | 0.5          | 0.5          | 0.5          | 0.6          | 0.6          | 0.5          | -11.5%       | 3.8%         |
| Other Travel*   | 0.1          | 0.1          | 0.1          | 0.1          | 0.1          | 0.1          | 0.1          | 0.1          | 0.1          | 0.2          | 25.2%        | 1.7%         |
| <b>TOTAL</b>  | <b>33.0</b>  | <b>40.2</b>  | <b>41.9</b>  | <b>46.3</b>  | <b>49.1</b>  | <b>51.2</b>  | <b>54.4</b>  | <b>57.8</b>  | <b>56.6</b>  | <b>67.6</b>  | <b>19.5%</b> | <b>-2.1%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |              |
| Accom. & Food Serv.   | 1,260        | 1,220        | 1,220        | 1,310        | 1,400        | 1,420        | 1,450        | 1,510        | 1,330        | 1,500        | 13.0%        | -12.3%       |
| Arts, Ent. & Rec.   | 460          | 370          | 340          | 360          | 380          | 380          | 420          | 430          | 380          | 350          | -8.4%        | -11.6%       |
| Retail**  | 230          | 190          | 210          | 220          | 220          | 220          | 230          | 230          | 290          | 300          | 3.9%         | 26.2%        |
| Ground Tran.  | 20           | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 20           | 10           | -16.9%       | 7.6%         |
| Other Travel*   | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 13.8%        | 9.2%         |
| <b>TOTAL</b>  | <b>1,970</b> | <b>1,800</b> | <b>1,790</b> | <b>1,910</b> | <b>2,010</b> | <b>2,040</b> | <b>2,120</b> | <b>2,200</b> | <b>2,020</b> | <b>2,170</b> | <b>7.4%</b>  | <b>-8.2%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |              |
| Local Tax Receipts  | 0.5          | 0.5          | 0.5          | 0.6          | 0.6          | 0.7          | 0.7          | 0.7          | 0.8          | 1.2          | 38.9%        | 21.6%        |
| State Tax Receipts  | 2.4          | 3.1          | 3.1          | 3.4          | 3.6          | 3.9          | 4.1          | 4.3          | 3.9          | 4.9          | 25.7%        | -8.3%        |
| <b>TOTAL</b>  | <b>2.8</b>   | <b>3.6</b>   | <b>3.7</b>   | <b>4.0</b>   | <b>4.2</b>   | <b>4.6</b>   | <b>4.8</b>   | <b>5.0</b>   | <b>4.7</b>   | <b>6.1</b>   | <b>28.0%</b> | <b>-4.2%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Curry County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Curry County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$111  | \$199 | \$308 | \$553 | 2.8        | 1.8            |
| Private Home       | \$34   | \$101 | \$79  | \$239 | 2.4        | 3.0            |
| Other Overnight    | \$57   | \$170 | \$154 | \$460 | 2.7        | 3.0            |
| All Overnight      | \$127  | \$294 | \$342 | \$795 | 2.7        | 2.3            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |         |         |
|--------------------|---------------|-----------|-----------|--------------|---------|---------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 467,870       | 489,390   | 751,850   | 190,710      | 178,440 | 270,220 |
| Private Home       | 230,240       | 253,020   | 231,360   | 89,990       | 107,360 | 98,170  |
| Other Overnight    | 936,130       | 653,460   | 694,900   | 271,860      | 241,360 | 256,680 |
| All Overnight      | 1,634,250     | 1,395,860 | 1,678,110 | 552,570      | 527,170 | 625,070 |

|                    | Person-Trips |         |         | Party-Trips |         |         |
|--------------------|--------------|---------|---------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 281,290      | 288,350 | 417,850 | 114,660     | 104,600 | 150,410 |
| Private Home       | 89,560       | 84,160  | 76,960  | 35,010      | 35,710  | 32,660  |
| Other Overnight    | 302,780      | 217,510 | 231,320 | 88,210      | 80,560  | 85,680  |
| All Overnight      | 673,620      | 590,020 | 726,130 | 237,880     | 220,870 | 268,740 |

# Deschutes County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job | \$116,665 |
|--|-----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$31 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$6 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 6% |
|---|----|

|  |     |
|--|-----|
| Overnight Visitor Day Share of Resident Population** | 11% |
|--|-----|

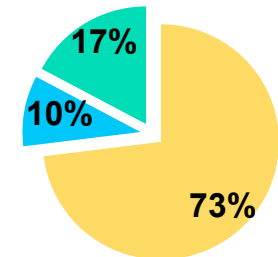
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

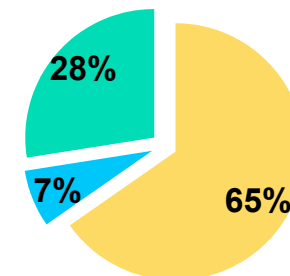
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Deschutes County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Deschutes County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 318.7 | 596.1 | 622.8 | 663.7 | 715.8 | 759.6 | 814.5 | 886.5 | 568.1 | 909.7 | ▲ 60.1%            | ▲ 6.0%  |
| Other                          | 29.6  | 63.9  | 66.3  | 67.5  | 71.0  | 80.4  | 94.9  | 97.2  | 43.1  | 79.4  | ▲ 84.2%            | ▲ 5.6%  |
| Visitor                        | 289.1 | 532.2 | 556.5 | 596.2 | 644.9 | 679.2 | 719.7 | 789.4 | 525.1 | 830.3 | ▲ 58.1%            | ▲ 6.0%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 78.3  | 140.8 | 154.6 | 175.5 | 187.7 | 202.5 | 226.2 | 246.2 | 218.1 | 261.1 | ▲ 19.7%            | ▲ 6.9%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 4,180 | 5,870 | 6,270 | 6,740 | 6,970 | 7,110 | 7,560 | 7,870 | 6,600 | 7,300 | ▲ 10.5%            | ▲ 3.1%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 13.8  | 23.9  | 25.6  | 28.4  | 31.3  | 35.3  | 37.5  | 41.9  | 35.6  | 48.0  | ▲ 35.1%            | ▲ 7.2%  |
| Local                          | 6.4   | 9.4   | 10.2  | 11.6  | 13.2  | 14.0  | 14.6  | 17.0  | 16.0  | 22.8  | ▲ 42.0%            | ▲ 7.3%  |
| State                          | 7.3   | 14.5  | 15.4  | 16.8  | 18.2  | 21.2  | 22.9  | 24.9  | 19.5  | 25.3  | ▲ 29.4%            | ▲ 7.1%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Deschutes County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 289.1        | 532.2        | 556.5        | 596.2        | 644.9        | 679.2        | 719.7        | 789.4        | 525.1        | 830.3        | 58.1%        | -33.5%        |
| Other Travel*  | 29.6         | 63.9         | 66.3         | 67.5         | 71.0         | 80.4         | 94.9         | 97.2         | 43.1         | 79.4         | 84.2%        | -55.7%        |
| <b>TOTAL</b>   | <b>318.7</b> | <b>596.1</b> | <b>622.8</b> | <b>663.7</b> | <b>715.8</b> | <b>759.6</b> | <b>814.5</b> | <b>886.5</b> | <b>568.1</b> | <b>909.7</b> | <b>60.1%</b> | <b>-35.9%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 141.8        | 296.3        | 314.6        | 343.9        | 381.2        | 401.8        | 426.0        | 480.2        | 322.1        | 543.6        | 68.7%        | -32.9%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 303.1        |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 240.5        |              |               |
| Private Home   | 52.0         | 88.5         | 90.7         | 96.2         | 101.2        | 109.1        | 117.0        | 123.2        | 90.3         | 127.5        | 41.2%        | -26.7%        |
| Campground   | 20.7         | 25.9         | 26.2         | 26.7         | 27.4         | 27.6         | 28.8         | 30.1         | 30.8         | 34.2         | 11.3%        | 2.3%          |
| 2nd Home   | 22.4         | 35.9         | 36.6         | 36.9         | 37.2         | 39.0         | 40.4         | 41.4         | 33.8         | 38.6         | 14.3%        | -18.5%        |
| Day Travel   | 52.3         | 85.7         | 88.3         | 92.5         | 97.8         | 101.7        | 107.4        | 114.5        | 48.1         | 86.4         | 79.7%        | -58.0%        |
| <b>TOTAL</b>   | <b>289.1</b> | <b>532.2</b> | <b>556.5</b> | <b>596.2</b> | <b>644.9</b> | <b>679.2</b> | <b>719.7</b> | <b>789.4</b> | <b>525.1</b> | <b>830.3</b> | <b>58.1%</b> | <b>-33.5%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 69.3         | 134.4        | 146.3        | 165.8        | 187.4        | 197.6        | 204.2        | 237.7        | 211.4        | 350.9        | 66.0%        | -11.1%        |
| Food Service   | 72.9         | 144.4        | 152.1        | 165.5        | 181.3        | 189.8        | 202.8        | 222.1        | 116.3        | 169.0        | 45.3%        | -47.6%        |
| Food Stores  | 26.8         | 44.0         | 46.1         | 48.8         | 50.3         | 50.8         | 52.4         | 55.4         | 43.8         | 67.1         | 53.4%        | -21.1%        |
| Local Tran. & Gas  | 22.9         | 58.8         | 57.4         | 49.4         | 49.1         | 54.1         | 62.7         | 66.1         | 34.5         | 57.3         | 66.2%        | -47.8%        |
| Arts, Ent. & Rec.  | 40.4         | 60.3         | 62.2         | 65.8         | 70.2         | 71.9         | 74.9         | 79.5         | 48.9         | 62.6         | 28.0%        | -38.4%        |
| Retail Sales   | 46.0         | 67.1         | 68.4         | 71.6         | 75.0         | 76.1         | 78.5         | 82.8         | 51.5         | 77.1         | 49.7%        | -37.8%        |
| Visitor Air Tran.  | 10.8         | 23.2         | 23.9         | 29.3         | 31.6         | 38.8         | 44.2         | 45.8         | 18.7         | 46.4         | 148.0%       | -59.2%        |
| <b>TOTAL</b>   | <b>289.1</b> | <b>532.2</b> | <b>556.5</b> | <b>596.2</b> | <b>644.9</b> | <b>679.2</b> | <b>719.7</b> | <b>789.4</b> | <b>525.1</b> | <b>830.3</b> | <b>58.1%</b> | <b>-33.5%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Deschutes County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 52.5         | 100.7        | 111.0        | 128.4        | 136.6        | 148.8        | 166.3        | 181.6        | 156.0        | 191.0        | 22.4%        | -14.1%        |
| Arts, Ent. & Rec.   | 12.0         | 18.7         | 21.1         | 22.6         | 23.7         | 24.9         | 28.7         | 31.5         | 26.3         | 32.2         | 22.4%        | -16.6%        |
| Retail**  | 9.2          | 14.5         | 15.2         | 16.4         | 17.6         | 18.5         | 19.8         | 20.9         | 25.4         | 27.5         | 8.3%         | 21.6%         |
| Ground Tran.  | 1.2          | 2.1          | 2.2          | 2.4          | 2.8          | 3.0          | 3.2          | 3.6          | 3.0          | 3.2          | 7.3%         | -16.5%        |
| Other Travel*   | 3.3          | 4.8          | 5.1          | 5.7          | 7.0          | 7.4          | 8.3          | 8.5          | 7.4          | 7.2          | -2.8%        | -13.0%        |
| <b>TOTAL</b>  | <b>78.3</b>  | <b>140.8</b> | <b>154.6</b> | <b>175.5</b> | <b>187.7</b> | <b>202.5</b> | <b>226.2</b> | <b>246.2</b> | <b>218.1</b> | <b>261.1</b> | <b>19.7%</b> | <b>-11.4%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 2,780        | 4,160        | 4,420        | 4,830        | 4,960        | 5,030        | 5,310        | 5,520        | 4,550        | 5,070        | 11.5%        | -17.6%        |
| Arts, Ent. & Rec.   | 740          | 900          | 1,010        | 1,030        | 1,080        | 1,140        | 1,260        | 1,350        | 1,020        | 1,180        | 14.9%        | -24.2%        |
| Retail**  | 460          | 600          | 620          | 650          | 650          | 660          | 690          | 700          | 770          | 790          | 2.8%         | 10.5%         |
| Ground Tran.  | 50           | 70           | 70           | 70           | 80           | 80           | 80           | 90           | 70           | 70           | 0.7%         | -13.5%        |
| Other Travel*   | 140          | 140          | 150          | 160          | 200          | 200          | 220          | 210          | 190          | 180          | -3.6%        | -13.1%        |
| <b>TOTAL</b>  | <b>4,180</b> | <b>5,870</b> | <b>6,270</b> | <b>6,740</b> | <b>6,970</b> | <b>7,110</b> | <b>7,560</b> | <b>7,870</b> | <b>6,600</b> | <b>7,300</b> | <b>10.6%</b> | <b>-16.1%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Local Tax Receipts  | 6.4          | 9.4          | 10.2         | 11.6         | 13.2         | 14.0         | 14.6         | 17.0         | 16.0         | 22.8         | 42.0%        | -5.7%         |
| State Tax Receipts  | 7.3          | 14.5         | 15.4         | 16.8         | 18.2         | 21.2         | 22.9         | 24.9         | 19.5         | 25.3         | 29.4%        | -21.6%        |
| <b>TOTAL</b>  | <b>13.8</b>  | <b>23.9</b>  | <b>25.6</b>  | <b>28.4</b>  | <b>31.3</b>  | <b>35.3</b>  | <b>37.5</b>  | <b>41.9</b>  | <b>35.6</b>  | <b>48.0</b>  | <b>35.1%</b> | <b>-15.1%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Deschutes County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Deschutes County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |         | Party Size | Length of Stay |
|--------------------|--------|-------|-------|---------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip    |            |                |
| Hotel, Motel, STVR | \$148  | \$338 | \$404 | \$925   | 2.7        | 2.3            |
| Private Home       | \$50   | \$178 | \$108 | \$401   | 2.2        | 3.7            |
| Other Overnight    | \$44   | \$144 | \$110 | \$366   | 2.5        | 3.3            |
| All Overnight      | \$163  | \$454 | \$404 | \$1,165 | 2.5        | 2.9            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 2,817,460     | 1,906,050 | 3,674,770 | 1,186,380    | 733,710   | 1,344,610 |
| Private Home       | 2,510,630     | 2,325,890 | 2,551,760 | 1,061,120    | 986,020   | 1,180,860 |
| Other Overnight    | 2,042,110     | 1,567,600 | 1,669,690 | 638,150      | 619,270   | 659,670   |
| All Overnight      | 7,370,200     | 5,799,540 | 7,896,210 | 2,885,650    | 2,339,000 | 3,185,150 |

|                    | Person-Trips |           |           | Party-Trips |         |           |
|--------------------|--------------|-----------|-----------|-------------|---------|-----------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021      |
| Hotel, Motel, STVR | 1,489,510    | 944,160   | 1,610,340 | 620,730     | 354,970 | 587,860   |
| Private Home       | 825,510      | 653,160   | 716,590   | 335,040     | 274,850 | 318,060   |
| Other Overnight    | 609,300      | 475,250   | 506,150   | 189,890     | 187,070 | 199,250   |
| All Overnight      | 2,924,320    | 2,072,570 | 2,833,080 | 1,145,660   | 816,880 | 1,105,170 |



# Douglas County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$74,876 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$36 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$4 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 6% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 6% |
|--|----|

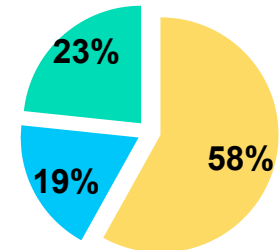
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\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

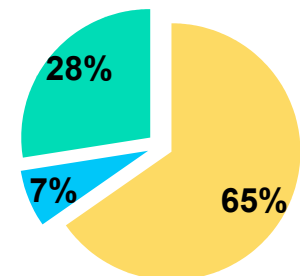
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Douglas County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Douglas County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 185.7 | 224.1 | 229.5 | 230.9 | 233.2 | 237.5 | 245.7 | 252.6 | 171.7 | 253.7 | ▲ 47.7%            | ▲ 1.7%  |
| Other                          | 9.6   | 18.4  | 17.7  | 14.3  | 12.5  | 13.9  | 16.0  | 16.2  | 7.6   | 14.2  | ▲ 86.6%            | ▲ 2.2%  |
| Visitor                        | 176.1 | 205.7 | 211.8 | 216.6 | 220.7 | 223.6 | 229.7 | 236.4 | 164.1 | 239.5 | ▲ 45.9%            | ▲ 1.7%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 49.8  | 58.6  | 61.5  | 64.5  | 68.1  | 70.4  | 72.8  | 76.9  | 74.9  | 88.1  | ▲ 17.6%            | ▲ 3.2%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 3,280 | 2,940 | 2,980 | 3,050 | 3,130 | 3,160 | 3,140 | 3,180 | 2,970 | 3,240 | ▲ 9.0%             | ▼ -0.1% |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 5.7   | 7.1   | 7.4   | 7.7   | 8.1   | 8.8   | 9.0   | 9.3   | 8.2   | 10.5  | ▲ 27.0%            | ▲ 3.5%  |
| Local                          | 0.9   | 1.1   | 1.2   | 1.3   | 1.4   | 1.4   | 1.4   | 1.5   | 1.7   | 2.2   | ▲ 29.6%            | ▲ 4.9%  |
| State                          | 4.7   | 6.0   | 6.2   | 6.4   | 6.7   | 7.4   | 7.6   | 7.9   | 6.5   | 8.3   | ▲ 26.4%            | ▲ 3.1%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Douglas County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 176.1        | 205.7        | 211.8        | 216.6        | 220.7        | 223.6        | 229.7        | 236.4        | 164.1        | 239.5        | 45.9%        | -30.6%        |
| Other Travel*  | 9.6          | 18.4         | 17.7         | 14.3         | 12.5         | 13.9         | 16.0         | 16.2         | 7.6          | 14.2         | 86.6%        | -53.2%        |
| <b>TOTAL</b>   | <b>185.7</b> | <b>224.1</b> | <b>229.5</b> | <b>230.9</b> | <b>233.2</b> | <b>237.5</b> | <b>245.7</b> | <b>252.6</b> | <b>171.7</b> | <b>253.7</b> | <b>47.7%</b> | <b>-32.0%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 51.9         | 58.9         | 62.2         | 65.3         | 67.6         | 68.6         | 67.6         | 69.6         | 68.8         | 96.0         | 39.6%        | -1.1%         |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 89.6         |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 6.5          |              |               |
| Private Home   | 25.8         | 34.2         | 34.5         | 34.3         | 34.5         | 35.2         | 36.9         | 37.6         | 28.0         | 42.0         | 50.2%        | -25.5%        |
| Campground   | 15.6         | 19.6         | 19.9         | 20.1         | 20.6         | 20.8         | 21.7         | 22.6         | 19.6         | 21.9         | 11.6%        | -13.1%        |
| 2nd Home   | 2.6          | 4.1          | 4.2          | 4.2          | 4.2          | 4.3          | 4.5          | 4.6          | 3.8          | 4.3          | 14.3%        | -18.5%        |
| Day Travel   | 80.3         | 88.8         | 91.1         | 92.7         | 93.7         | 94.6         | 98.9         | 102.1        | 43.9         | 75.2         | 71.2%        | -57.0%        |
| <b>TOTAL</b>   | <b>176.1</b> | <b>205.7</b> | <b>211.8</b> | <b>216.6</b> | <b>220.7</b> | <b>223.6</b> | <b>229.7</b> | <b>236.4</b> | <b>164.1</b> | <b>239.5</b> | <b>45.9%</b> | <b>-30.6%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 27.2         | 30.5         | 32.4         | 35.6         | 37.8         | 38.5         | 35.2         | 35.8         | 38.2         | 53.3         | 39.7%        | 6.7%          |
| Food Service   | 45.3         | 57.5         | 60.2         | 63.4         | 65.7         | 67.2         | 71.0         | 74.6         | 50.4         | 72.9         | 44.7%        | -32.5%        |
| Food Stores  | 19.7         | 24.5         | 25.5         | 26.4         | 26.3         | 26.0         | 26.7         | 27.5         | 19.4         | 27.4         | 41.3%        | -29.3%        |
| Local Tran. & Gas  | 14.6         | 23.7         | 23.1         | 19.2         | 18.0         | 19.4         | 22.3         | 22.5         | 13.8         | 22.5         | 63.4%        | -39.0%        |
| Arts, Ent. & Rec.  | 37.8         | 37.9         | 38.7         | 39.6         | 40.4         | 40.4         | 41.8         | 42.6         | 21.8         | 32.3         | 48.1%        | -48.8%        |
| Retail Sales   | 31.6         | 31.4         | 31.9         | 32.4         | 32.4         | 32.0         | 32.8         | 33.4         | 20.6         | 31.0         | 50.8%        | -38.4%        |
| <b>TOTAL</b>   | <b>176.1</b> | <b>205.7</b> | <b>211.8</b> | <b>216.6</b> | <b>220.7</b> | <b>223.6</b> | <b>229.7</b> | <b>236.4</b> | <b>164.1</b> | <b>239.5</b> | <b>45.9%</b> | <b>-30.6%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Douglas County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 29.8  | 35.6  | 36.9  | 38.9  | 41.8  | 43.4  | 45.7  | 48.5  | 44.5  | 54.4  | 22.2%   | -8.2%   |
| Arts, Ent. & Rec.   | 11.8  | 13.7  | 15.0  | 15.5  | 16.3  | 16.7  | 16.3  | 17.2  | 17.2  | 19.9  | 16.2%   | -0.4%   |
| Retail**  | 6.6   | 7.4   | 7.8   | 8.1   | 8.4   | 8.6   | 9.0   | 9.2   | 11.3  | 11.7  | 3.9%    | 22.0%   |
| Ground Tran.  | 0.7   | 0.8   | 0.9   | 0.9   | 1.0   | 1.0   | 1.1   | 1.2   | 1.1   | 1.1   | -6.4%   | -2.7%   |
| Other Travel*   | 0.8   | 1.0   | 1.0   | 1.0   | 0.7   | 0.7   | 0.7   | 0.8   | 0.8   | 1.0   | 21.2%   | 1.9%    |
| <b>TOTAL</b>  | 49.8  | 58.6  | 61.5  | 64.5  | 68.1  | 70.4  | 72.8  | 76.9  | 74.9  | 88.1  | 17.6%   | -2.6%   |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 1,950 | 1,780 | 1,790 | 1,830 | 1,900 | 1,910 | 1,940 | 1,950 | 1,770 | 1,970 | 11.0%   | -9.3%   |
| Arts, Ent. & Rec.   | 870   | 760   | 770   | 780   | 810   | 830   | 780   | 790   | 720   | 790   | 9.8%    | -8.6%   |
| Retail**  | 370   | 340   | 340   | 360   | 360   | 360   | 370   | 370   | 410   | 410   | 0.4%    | 12.3%   |
| Ground Tran.  | 30    | 30    | 30    | 30    | 30    | 30    | 30    | 30    | 30    | 30    | -12.1%  | 0.8%    |
| Other Travel*   | 50    | 50    | 50    | 50    | 40    | 40    | 40    | 40    | 40    | 40    | 10.4%   | -5.2%   |
| <b>TOTAL</b>  | 3,280 | 2,940 | 2,980 | 3,050 | 3,130 | 3,160 | 3,140 | 3,180 | 2,970 | 3,240 | 9.1%    | -6.6%   |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Local Tax Receipts  | 0.9   | 1.1   | 1.2   | 1.3   | 1.4   | 1.4   | 1.4   | 1.5   | 1.7   | 2.2   | 29.6%   | 15.4%   |
| State Tax Receipts  | 4.7   | 6.0   | 6.2   | 6.4   | 6.7   | 7.4   | 7.6   | 7.9   | 6.5   | 8.3   | 26.4%   | -16.7%  |
| <b>TOTAL</b>  | 5.7   | 7.1   | 7.4   | 7.7   | 8.1   | 8.8   | 9.0   | 9.3   | 8.2   | 10.5  | 27.0%   | -11.7%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Douglas County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Douglas County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$128  | \$245 | \$355 | \$678 | 2.8        | 1.9            |
| Private Home       | \$40   | \$139 | \$95  | \$333 | 2.4        | 3.5            |
| Other Overnight    | \$61   | \$191 | \$165 | \$512 | 2.7        | 3.1            |
| All Overnight      | \$117  | \$314 | \$303 | \$823 | 2.6        | 2.7            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |         |           |
|--------------------|---------------|-----------|-----------|--------------|---------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020    | 2021      |
| Hotel, Motel, STVR | 617,420       | 680,260   | 876,090   | 252,400      | 247,170 | 316,600   |
| Private Home       | 1,132,580     | 813,790   | 1,140,250 | 435,310      | 339,710 | 475,330   |
| Other Overnight    | 800,390       | 555,750   | 591,120   | 234,550      | 207,240 | 220,440   |
| All Overnight      | 2,550,400     | 2,049,800 | 2,607,450 | 922,270      | 794,120 | 1,012,370 |

|                    | Person-Trips |         |         | Party-Trips |         |         |
|--------------------|--------------|---------|---------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 334,900      | 366,420 | 458,710 | 136,900     | 132,900 | 165,880 |
| Private Home       | 377,970      | 234,940 | 325,020 | 145,310     | 98,120  | 135,520 |
| Other Overnight    | 251,170      | 179,000 | 190,380 | 73,590      | 66,690  | 70,940  |
| All Overnight      | 964,040      | 780,360 | 974,100 | 355,800     | 297,700 | 372,340 |

# Gilliam/Sherman County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$89,054 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$29 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$4 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 3% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 9% |
|--|----|

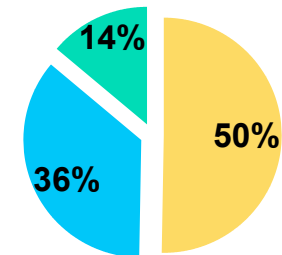
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

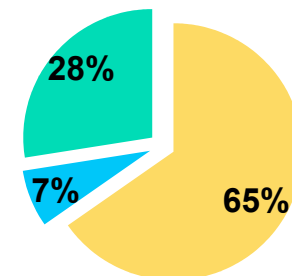
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Gilliam/Sherman County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Gilliam/Sherman County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 7.9  | 8.8  | 9.0  | 9.1  | 9.4  | 9.9  | 10.3 | 10.7 | 7.1  | 7.8  | ▲ 10.4%            | ▼ -0.1% |
| Other                          | 0.3  | 0.6  | 0.6  | 0.4  | 0.4  | 0.5  | 0.5  | 0.5  | 0.3  | 0.5  | ▲ 86.6%            | ▲ 2.5%  |
| Visitor                        | 7.6  | 8.2  | 8.4  | 8.7  | 9.0  | 9.4  | 9.7  | 10.1 | 6.8  | 7.4  | ▲ 7.5%             | ▼ -0.2% |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 1.9  | 2.2  | 2.2  | 2.3  | 2.4  | 2.6  | 2.8  | 3.2  | 2.7  | 2.2  | ▼ -19.7%           | ▲ 0.6%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 140  | 100  | 100  | 100  | 100  | 110  | 110  | 130  | 110  | 80   | ▼ -23.2%           | ▼ -2.8% |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 0.2  | 0.3  | 0.3  | 0.3  | 0.3  | 0.3  | 0.3  | 0.4  | 0.3  | 0.3  | ▲ 6.6%             | ▲ 2.4%  |
| State                          | 0.2  | 0.2  | 0.2  | 0.2  | 0.3  | 0.3  | 0.3  | 0.3  | 0.3  | 0.3  | ▲ 3.6%             | ▲ 1.9%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Gilliam/Sherman County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018        | 2019        | 2020       | 2021       | 2020-21      | 2019-20       |
|--|------------|------------|------------|------------|------------|------------|-------------|-------------|------------|------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |            |            |            |            |            |            |             |             |            |            |              |               |
| Destination Spending   | 7.6        | 8.2        | 8.4        | 8.7        | 9.0        | 9.4        | 9.7         | 10.1        | 6.8        | 7.4        | 7.5%         | -32.4%        |
| Other Travel*  | 0.3        | 0.6        | 0.6        | 0.4        | 0.4        | 0.5        | 0.5         | 0.5         | 0.3        | 0.5        | 86.6%        | -52.3%        |
| <b>TOTAL</b>   | <b>7.9</b> | <b>8.8</b> | <b>9.0</b> | <b>9.1</b> | <b>9.4</b> | <b>9.9</b> | <b>10.3</b> | <b>10.7</b> | <b>7.1</b> | <b>7.8</b> | <b>10.4%</b> | <b>-33.4%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |            |            |            |            |            |            |             |             |            |            |              |               |
| Hotel, Motel, STVR**   | 3.1        | 3.4        | 3.5        | 3.7        | 4.0        | 4.3        | 4.4         | 4.6         | 3.3        | 3.0        | -7.7%        | -28.0%        |
| Hotel, Motel   |            |            |            |            |            |            |             |             |            | 2.6        |              |               |
| STVR   |            |            |            |            |            |            |             |             |            | 0.4        |              |               |
| Private Home   | 0.5        | 0.7        | 0.7        | 0.7        | 0.7        | 0.7        | 0.8         | 0.8         | 0.7        | 0.8        | 26.5%        | -14.6%        |
| Campground   | 1.6        | 1.9        | 1.9        | 1.9        | 2.0        | 2.0        | 2.1         | 2.1         | 1.8        | 2.0        | 11.8%        | -15.8%        |
| 2nd Home   | 0.1        | 0.1        | 0.1        | 0.1        | 0.2        | 0.2        | 0.2         | 0.2         | 0.1        | 0.2        | 14.7%        | -15.3%        |
| Day Travel   | 2.3        | 2.1        | 2.1        | 2.2        | 2.2        | 2.3        | 2.4         | 2.4         | 0.9        | 1.3        | 38.8%        | -61.8%        |
| <b>TOTAL</b>   | <b>7.6</b> | <b>8.2</b> | <b>8.4</b> | <b>8.7</b> | <b>9.0</b> | <b>9.4</b> | <b>9.7</b>  | <b>10.1</b> | <b>6.8</b> | <b>7.4</b> | <b>7.5%</b>  | <b>-32.4%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |            |            |            |            |            |            |             |             |            |            |              |               |
| Accommodations   | 1.5        | 1.9        | 2.0        | 2.2        | 2.3        | 2.5        | 2.6         | 2.7         | 2.1        | 2.0        | -5.4%        | -20.5%        |
| Food Service   | 1.9        | 2.1        | 2.2        | 2.3        | 2.4        | 2.6        | 2.7         | 2.8         | 1.9        | 2.1        | 11.0%        | -32.5%        |
| Food Stores  | 1.0        | 1.1        | 1.2        | 1.2        | 1.2        | 1.2        | 1.2         | 1.3         | 0.9        | 1.1        | 16.8%        | -28.7%        |
| Local Tran. & Gas  | 0.6        | 0.8        | 0.8        | 0.7        | 0.6        | 0.7        | 0.8         | 0.8         | 0.5        | 0.6        | 28.6%        | -42.5%        |
| Arts, Ent. & Rec.  | 1.4        | 1.2        | 1.3        | 1.3        | 1.3        | 1.4        | 1.4         | 1.5         | 0.9        | 0.9        | 1.0%         | -39.3%        |
| Retail Sales   | 1.2        | 1.0        | 1.0        | 1.0        | 1.0        | 1.0        | 1.0         | 1.1         | 0.5        | 0.7        | 22.6%        | -48.6%        |
| <b>TOTAL</b>   | <b>7.6</b> | <b>8.2</b> | <b>8.4</b> | <b>8.7</b> | <b>9.0</b> | <b>9.4</b> | <b>9.7</b>  | <b>10.1</b> | <b>6.8</b> | <b>7.4</b> | <b>7.5%</b>  | <b>-32.4%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.



# Gilliam/Sherman County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018       | 2019       | 2020       | 2021       | 2020-21       | 2019-20       |
|---|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|---------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |            |            |            |            |            |            |            |            |            |            |               |               |
| Accom. & Food Serv.   | 1.2        | 1.4        | 1.4        | 1.5        | 1.6        | 1.7        | 1.8        | 2.2        | 1.7        | 1.4        | -16.1%        | -24.2%        |
| Arts, Ent. & Rec.   | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.5        | 0.4        | 0.3        | -32.2%        | -5.5%         |
| Retail**  | 0.3        | 0.3        | 0.3        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.5        | 0.4        | -21.6%        | 14.5%         |
| Ground Tran.  | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.1        | 0.1        | 0.1        | 0.1        | 0.0        | -33.6%        | -10.2%        |
| Other Travel*   | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 11.6%         | 4.1%          |
| <b>TOTAL</b>  | <b>1.9</b> | <b>2.2</b> | <b>2.2</b> | <b>2.3</b> | <b>2.4</b> | <b>2.6</b> | <b>2.8</b> | <b>3.2</b> | <b>2.7</b> | <b>2.2</b> | <b>-19.7%</b> | <b>-15.9%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |            |            |            |            |            |            |            |            |            |            |               |               |
| Accom. & Food Serv.   | 90         | 60         | 60         | 70         | 70         | 70         | 70         | 90         | 70         | 60         | -19.3%        | -19.2%        |
| Arts, Ent. & Rec.   | 30         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 10         | -37.1%        | -0.1%         |
| Retail**  | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 10         | -24.2%        | 5.4%          |
| Ground Tran.  | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | -37.7%        | -6.9%         |
| Other Travel*   | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 4.6%          | -1.6%         |
| <b>TOTAL</b>  | <b>140</b> | <b>100</b> | <b>100</b> | <b>100</b> | <b>100</b> | <b>110</b> | <b>110</b> | <b>130</b> | <b>110</b> | <b>80</b>  | <b>-27.3%</b> | <b>-15.4%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |            |            |            |            |            |            |            |            |            |            |               |               |
| Local Tax Receipts  | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 51.6%         | -10.6%        |
| State Tax Receipts  | 0.2        | 0.2        | 0.2        | 0.2        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 3.6%          | -24.9%        |
| <b>TOTAL</b>  | <b>0.2</b> | <b>0.3</b> | <b>0.3</b> | <b>0.3</b> | <b>0.3</b> | <b>0.3</b> | <b>0.3</b> | <b>0.4</b> | <b>0.3</b> | <b>0.3</b> | <b>6.6%</b>   | <b>-24.2%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Gilliam/Sherman County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Gilliam/Sherman County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$86   | \$152 | \$240 | \$422 | 2.8        | 1.8            |
| Private Home       | \$23   | \$68  | \$53  | \$160 | 2.4        | 3.0            |
| Other Overnight    | \$42   | \$127 | \$114 | \$344 | 2.7        | 3.0            |
| All Overnight      | \$73   | \$184 | \$192 | \$485 | 2.6        | 2.5            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |        |        |
|--------------------|---------------|---------|---------|--------------|--------|--------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020   | 2021   |
| Hotel, Motel, STVR | 49,670        | 39,360  | 35,320  | 20,250       | 14,270 | 12,700 |
| Private Home       | 36,440        | 31,500  | 37,260  | 14,240       | 13,370 | 15,810 |
| Other Overnight    | 72,450        | 48,470  | 51,540  | 20,990       | 17,870 | 19,000 |
| All Overnight      | 158,570       | 119,330 | 124,120 | 55,480       | 45,510 | 47,520 |

|                    | Person-Trips |        |        | Party-Trips |        |        |
|--------------------|--------------|--------|--------|-------------|--------|--------|
|                    | 2019         | 2020   | 2021   | 2019        | 2020   | 2021   |
| Hotel, Motel, STVR | 29,860       | 23,550 | 20,010 | 12,170      | 8,520  | 7,210  |
| Private Home       | 14,180       | 10,480 | 12,390 | 5,540       | 4,450  | 5,260  |
| Other Overnight    | 23,330       | 16,080 | 17,110 | 6,780       | 5,950  | 6,320  |
| All Overnight      | 67,370       | 50,110 | 49,510 | 24,490      | 18,910 | 18,790 |

# Grant County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$65,866 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$27 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$4 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 5% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 8% |
|--|----|

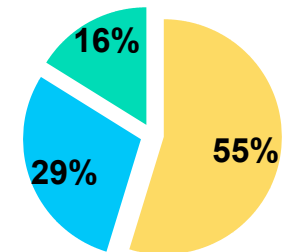
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

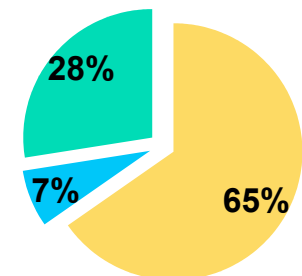
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Grant County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Grant County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 8.6  | 10.1 | 10.5 | 10.5 | 10.7 | 11.2 | 11.7 | 12.1 | 6.8  | 13.1 | ▲ 91.8%            | ▲ 2.4%  |
| Other                          | 0.6  | 1.2  | 1.1  | 0.9  | 0.8  | 0.9  | 1.0  | 1.1  | 0.5  | 0.9  | ▲ 86.6%            | ▲ 2.1%  |
| Visitor                        | 8.0  | 8.9  | 9.4  | 9.6  | 9.9  | 10.3 | 10.7 | 11.0 | 6.3  | 12.2 | ▲ 92.2%            | ▲ 2.4%  |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 2.2  | 2.4  | 2.5  | 2.7  | 2.8  | 3.0  | 3.2  | 3.4  | 2.9  | 3.4  | ▲ 17.7%            | ▲ 2.4%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 200  | 170  | 170  | 170  | 180  | 180  | 180  | 190  | 160  | 190  | ▲ 15.3%            | ▼ -0.4% |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 0.3  | 0.3  | 0.4  | 0.4  | 0.4  | 0.4  | 0.5  | 0.5  | 0.3  | 0.5  | ▲ 52.9%            | ▲ 3.2%  |
| Local                          | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | ▲ 106.4%           | ▲ 5.1%  |
| State                          | 0.2  | 0.3  | 0.3  | 0.3  | 0.3  | 0.4  | 0.4  | 0.4  | 0.3  | 0.4  | ▲ 40.7%            | ▲ 2.7%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Grant County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003       | 2013        | 2014        | 2015        | 2016        | 2017        | 2018        | 2019        | 2020       | 2021        | 2020-21      | 2019-20       |
|--|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|------------|-------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |            |             |             |             |             |             |             |             |            |             |              |               |
| Destination Spending   | 8.0        | 8.9         | 9.4         | 9.6         | 9.9         | 10.3        | 10.7        | 11.0        | 6.3        | 12.2        | 92.2%        | -42.7%        |
| Other Travel*  | 0.6        | 1.2         | 1.1         | 0.9         | 0.8         | 0.9         | 1.0         | 1.1         | 0.5        | 0.9         | 86.6%        | -53.3%        |
| <b>TOTAL</b>   | <b>8.6</b> | <b>10.1</b> | <b>10.5</b> | <b>10.5</b> | <b>10.7</b> | <b>11.2</b> | <b>11.7</b> | <b>12.1</b> | <b>6.8</b> | <b>13.1</b> | <b>91.8%</b> | <b>-43.6%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |            |             |             |             |             |             |             |             |            |             |              |               |
| Hotel, Motel, STVR**   | 2.4        | 2.7         | 3.0         | 3.2         | 3.4         | 3.7         | 3.8         | 4.0         | 1.7        | 5.6         | 231.3%       | -57.7%        |
| Hotel, Motel   |            |             |             |             |             |             |             |             |            | 4.1         |              |               |
| STVR   |            |             |             |             |             |             |             |             |            | 1.5         |              |               |
| Private Home   | 1.1        | 1.5         | 1.5         | 1.5         | 1.4         | 1.5         | 1.5         | 1.6         | 1.0        | 1.6         | 62.3%        | -34.9%        |
| Campground   | 1.6        | 2.0         | 2.0         | 2.0         | 2.1         | 2.1         | 2.2         | 2.2         | 1.9        | 2.1         | 11.8%        | -15.9%        |
| 2nd Home   | 0.7        | 0.8         | 0.8         | 0.8         | 0.8         | 0.8         | 0.9         | 0.9         | 0.8        | 0.9         | 14.6%        | -15.3%        |
| Day Travel   | 2.1        | 2.0         | 2.1         | 2.1         | 2.2         | 2.2         | 2.3         | 2.4         | 1.0        | 2.0         | 99.3%        | -58.5%        |
| <b>TOTAL</b>   | <b>8.0</b> | <b>8.9</b>  | <b>9.4</b>  | <b>9.6</b>  | <b>9.9</b>  | <b>10.3</b> | <b>10.7</b> | <b>11.0</b> | <b>6.3</b> | <b>12.2</b> | <b>92.2%</b> | <b>-42.7%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |            |             |             |             |             |             |             |             |            |             |              |               |
| Accommodations   | 1.3        | 1.7         | 1.8         | 2.0         | 2.1         | 2.3         | 2.4         | 2.5         | 1.6        | 3.5         | 123.3%       | -36.4%        |
| Food Service   | 2.0        | 2.4         | 2.5         | 2.7         | 2.8         | 2.9         | 3.0         | 3.2         | 1.8        | 3.5         | 92.0%        | -42.3%        |
| Food Stores  | 1.3        | 1.5         | 1.6         | 1.6         | 1.6         | 1.6         | 1.6         | 1.7         | 1.1        | 1.6         | 47.2%        | -32.7%        |
| Local Tran. & Gas  | 0.7        | 1.0         | 1.0         | 0.8         | 0.8         | 0.9         | 1.0         | 1.0         | 0.5        | 1.0         | 109.3%       | -50.4%        |
| Arts, Ent. & Rec.  | 1.4        | 1.2         | 1.3         | 1.4         | 1.4         | 1.4         | 1.5         | 1.5         | 0.7        | 1.3         | 92.4%        | -53.6%        |
| Retail Sales   | 1.3        | 1.2         | 1.2         | 1.2         | 1.2         | 1.2         | 1.2         | 1.2         | 0.6        | 1.1         | 81.5%        | -50.2%        |
| <b>TOTAL</b>   | <b>8.0</b> | <b>8.9</b>  | <b>9.4</b>  | <b>9.6</b>  | <b>9.9</b>  | <b>10.3</b> | <b>10.7</b> | <b>11.0</b> | <b>6.3</b> | <b>12.2</b> | <b>92.2%</b> | <b>-42.7%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Grant County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018       | 2019       | 2020       | 2021       | 2020-21      | 2019-20       |
|---|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |            |            |            |            |            |            |            |            |            |            |              |               |
| Accom. & Food Serv.   | 1.4        | 1.6        | 1.7        | 1.8        | 1.9        | 2.1        | 2.3        | 2.4        | 1.9        | 2.3        | 23.3%        | -22.6%        |
| Arts, Ent. & Rec.   | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.5        | 8.7%         | 11.8%         |
| Retail**  | 0.3        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.5        | 0.5        | 2.8%         | 8.0%          |
| Ground Tran.  | 0.0        | 0.0        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.0        | 0.1        | 35.0%        | -33.0%        |
| Other Travel*   | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.1        | 0.1        | 0.1        | 0.1        | 11.6%        | 1.6%          |
| <b>TOTAL</b>  | <b>2.2</b> | <b>2.4</b> | <b>2.5</b> | <b>2.7</b> | <b>2.8</b> | <b>3.0</b> | <b>3.2</b> | <b>3.4</b> | <b>2.9</b> | <b>3.4</b> | <b>17.7%</b> | <b>-14.4%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |            |            |            |            |            |            |            |            |            |            |              |               |
| Accom. & Food Serv.   | 110        | 100        | 100        | 100        | 110        | 110        | 120        | 130        | 100        | 120        | 16.8%        | -21.5%        |
| Arts, Ent. & Rec.   | 60         | 50         | 50         | 40         | 40         | 40         | 30         | 40         | 40         | 50         | 20.8%        | 2.4%          |
| Retail**  | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | -2.4%        | 9.6%          |
| Ground Tran.  | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 26.7%        | -30.6%        |
| Other Travel*   | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 16.2%        | -1.8%         |
| <b>TOTAL</b>  | <b>200</b> | <b>170</b> | <b>170</b> | <b>170</b> | <b>180</b> | <b>180</b> | <b>180</b> | <b>190</b> | <b>160</b> | <b>190</b> | <b>18.8%</b> | <b>-15.8%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |            |            |            |            |            |            |            |            |            |            |              |               |
| Local Tax Receipts  | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 106.4%       | -34.7%        |
| State Tax Receipts  | 0.2        | 0.3        | 0.3        | 0.3        | 0.3        | 0.4        | 0.4        | 0.4        | 0.3        | 0.4        | 40.7%        | -29.8%        |
| <b>TOTAL</b>  | <b>0.3</b> | <b>0.3</b> | <b>0.4</b> | <b>0.4</b> | <b>0.4</b> | <b>0.4</b> | <b>0.5</b> | <b>0.5</b> | <b>0.3</b> | <b>0.5</b> | <b>52.9%</b> | <b>-30.8%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Grant County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Grant County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$88   | \$166 | \$245 | \$462 | 2.8        | 1.9            |
| Private Home       | \$23   | \$68  | \$53  | \$160 | 2.4        | 3.0            |
| Other Overnight    | \$35   | \$101 | \$93  | \$263 | 2.6        | 2.8            |
| All Overnight      | \$71   | \$181 | \$184 | \$468 | 2.6        | 2.5            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |        |        |
|--------------------|---------------|---------|---------|--------------|--------|--------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020   | 2021   |
| Hotel, Motel, STVR | 41,360        | 15,300  | 63,410  | 16,860       | 5,750  | 22,740 |
| Private Home       | 72,600        | 47,860  | 72,650  | 28,380       | 20,310 | 30,830 |
| Other Overnight    | 114,640       | 79,360  | 84,470  | 34,320       | 30,240 | 32,190 |
| All Overnight      | 228,590       | 142,530 | 220,530 | 79,560       | 56,300 | 85,760 |

|                    | Person-Trips |        |        | Party-Trips |        |        |
|--------------------|--------------|--------|--------|-------------|--------|--------|
|                    | 2019         | 2020   | 2021   | 2019        | 2020   | 2021   |
| Hotel, Motel, STVR | 24,860       | 8,260  | 33,550 | 10,130      | 3,050  | 12,060 |
| Private Home       | 28,240       | 15,920 | 24,170 | 11,040      | 6,760  | 10,250 |
| Other Overnight    | 39,210       | 27,810 | 29,610 | 11,810      | 10,650 | 11,340 |
| All Overnight      | 92,310       | 52,000 | 87,330 | 32,980      | 20,460 | 33,650 |

# Harney County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$49,825 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$46 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$6 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 8% |
|---|----|

|  |     |
|--|-----|
| Overnight Visitor Day Share of Resident Population** | 10% |
|--|-----|

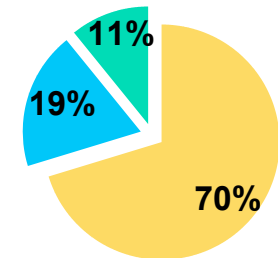
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

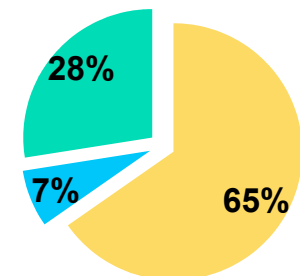
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Harney County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight



# Harney County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 15.5 | 16.3 | 16.7 | 17.2 | 17.7 | 18.8 | 19.4 | 20.2 | 11.9 | 19.2 | ▲ 60.5%            | ▲ 1.2%  |
| Other                          | 0.6  | 1.2  | 1.1  | 0.9  | 0.8  | 0.9  | 1.1  | 1.1  | 0.5  | 0.9  | ▲ 86.6%            | ▲ 2.4%  |
| Visitor                        | 14.9 | 15.1 | 15.6 | 16.3 | 16.9 | 17.8 | 18.4 | 19.1 | 11.4 | 18.2 | ▲ 59.4%            | ▲ 1.1%  |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 4.9  | 4.9  | 5.3  | 5.8  | 6.3  | 6.5  | 6.8  | 7.7  | 7.2  | 8.5  | ▲ 18.1%            | ▲ 3.1%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 370  | 290  | 300  | 310  | 310  | 330  | 340  | 360  | 340  | 370  | ▲ 7.0%             | ▲ 0.0%  |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 0.5  | 0.7  | 0.7  | 0.7  | 0.8  | 0.9  | 0.9  | 1.0  | 0.7  | 1.0  | ▲ 37.3%            | ▲ 3.9%  |
| Local                          | 0.1  | 0.2  | 0.2  | 0.3  | 0.3  | 0.3  | 0.3  | 0.3  | 0.2  | 0.4  | ▲ 56.3%            | ▲ 5.7%  |
| State                          | 0.4  | 0.4  | 0.4  | 0.5  | 0.5  | 0.6  | 0.6  | 0.6  | 0.5  | 0.6  | ▲ 28.2%            | ▲ 3.1%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Harney County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2020-21 | 2019-20 |
|--|------|------|------|------|------|------|------|------|------|------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |      |      |      |      |      |      |      |      |      |      |         |         |
| Destination Spending   | 14.9 | 15.1 | 15.6 | 16.3 | 16.9 | 17.8 | 18.4 | 19.1 | 11.4 | 18.2 | 59.4%   | -40.1%  |
| Other Travel*  | 0.6  | 1.2  | 1.1  | 0.9  | 0.8  | 0.9  | 1.1  | 1.1  | 0.5  | 0.9  | 86.6%   | -53.0%  |
| <b>TOTAL</b>   | 15.5 | 16.3 | 16.7 | 17.2 | 17.7 | 18.8 | 19.4 | 20.2 | 11.9 | 19.2 | 60.5%   | -40.8%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |      |      |      |      |      |      |      |      |      |      |         |         |
| Hotel, Motel, STVR**   | 7.1  | 7.3  | 7.6  | 8.1  | 8.6  | 9.3  | 9.6  | 10.0 | 6.0  | 11.1 | 84.6%   | -40.0%  |
| Hotel, Motel   |      |      |      |      |      |      |      |      |      | 10.1 |         |         |
| STVR   |      |      |      |      |      |      |      |      |      | 0.9  |         |         |
| Private Home   | 1.1  | 1.4  | 1.5  | 1.5  | 1.5  | 1.5  | 1.6  | 1.6  | 1.3  | 1.7  | 26.5%   | -16.0%  |
| Campground   | 1.9  | 2.5  | 2.5  | 2.5  | 2.6  | 2.6  | 2.7  | 2.8  | 2.4  | 2.6  | 11.6%   | -15.9%  |
| 2nd Home   | 0.3  | 0.3  | 0.3  | 0.3  | 0.3  | 0.3  | 0.4  | 0.4  | 0.3  | 0.4  | 14.7%   | -15.3%  |
| Day Travel   | 4.6  | 3.6  | 3.7  | 3.8  | 3.9  | 4.1  | 4.2  | 4.4  | 1.4  | 2.5  | 73.1%   | -67.1%  |
| <b>TOTAL</b>   | 14.9 | 15.1 | 15.6 | 16.3 | 16.9 | 17.8 | 18.4 | 19.1 | 11.4 | 18.2 | 59.4%   | -40.1%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |      |      |      |      |      |      |      |      |      |      |         |         |
| Accommodations   | 3.2  | 3.9  | 4.0  | 4.4  | 4.7  | 5.2  | 5.3  | 5.5  | 3.7  | 6.4  | 73.0%   | -32.2%  |
| Food Service   | 3.7  | 3.9  | 4.0  | 4.3  | 4.5  | 4.7  | 4.9  | 5.2  | 3.2  | 4.9  | 56.3%   | -39.6%  |
| Food Stores  | 1.7  | 1.9  | 1.9  | 2.0  | 2.0  | 2.0  | 2.1  | 2.1  | 1.4  | 1.9  | 31.7%   | -33.8%  |
| Local Tran. & Gas  | 1.1  | 1.4  | 1.4  | 1.2  | 1.1  | 1.3  | 1.4  | 1.4  | 0.8  | 1.3  | 73.8%   | -47.3%  |
| Arts, Ent. & Rec.  | 3.4  | 2.7  | 2.7  | 2.8  | 2.9  | 3.0  | 3.1  | 3.2  | 1.6  | 2.5  | 54.8%   | -50.2%  |
| Retail Sales   | 1.9  | 1.5  | 1.5  | 1.5  | 1.6  | 1.6  | 1.6  | 1.6  | 0.8  | 1.2  | 52.4%   | -50.7%  |
| <b>TOTAL</b>   | 14.9 | 15.1 | 15.6 | 16.3 | 16.9 | 17.8 | 18.4 | 19.1 | 11.4 | 18.2 | 59.4%   | -40.1%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Harney County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018       | 2019       | 2020       | 2021       | 2020-21      | 2019-20       |
|---|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |            |            |            |            |            |            |            |            |            |            |              |               |
| Accom. & Food Serv.   | 3.4        | 3.6        | 3.9        | 4.3        | 4.7        | 4.8        | 5.1        | 5.8        | 5.2        | 6.5        | 24.6%        | -10.5%        |
| Arts, Ent. & Rec.   | 0.9        | 0.8        | 0.8        | 0.9        | 0.9        | 1.0        | 1.1        | 1.1        | 1.2        | 1.3        | 4.4%         | 10.0%         |
| Retail**  | 0.5        | 0.4        | 0.5        | 0.5        | 0.5        | 0.5        | 0.6        | 0.6        | 0.6        | 0.6        | -6.6%        | 7.8%          |
| Ground Tran.  | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 6.0%         | -20.2%        |
| Other Travel*   | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.1        | 0.1        | 0.1        | 0.1        | 11.6%        | 2.1%          |
| <b>TOTAL</b>  | <b>4.9</b> | <b>4.9</b> | <b>5.3</b> | <b>5.8</b> | <b>6.3</b> | <b>6.5</b> | <b>6.8</b> | <b>7.7</b> | <b>7.2</b> | <b>8.5</b> | <b>18.1%</b> | <b>-6.1%</b>  |
| <b>Travel Industry Employment (Jobs)</b>                      |            |            |            |            |            |            |            |            |            |            |              |               |
| Accom. & Food Serv.   | 210        | 180        | 180        | 200        | 200        | 210        | 220        | 240        | 230        | 260        | 13.3%        | -5.5%         |
| Arts, Ent. & Rec.   | 130        | 90         | 90         | 90         | 90         | 90         | 90         | 90         | 90         | 80         | -5.1%        | 0.0%          |
| Retail**  | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | -9.3%        | -0.9%         |
| Ground Tran.  | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | -0.5%        | -17.3%        |
| Other Travel*   | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 5.7%         | -4.1%         |
| <b>TOTAL</b>  | <b>370</b> | <b>290</b> | <b>300</b> | <b>310</b> | <b>310</b> | <b>330</b> | <b>340</b> | <b>360</b> | <b>340</b> | <b>370</b> | <b>8.8%</b>  | <b>-5.6%</b>  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |            |            |            |            |            |            |            |            |            |            |              |               |
| Local Tax Receipts  | 0.1        | 0.2        | 0.2        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 0.2        | 0.4        | 56.3%        | -27.5%        |
| State Tax Receipts  | 0.4        | 0.4        | 0.4        | 0.5        | 0.5        | 0.6        | 0.6        | 0.6        | 0.5        | 0.6        | 28.2%        | -21.4%        |
| <b>TOTAL</b>  | <b>0.5</b> | <b>0.7</b> | <b>0.7</b> | <b>0.7</b> | <b>0.8</b> | <b>0.9</b> | <b>0.9</b> | <b>1.0</b> | <b>0.7</b> | <b>1.0</b> | <b>37.3%</b> | <b>-23.5%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Harney County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Harney County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$92   | \$158 | \$255 | \$437 | 2.8        | 1.7            |
| Private Home       | \$23   | \$68  | \$53  | \$160 | 2.4        | 3.0            |
| Other Overnight    | \$41   | \$121 | \$110 | \$325 | 2.7        | 3.0            |
| All Overnight      | \$100  | \$224 | \$262 | \$595 | 2.6        | 2.3            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |        |         |
|--------------------|---------------|---------|---------|--------------|--------|---------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020   | 2021    |
| Hotel, Motel, STVR | 102,700       | 67,570  | 120,150 | 41,860       | 24,520 | 43,280  |
| Private Home       | 74,150        | 63,080  | 74,610  | 28,980       | 26,770 | 31,660  |
| Other Overnight    | 102,780       | 69,290  | 73,700  | 30,000       | 25,740 | 27,380  |
| All Overnight      | 279,630       | 199,940 | 268,460 | 100,840      | 77,030 | 102,320 |

|                    | Person-Trips |        |         | Party-Trips |        |        |
|--------------------|--------------|--------|---------|-------------|--------|--------|
|                    | 2019         | 2020   | 2021    | 2019        | 2020   | 2021   |
| Hotel, Motel, STVR | 61,750       | 40,350 | 70,140  | 25,170      | 14,600 | 25,280 |
| Private Home       | 28,840       | 20,980 | 24,820  | 11,270      | 8,900  | 10,530 |
| Other Overnight    | 33,550       | 23,290 | 24,770  | 9,830       | 8,680  | 9,240  |
| All Overnight      | 124,140      | 84,620 | 119,740 | 46,280      | 32,190 | 45,050 |

# Hood River County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

Amount of Visitor Spending that supports 1 Job \$92,193

Employee Earnings generated by \$100 Visitor Spending \$37

Local & State Tax Revenues generated by \$100 Visitor Spending \$7

### Visitor Shares

Travel Share of Total Employment (2021) 5%

Overnight Visitor Day Share of Resident Population\*\* 10%

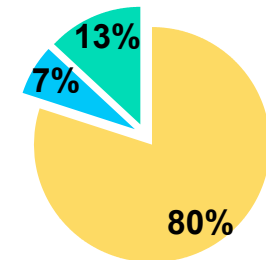
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

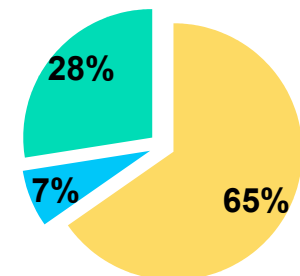
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Hood River County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Hood River County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|-------|-------|-------|-------|-------|-------|------|------|--------------------|---------|
|                                |      |      |       |       |       |       |       |       |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |       |       |       |       |       |       |      |      |                    |         |
| Total (Current \$)             | 58.6 | 83.1 | 87.3  | 92.3  | 100.8 | 111.4 | 114.9 | 119.0 | 59.9 | 82.6 | ▲ 37.9%            | ▲ 1.9%  |
| Other                          | 2.6  | 3.9  | 3.7   | 3.1   | 3.0   | 3.3   | 3.7   | 3.8   | 1.9  | 3.2  | ▲ 71.9%            | ▲ 1.3%  |
| Visitor                        | 56.0 | 79.2 | 83.6  | 89.3  | 97.8  | 108.2 | 111.2 | 115.2 | 58.0 | 79.4 | ▲ 36.8%            | ▲ 2.0%  |
| <b>Earnings (\$Million)</b>    |      |      |       |       |       |       |       |       |      |      |                    |         |
| Earnings (Current \$)          | 15.1 | 21.2 | 22.9  | 24.8  | 27.7  | 29.5  | 31.3  | 33.2  | 24.9 | 29.3 | ▲ 17.8%            | ▲ 3.8%  |
| <b>Employment (Jobs)</b>       |      |      |       |       |       |       |       |       |      |      |                    |         |
| Employment                     | 910  | 990  | 1,030 | 1,040 | 1,120 | 1,160 | 1,170 | 1,170 | 810  | 870  | ▲ 7.7%             | ▼ -0.2% |
| <b>Tax Revenue (\$Million)</b> |      |      |       |       |       |       |       |       |      |      |                    |         |
| Total (Current \$)             | 2.3  | 3.7  | 3.9   | 4.3   | 4.9   | 5.7   | 6.0   | 6.2   | 4.0  | 5.2  | ▲ 29.2%            | ▲ 4.7%  |
| Local                          | 0.8  | 1.4  | 1.5   | 1.7   | 2.1   | 2.4   | 2.4   | 2.5   | 1.6  | 2.3  | ▲ 37.4%            | ▲ 6.0%  |
| State                          | 1.5  | 2.3  | 2.4   | 2.6   | 2.8   | 3.4   | 3.5   | 3.7   | 2.4  | 2.9  | ▲ 23.5%            | ▲ 3.9%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Hood River County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003 | 2013 | 2014 | 2015 | 2016  | 2017  | 2018  | 2019  | 2020 | 2021 | 2020-21 | 2019-20 |
|--|------|------|------|------|-------|-------|-------|-------|------|------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |      |      |      |      |       |       |       |       |      |      |         |         |
| Destination Spending   | 56.0 | 79.2 | 83.6 | 89.3 | 97.8  | 108.2 | 111.2 | 115.2 | 58.0 | 79.4 | 36.8%   | -49.6%  |
| Other Travel*  | 2.6  | 3.9  | 3.7  | 3.1  | 3.0   | 3.3   | 3.7   | 3.8   | 1.9  | 3.2  | 71.9%   | -50.4%  |
| <b>TOTAL</b>   | 58.6 | 83.1 | 87.3 | 92.3 | 100.8 | 111.4 | 114.9 | 119.0 | 59.9 | 82.6 | 37.9%   | -49.7%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |      |      |      |      |       |       |       |       |      |      |         |         |
| Hotel, Motel, STVR**   | 26.5 | 43.9 | 47.0 | 51.5 | 58.3  | 66.4  | 68.7  | 71.2  | 34.1 | 54.4 | 59.8%   | -52.2%  |
| Hotel, Motel   |      |      |      |      |       |       |       |       |      | 37.5 |         |         |
| STVR   |      |      |      |      |       |       |       |       |      | 16.9 |         |         |
| Private Home   | 6.6  | 9.0  | 9.2  | 9.3  | 9.4   | 9.7   | 9.8   | 10.0  | 11.7 | 9.0  | -23.3%  | 16.5%   |
| Campground   | 2.5  | 3.4  | 3.5  | 3.5  | 3.6   | 3.6   | 3.8   | 3.9   | 3.1  | 3.5  | 12.1%   | -21.6%  |
| 2nd Home   | 0.8  | 1.1  | 1.1  | 1.1  | 1.1   | 1.2   | 1.2   | 1.2   | 1.0  | 1.2  | 14.3%   | -18.5%  |
| Day Travel   | 19.5 | 21.8 | 22.7 | 23.8 | 25.3  | 27.3  | 27.7  | 28.8  | 8.2  | 11.4 | 39.4%   | -71.5%  |
| <b>TOTAL</b>   | 56.0 | 79.2 | 83.6 | 89.3 | 97.8  | 108.2 | 111.2 | 115.2 | 58.0 | 79.4 | 36.8%   | -49.6%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |      |      |      |      |       |       |       |       |      |      |         |         |
| Accommodations   | 11.7 | 20.6 | 22.4 | 25.8 | 30.2  | 34.1  | 35.3  | 36.4  | 22.2 | 35.3 | 59.2%   | -39.0%  |
| Food Service   | 15.6 | 22.3 | 23.7 | 25.9 | 28.5  | 31.6  | 32.4  | 34.3  | 15.1 | 18.7 | 24.0%   | -56.0%  |
| Food Stores  | 4.9  | 6.4  | 6.8  | 7.2  | 7.4   | 7.7   | 7.7   | 7.9   | 5.2  | 6.1  | 16.8%   | -34.0%  |
| Local Tran. & Gas  | 5.2  | 10.0 | 9.9  | 8.6  | 8.6   | 10.1  | 11.2  | 11.4  | 5.1  | 7.3  | 42.5%   | -55.0%  |
| Arts, Ent. & Rec.  | 8.4  | 9.3  | 9.7  | 10.2 | 11.0  | 11.8  | 11.8  | 12.1  | 3.9  | 4.3  | 8.8%    | -67.5%  |
| Retail Sales   | 10.1 | 10.7 | 11.0 | 11.6 | 12.2  | 12.9  | 12.8  | 13.1  | 6.5  | 7.7  | 18.8%   | -50.7%  |
| <b>TOTAL</b>   | 56.0 | 79.2 | 83.6 | 89.3 | 97.8  | 108.2 | 111.2 | 115.2 | 58.0 | 79.4 | 36.8%   | -49.6%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Hood River County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003 | 2013 | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020 | 2021 | 2020-21 | 2019-20 |
|---|------|------|-------|-------|-------|-------|-------|-------|------|------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |      |      |       |       |       |       |       |       |      |      |         |         |
| Accom. & Food Serv.   | 10.0 | 15.7 | 17.3  | 18.8  | 21.2  | 22.4  | 23.8  | 25.3  | 19.2 | 24.1 | 25.6%   | -24.0%  |
| Arts, Ent. & Rec.   | 2.5  | 2.8  | 2.7   | 2.9   | 3.1   | 3.4   | 3.7   | 3.9   | 1.9  | 1.4  | -26.5%  | -51.0%  |
| Retail**  | 1.8  | 2.2  | 2.3   | 2.5   | 2.7   | 2.9   | 3.0   | 3.1   | 3.1  | 3.2  | 4.0%    | -0.2%   |
| Ground Tran.  | 0.3  | 0.3  | 0.4   | 0.4   | 0.5   | 0.5   | 0.5   | 0.6   | 0.4  | 0.3  | -25.9%  | -25.4%  |
| Other Travel*   | 0.4  | 0.2  | 0.2   | 0.2   | 0.3   | 0.3   | 0.3   | 0.3   | 0.3  | 0.3  | 8.6%    | -8.8%   |
| <b>TOTAL</b>  | 15.1 | 21.2 | 22.9  | 24.8  | 27.7  | 29.5  | 31.3  | 33.2  | 24.9 | 29.3 | 17.8%   | -24.9%  |
| <b>Travel Industry Employment (Jobs)</b>                      |      |      |       |       |       |       |       |       |      |      |         |         |
| Accom. & Food Serv.   | 630  | 740  | 780   | 800   | 850   | 860   | 870   | 880   | 610  | 700  | 14.5%   | -30.5%  |
| Arts, Ent. & Rec.   | 150  | 130  | 120   | 120   | 140   | 140   | 150   | 150   | 70   | 40   | -33.2%  | -55.0%  |
| Retail**  | 100  | 100  | 100   | 100   | 110   | 120   | 120   | 120   | 110  | 110  | -1.7%   | -7.8%   |
| Ground Tran.  | 10   | 10   | 10    | 10    | 10    | 10    | 10    | 10    | 10   | 10   | -30.5%  | -22.7%  |
| Other Travel*   | 20   | 10   | 10    | 10    | 10    | 10    | 10    | 10    | 10   | 10   | 5.3%    | -7.9%   |
| <b>TOTAL</b>  | 910  | 990  | 1,030 | 1,040 | 1,120 | 1,160 | 1,170 | 1,170 | 810  | 870  | 7.4%    | -30.8%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |      |      |       |       |       |       |       |       |      |      |         |         |
| Local Tax Receipts  | 0.8  | 1.4  | 1.5   | 1.7   | 2.1   | 2.4   | 2.4   | 2.5   | 1.6  | 2.3  | 37.4%   | -33.8%  |
| State Tax Receipts  | 1.5  | 2.3  | 2.4   | 2.6   | 2.8   | 3.4   | 3.5   | 3.7   | 2.4  | 2.9  | 23.5%   | -35.6%  |
| <b>TOTAL</b>  | 2.3  | 3.7  | 3.9   | 4.3   | 4.9   | 5.7   | 6.0   | 6.2   | 4.0  | 5.2  | 29.2%   | -34.9%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.



# Hood River County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Hood River County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                      | Person       |              | Party        |              | Party Size | Length of Stay |
|----------------------|--------------|--------------|--------------|--------------|------------|----------------|
|                      | Day          | Trip         | Day          | Trip         |            |                |
| Hotel, Motel, STVR   | \$123        | \$257        | \$342        | \$712        | 2.8        | 2.1            |
| Private Home         | \$30         | \$106        | \$71         | \$254        | 2.4        | 3.6            |
| Other Overnight      | \$35         | \$111        | \$93         | \$295        | 2.7        | 3.2            |
| <b>All Overnight</b> | <b>\$140</b> | <b>\$362</b> | <b>\$366</b> | <b>\$961</b> | <b>2.6</b> | <b>2.6</b>     |

### Overnight Visitor Volume, 2019-2021

|                      | Person-Nights    |                |                | Party-Nights   |                |                |
|----------------------|------------------|----------------|----------------|----------------|----------------|----------------|
|                      | 2019             | 2020           | 2021           | 2019           | 2020           | 2021           |
| Hotel, Motel, STVR   | 539,160          | 281,250        | 442,840        | 220,560        | 103,860        | 159,320        |
| Private Home         | 302,820          | 421,010        | 301,810        | 116,210        | 175,230        | 125,610        |
| Other Overnight      | 192,240          | 124,220        | 132,150        | 56,560         | 46,620         | 49,600         |
| <b>All Overnight</b> | <b>1,034,220</b> | <b>826,480</b> | <b>876,800</b> | <b>393,330</b> | <b>325,700</b> | <b>334,540</b> |

|                      | Person-Trips   |                |                | Party-Trips    |                |                |
|----------------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                      | 2019           | 2020           | 2021           | 2019           | 2020           | 2021           |
| Hotel, Motel, STVR   | 285,040        | 142,860        | 211,990        | 116,600        | 52,260         | 76,420         |
| Private Home         | 99,570         | 118,230        | 84,750         | 38,210         | 49,210         | 35,280         |
| Other Overnight      | 59,370         | 39,260         | 41,760         | 17,440         | 14,690         | 15,630         |
| <b>All Overnight</b> | <b>443,980</b> | <b>300,350</b> | <b>338,510</b> | <b>172,250</b> | <b>116,160</b> | <b>127,330</b> |

# Jackson County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job | \$114,620 |
|--|-----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$28 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 4% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 7% |
|--|----|

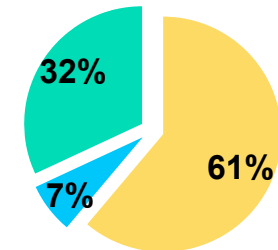
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

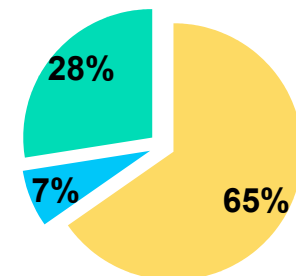
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Jackson County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Jackson County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 352.3 | 493.6 | 508.9 | 527.8 | 547.5 | 580.3 | 611.1 | 626.6 | 363.9 | 625.3 | ▲ 71.8%            | ▲ 3.2%  |
| Other                          | 46.6  | 81.1  | 83.4  | 82.4  | 79.9  | 88.7  | 99.0  | 101.3 | 43.2  | 84.4  | ▲ 95.2%            | ▲ 3.4%  |
| Visitor                        | 305.7 | 412.5 | 425.5 | 445.4 | 467.6 | 491.5 | 512.2 | 525.3 | 320.7 | 540.9 | ▲ 68.7%            | ▲ 3.2%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 86.2  | 115.4 | 124.1 | 133.2 | 142.4 | 153.5 | 163.1 | 170.8 | 146.0 | 162.9 | ▲ 11.6%            | ▲ 3.6%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 4,640 | 4,860 | 5,070 | 5,290 | 5,440 | 5,630 | 5,750 | 5,790 | 4,750 | 4,930 | ▲ 3.8%             | ▲ 0.3%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 12.7  | 19.0  | 20.0  | 21.5  | 23.1  | 25.7  | 26.9  | 27.4  | 20.0  | 27.6  | ▲ 38.3%            | ▲ 4.4%  |
| Local                          | 4.3   | 6.7   | 7.4   | 8.3   | 9.1   | 9.6   | 10.1  | 10.2  | 7.5   | 11.6  | ▲ 54.7%            | ▲ 5.7%  |
| State                          | 8.4   | 12.2  | 12.6  | 13.2  | 14.1  | 16.1  | 16.7  | 17.2  | 12.5  | 16.0  | ▲ 28.5%            | ▲ 3.7%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Jackson County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 305.7        | 412.5        | 425.5        | 445.4        | 467.6        | 491.5        | 512.2        | 525.3        | 320.7        | 540.9        | 68.7%        | -39.0%        |
| Other Travel*  | 46.6         | 81.1         | 83.4         | 82.4         | 79.9         | 88.7         | 99.0         | 101.3        | 43.2         | 84.4         | 95.2%        | -57.3%        |
| <b>TOTAL</b>   | <b>352.3</b> | <b>493.6</b> | <b>508.9</b> | <b>527.8</b> | <b>547.5</b> | <b>580.3</b> | <b>611.1</b> | <b>626.6</b> | <b>363.9</b> | <b>625.3</b> | <b>71.8%</b> | <b>-41.9%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 142.3        | 201.9        | 210.1        | 223.4        | 238.2        | 254.4        | 264.7        | 269.1        | 175.1        | 280.7        | 60.3%        | -34.9%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 248.8        |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 31.9         |              |               |
| Private Home   | 79.6         | 112.4        | 115.4        | 119.3        | 123.1        | 127.9        | 134.4        | 139.1        | 77.4         | 146.4        | 89.0%        | -44.3%        |
| Campground   | 22.3         | 25.3         | 25.6         | 26.1         | 26.8         | 27.0         | 28.1         | 29.2         | 24.3         | 27.0         | 11.2%        | -16.9%        |
| 2nd Home   | 3.0          | 4.1          | 4.2          | 4.2          | 4.3          | 4.4          | 4.5          | 4.6          | 3.8          | 4.3          | 14.3%        | -18.5%        |
| Day Travel   | 58.5         | 68.8         | 70.2         | 72.3         | 75.2         | 77.9         | 80.5         | 83.2         | 40.0         | 82.5         | 106.0%       | -51.9%        |
| <b>TOTAL</b>   | <b>305.7</b> | <b>412.5</b> | <b>425.5</b> | <b>445.4</b> | <b>467.6</b> | <b>491.5</b> | <b>512.2</b> | <b>525.3</b> | <b>320.7</b> | <b>540.9</b> | <b>68.7%</b> | <b>-39.0%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 57.3         | 77.5         | 82.4         | 90.5         | 98.1         | 104.2        | 105.5        | 105.2        | 79.9         | 129.0        | 61.5%        | -24.1%        |
| Food Service   | 77.4         | 110.3        | 114.6        | 121.9        | 130.3        | 137.6        | 142.7        | 149.8        | 94.9         | 154.8        | 63.2%        | -36.7%        |
| Food Stores  | 28.6         | 37.5         | 38.9         | 40.6         | 41.2         | 41.4         | 42.0         | 43.4         | 29.0         | 48.9         | 68.3%        | -33.1%        |
| Local Tran. & Gas  | 29.0         | 53.5         | 51.2         | 46.4         | 45.8         | 50.3         | 57.8         | 58.2         | 29.6         | 57.2         | 92.9%        | -49.1%        |
| Arts, Ent. & Rec.  | 43.3         | 48.1         | 49.0         | 50.8         | 53.0         | 54.5         | 55.3         | 56.6         | 28.6         | 45.5         | 59.1%        | -49.5%        |
| Retail Sales   | 49.6         | 54.3         | 54.6         | 56.2         | 57.7         | 58.5         | 58.9         | 60.1         | 36.0         | 64.0         | 77.5%        | -40.0%        |
| Visitor Air Tran.  | 20.7         | 31.2         | 34.8         | 39.1         | 41.5         | 45.0         | 50.0         | 52.0         | 22.6         | 41.6         | 83.9%        | -56.6%        |
| <b>TOTAL</b>   | <b>305.7</b> | <b>412.5</b> | <b>425.5</b> | <b>445.4</b> | <b>467.6</b> | <b>491.5</b> | <b>512.2</b> | <b>525.3</b> | <b>320.7</b> | <b>540.9</b> | <b>68.7%</b> | <b>-39.0%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Jackson County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 56.0  | 76.6  | 83.6  | 90.1  | 98.6  | 106.8 | 113.9 | 119.2 | 100.0 | 114.0 | 14.1%   | -16.2%  |
| Arts, Ent. & Rec.   | 12.5  | 14.9  | 15.4  | 16.1  | 16.9  | 17.8  | 18.6  | 19.8  | 13.8  | 13.7  | -0.8%   | -30.0%  |
| Retail**  | 10.0  | 12.1  | 12.6  | 13.3  | 14.0  | 14.7  | 15.3  | 15.8  | 18.0  | 19.8  | 9.9%    | 14.2%   |
| Ground Tran.  | 1.8   | 2.4   | 2.4   | 2.8   | 3.0   | 3.2   | 3.5   | 3.8   | 3.6   | 5.0   | 35.9%   | -3.3%   |
| Other Travel*   | 5.9   | 9.4   | 10.2  | 10.8  | 9.9   | 11.0  | 11.7  | 12.2  | 10.5  | 10.4  | -1.2%   | -14.1%  |
| <b>TOTAL</b>  | 86.2  | 115.4 | 124.1 | 133.2 | 142.4 | 153.5 | 163.1 | 170.8 | 146.0 | 162.9 | 11.6%   | -14.5%  |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 3,110 | 3,370 | 3,560 | 3,730 | 3,910 | 4,040 | 4,110 | 4,140 | 3,350 | 3,490 | 4.0%    | -19.0%  |
| Arts, Ent. & Rec.   | 760   | 700   | 700   | 710   | 710   | 760   | 780   | 780   | 530   | 530   | 1.3%    | -32.6%  |
| Retail**  | 460   | 470   | 480   | 500   | 500   | 520   | 520   | 520   | 550   | 560   | 2.6%    | 5.3%    |
| Ground Tran.  | 80    | 80    | 70    | 90    | 90    | 90    | 90    | 100   | 100   | 130   | 31.7%   | 3.5%    |
| Other Travel*   | 230   | 250   | 260   | 270   | 230   | 230   | 250   | 250   | 220   | 210   | -2.7%   | -12.5%  |
| <b>TOTAL</b>  | 4,640 | 4,860 | 5,070 | 5,290 | 5,440 | 5,630 | 5,750 | 5,790 | 4,750 | 4,930 | 3.8%    | -18.0%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Local Tax Receipts  | 4.3   | 6.7   | 7.4   | 8.3   | 9.1   | 9.6   | 10.1  | 10.2  | 7.5   | 11.6  | 54.7%   | -26.7%  |
| State Tax Receipts  | 8.4   | 12.2  | 12.6  | 13.2  | 14.1  | 16.1  | 16.7  | 17.2  | 12.5  | 16.0  | 28.5%   | -27.5%  |
| <b>TOTAL</b>  | 12.7  | 19.0  | 20.0  | 21.5  | 23.1  | 25.7  | 26.9  | 27.4  | 20.0  | 27.6  | 38.3%   | -27.2%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Jackson County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Jackson County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$137  | \$274 | \$366 | \$739 | 2.7        | 2.0            |
| Private Home       | \$51   | \$183 | \$113 | \$417 | 2.2        | 3.7            |
| Other Overnight    | \$51   | \$162 | \$138 | \$435 | 2.7        | 3.2            |
| All Overnight      | \$134  | \$366 | \$323 | \$920 | 2.4        | 2.9            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 1,846,370     | 1,354,690 | 2,051,460 | 794,230      | 520,860   | 767,080   |
| Private Home       | 2,824,890     | 1,692,760 | 2,851,890 | 1,196,470    | 724,910   | 1,295,200 |
| Other Overnight    | 862,010       | 572,480   | 608,900   | 252,390      | 213,550   | 227,150   |
| All Overnight      | 5,533,270     | 3,619,930 | 5,512,240 | 2,243,090    | 1,459,320 | 2,289,430 |

|                    | Person-Trips |           |           | Party-Trips |         |         |
|--------------------|--------------|-----------|-----------|-------------|---------|---------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 976,120      | 707,610   | 1,026,180 | 412,440     | 266,220 | 379,860 |
| Private Home       | 928,840      | 475,370   | 800,870   | 377,450     | 201,250 | 351,380 |
| Other Overnight    | 266,930      | 181,750   | 193,300   | 78,030      | 67,640  | 71,950  |
| All Overnight      | 2,171,900    | 1,364,720 | 2,020,350 | 867,920     | 535,110 | 803,180 |

# Jefferson County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$82,798 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$27 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5 |
|--|-----|

### Visitor Shares

|   |     |
|---|-----|
| Travel Share of Total Employment (2021) | 11% |
|---|-----|

|  |     |
|--|-----|
| Overnight Visitor Day Share of Resident Population** | 13% |
|--|-----|

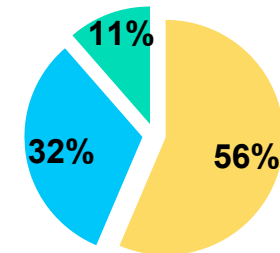
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

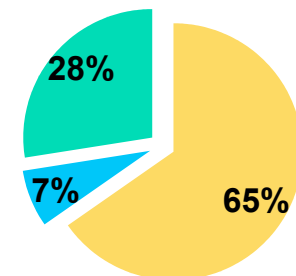
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Jefferson County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Jefferson County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015  | 2016  | 2017  | 2018  | 2019  | 2020 | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|-------|-------|-------|-------|-------|------|-------|--------------------|---------|
|                                |      |      |      |       |       |       |       |       |      |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |       |       |       |       |       |      |       |                    |         |
| Total (Current \$)             | 33.5 | 49.9 | 48.1 | 49.2  | 50.5  | 52.5  | 55.7  | 59.0  | 67.0 | 90.5  | ▲ 35.0%            | ▲ 5.7%  |
| Other                          | 1.7  | 3.6  | 3.5  | 2.8   | 2.7   | 3.0   | 3.5   | 3.6   | 1.7  | 3.2   | ▲ 86.6%            | ▲ 3.5%  |
| Visitor                        | 31.8 | 46.3 | 44.6 | 46.4  | 47.8  | 49.4  | 52.2  | 55.5  | 65.4 | 87.4  | ▲ 33.7%            | ▲ 5.8%  |
| <b>Earnings (\$Million)</b>    |      |      |      |       |       |       |       |       |      |       |                    |         |
| Earnings (Current \$)          | 7.8  | 13.7 | 14.6 | 15.9  | 16.6  | 17.5  | 18.8  | 20.2  | 20.1 | 23.9  | ▲ 19.4%            | ▲ 6.4%  |
| <b>Employment (Jobs)</b>       |      |      |      |       |       |       |       |       |      |       |                    |         |
| Employment                     | 590  | 930  | 960  | 1,000 | 1,020 | 1,010 | 1,030 | 1,060 | 930  | 1,070 | ▲ 15.4%            | ▲ 3.4%  |
| <b>Tax Revenue (\$Million)</b> |      |      |      |       |       |       |       |       |      |       |                    |         |
| Total (Current \$)             | 1.2  | 2.0  | 2.0  | 2.2   | 2.3   | 2.5   | 2.7   | 2.9   | 4.1  | 4.7   | ▲ 15.2%            | ▲ 8.1%  |
| Local                          | 0.3  | 0.6  | 0.5  | 0.6   | 0.6   | 0.7   | 0.7   | 0.8   | 1.9  | 2.0   | ▲ 7.4%             | ▲ 11.5% |
| State                          | 0.9  | 1.5  | 1.5  | 1.6   | 1.7   | 1.9   | 2.0   | 2.1   | 2.2  | 2.7   | ▲ 22.0%            | ▲ 6.4%  |

**Notes:**  
 Calendar year 2020 has been revised since the release of the April 2021 report.  
 (Current \$) reflects dollar amounts that are not adjusted for inflation.  
 CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.  
 The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.  
 Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).  
 State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.



# Jefferson County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003        | 2013        | 2014        | 2015        | 2016        | 2017        | 2018        | 2019        | 2020        | 2021        | 2020-21      | 2019-20      |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|--------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |             |             |             |             |             |             |             |             |             |             |              |              |
| Destination Spending   | 31.8        | 46.3        | 44.6        | 46.4        | 47.8        | 49.4        | 52.2        | 55.5        | 65.4        | 87.4        | 33.7%        | 17.8%        |
| Other Travel*  | 1.7         | 3.6         | 3.5         | 2.8         | 2.7         | 3.0         | 3.5         | 3.6         | 1.7         | 3.2         | 86.6%        | -52.5%       |
| <b>TOTAL</b>   | <b>33.5</b> | <b>49.9</b> | <b>48.1</b> | <b>49.2</b> | <b>50.5</b> | <b>52.5</b> | <b>55.7</b> | <b>59.0</b> | <b>67.0</b> | <b>90.5</b> | <b>35.0%</b> | <b>13.6%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |             |             |             |             |             |             |             |             |             |             |              |              |
| Hotel, Motel, STVR**   | 5.5         | 13.6        | 12.1        | 13.0        | 13.8        | 14.4        | 15.5        | 17.4        | 36.2        | 42.3        | 16.9%        | 108.0%       |
| Hotel, Motel   |             |             |             |             |             |             |             |             |             | 31.9        |              |              |
| STVR   |             |             |             |             |             |             |             |             |             | 10.4        |              |              |
| Private Home   | 5.0         | 7.1         | 6.9         | 7.3         | 7.4         | 7.7         | 8.1         | 8.3         | 5.3         | 8.5         | 61.8%        | -36.7%       |
| Campground   | 8.7         | 9.7         | 9.7         | 9.9         | 10.1        | 10.2        | 10.6        | 11.1        | 11.6        | 18.6        | 60.5%        | 4.5%         |
| 2nd Home   | 4.3         | 5.2         | 5.3         | 5.3         | 5.4         | 5.6         | 5.8         | 6.0         | 4.9         | 5.6         | 14.3%        | -18.5%       |
| Day Travel   | 8.4         | 10.8        | 10.6        | 10.9        | 11.2        | 11.5        | 12.1        | 12.6        | 7.4         | 12.3        | 66.9%        | -41.6%       |
| <b>TOTAL</b>   | <b>31.8</b> | <b>46.3</b> | <b>44.6</b> | <b>46.4</b> | <b>47.8</b> | <b>49.4</b> | <b>52.2</b> | <b>55.5</b> | <b>65.4</b> | <b>87.4</b> | <b>33.7%</b> | <b>17.8%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |             |             |             |             |             |             |             |             |             |             |              |              |
| Accommodations   | 4.4         | 8.2         | 7.8         | 8.6         | 9.3         | 9.8         | 10.2        | 11.5        | 24.2        | 30.9        | 27.5%        | 111.1%       |
| Food Service   | 7.9         | 12.4        | 12.1        | 13.0        | 13.7        | 14.2        | 15.1        | 16.2        | 15.3        | 19.7        | 29.2%        | -5.8%        |
| Food Stores  | 5.2         | 6.6         | 6.7         | 7.0         | 7.1         | 7.1         | 7.2         | 7.5         | 7.2         | 10.8        | 49.3%        | -3.7%        |
| Local Tran. & Gas  | 2.9         | 6.1         | 5.5         | 4.6         | 4.4         | 4.8         | 5.6         | 5.8         | 5.6         | 8.2         | 46.8%        | -3.3%        |
| Arts, Ent. & Rec.  | 6.0         | 7.0         | 6.8         | 7.1         | 7.3         | 7.4         | 7.7         | 8.0         | 7.2         | 9.7         | 34.4%        | -9.7%        |
| Retail Sales   | 5.3         | 6.1         | 5.8         | 6.1         | 6.1         | 6.2         | 6.3         | 6.6         | 5.9         | 8.1         | 38.7%        | -10.5%       |
| <b>TOTAL</b>   | <b>31.8</b> | <b>46.3</b> | <b>44.6</b> | <b>46.4</b> | <b>47.8</b> | <b>49.4</b> | <b>52.2</b> | <b>55.5</b> | <b>65.4</b> | <b>87.4</b> | <b>33.7%</b> | <b>17.8%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Jefferson County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003       | 2013        | 2014        | 2015         | 2016         | 2017         | 2018         | 2019         | 2020        | 2021         | 2020-21      | 2019-20       |
|---|------------|-------------|-------------|--------------|--------------|--------------|--------------|--------------|-------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |            |             |             |              |              |              |              |              |             |              |              |               |
| Accom. & Food Serv.   | 4.7        | 8.2         | 8.7         | 9.6          | 10.2         | 10.8         | 12.1         | 13.0         | 12.6        | 14.6         | 16.2%        | -3.4%         |
| Arts, Ent. & Rec.   | 1.6        | 3.4         | 3.9         | 4.2          | 4.2          | 4.3          | 4.2          | 4.5          | 3.2         | 4.5          | 42.4%        | -30.0%        |
| Retail**  | 1.4        | 1.7         | 1.7         | 1.8          | 1.9          | 2.0          | 2.1          | 2.2          | 3.7         | 4.2          | 12.4%        | 71.1%         |
| Ground Tran.  | 0.1        | 0.2         | 0.2         | 0.2          | 0.2          | 0.2          | 0.2          | 0.3          | 0.4         | 0.3          | -21.9%       | 54.1%         |
| Other Travel*   | 0.1        | 0.1         | 0.1         | 0.1          | 0.1          | 0.1          | 0.2          | 0.2          | 0.2         | 0.3          | 81.9%        | 3.2%          |
| <b>TOTAL</b>  | <b>7.8</b> | <b>13.7</b> | <b>14.6</b> | <b>15.9</b>  | <b>16.6</b>  | <b>17.5</b>  | <b>18.8</b>  | <b>20.2</b>  | <b>20.1</b> | <b>23.9</b>  | <b>19.4%</b> | <b>-0.5%</b>  |
| <b>Travel Industry Employment (Jobs)</b>                      |            |             |             |              |              |              |              |              |             |              |              |               |
| Accom. & Food Serv.   | 310        | 430         | 430         | 460          | 470          | 480          | 520          | 550          | 510         | 540          | 5.3%         | -7.8%         |
| Arts, Ent. & Rec.   | 190        | 410         | 420         | 440          | 450          | 420          | 410          | 400          | 250         | 350          | 38.5%        | -36.4%        |
| Retail**  | 80         | 90          | 80          | 80           | 90           | 90           | 90           | 90           | 140         | 160          | 10.7%        | 59.9%         |
| Ground Tran.  | 10         | 10          | 10          | 10           | 10           | 10           | 10           | 10           | 10          | 10           | -26.7%       | 59.7%         |
| Other Travel*   | 10         | 10          | 10          | 10           | 10           | 10           | 10           | 10           | 10          | 10           | 74.9%        | -6.2%         |
| <b>TOTAL</b>  | <b>590</b> | <b>930</b>  | <b>960</b>  | <b>1,000</b> | <b>1,020</b> | <b>1,010</b> | <b>1,030</b> | <b>1,060</b> | <b>930</b>  | <b>1,070</b> | <b>15.1%</b> | <b>-12.3%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |            |             |             |              |              |              |              |              |             |              |              |               |
| Local Tax Receipts  | 0.3        | 0.6         | 0.5         | 0.6          | 0.6          | 0.7          | 0.7          | 0.8          | 1.9         | 2.0          | 7.4%         | 132.0%        |
| State Tax Receipts  | 0.9        | 1.5         | 1.5         | 1.6          | 1.7          | 1.9          | 2.0          | 2.1          | 2.2         | 2.7          | 22.0%        | 5.4%          |
| <b>TOTAL</b>  | <b>1.2</b> | <b>2.0</b>  | <b>2.0</b>  | <b>2.2</b>   | <b>2.3</b>   | <b>2.5</b>   | <b>2.7</b>   | <b>2.9</b>   | <b>4.1</b>  | <b>4.7</b>   | <b>15.2%</b> | <b>41.2%</b>  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Jefferson County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Jefferson County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$133  | \$233 | \$369 | \$647 | 2.8        | 1.8            |
| Private Home       | \$34   | \$103 | \$81  | \$243 | 2.4        | 3.0            |
| Other Overnight    | \$38   | \$113 | \$103 | \$302 | 2.7        | 2.9            |
| All Overnight      | \$98   | \$246 | \$258 | \$650 | 2.6        | 2.5            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |           | Party-Nights |         |         |
|--------------------|---------------|---------|-----------|--------------|---------|---------|
|                    | 2019          | 2020    | 2021      | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 141,080       | 320,330 | 319,000   | 57,510       | 116,950 | 114,770 |
| Private Home       | 247,100       | 163,940 | 248,850   | 96,580       | 69,570  | 105,590 |
| Other Overnight    | 569,200       | 454,800 | 629,830   | 169,380      | 171,290 | 235,290 |
| All Overnight      | 957,380       | 939,080 | 1,197,670 | 323,470      | 357,800 | 455,650 |

|                    | Person-Trips |         |         | Party-Trips |         |         |
|--------------------|--------------|---------|---------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 84,820       | 188,090 | 181,520 | 34,570      | 68,280  | 65,380  |
| Private Home       | 96,120       | 54,530  | 82,780  | 37,570      | 23,140  | 35,120  |
| Other Overnight    | 192,530      | 156,360 | 213,640 | 57,630      | 59,160  | 80,130  |
| All Overnight      | 373,470      | 398,990 | 477,940 | 129,770     | 150,580 | 180,640 |

# Josephine County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$73,016 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$41 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 5% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 6% |
|--|----|

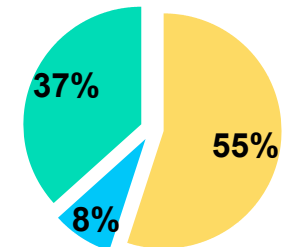
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

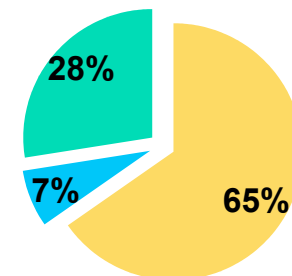
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Josephine County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Josephine County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 98.6  | 125.4 | 123.5 | 124.3 | 125.7 | 129.2 | 133.2 | 141.4 | 86.6  | 153.5 | ▲ 77.4%            | ▲ 2.5%  |
| Other                          | 8.5   | 14.6  | 14.1  | 11.8  | 11.3  | 11.0  | 12.7  | 12.9  | 6.0   | 11.2  | ▲ 86.6%            | ▲ 1.6%  |
| Visitor                        | 90.1  | 110.7 | 109.3 | 112.4 | 114.4 | 118.3 | 120.5 | 128.6 | 80.6  | 142.4 | ▲ 76.7%            | ▲ 2.6%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 28.3  | 33.2  | 35.5  | 38.7  | 41.7  | 45.4  | 50.2  | 52.9  | 49.8  | 59.4  | ▲ 19.2%            | ▲ 4.2%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 1,730 | 1,620 | 1,650 | 1,730 | 1,780 | 1,800 | 1,910 | 2,030 | 1,800 | 1,980 | ▲ 9.9%             | ▲ 0.8%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 3.6   | 4.8   | 4.9   | 5.1   | 5.4   | 6.1   | 6.3   | 6.6   | 5.2   | 7.2   | ▲ 37.1%            | ▲ 3.9%  |
| Local                          | 0.8   | 1.1   | 1.1   | 1.2   | 1.3   | 1.3   | 1.3   | 1.4   | 1.3   | 1.9   | ▲ 44.4%            | ▲ 5.1%  |
| State                          | 2.8   | 3.7   | 3.8   | 3.9   | 4.2   | 4.7   | 5.0   | 5.2   | 3.9   | 5.3   | ▲ 34.7%            | ▲ 3.6%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Josephine County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003 | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020 | 2021  | 2020-21 | 2019-20 |
|--|------|-------|-------|-------|-------|-------|-------|-------|------|-------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |      |       |       |       |       |       |       |       |      |       |         |         |
| Destination Spending   | 90.1 | 110.7 | 109.3 | 112.4 | 114.4 | 118.3 | 120.5 | 128.6 | 80.6 | 142.4 | 76.7%   | -37.3%  |
| Other Travel*  | 8.5  | 14.6  | 14.1  | 11.8  | 11.3  | 11.0  | 12.7  | 12.9  | 6.0  | 11.2  | 86.6%   | -53.4%  |
| <b>TOTAL</b>   | 98.6 | 125.4 | 123.5 | 124.3 | 125.7 | 129.2 | 133.2 | 141.4 | 86.6 | 153.5 | 77.4%   | -38.8%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |      |       |       |       |       |       |       |       |      |       |         |         |
| Hotel, Motel, STVR**   | 35.3 | 43.4  | 42.7  | 44.4  | 45.6  | 47.8  | 48.2  | 52.3  | 39.0 | 62.9  | 61.2%   | -25.5%  |
| Hotel, Motel   |      |       |       |       |       |       |       |       |      | 54.7  |         |         |
| STVR   |      |       |       |       |       |       |       |       |      | 8.1   |         |         |
| Private Home   | 25.0 | 33.8  | 33.3  | 33.9  | 34.1  | 35.1  | 36.1  | 37.9  | 20.3 | 41.9  | 106.7%  | -46.5%  |
| Campground   | 7.1  | 7.9   | 8.0   | 8.1   | 8.3   | 8.4   | 8.7   | 9.1   | 6.7  | 7.5   | 11.4%   | -26.2%  |
| 2nd Home   | 1.5  | 2.0   | 2.0   | 2.0   | 2.1   | 2.1   | 2.2   | 2.2   | 1.8  | 2.1   | 14.3%   | -18.5%  |
| Day Travel   | 21.2 | 23.6  | 23.3  | 23.9  | 24.3  | 24.9  | 25.4  | 27.0  | 12.7 | 28.0  | 119.7%  | -52.8%  |
| <b>TOTAL</b>   | 90.1 | 110.7 | 109.3 | 112.4 | 114.4 | 118.3 | 120.5 | 128.6 | 80.6 | 142.4 | 76.7%   | -37.3%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |      |       |       |       |       |       |       |       |      |       |         |         |
| Accommodations   | 16.1 | 19.1  | 19.4  | 21.3  | 22.5  | 23.5  | 23.5  | 25.1  | 21.2 | 34.0  | 59.9%   | -15.5%  |
| Food Service   | 24.0 | 31.4  | 31.5  | 33.4  | 34.6  | 36.1  | 37.0  | 40.2  | 24.9 | 44.3  | 78.2%   | -38.2%  |
| Food Stores  | 10.2 | 12.9  | 13.0  | 13.6  | 13.6  | 13.6  | 13.6  | 14.4  | 9.0  | 16.1  | 79.9%   | -37.7%  |
| Local Tran. & Gas  | 9.2  | 15.6  | 14.5  | 12.2  | 11.4  | 12.6  | 13.9  | 14.6  | 7.3  | 14.5  | 98.3%   | -50.1%  |
| Arts, Ent. & Rec.  | 14.0 | 14.6  | 14.3  | 14.8  | 15.1  | 15.4  | 15.4  | 16.3  | 7.9  | 13.7  | 72.8%   | -51.4%  |
| Retail Sales   | 16.6 | 17.1  | 16.6  | 17.1  | 17.1  | 17.2  | 17.1  | 18.0  | 10.3 | 19.8  | 92.7%   | -42.7%  |
| <b>TOTAL</b>   | 90.1 | 110.7 | 109.3 | 112.4 | 114.4 | 118.3 | 120.5 | 128.6 | 80.6 | 142.4 | 76.7%   | -37.3%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Josephine County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 18.5         | 22.7         | 24.8         | 27.4         | 29.8         | 33.6         | 37.6         | 39.2         | 35.5         | 41.9         | 18.1%        | -9.5%         |
| Arts, Ent. & Rec.   | 4.5          | 4.6          | 4.7          | 5.0          | 5.3          | 5.5          | 5.9          | 6.5          | 6.9          | 9.3          | 35.7%        | 6.2%          |
| Retail**  | 3.8          | 4.4          | 4.4          | 4.6          | 4.8          | 5.0          | 5.3          | 5.6          | 6.1          | 6.7          | 10.3%        | 8.5%          |
| Ground Tran.  | 0.5          | 0.6          | 0.6          | 0.6          | 0.7          | 0.7          | 0.7          | 0.8          | 0.6          | 0.7          | 4.4%         | -20.9%        |
| Other Travel*   | 1.1          | 0.9          | 1.0          | 1.1          | 1.2          | 0.6          | 0.7          | 0.8          | 0.8          | 0.8          | 3.8%         | 1.3%          |
| <b>TOTAL</b>  | <b>28.3</b>  | <b>33.2</b>  | <b>35.5</b>  | <b>38.7</b>  | <b>41.7</b>  | <b>45.4</b>  | <b>50.2</b>  | <b>52.9</b>  | <b>49.8</b>  | <b>59.4</b>  | <b>19.2%</b> | <b>-5.7%</b>  |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 1,040        | 1,030        | 1,060        | 1,130        | 1,180        | 1,220        | 1,320        | 1,410        | 1,200        | 1,280        | 7.1%         | -15.0%        |
| Arts, Ent. & Rec.   | 440          | 340          | 350          | 350          | 360          | 350          | 350          | 370          | 360          | 440          | 23.4%        | -3.5%         |
| Retail**  | 190          | 190          | 180          | 190          | 180          | 190          | 200          | 200          | 200          | 210          | 5.7%         | -0.5%         |
| Ground Tran.  | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 20           | -2.0%        | -18.1%        |
| Other Travel*   | 50           | 40           | 40           | 50           | 50           | 30           | 30           | 30           | 30           | 30           | -5.1%        | -0.7%         |
| <b>TOTAL</b>  | <b>1,730</b> | <b>1,620</b> | <b>1,650</b> | <b>1,730</b> | <b>1,780</b> | <b>1,800</b> | <b>1,910</b> | <b>2,030</b> | <b>1,800</b> | <b>1,980</b> | <b>10.0%</b> | <b>-11.3%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Local Tax Receipts  | 0.8          | 1.1          | 1.1          | 1.2          | 1.3          | 1.3          | 1.3          | 1.4          | 1.3          | 1.9          | 44.4%        | -9.6%         |
| State Tax Receipts  | 2.8          | 3.7          | 3.8          | 3.9          | 4.2          | 4.7          | 5.0          | 5.2          | 3.9          | 5.3          | 34.7%        | -24.1%        |
| <b>TOTAL</b>  | <b>3.6</b>   | <b>4.8</b>   | <b>4.9</b>   | <b>5.1</b>   | <b>5.4</b>   | <b>6.1</b>   | <b>6.3</b>   | <b>6.6</b>   | <b>5.2</b>   | <b>7.2</b>   | <b>37.1%</b> | <b>-21.0%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Josephine County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Josephine County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$101  | \$200 | \$280 | \$554 | 2.8        | 2.0            |
| Private Home       | \$37   | \$132 | \$89  | \$318 | 2.4        | 3.6            |
| Other Overnight    | \$47   | \$149 | \$124 | \$396 | 2.7        | 3.2            |
| All Overnight      | \$91   | \$255 | \$230 | \$657 | 2.5        | 2.9            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |         |         |
|--------------------|---------------|-----------|-----------|--------------|---------|---------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 514,290       | 407,100   | 622,540   | 210,380      | 148,670 | 224,730 |
| Private Home       | 1,144,300     | 581,680   | 1,129,260 | 439,150      | 242,100 | 470,000 |
| Other Overnight    | 312,800       | 192,100   | 204,370   | 92,330       | 72,480  | 77,120  |
| All Overnight      | 1,971,390     | 1,180,870 | 1,956,170 | 741,860      | 463,250 | 771,850 |

|                    | Person-Trips |         |         | Party-Trips |         |         |
|--------------------|--------------|---------|---------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 271,890      | 212,630 | 313,900 | 111,220     | 77,340  | 113,450 |
| Private Home       | 376,250      | 163,350 | 317,120 | 144,400     | 67,990  | 131,990 |
| Other Overnight    | 96,440       | 60,450  | 64,310  | 28,410      | 22,740  | 24,190  |
| All Overnight      | 744,580      | 436,430 | 695,330 | 284,030     | 168,070 | 269,630 |



# Klamath County / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job                 | \$102,184 |
| Employee Earnings generated by \$100 Visitor Spending          | \$30      |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$4       |
| Visitor Shares   |           |
| Travel Share of Total Employment (2021)                        | 7%        |
| Overnight Visitor Day Share of Resident Population**           | 12%       |

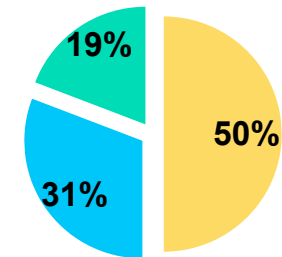
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

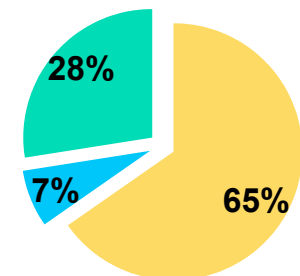
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Klamath County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Klamath County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 117.4 | 140.0 | 139.8 | 139.5 | 141.2 | 153.9 | 156.1 | 162.3 | 110.1 | 213.0 | ▲ 93.4%            | ▲ 3.4%  |
| Other                          | 8.9   | 13.6  | 11.4  | 8.6   | 8.3   | 10.7  | 10.5  | 10.7  | 5.2   | 9.2   | ▲ 75.9%            | ▲ 0.2%  |
| Visitor                        | 108.6 | 126.4 | 128.4 | 131.0 | 132.9 | 143.1 | 145.6 | 151.7 | 104.8 | 203.7 | ▲ 94.3%            | ▲ 3.6%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 32.8  | 41.4  | 43.4  | 45.7  | 46.5  | 51.9  | 55.4  | 56.3  | 52.0  | 60.9  | ▲ 17.3%            | ▲ 3.5%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 1,810 | 1,820 | 1,850 | 1,890 | 1,920 | 2,080 | 2,170 | 2,140 | 1,880 | 2,020 | ▲ 7.9%             | ▲ 0.6%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 4.1   | 5.6   | 5.8   | 6.0   | 6.2   | 7.2   | 7.4   | 7.6   | 6.0   | 8.9   | ▲ 48.8%            | ▲ 4.4%  |
| Local                          | 1.0   | 1.5   | 1.6   | 1.7   | 1.8   | 2.0   | 2.0   | 2.0   | 1.7   | 2.9   | ▲ 67.7%            | ▲ 6.1%  |
| State                          | 3.1   | 4.1   | 4.2   | 4.3   | 4.4   | 5.2   | 5.4   | 5.6   | 4.2   | 6.0   | ▲ 41.0%            | ▲ 3.7%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Klamath County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 108.6        | 126.4        | 128.4        | 131.0        | 132.9        | 143.1        | 145.6        | 151.7        | 104.8        | 203.7        | 94.3%        | -30.9%        |
| Other Travel*  | 8.9          | 13.6         | 11.4         | 8.6          | 8.3          | 10.7         | 10.5         | 10.7         | 5.2          | 9.2          | 75.9%        | -50.8%        |
| <b>TOTAL</b>   | <b>117.4</b> | <b>140.0</b> | <b>139.8</b> | <b>139.5</b> | <b>141.2</b> | <b>153.9</b> | <b>156.1</b> | <b>162.3</b> | <b>110.1</b> | <b>213.0</b> | <b>93.4%</b> | <b>-32.2%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 48.0         | 57.5         | 59.0         | 61.2         | 62.4         | 69.3         | 70.5         | 73.9         | 45.9         | 85.6         | 86.4%        | -37.9%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 72.0         |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 13.6         |              |               |
| Private Home   | 23.1         | 26.7         | 26.6         | 26.4         | 26.5         | 28.2         | 28.1         | 29.0         | 22.2         | 32.7         | 47.5%        | -23.6%        |
| Campground   | 8.3          | 10.9         | 11.1         | 11.2         | 11.5         | 11.6         | 12.1         | 12.6         | 16.6         | 46.3         | 178.5%       | 31.8%         |
| 2nd Home   | 5.1          | 6.4          | 6.5          | 6.6          | 6.6          | 6.8          | 7.0          | 7.2          | 5.9          | 6.7          | 14.3%        | -18.5%        |
| Day Travel   | 24.0         | 24.9         | 25.3         | 25.6         | 25.9         | 27.3         | 27.9         | 28.9         | 14.3         | 32.5         | 127.3%       | -50.7%        |
| <b>TOTAL</b>   | <b>108.6</b> | <b>126.4</b> | <b>128.4</b> | <b>131.0</b> | <b>132.9</b> | <b>143.1</b> | <b>145.6</b> | <b>151.7</b> | <b>104.8</b> | <b>203.7</b> | <b>94.3%</b> | <b>-30.9%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 21.5         | 25.7         | 27.2         | 29.8         | 31.0         | 33.9         | 34.0         | 35.5         | 28.1         | 54.1         | 92.3%        | -20.8%        |
| Food Service   | 26.3         | 33.0         | 34.3         | 36.1         | 37.5         | 40.4         | 41.6         | 44.2         | 29.8         | 55.8         | 87.6%        | -32.6%        |
| Food Stores  | 11.1         | 13.5         | 14.0         | 14.5         | 14.4         | 14.7         | 14.8         | 15.3         | 13.6         | 28.3         | 108.6%       | -11.3%        |
| Local Tran. & Gas  | 11.4         | 18.5         | 17.8         | 14.8         | 13.9         | 15.9         | 17.7         | 18.1         | 9.4          | 20.3         | 117.1%       | -48.5%        |
| Arts, Ent. & Rec.  | 17.8         | 17.4         | 17.8         | 18.2         | 18.6         | 19.4         | 19.5         | 20.1         | 11.5         | 21.8         | 89.7%        | -42.9%        |
| Retail Sales   | 17.6         | 17.0         | 17.1         | 17.4         | 17.4         | 18.0         | 17.9         | 18.4         | 12.5         | 23.3         | 86.5%        | -32.0%        |
| Visitor Air Tran.  | 2.8          | 1.3          | 0.3          | 0.0          | 0.0          | 0.9          | 0.0          | 0.0          | 0.0          | 0.0          | 0.0%         | 0.0%          |
| <b>TOTAL</b>   | <b>108.6</b> | <b>126.4</b> | <b>128.4</b> | <b>131.0</b> | <b>132.9</b> | <b>143.1</b> | <b>145.6</b> | <b>151.7</b> | <b>104.8</b> | <b>203.7</b> | <b>94.3%</b> | <b>-30.9%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.



# Klamath County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 22.0         | 29.8         | 31.7         | 34.1         | 34.8         | 38.6         | 41.7         | 41.8         | 37.3         | 46.2         | 23.8%        | -10.7%        |
| Arts, Ent. & Rec.   | 5.5          | 5.8          | 5.6          | 5.8          | 5.6          | 6.0          | 6.9          | 7.4          | 5.8          | 5.9          | 1.6%         | -22.0%        |
| Retail**  | 3.8          | 4.1          | 4.3          | 4.5          | 4.6          | 4.9          | 5.2          | 5.4          | 7.4          | 7.9          | 6.5%         | 37.2%         |
| Ground Tran.  | 0.6          | 0.6          | 0.7          | 0.7          | 0.8          | 0.9          | 0.9          | 1.0          | 0.8          | 0.3          | -54.3%       | -20.6%        |
| Other Travel*   | 1.0          | 1.1          | 1.1          | 0.6          | 0.7          | 1.5          | 0.7          | 0.8          | 0.7          | 0.7          | -7.9%        | -6.1%         |
| <b>TOTAL</b>  | <b>32.8</b>  | <b>41.4</b>  | <b>43.4</b>  | <b>45.7</b>  | <b>46.5</b>  | <b>51.9</b>  | <b>55.4</b>  | <b>56.3</b>  | <b>52.0</b>  | <b>60.9</b>  | <b>17.3%</b> | <b>-7.7%</b>  |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 1,070        | 1,150        | 1,160        | 1,210        | 1,210        | 1,310        | 1,340        | 1,270        | 1,100        | 1,250        | 12.9%        | -13.2%        |
| Arts, Ent. & Rec.   | 470          | 440          | 450          | 440          | 450          | 500          | 560          | 600          | 450          | 460          | 1.8%         | -24.9%        |
| Retail**  | 200          | 180          | 180          | 190          | 200          | 210          | 210          | 220          | 270          | 280          | 4.1%         | 25.8%         |
| Ground Tran.  | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 10           | -57.1%       | -17.7%        |
| Other Travel*   | 50           | 40           | 40           | 30           | 30           | 50           | 40           | 40           | 30           | 30           | -10.3%       | -9.5%         |
| <b>TOTAL</b>  | <b>1,810</b> | <b>1,820</b> | <b>1,850</b> | <b>1,890</b> | <b>1,920</b> | <b>2,080</b> | <b>2,170</b> | <b>2,140</b> | <b>1,880</b> | <b>2,020</b> | <b>7.4%</b>  | <b>-12.1%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Local Tax Receipts  | 1.0          | 1.5          | 1.6          | 1.7          | 1.8          | 2.0          | 2.0          | 2.0          | 1.7          | 2.9          | 67.7%        | -14.7%        |
| State Tax Receipts  | 3.1          | 4.1          | 4.2          | 4.3          | 4.4          | 5.2          | 5.4          | 5.6          | 4.2          | 6.0          | 41.0%        | -23.8%        |
| <b>TOTAL</b>  | <b>4.1</b>   | <b>5.6</b>   | <b>5.8</b>   | <b>6.0</b>   | <b>6.2</b>   | <b>7.2</b>   | <b>7.4</b>   | <b>7.6</b>   | <b>6.0</b>   | <b>8.9</b>   | <b>48.8%</b> | <b>-21.3%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Klamath County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Klamath County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$103  | \$204 | \$285 | \$565 | 2.8        | 2.0            |
| Private Home       | \$37   | \$132 | \$89  | \$318 | 2.4        | 3.6            |
| Other Overnight    | \$44   | \$137 | \$118 | \$370 | 2.7        | 3.1            |
| All Overnight      | \$88   | \$244 | \$230 | \$646 | 2.6        | 2.8            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |         |           |
|--------------------|---------------|-----------|-----------|--------------|---------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020    | 2021      |
| Hotel, Motel, STVR | 735,790       | 462,860   | 832,610   | 301,000      | 169,890 | 300,510   |
| Private Home       | 875,840       | 635,720   | 880,800   | 336,120      | 264,590 | 366,590   |
| Other Overnight    | 598,080       | 555,150   | 1,212,840 | 180,380      | 210,330 | 449,860   |
| All Overnight      | 2,209,710     | 1,653,730 | 2,926,240 | 817,500      | 644,820 | 1,116,970 |

|                    | Person-Trips |         |           | Party-Trips |         |         |
|--------------------|--------------|---------|-----------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021      | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 388,990      | 238,750 | 418,930   | 159,130     | 87,060  | 151,390 |
| Private Home       | 287,980      | 178,520 | 247,350   | 110,520     | 74,300  | 102,950 |
| Other Overnight    | 182,190      | 174,140 | 386,710   | 54,800      | 65,770  | 143,170 |
| All Overnight      | 859,160      | 591,410 | 1,052,990 | 324,450     | 227,130 | 397,510 |

# Lake County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$75,220 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$25 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$4 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 6% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 9% |
|--|----|

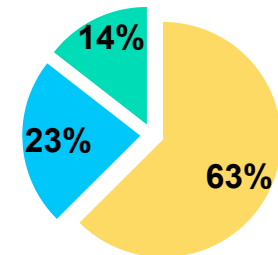
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

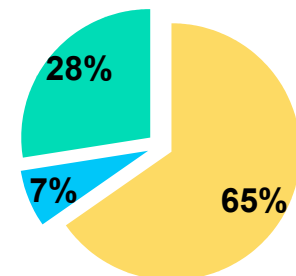
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Lake County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Lake County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 10.4 | 13.2 | 13.5 | 13.6 | 13.8 | 14.3 | 14.8 | 15.3 | 12.2 | 17.4 | ▲ 42.3%            | ▲ 2.9%  |
| Other                          | 0.6  | 1.3  | 1.2  | 1.0  | 0.9  | 1.0  | 1.1  | 1.2  | 0.5  | 1.0  | ▲ 86.6%            | ▲ 2.6%  |
| Visitor                        | 9.7  | 11.9 | 12.3 | 12.7 | 12.9 | 13.3 | 13.7 | 14.1 | 11.7 | 16.4 | ▲ 40.2%            | ▲ 2.9%  |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 2.3  | 2.7  | 3.0  | 3.1  | 3.2  | 3.3  | 3.4  | 3.5  | 3.9  | 4.1  | ▲ 7.0%             | ▲ 3.2%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 220  | 220  | 220  | 210  | 220  | 220  | 230  | 210  | 220  | 220  | ▲ 2.6%             | ▲ 0.0%  |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 0.3  | 0.5  | 0.5  | 0.5  | 0.5  | 0.6  | 0.6  | 0.6  | 0.6  | 0.7  | ▲ 25.6%            | ▲ 4.4%  |
| Local                          | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.2  | ▲ 36.3%            | ▲ 7.3%  |
| State                          | 0.3  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.5  | 0.4  | 0.5  | ▲ 21.6%            | ▲ 3.5%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Lake County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2020-21 | 2019-20 |
|--|------|------|------|------|------|------|------|------|------|------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |      |      |      |      |      |      |      |      |      |      |         |         |
| Destination Spending   | 9.7  | 11.9 | 12.3 | 12.7 | 12.9 | 13.3 | 13.7 | 14.1 | 11.7 | 16.4 | 40.2%   | -17.2%  |
| Other Travel*  | 0.6  | 1.3  | 1.2  | 1.0  | 0.9  | 1.0  | 1.1  | 1.2  | 0.5  | 1.0  | 86.6%   | -53.5%  |
| <b>TOTAL</b>   | 10.4 | 13.2 | 13.5 | 13.6 | 13.8 | 14.3 | 14.8 | 15.3 | 12.2 | 17.4 | 42.3%   | -20.0%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |      |      |      |      |      |      |      |      |      |      |         |         |
| Hotel, Motel, STVR**   | 2.9  | 4.4  | 4.6  | 4.9  | 5.0  | 5.3  | 5.4  | 5.5  | 5.7  | 8.5  | 49.6%   | 2.7%    |
| Hotel, Motel   |      |      |      |      |      |      |      |      |      | 8.0  |         |         |
| STVR   |      |      |      |      |      |      |      |      |      | 0.5  |         |         |
| Private Home   | 1.1  | 1.5  | 1.6  | 1.6  | 1.6  | 1.6  | 1.7  | 1.7  | 1.5  | 1.9  | 33.5%   | -14.4%  |
| Campground   | 2.2  | 2.0  | 2.1  | 2.1  | 2.1  | 2.1  | 2.2  | 2.3  | 1.8  | 2.0  | 11.8%   | -21.6%  |
| 2nd Home   | 0.8  | 1.0  | 1.0  | 1.0  | 1.0  | 1.1  | 1.1  | 1.1  | 0.9  | 1.1  | 14.7%   | -17.0%  |
| Day Travel   | 2.8  | 3.0  | 3.1  | 3.1  | 3.1  | 3.2  | 3.3  | 3.4  | 1.8  | 2.8  | 58.5%   | -47.7%  |
| <b>TOTAL</b>   | 9.7  | 11.9 | 12.3 | 12.7 | 12.9 | 13.3 | 13.7 | 14.1 | 11.7 | 16.4 | 40.2%   | -17.2%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |      |      |      |      |      |      |      |      |      |      |         |         |
| Accommodations   | 1.7  | 2.4  | 2.6  | 2.8  | 2.9  | 3.1  | 3.1  | 3.2  | 3.4  | 5.0  | 48.0%   | 6.1%    |
| Food Service   | 2.4  | 3.2  | 3.4  | 3.5  | 3.6  | 3.8  | 3.9  | 4.2  | 3.4  | 4.6  | 37.8%   | -19.2%  |
| Food Stores  | 1.5  | 1.7  | 1.8  | 1.9  | 1.9  | 1.9  | 1.9  | 2.0  | 1.6  | 2.1  | 27.4%   | -17.0%  |
| Local Tran. & Gas  | 0.8  | 1.3  | 1.2  | 1.0  | 1.0  | 1.1  | 1.2  | 1.2  | 0.8  | 1.3  | 54.2%   | -31.8%  |
| Arts, Ent. & Rec.  | 1.7  | 1.7  | 1.8  | 1.8  | 1.9  | 1.9  | 1.9  | 2.0  | 1.3  | 1.8  | 32.0%   | -32.2%  |
| Retail Sales   | 1.6  | 1.5  | 1.6  | 1.6  | 1.6  | 1.6  | 1.6  | 1.6  | 1.2  | 1.6  | 41.7%   | -28.6%  |
| <b>TOTAL</b>   | 9.7  | 11.9 | 12.3 | 12.7 | 12.9 | 13.3 | 13.7 | 14.1 | 11.7 | 16.4 | 40.2%   | -17.2%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.



# Lake County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018       | 2019       | 2020       | 2021       | 2020-21      | 2019-20      |
|---|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------------|--------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |            |            |            |            |            |            |            |            |            |            |              |              |
| Accom. & Food Serv.   | 1.3        | 1.6        | 1.8        | 1.8        | 1.9        | 1.9        | 2.0        | 2.0        | 2.1        | 2.5        | 18.1%        | 5.1%         |
| Arts, Ent. & Rec.   | 0.5        | 0.5        | 0.6        | 0.6        | 0.6        | 0.7        | 0.7        | 0.7        | 0.8        | 0.7        | -11.0%       | 5.5%         |
| Retail**  | 0.4        | 0.5        | 0.5        | 0.5        | 0.5        | 0.5        | 0.6        | 0.6        | 0.8        | 0.8        | -2.6%        | 41.7%        |
| Ground Tran.  | 0.0        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | -10.4%       | 14.9%        |
| Other Travel*   | 0.0        | 0.0        | 0.0        | 0.0        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 11.6%        | 1.1%         |
| <b>TOTAL</b>  | <b>2.3</b> | <b>2.7</b> | <b>3.0</b> | <b>3.1</b> | <b>3.2</b> | <b>3.3</b> | <b>3.4</b> | <b>3.5</b> | <b>3.9</b> | <b>4.1</b> | <b>7.0%</b>  | <b>11.5%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |            |            |            |            |            |            |            |            |            |            |              |              |
| Accom. & Food Serv.   | 150        | 140        | 140        | 130        | 140        | 140        | 140        | 130        | 120        | 140        | 10.8%        | -4.1%        |
| Arts, Ent. & Rec.   | 40         | 50         | 50         | 50         | 50         | 50         | 50         | 50         | 50         | 40         | -14.2%       | -4.1%        |
| Retail**  | 30         | 20         | 20         | 20         | 20         | 30         | 30         | 30         | 30         | 30         | -1.3%        | 31.7%        |
| Ground Tran.  | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | -15.9%       | 19.1%        |
| Other Travel*   | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 4.6%         | -4.8%        |
| <b>TOTAL</b>  | <b>220</b> | <b>220</b> | <b>220</b> | <b>210</b> | <b>220</b> | <b>220</b> | <b>230</b> | <b>210</b> | <b>220</b> | <b>220</b> | <b>0.0%</b>  | <b>4.8%</b>  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |            |            |            |            |            |            |            |            |            |            |              |              |
| Local Tax Receipts  | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.2        | 36.3%        | 12.3%        |
| State Tax Receipts  | 0.3        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.5        | 0.4        | 0.5        | 21.6%        | -10.7%       |
| <b>TOTAL</b>  | <b>0.3</b> | <b>0.5</b> | <b>0.5</b> | <b>0.5</b> | <b>0.5</b> | <b>0.6</b> | <b>0.6</b> | <b>0.6</b> | <b>0.6</b> | <b>0.7</b> | <b>25.6%</b> | <b>-5.5%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Lake County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Lake County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$90   | \$154 | \$250 | \$426 | 2.8        | 1.7            |
| Private Home       | \$25   | \$74  | \$58  | \$174 | 2.4        | 3.0            |
| Other Overnight    | \$34   | \$95  | \$88  | \$247 | 2.6        | 2.8            |
| All Overnight      | \$83   | \$193 | \$214 | \$503 | 2.6        | 2.4            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |        |         |
|--------------------|---------------|---------|---------|--------------|--------|---------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020   | 2021    |
| Hotel, Motel, STVR | 60,000        | 68,010  | 93,850  | 24,460       | 24,640 | 33,810  |
| Private Home       | 79,520        | 63,550  | 79,410  | 31,080       | 26,970 | 33,700  |
| Other Overnight    | 129,120       | 86,640  | 92,240  | 38,880       | 33,260 | 35,410  |
| All Overnight      | 268,650       | 218,200 | 265,500 | 94,420       | 84,860 | 102,920 |

|                    | Person-Trips |        |         | Party-Trips |        |        |
|--------------------|--------------|--------|---------|-------------|--------|--------|
|                    | 2019         | 2020   | 2021    | 2019        | 2020   | 2021   |
| Hotel, Motel, STVR | 36,070       | 40,800 | 55,080  | 14,700      | 14,750 | 19,860 |
| Private Home       | 30,930       | 21,140 | 26,420  | 12,090      | 8,970  | 11,210 |
| Other Overnight    | 44,620       | 30,740 | 32,730  | 13,520      | 11,860 | 12,630 |
| All Overnight      | 111,620      | 92,670 | 114,220 | 40,310      | 35,580 | 43,700 |

# Lane County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

Amount of Visitor Spending that supports 1 Job \$105,813

Employee Earnings generated by \$100 Visitor Spending \$28

Local & State Tax Revenues generated by \$100 Visitor Spending \$5

### Visitor Shares

Travel Share of Total Employment (2021) 4%

Overnight Visitor Day Share of Resident Population\*\* 6%

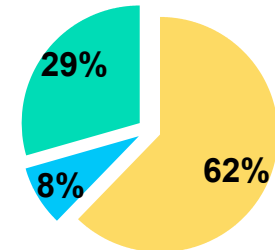
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

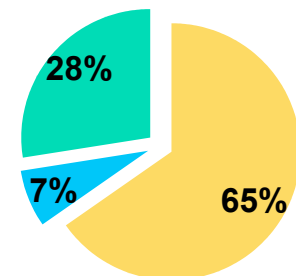
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Lane County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Lane County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015   | 2016   | 2017   | 2018    | 2019    | 2020  | 2021    | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|--------|--------|--------|---------|---------|-------|---------|--------------------|---------|
|                                |       |       |       |        |        |        |         |         |       |         | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |        |        |        |         |         |       |         |                    |         |
| Total (Current \$)             | 520.5 | 810.8 | 842.7 | 868.6  | 928.7  | 950.8  | 1,024.1 | 1,041.1 | 566.0 | 1,050.3 | ▲ 85.6%            | ▲ 4.0%  |
| Other                          | 74.8  | 188.8 | 194.5 | 195.4  | 211.5  | 225.9  | 258.3   | 258.2   | 151.6 | 190.9   | ▲ 25.9%            | ▲ 5.3%  |
| Visitor                        | 445.7 | 622.0 | 648.2 | 673.2  | 717.2  | 724.8  | 765.8   | 782.9   | 414.3 | 859.5   | ▲ 107.4%           | ▲ 3.7%  |
| <b>Earnings (\$Million)</b>    |       |       |       |        |        |        |         |         |       |         |                    |         |
| Earnings (Current \$)          | 126.2 | 205.1 | 220.0 | 238.6  | 261.8  | 273.7  | 297.6   | 308.4   | 252.9 | 280.0   | ▲ 10.7%            | ▲ 4.5%  |
| <b>Employment (Jobs)</b>       |       |       |       |        |        |        |         |         |       |         |                    |         |
| Employment                     | 7,510 | 9,490 | 9,770 | 10,160 | 10,630 | 10,800 | 11,110  | 11,140  | 8,530 | 8,950   | ▲ 4.9%             | ▲ 1.0%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |        |        |        |         |         |       |         |                    |         |
| Total (Current \$)             | 18.2  | 29.5  | 31.1  | 33.7   | 36.6   | 39.2   | 41.5    | 42.1    | 29.1  | 42.3    | ▲ 45.5%            | ▲ 4.8%  |
| Local                          | 5.8   | 9.6   | 10.5  | 11.9   | 12.9   | 13.0   | 13.6    | 13.6    | 9.2   | 15.8    | ▲ 71.7%            | ▲ 5.7%  |
| State                          | 12.4  | 19.9  | 20.7  | 21.8   | 23.7   | 26.2   | 27.9    | 28.5    | 19.9  | 26.5    | ▲ 33.4%            | ▲ 4.3%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Lane County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018           | 2019           | 2020         | 2021           | 2020-21       | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|----------------|----------------|--------------|----------------|---------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |                |                |              |                |               |               |
| Destination Spending   | 445.7        | 622.0        | 648.2        | 673.2        | 717.2        | 724.8        | 765.8          | 782.9          | 414.3        | 859.5          | 107.4%        | -47.1%        |
| Other Travel*  | 74.8         | 188.8        | 194.5        | 195.4        | 211.5        | 225.9        | 258.3          | 258.2          | 151.6        | 190.9          | 25.9%         | -41.3%        |
| <b>TOTAL</b>   | <b>520.5</b> | <b>810.8</b> | <b>842.7</b> | <b>868.6</b> | <b>928.7</b> | <b>950.8</b> | <b>1,024.1</b> | <b>1,041.1</b> | <b>566.0</b> | <b>1,050.3</b> | <b>85.6%</b>  | <b>-45.6%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |                |                |              |                |               |               |
| Hotel, Motel, STVR**   | 157.7        | 250.7        | 267.2        | 285.2        | 313.6        | 315.4        | 332.5          | 338.9          | 189.1        | 393.6          | 108.1%        | -44.2%        |
| Hotel, Motel   |              |              |              |              |              |              |                |                |              | 316.8          |               |               |
| STVR   |              |              |              |              |              |              |                |                |              | 76.9           |               |               |
| Private Home   | 126.8        | 177.0        | 181.2        | 183.7        | 190.1        | 194.5        | 206.9          | 210.9          | 107.6        | 233.7          | 117.3%        | -49.0%        |
| Campground   | 29.0         | 34.9         | 35.4         | 36.0         | 37.0         | 37.2         | 38.7           | 40.3           | 32.4         | 36.0           | 11.3%         | -19.8%        |
| 2nd Home   | 5.1          | 9.2          | 9.4          | 9.5          | 9.5          | 9.8          | 10.2           | 10.5           | 8.6          | 9.8            | 14.5%         | -17.9%        |
| Day Travel   | 127.1        | 150.2        | 155.0        | 158.8        | 167.0        | 167.9        | 177.5          | 182.4          | 76.7         | 186.3          | 143.0%        | -58.0%        |
| <b>TOTAL</b>   | <b>445.7</b> | <b>622.0</b> | <b>648.2</b> | <b>673.2</b> | <b>717.2</b> | <b>724.8</b> | <b>765.8</b>   | <b>782.9</b>   | <b>414.3</b> | <b>859.5</b>   | <b>107.4%</b> | <b>-47.1%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |                |                |              |                |               |               |
| Accommodations   | 63.3         | 103.5        | 112.2        | 124.8        | 139.9        | 142.1        | 141.3          | 142.5          | 99.8         | 196.9          | 97.4%         | -30.0%        |
| Food Service   | 116.9        | 170.4        | 179.0        | 190.2        | 206.0        | 209.1        | 224.0          | 233.6          | 111.9        | 232.8          | 108.0%        | -52.1%        |
| Food Stores  | 46.4         | 62.2         | 65.0         | 67.7         | 69.2         | 68.2         | 70.6           | 72.2           | 43.6         | 84.4           | 93.5%         | -39.6%        |
| Local Tran. & Gas  | 42.9         | 75.7         | 75.8         | 66.8         | 66.9         | 68.5         | 81.3           | 81.6           | 34.9         | 82.6           | 136.6%        | -57.2%        |
| Arts, Ent. & Rec.  | 70.0         | 80.5         | 83.0         | 85.8         | 90.9         | 90.3         | 94.3           | 95.8           | 48.7         | 94.8           | 94.5%         | -49.1%        |
| Retail Sales   | 83.6         | 91.8         | 93.3         | 95.6         | 99.1         | 97.6         | 101.0          | 102.1          | 52.4         | 114.1          | 117.6%        | -48.7%        |
| Visitor Air Tran.  | 22.5         | 38.0         | 39.8         | 42.4         | 45.1         | 49.0         | 53.3           | 55.0           | 22.9         | 53.9           | 134.7%        | -58.3%        |
| <b>TOTAL</b>   | <b>445.7</b> | <b>622.0</b> | <b>648.2</b> | <b>673.2</b> | <b>717.2</b> | <b>724.8</b> | <b>765.8</b>   | <b>782.9</b>   | <b>414.3</b> | <b>859.5</b>   | <b>107.4%</b> | <b>-47.1%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.



# Lane County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015   | 2016   | 2017   | 2018   | 2019   | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|--------|--------|--------|--------|--------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |        |        |        |        |        |       |       |         |         |
| Accom. & Food Serv.   | 77.8  | 117.8 | 127.1 | 138.1  | 149.6  | 158.2  | 169.2  | 178.4  | 143.3 | 170.2 | 18.8%   | -19.7%  |
| Arts, Ent. & Rec.   | 20.5  | 28.4  | 30.0  | 31.4   | 34.2   | 34.8   | 37.6   | 39.6   | 31.0  | 35.1  | 13.2%   | -21.7%  |
| Retail**  | 15.8  | 19.3  | 20.2  | 21.2   | 22.6   | 23.1   | 24.2   | 24.7   | 24.5  | 27.0  | 10.4%   | -0.7%   |
| Ground Tran.  | 3.1   | 3.4   | 3.8   | 4.1    | 4.4    | 4.3    | 4.9    | 5.2    | 4.2   | 5.4   | 28.3%   | -19.1%  |
| Other Travel*   | 9.0   | 36.3  | 38.9  | 43.8   | 51.0   | 53.3   | 61.8   | 60.4   | 49.8  | 42.2  | -15.3%  | -17.6%  |
| <b>TOTAL</b>  | 126.2 | 205.1 | 220.0 | 238.6  | 261.8  | 273.7  | 297.6  | 308.4  | 252.9 | 280.0 | 10.7%   | -18.0%  |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |        |        |        |        |        |       |       |         |         |
| Accom. & Food Serv.   | 4,300 | 5,130 | 5,300 | 5,540  | 5,780  | 5,920  | 6,030  | 6,150  | 4,720 | 5,090 | 7.9%    | -23.2%  |
| Arts, Ent. & Rec.   | 1,940 | 2,370 | 2,420 | 2,400  | 2,540  | 2,580  | 2,620  | 2,630  | 1,870 | 2,040 | 8.9%    | -28.8%  |
| Retail**  | 780   | 830   | 840   | 860    | 880    | 880    | 890    | 890    | 800   | 840   | 5.0%    | -9.5%   |
| Ground Tran.  | 140   | 110   | 120   | 120    | 130    | 120    | 130    | 130    | 120   | 140   | 25.2%   | -13.7%  |
| Other Travel*   | 350   | 1,060 | 1,100 | 1,240  | 1,310  | 1,310  | 1,450  | 1,340  | 1,020 | 830   | -18.6%  | -24.0%  |
| <b>TOTAL</b>  | 7,510 | 9,490 | 9,770 | 10,160 | 10,630 | 10,800 | 11,110 | 11,140 | 8,530 | 8,950 | 4.9%    | -23.4%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |        |        |        |        |        |       |       |         |         |
| Local Tax Receipts  | 5.8   | 9.6   | 10.5  | 11.9   | 12.9   | 13.0   | 13.6   | 13.6   | 9.2   | 15.8  | 71.7%   | -32.1%  |
| State Tax Receipts  | 12.4  | 19.9  | 20.7  | 21.8   | 23.7   | 26.2   | 27.9   | 28.5   | 19.9  | 26.5  | 33.4%   | -30.4%  |
| <b>TOTAL</b>  | 18.2  | 29.5  | 31.1  | 33.7   | 36.6   | 39.2   | 41.5   | 42.1   | 29.1  | 42.3  | 45.5%   | -31.0%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Lane County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Lane County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |         | Party Size | Length of Stay |
|--------------------|--------|-------|-------|---------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip    |            |                |
| Hotel, Motel, STVR | \$183  | \$370 | \$490 | \$1,002 | 2.7        | 2.0            |
| Private Home       | \$48   | \$171 | \$108 | \$394   | 2.2        | 3.6            |
| Other Overnight    | \$68   | \$205 | \$178 | \$542   | 2.6        | 3.0            |
| All Overnight      | \$151  | \$426 | \$364 | \$1,066 | 2.4        | 2.9            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 2,075,730     | 1,316,490 | 2,737,550 | 887,280      | 513,320   | 1,020,920 |
| Private Home       | 4,853,840     | 2,561,550 | 4,899,810 | 1,974,840    | 1,088,230 | 2,184,500 |
| Other Overnight    | 1,407,220     | 932,280   | 992,030   | 417,660      | 352,800   | 375,450   |
| All Overnight      | 8,336,790     | 4,810,320 | 8,629,390 | 3,279,780    | 1,954,350 | 3,580,870 |

|                    | Person-Trips |           |           | Party-Trips |         |           |
|--------------------|--------------|-----------|-----------|-------------|---------|-----------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021      |
| Hotel, Motel, STVR | 1,117,220    | 695,060   | 1,350,340 | 469,790     | 263,220 | 498,940   |
| Private Home       | 1,602,780    | 724,330   | 1,381,880 | 636,200     | 305,290 | 599,510   |
| Other Overnight    | 451,500      | 306,570   | 326,230   | 134,220     | 116,100 | 123,560   |
| All Overnight      | 3,171,500    | 1,725,960 | 3,058,460 | 1,240,210   | 684,610 | 1,222,010 |

# Lincoln County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$98,983 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$34 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$6 |
|--|-----|

### Visitor Shares

|   |     |
|---|-----|
| Travel Share of Total Employment (2021) | 23% |
|---|-----|

|  |     |
|--|-----|
| Overnight Visitor Day Share of Resident Population** | 28% |
|--|-----|

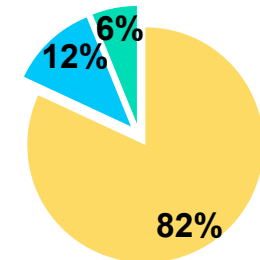
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

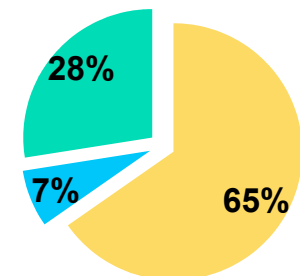
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Lincoln County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight



# Lincoln County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 324.6 | 470.6 | 506.7 | 529.1 | 573.1 | 590.9 | 617.4 | 644.3 | 467.4 | 605.1 | ▲ 29.5%            | ▲ 3.5%  |
| Other                          | 8.8   | 11.0  | 10.9  | 10.0  | 11.4  | 12.2  | 14.0  | 14.2  | 9.1   | 11.3  | ▲ 24.5%            | ▲ 1.4%  |
| Visitor                        | 315.7 | 459.6 | 495.8 | 519.1 | 561.8 | 578.7 | 603.4 | 630.1 | 458.4 | 593.8 | ▲ 29.6%            | ▲ 3.6%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 85.5  | 125.6 | 133.1 | 141.8 | 153.5 | 161.8 | 180.5 | 193.3 | 165.6 | 204.2 | ▲ 23.3%            | ▲ 5.0%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 4,690 | 5,630 | 5,790 | 5,820 | 6,070 | 6,120 | 6,470 | 6,650 | 5,330 | 6,060 | ▲ 13.6%            | ▲ 1.4%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 13.6  | 21.8  | 23.4  | 25.4  | 27.2  | 30.0  | 31.7  | 32.8  | 29.6  | 35.6  | ▲ 20.0%            | ▲ 5.5%  |
| Local                          | 6.4   | 10.1  | 11.0  | 12.3  | 12.9  | 13.6  | 14.1  | 14.3  | 14.5  | 17.3  | ▲ 19.6%            | ▲ 5.7%  |
| State                          | 7.2   | 11.7  | 12.4  | 13.1  | 14.3  | 16.4  | 17.6  | 18.5  | 15.2  | 18.3  | ▲ 20.5%            | ▲ 5.3%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Lincoln County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 315.7        | 459.6        | 495.8        | 519.1        | 561.8        | 578.7        | 603.4        | 630.1        | 458.4        | 593.8        | 29.6%        | -27.2%        |
| Other Travel*  | 8.8          | 11.0         | 10.9         | 10.0         | 11.4         | 12.2         | 14.0         | 14.2         | 9.1          | 11.3         | 24.5%        | -36.4%        |
| <b>TOTAL</b>   | <b>324.6</b> | <b>470.6</b> | <b>506.7</b> | <b>529.1</b> | <b>573.1</b> | <b>590.9</b> | <b>617.4</b> | <b>644.3</b> | <b>467.4</b> | <b>605.1</b> | <b>29.5%</b> | <b>-27.5%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 167.0        | 277.9        | 306.7        | 326.8        | 359.3        | 373.1        | 390.0        | 408.5        | 325.7        | 423.1        | 29.9%        | -20.3%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 290.2        |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 132.9        |              |               |
| Private Home   | 16.3         | 21.4         | 21.6         | 21.4         | 22.2         | 22.6         | 23.5         | 24.1         | 31.7         | 31.1         | -2.0%        | 31.3%         |
| Campground   | 35.1         | 41.6         | 42.2         | 43.2         | 44.3         | 44.6         | 46.4         | 48.3         | 29.6         | 37.4         | 26.1%        | -38.7%        |
| 2nd Home   | 18.0         | 22.8         | 23.2         | 23.4         | 23.6         | 24.6         | 25.5         | 26.1         | 21.3         | 24.3         | 14.3%        | -18.5%        |
| Day Travel   | 79.4         | 95.9         | 102.0        | 104.3        | 112.3        | 113.8        | 118.1        | 122.9        | 50.0         | 78.0         | 55.8%        | -59.3%        |
| <b>TOTAL</b>   | <b>315.7</b> | <b>459.6</b> | <b>495.8</b> | <b>519.1</b> | <b>561.8</b> | <b>578.7</b> | <b>603.4</b> | <b>630.1</b> | <b>458.4</b> | <b>593.8</b> | <b>29.6%</b> | <b>-27.2%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 81.7         | 127.3        | 138.6        | 153.6        | 162.6        | 171.2        | 177.0        | 182.9        | 183.4        | 255.6        | 39.4%        | 0.3%          |
| Food Service   | 72.0         | 116.2        | 128.9        | 138.4        | 156.9        | 161.5        | 169.5        | 181.2        | 113.5        | 129.5        | 14.0%        | -37.3%        |
| Food Stores  | 32.7         | 43.0         | 46.1         | 48.2         | 50.4         | 50.0         | 51.1         | 53.2         | 35.9         | 50.1         | 39.5%        | -32.5%        |
| Local Tran. & Gas  | 25.5         | 52.2         | 53.5         | 45.3         | 46.4         | 50.4         | 57.4         | 59.0         | 34.3         | 46.6         | 36.0%        | -41.9%        |
| Arts, Ent. & Rec.  | 51.3         | 60.5         | 64.8         | 67.7         | 74.2         | 74.6         | 76.6         | 79.5         | 44.7         | 52.9         | 18.3%        | -43.7%        |
| Retail Sales   | 52.5         | 60.3         | 63.9         | 66.0         | 71.1         | 70.8         | 71.9         | 74.4         | 46.5         | 59.2         | 27.2%        | -37.4%        |
| <b>TOTAL</b>   | <b>315.7</b> | <b>459.6</b> | <b>495.8</b> | <b>519.1</b> | <b>561.8</b> | <b>578.7</b> | <b>603.4</b> | <b>630.1</b> | <b>458.4</b> | <b>593.8</b> | <b>29.6%</b> | <b>-27.2%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Lincoln County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 57.5  | 93.4  | 99.5  | 106.2 | 114.5 | 121.5 | 137.0 | 146.9 | 121.9 | 159.6 | 30.9%   | -17.0%  |
| Arts, Ent. & Rec.   | 13.6  | 14.9  | 14.9  | 15.6  | 16.3  | 16.8  | 18.8  | 20.2  | 14.8  | 15.1  | 2.2%    | -26.8%  |
| Retail**  | 11.0  | 13.7  | 14.9  | 15.8  | 17.4  | 17.9  | 18.7  | 19.7  | 23.2  | 25.6  | 10.5%   | 17.7%   |
| Ground Tran.  | 1.2   | 1.7   | 2.0   | 2.1   | 2.5   | 2.6   | 2.7   | 3.0   | 2.9   | 1.2   | -58.0%  | -4.8%   |
| Other Travel*   | 2.3   | 1.7   | 1.9   | 2.1   | 2.8   | 2.9   | 3.3   | 3.4   | 2.8   | 2.7   | -5.8%   | -16.7%  |
| <b>TOTAL</b>  | 85.5  | 125.6 | 133.1 | 141.8 | 153.5 | 161.8 | 180.5 | 193.3 | 165.6 | 204.2 | 23.3%   | -14.3%  |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 3,120 | 3,960 | 4,080 | 4,130 | 4,290 | 4,360 | 4,600 | 4,770 | 3,720 | 4,430 | 19.1%   | -21.9%  |
| Arts, Ent. & Rec.   | 880   | 930   | 940   | 900   | 910   | 890   | 990   | 1,000 | 670   | 720   | 8.3%    | -33.5%  |
| Retail**  | 590   | 630   | 670   | 690   | 730   | 730   | 740   | 740   | 810   | 820   | 1.1%    | 9.7%    |
| Ground Tran.  | 50    | 60    | 60    | 60    | 70    | 70    | 70    | 70    | 70    | 30    | -60.6%  | -1.3%   |
| Other Travel*   | 60    | 40    | 40    | 40    | 70    | 70    | 80    | 70    | 60    | 60    | -3.8%   | -15.2%  |
| <b>TOTAL</b>  | 4,690 | 5,630 | 5,790 | 5,820 | 6,070 | 6,120 | 6,470 | 6,650 | 5,330 | 6,060 | 13.7%   | -19.8%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Local Tax Receipts  | 6.4   | 10.1  | 11.0  | 12.3  | 12.9  | 13.6  | 14.1  | 14.3  | 14.5  | 17.3  | 19.6%   | 1.5%    |
| State Tax Receipts  | 7.2   | 11.7  | 12.4  | 13.1  | 14.3  | 16.4  | 17.6  | 18.5  | 15.2  | 18.3  | 20.5%   | -18.3%  |
| <b>TOTAL</b>  | 13.6  | 21.8  | 23.4  | 25.4  | 27.2  | 30.0  | 31.7  | 32.8  | 29.6  | 35.6  | 20.0%   | -9.7%   |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Lincoln County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Lincoln County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |         | Party Size | Length of Stay |
|--------------------|--------|-------|-------|---------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip    |            |                |
| Hotel, Motel, STVR | \$137  | \$291 | \$380 | \$808   | 2.8        | 2.1            |
| Private Home       | \$37   | \$134 | \$90  | \$321   | 2.4        | 3.6            |
| Other Overnight    | \$52   | \$169 | \$132 | \$432   | 2.6        | 3.3            |
| All Overnight      | \$183  | \$457 | \$487 | \$1,230 | 2.7        | 2.5            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 2,769,080     | 2,418,650 | 3,097,210 | 1,132,770    | 886,740   | 1,112,940 |
| Private Home       | 640,100       | 899,600   | 828,760   | 245,650      | 374,420   | 344,930   |
| Other Overnight    | 1,772,510     | 1,061,190 | 1,197,910 | 540,910      | 416,910   | 468,670   |
| All Overnight      | 5,181,680     | 4,379,440 | 5,123,880 | 1,919,340    | 1,678,060 | 1,926,540 |

|                    | Person-Trips |           |           | Party-Trips |         |         |
|--------------------|--------------|-----------|-----------|-------------|---------|---------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 1,463,930    | 1,251,190 | 1,453,970 | 598,860     | 455,960 | 523,630 |
| Private Home       | 210,470      | 252,630   | 232,730   | 80,770      | 105,150 | 96,870  |
| Other Overnight    | 536,310      | 323,220   | 366,130   | 163,200     | 126,510 | 142,710 |
| All Overnight      | 2,210,710    | 1,827,030 | 2,052,830 | 842,830     | 687,620 | 763,200 |

# Linn County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$85,797 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$28 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 3% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 4% |
|--|----|

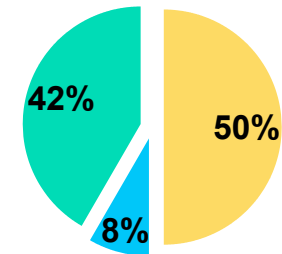
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

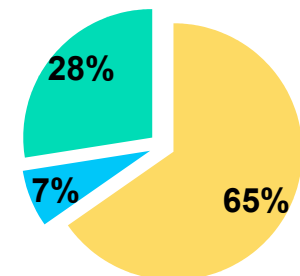
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Linn County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Linn County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 92.0  | 134.2 | 136.0 | 135.1 | 139.2 | 143.6 | 151.1 | 157.2 | 91.6  | 174.2 | ▲ 90.2%            | ▲ 3.6%  |
| Other                          | 10.6  | 20.0  | 19.3  | 15.7  | 14.2  | 15.9  | 18.4  | 18.7  | 8.9   | 16.6  | ▲ 86.6%            | ▲ 2.5%  |
| Visitor                        | 81.4  | 114.2 | 116.7 | 119.4 | 125.0 | 127.7 | 132.7 | 138.4 | 82.7  | 157.6 | ▲ 90.6%            | ▲ 3.7%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 21.1  | 28.5  | 29.8  | 32.4  | 34.8  | 36.9  | 40.6  | 43.1  | 38.6  | 45.9  | ▲ 19.0%            | ▲ 4.4%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 1,510 | 1,610 | 1,630 | 1,700 | 1,780 | 1,800 | 1,910 | 1,920 | 1,630 | 1,880 | ▲ 15.6%            | ▲ 1.2%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 3.3   | 5.0   | 5.1   | 5.4   | 5.8   | 6.4   | 6.7   | 7.4   | 5.3   | 8.3   | ▲ 55.9%            | ▲ 5.4%  |
| Local                          | 0.5   | 0.9   | 0.9   | 1.0   | 1.2   | 1.2   | 1.2   | 1.7   | 1.3   | 2.6   | ▲ 95.7%            | ▲ 10.2% |
| State                          | 2.8   | 4.1   | 4.2   | 4.3   | 4.6   | 5.2   | 5.5   | 5.7   | 4.0   | 5.7   | ▲ 42.6%            | ▲ 4.1%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Linn County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003 | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020 | 2021  | 2020-21 | 2019-20 |
|--|------|-------|-------|-------|-------|-------|-------|-------|------|-------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |      |       |       |       |       |       |       |       |      |       |         |         |
| Destination Spending   | 81.4 | 114.2 | 116.7 | 119.4 | 125.0 | 127.7 | 132.7 | 138.4 | 82.7 | 157.6 | 90.6%   | -40.3%  |
| Other Travel*  | 10.6 | 20.0  | 19.3  | 15.7  | 14.2  | 15.9  | 18.4  | 18.7  | 8.9  | 16.6  | 86.6%   | -52.6%  |
| <b>TOTAL</b>   | 92.0 | 134.2 | 136.0 | 135.1 | 139.2 | 143.6 | 151.1 | 157.2 | 91.6 | 174.2 | 90.2%   | -41.7%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |      |       |       |       |       |       |       |       |      |       |         |         |
| Hotel, Motel, STVR**   | 18.4 | 30.2  | 32.1  | 33.8  | 37.0  | 38.1  | 39.4  | 41.5  | 24.6 | 59.0  | 140.3%  | -40.8%  |
| Hotel, Motel   |      |       |       |       |       |       |       |       |      | 47.5  |         |         |
| STVR   |      |       |       |       |       |       |       |       |      | 11.5  |         |         |
| Private Home   | 27.1 | 38.4  | 38.4  | 38.5  | 39.4  | 40.2  | 41.9  | 43.5  | 30.4 | 49.1  | 61.5%   | -30.1%  |
| Campground   | 6.4  | 8.1   | 8.2   | 8.3   | 8.5   | 8.6   | 9.0   | 9.4   | 7.3  | 8.1   | 11.6%   | -22.0%  |
| 2nd Home   | 1.1  | 1.5   | 1.5   | 1.5   | 1.5   | 1.6   | 1.6   | 1.7   | 1.4  | 1.6   | 14.3%   | -18.5%  |
| Day Travel   | 28.4 | 36.0  | 36.5  | 37.2  | 38.6  | 39.2  | 40.7  | 42.4  | 19.1 | 39.8  | 108.5%  | -55.0%  |
| <b>TOTAL</b>   | 81.4 | 114.2 | 116.7 | 119.4 | 125.0 | 127.7 | 132.7 | 138.4 | 82.7 | 157.6 | 90.6%   | -40.3%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |      |       |       |       |       |       |       |       |      |       |         |         |
| Accommodations   | 8.7  | 14.0  | 15.3  | 16.9  | 19.2  | 19.9  | 20.2  | 21.3  | 15.6 | 34.1  | 119.2%  | -26.8%  |
| Food Service   | 22.6 | 33.7  | 34.9  | 36.9  | 39.2  | 40.4  | 42.3  | 44.8  | 24.5 | 46.0  | 87.9%   | -45.4%  |
| Food Stores  | 10.6 | 14.7  | 15.2  | 15.7  | 15.9  | 15.8  | 16.1  | 16.8  | 11.6 | 19.0  | 64.1%   | -31.0%  |
| Local Tran. & Gas  | 7.8  | 15.2  | 14.6  | 12.3  | 11.9  | 12.9  | 14.6  | 14.9  | 7.1  | 15.7  | 121.7%  | -52.5%  |
| Arts, Ent. & Rec.  | 14.1 | 16.4  | 16.6  | 17.1  | 17.8  | 17.9  | 18.3  | 18.9  | 10.9 | 18.8  | 72.6%   | -42.2%  |
| Retail Sales   | 17.7 | 20.1  | 20.1  | 20.5  | 21.0  | 20.9  | 21.2  | 21.8  | 13.1 | 24.0  | 83.3%   | -39.9%  |
| <b>TOTAL</b>   | 81.4 | 114.2 | 116.7 | 119.4 | 125.0 | 127.7 | 132.7 | 138.4 | 82.7 | 157.6 | 90.6%   | -40.3%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Linn County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 11.9         | 17.5         | 18.3         | 20.3         | 22.4         | 24.1         | 26.9         | 28.3         | 24.2         | 27.4         | 12.9%        | -14.5%        |
| Arts, Ent. & Rec.   | 4.2          | 5.1          | 5.4          | 5.6          | 5.9          | 6.1          | 6.5          | 6.9          | 5.7          | 9.1          | 59.7%        | -17.3%        |
| Retail**  | 3.5          | 4.5          | 4.6          | 4.8          | 5.1          | 5.2          | 5.6          | 5.9          | 6.8          | 7.5          | 10.4%        | 14.6%         |
| Ground Tran.  | 0.4          | 0.6          | 0.6          | 0.6          | 0.7          | 0.7          | 0.8          | 0.8          | 0.6          | 0.7          | 6.6%         | -23.4%        |
| Other Travel*   | 1.0          | 0.9          | 0.9          | 1.0          | 0.7          | 0.8          | 0.9          | 1.2          | 1.2          | 1.2          | 3.3%         | 3.1%          |
| <b>TOTAL</b>  | <b>21.1</b>  | <b>28.5</b>  | <b>29.8</b>  | <b>32.4</b>  | <b>34.8</b>  | <b>36.9</b>  | <b>40.6</b>  | <b>43.1</b>  | <b>38.6</b>  | <b>45.9</b>  | <b>19.0%</b> | <b>-10.6%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 870          | 990          | 1,010        | 1,060        | 1,120        | 1,120        | 1,200        | 1,220        | 1,010        | 1,080        | 6.9%         | -16.6%        |
| Arts, Ent. & Rec.   | 380          | 350          | 350          | 350          | 370          | 390          | 410          | 400          | 300          | 470          | 57.8%        | -24.8%        |
| Retail**  | 200          | 210          | 210          | 220          | 220          | 230          | 230          | 240          | 250          | 270          | 6.0%         | 5.5%          |
| Ground Tran.  | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 0.1%         | -20.6%        |
| Other Travel*   | 60           | 50           | 50           | 50           | 40           | 40           | 40           | 50           | 50           | 50           | -6.1%        | -2.7%         |
| <b>TOTAL</b>  | <b>1,510</b> | <b>1,610</b> | <b>1,630</b> | <b>1,700</b> | <b>1,780</b> | <b>1,800</b> | <b>1,910</b> | <b>1,920</b> | <b>1,630</b> | <b>1,880</b> | <b>15.3%</b> | <b>-15.1%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Local Tax Receipts  | 0.5          | 0.9          | 0.9          | 1.0          | 1.2          | 1.2          | 1.2          | 1.7          | 1.3          | 2.6          | 95.7%        | -20.2%        |
| State Tax Receipts  | 2.8          | 4.1          | 4.2          | 4.3          | 4.6          | 5.2          | 5.5          | 5.7          | 4.0          | 5.7          | 42.6%        | -29.4%        |
| <b>TOTAL</b>  | <b>3.3</b>   | <b>5.0</b>   | <b>5.1</b>   | <b>5.4</b>   | <b>5.8</b>   | <b>6.4</b>   | <b>6.7</b>   | <b>7.4</b>   | <b>5.3</b>   | <b>8.3</b>   | <b>55.9%</b> | <b>-27.3%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.



# Linn County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Linn County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$102  | \$182 | \$285 | \$505 | 2.8        | 1.8            |
| Private Home       | \$37   | \$113 | \$88  | \$266 | 2.4        | 3.0            |
| Other Overnight    | \$42   | \$125 | \$113 | \$334 | 2.7        | 3.0            |
| All Overnight      | \$84   | \$211 | \$208 | \$535 | 2.5        | 2.6            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |         |         |
|--------------------|---------------|-----------|-----------|--------------|---------|---------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 403,400       | 243,330   | 576,230   | 164,430      | 89,640  | 207,230 |
| Private Home       | 1,288,720     | 862,670   | 1,309,410 | 503,720      | 366,060 | 555,630 |
| Other Overnight    | 346,320       | 218,240   | 232,110   | 100,830      | 80,980  | 86,130  |
| All Overnight      | 2,038,440     | 1,324,240 | 2,117,760 | 768,980      | 536,670 | 848,990 |

|                    | Person-Trips |         |         | Party-Trips |         |         |
|--------------------|--------------|---------|---------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 242,520      | 139,290 | 324,810 | 98,860      | 50,810  | 116,970 |
| Private Home       | 501,310      | 286,960 | 435,560 | 195,940     | 121,770 | 184,820 |
| Other Overnight    | 112,540      | 73,200  | 77,860  | 32,880      | 27,250  | 28,990  |
| All Overnight      | 856,370      | 499,450 | 838,230 | 327,680     | 199,830 | 330,780 |

# Malheur County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$81,585 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$32 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$6 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 4% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 6% |
|--|----|

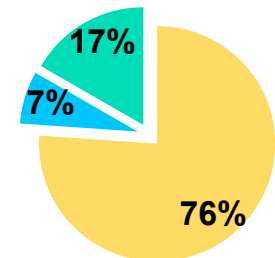
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

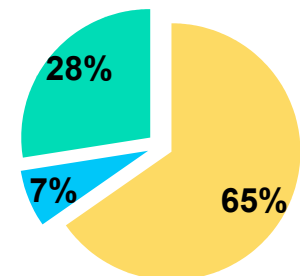
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Malheur County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Malheur County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 35.6 | 40.1 | 40.1 | 40.6 | 42.1 | 45.6 | 45.1 | 46.8 | 34.2 | 52.4 | ▲ 53.1%            | ▲ 2.2%  |
| Other                          | 2.7  | 5.0  | 4.7  | 3.8  | 3.5  | 3.9  | 4.4  | 4.5  | 2.1  | 3.9  | ▲ 86.6%            | ▲ 2.1%  |
| Visitor                        | 32.9 | 35.1 | 35.3 | 36.8 | 38.6 | 41.7 | 40.6 | 42.3 | 32.1 | 48.5 | ▲ 50.9%            | ▲ 2.2%  |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 9.7  | 10.9 | 11.1 | 11.7 | 12.4 | 13.1 | 13.5 | 14.2 | 14.4 | 16.0 | ▲ 10.7%            | ▲ 2.8%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 660  | 580  | 560  | 580  | 590  | 620  | 600  | 600  | 580  | 600  | ▲ 4.4%             | ▼ -0.5% |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 1.3  | 1.9  | 1.9  | 2.0  | 2.1  | 2.5  | 2.4  | 2.5  | 2.2  | 2.9  | ▲ 31.7%            | ▲ 4.3%  |
| Local                          | 0.4  | 0.7  | 0.7  | 0.7  | 0.8  | 0.9  | 0.9  | 0.9  | 0.9  | 1.3  | ▲ 40.8%            | ▲ 6.7%  |
| State                          | 1.0  | 1.2  | 1.2  | 1.2  | 1.3  | 1.5  | 1.5  | 1.6  | 1.3  | 1.6  | ▲ 25.4%            | ▲ 3.0%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Malheur County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2020-21 | 2019-20 |
|--|------|------|------|------|------|------|------|------|------|------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |      |      |      |      |      |      |      |      |      |      |         |         |
| Destination Spending   | 32.9 | 35.1 | 35.3 | 36.8 | 38.6 | 41.7 | 40.6 | 42.3 | 32.1 | 48.5 | 50.9%   | -24.1%  |
| Other Travel*  | 2.7  | 5.0  | 4.7  | 3.8  | 3.5  | 3.9  | 4.4  | 4.5  | 2.1  | 3.9  | 86.6%   | -53.7%  |
| <b>TOTAL</b>   | 35.6 | 40.1 | 40.1 | 40.6 | 42.1 | 45.6 | 45.1 | 46.8 | 34.2 | 52.4 | 53.1%   | -26.9%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |      |      |      |      |      |      |      |      |      |      |         |         |
| Hotel, Motel, STVR**   | 16.4 | 18.3 | 18.4 | 19.7 | 21.2 | 23.7 | 22.4 | 23.3 | 20.3 | 32.0 | 57.4%   | -13.0%  |
| Hotel, Motel   |      |      |      |      |      |      |      |      |      | 30.5 |         |         |
| STVR   |      |      |      |      |      |      |      |      |      | 1.5  |         |         |
| Private Home   | 4.8  | 6.1  | 6.1  | 6.1  | 6.1  | 6.3  | 6.4  | 6.6  | 5.3  | 7.0  | 31.2%   | -19.9%  |
| Campground   | 2.7  | 3.5  | 3.5  | 3.6  | 3.7  | 3.7  | 3.9  | 4.0  | 2.4  | 2.6  | 11.1%   | -40.7%  |
| 2nd Home   | 0.3  | 0.3  | 0.3  | 0.3  | 0.3  | 0.3  | 0.3  | 0.4  | 0.3  | 0.3  | 14.6%   | -15.3%  |
| Day Travel   | 8.8  | 6.9  | 7.0  | 7.1  | 7.3  | 7.7  | 7.6  | 7.9  | 3.8  | 6.5  | 71.8%   | -52.1%  |
| <b>TOTAL</b>   | 32.9 | 35.1 | 35.3 | 36.8 | 38.6 | 41.7 | 40.6 | 42.3 | 32.1 | 48.5 | 50.9%   | -24.1%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |      |      |      |      |      |      |      |      |      |      |         |         |
| Accommodations   | 7.1  | 9.1  | 9.2  | 10.2 | 11.3 | 12.8 | 11.9 | 12.4 | 11.2 | 17.5 | 55.9%   | -9.5%   |
| Food Service   | 8.5  | 9.2  | 9.4  | 9.9  | 10.4 | 11.2 | 11.2 | 11.8 | 9.2  | 13.7 | 48.4%   | -21.8%  |
| Food Stores  | 3.8  | 4.2  | 4.3  | 4.5  | 4.5  | 4.5  | 4.5  | 4.7  | 3.0  | 4.1  | 36.9%   | -35.6%  |
| Local Tran. & Gas  | 2.4  | 3.4  | 3.3  | 2.8  | 2.7  | 3.0  | 3.2  | 3.3  | 2.2  | 3.6  | 66.1%   | -35.0%  |
| Arts, Ent. & Rec.  | 6.2  | 5.2  | 5.2  | 5.4  | 5.6  | 5.9  | 5.7  | 5.9  | 4.1  | 5.9  | 44.8%   | -30.9%  |
| Retail Sales   | 4.9  | 4.0  | 4.0  | 4.0  | 4.1  | 4.2  | 4.1  | 4.2  | 2.4  | 3.6  | 51.6%   | -42.7%  |
| <b>TOTAL</b>   | 32.9 | 35.1 | 35.3 | 36.8 | 38.6 | 41.7 | 40.6 | 42.3 | 32.1 | 48.5 | 50.9%   | -24.1%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Malheur County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003       | 2013        | 2014        | 2015        | 2016        | 2017        | 2018        | 2019        | 2020        | 2021        | 2020-21      | 2019-20       |
|---|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |            |             |             |             |             |             |             |             |             |             |              |               |
| Accom. & Food Serv.   | 6.5        | 7.6         | 7.8         | 8.2         | 8.6         | 9.0         | 9.8         | 10.2        | 10.1        | 11.6        | 14.9%        | -0.8%         |
| Arts, Ent. & Rec.   | 1.8        | 1.9         | 1.9         | 2.0         | 2.2         | 2.4         | 2.0         | 2.2         | 2.3         | 2.3         | -2.3%        | 7.6%          |
| Retail**  | 1.1        | 1.0         | 1.0         | 1.1         | 1.1         | 1.2         | 1.3         | 1.3         | 1.5         | 1.5         | 4.7%         | 13.2%         |
| Ground Tran.  | 0.2        | 0.2         | 0.2         | 0.2         | 0.2         | 0.3         | 0.3         | 0.3         | 0.3         | 0.3         | -3.5%        | 7.5%          |
| Other Travel*   | 0.1        | 0.2         | 0.2         | 0.2         | 0.2         | 0.2         | 0.2         | 0.2         | 0.2         | 0.2         | 11.6%        | 0.7%          |
| <b>TOTAL</b>  | <b>9.7</b> | <b>10.9</b> | <b>11.1</b> | <b>11.7</b> | <b>12.4</b> | <b>13.1</b> | <b>13.5</b> | <b>14.2</b> | <b>14.4</b> | <b>16.0</b> | <b>10.7%</b> | <b>2.0%</b>   |
| <b>Travel Industry Employment (Jobs)</b>                      |            |             |             |             |             |             |             |             |             |             |              |               |
| Accom. & Food Serv.   | 410        | 380         | 380         | 400         | 410         | 410         | 430         | 420         | 400         | 430         | 8.2%         | -5.9%         |
| Arts, Ent. & Rec.   | 170        | 140         | 130         | 120         | 120         | 130         | 100         | 100         | 110         | 100         | -8.3%        | 1.7%          |
| Retail**  | 60         | 50          | 50          | 50          | 50          | 50          | 50          | 50          | 60          | 60          | 2.6%         | 4.9%          |
| Ground Tran.  | 10         | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 10          | -9.4%        | 11.4%         |
| Other Travel*   | 10         | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 6.6%         | -6.2%         |
| <b>TOTAL</b>  | <b>660</b> | <b>580</b>  | <b>560</b>  | <b>580</b>  | <b>590</b>  | <b>620</b>  | <b>600</b>  | <b>600</b>  | <b>580</b>  | <b>600</b>  | <b>3.4%</b>  | <b>-3.3%</b>  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |            |             |             |             |             |             |             |             |             |             |              |               |
| Local Tax Receipts  | 0.4        | 0.7         | 0.7         | 0.7         | 0.8         | 0.9         | 0.9         | 0.9         | 0.9         | 1.3         | 40.8%        | -1.5%         |
| State Tax Receipts  | 1.0        | 1.2         | 1.2         | 1.2         | 1.3         | 1.5         | 1.5         | 1.6         | 1.3         | 1.6         | 25.4%        | -17.1%        |
| <b>TOTAL</b>  | <b>1.3</b> | <b>1.9</b>  | <b>1.9</b>  | <b>2.0</b>  | <b>2.1</b>  | <b>2.5</b>  | <b>2.4</b>  | <b>2.5</b>  | <b>2.2</b>  | <b>2.9</b>  | <b>31.7%</b> | <b>-11.4%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Malheur County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Malheur County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$94   | \$158 | \$260 | \$440 | 2.8        | 1.7            |
| Private Home       | \$23   | \$68  | \$53  | \$160 | 2.4        | 3.0            |
| Other Overnight    | \$51   | \$150 | \$136 | \$401 | 2.7        | 2.9            |
| All Overnight      | \$104  | \$228 | \$268 | \$597 | 2.6        | 2.2            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |         |         |
|--------------------|---------------|---------|---------|--------------|---------|---------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 233,810       | 228,080 | 341,050 | 95,310       | 82,490  | 122,920 |
| Private Home       | 310,160       | 251,500 | 308,520 | 121,230      | 106,720 | 130,910 |
| Other Overnight    | 108,780       | 55,190  | 58,710  | 31,700       | 20,610  | 21,920  |
| All Overnight      | 652,760       | 534,770 | 708,280 | 248,240      | 209,820 | 275,760 |

|                    | Person-Trips |         |         | Party-Trips |        |         |
|--------------------|--------------|---------|---------|-------------|--------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020   | 2021    |
| Hotel, Motel, STVR | 140,570      | 137,370 | 201,710 | 57,300      | 49,630 | 72,730  |
| Private Home       | 120,650      | 83,660  | 102,630 | 47,160      | 35,500 | 43,550  |
| Other Overnight    | 35,410       | 18,710  | 19,900  | 10,360      | 7,010  | 7,460   |
| All Overnight      | 296,630      | 239,740 | 324,230 | 114,810     | 92,140 | 123,740 |

# Marion County / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job                 | \$107,800 |
| Employee Earnings generated by \$100 Visitor Spending          | \$27      |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5       |
| Visitor Shares   |           |
| Travel Share of Total Employment (2021)                        | 2%        |
| Overnight Visitor Day Share of Resident Population**           | 4%        |

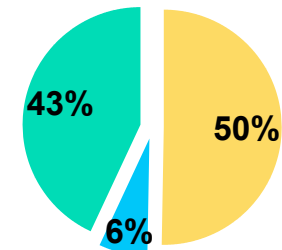
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

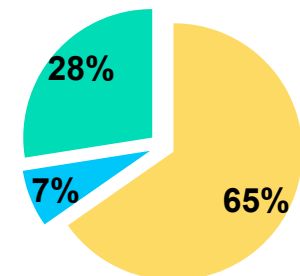
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Marion County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Marion County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 255.8 | 375.5 | 381.9 | 382.9 | 396.7 | 415.5 | 429.3 | 454.8 | 236.1 | 484.6 | ▲ 105.3%           | ▲ 3.6%  |
| Other                          | 31.6  | 57.9  | 56.5  | 47.4  | 47.3  | 52.6  | 60.4  | 61.5  | 32.0  | 51.6  | ▲ 61.1%            | ▲ 2.8%  |
| Visitor                        | 224.2 | 317.6 | 325.5 | 335.5 | 349.4 | 363.0 | 368.9 | 393.3 | 204.1 | 433.1 | ▲ 112.2%           | ▲ 3.7%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 61.5  | 85.8  | 89.5  | 98.1  | 104.9 | 111.9 | 119.0 | 125.0 | 105.7 | 121.4 | ▲ 14.9%            | ▲ 3.8%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 3,730 | 4,230 | 4,340 | 4,490 | 4,660 | 4,720 | 4,760 | 4,910 | 3,970 | 4,180 | ▲ 5.4%             | ▲ 0.6%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 9.6   | 14.7  | 15.1  | 16.1  | 17.2  | 19.2  | 19.7  | 20.7  | 13.8  | 21.0  | ▲ 52.8%            | ▲ 4.4%  |
| Local                          | 1.9   | 3.1   | 3.4   | 3.8   | 4.2   | 4.5   | 4.4   | 4.8   | 3.2   | 6.0   | ▲ 85.9%            | ▲ 6.7%  |
| State                          | 7.8   | 11.5  | 11.7  | 12.3  | 13.0  | 14.8  | 15.3  | 15.9  | 10.5  | 15.0  | ▲ 42.6%            | ▲ 3.7%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.



# Marion County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21       | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |               |               |
| Destination Spending   | 224.2        | 317.6        | 325.5        | 335.5        | 349.4        | 363.0        | 368.9        | 393.3        | 204.1        | 433.1        | 112.2%        | -48.1%        |
| Other Travel*  | 31.6         | 57.9         | 56.5         | 47.4         | 47.3         | 52.6         | 60.4         | 61.5         | 32.0         | 51.6         | 61.1%         | -48.0%        |
| <b>TOTAL</b>   | <b>255.8</b> | <b>375.5</b> | <b>381.9</b> | <b>382.9</b> | <b>396.7</b> | <b>415.5</b> | <b>429.3</b> | <b>454.8</b> | <b>236.1</b> | <b>484.6</b> | <b>105.3%</b> | <b>-48.1%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |               |               |
| Hotel, Motel, STVR**   | 62.7         | 103.4        | 109.2        | 115.8        | 124.6        | 132.0        | 132.2        | 143.8        | 74.1         | 164.2        | 121.6%        | -48.5%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 135.4        |               |               |
| STVR   |              |              |              |              |              |              |              |              |              | 28.8         |               |               |
| Private Home   | 80.6         | 111.6        | 112.1        | 113.1        | 115.2        | 118.6        | 121.7        | 128.0        | 68.2         | 140.9        | 106.6%        | -46.7%        |
| Campground   | 13.4         | 17.7         | 17.9         | 18.3         | 18.8         | 18.9         | 19.7         | 20.5         | 15.3         | 17.0         | 11.0%         | -25.4%        |
| 2nd Home   | 2.8          | 3.9          | 3.9          | 4.0          | 4.0          | 4.1          | 4.3          | 4.4          | 3.6          | 4.1          | 14.3%         | -18.5%        |
| Day Travel   | 64.5         | 81.1         | 82.2         | 84.3         | 86.8         | 89.4         | 91.0         | 96.5         | 42.9         | 106.9        | 149.3%        | -55.6%        |
| <b>TOTAL</b>   | <b>224.2</b> | <b>317.6</b> | <b>325.5</b> | <b>335.5</b> | <b>349.4</b> | <b>363.0</b> | <b>368.9</b> | <b>393.3</b> | <b>204.1</b> | <b>433.1</b> | <b>112.2%</b> | <b>-48.1%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |               |               |
| Accommodations   | 28.9         | 47.4         | 51.5         | 57.2         | 63.5         | 67.6         | 67.1         | 73.0         | 45.8         | 96.6         | 110.9%        | -37.2%        |
| Food Service   | 61.8         | 92.8         | 96.2         | 102.1        | 108.1        | 112.8        | 115.5        | 125.0        | 59.4         | 126.7        | 113.2%        | -52.5%        |
| Food Stores  | 28.0         | 39.0         | 40.2         | 41.9         | 42.2         | 42.4         | 42.5         | 44.8         | 26.2         | 51.2         | 95.1%         | -41.4%        |
| Local Tran. & Gas  | 20.9         | 41.0         | 39.5         | 33.3         | 32.1         | 35.3         | 39.0         | 40.7         | 16.5         | 40.5         | 145.8%        | -59.5%        |
| Arts, Ent. & Rec.  | 37.8         | 44.1         | 44.7         | 46.2         | 47.8         | 48.7         | 48.9         | 51.4         | 25.7         | 51.9         | 102.1%        | -50.0%        |
| Retail Sales   | 46.8         | 53.3         | 53.4         | 54.7         | 55.7         | 56.1         | 55.9         | 58.4         | 30.5         | 66.2         | 117.3%        | -47.8%        |
| <b>TOTAL</b>   | <b>224.2</b> | <b>317.6</b> | <b>325.5</b> | <b>335.5</b> | <b>349.4</b> | <b>363.0</b> | <b>368.9</b> | <b>393.3</b> | <b>204.1</b> | <b>433.1</b> | <b>112.2%</b> | <b>-48.1%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Marion County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 36.2         | 54.8         | 57.8         | 64.5         | 69.6         | 74.8         | 79.1         | 82.4         | 69.2         | 81.2         | 17.4%        | -16.1%        |
| Arts, Ent. & Rec.   | 11.3         | 14.0         | 14.0         | 14.6         | 14.7         | 15.3         | 16.8         | 18.3         | 14.1         | 16.4         | 16.3%        | -23.0%        |
| Retail**  | 9.1          | 11.6         | 12.0         | 12.6         | 13.2         | 13.8         | 14.3         | 15.1         | 15.0         | 16.8         | 12.1%        | -1.1%         |
| Ground Tran.  | 1.1          | 1.5          | 1.6          | 1.7          | 1.9          | 2.0          | 2.1          | 2.3          | 1.5          | 1.7          | 13.5%        | -35.1%        |
| Other Travel*   | 3.7          | 3.9          | 4.2          | 4.6          | 5.5          | 5.9          | 6.6          | 6.9          | 6.0          | 5.3          | -10.3%       | -13.2%        |
| <b>TOTAL</b>  | <b>61.5</b>  | <b>85.8</b>  | <b>89.5</b>  | <b>98.1</b>  | <b>104.9</b> | <b>111.9</b> | <b>119.0</b> | <b>125.0</b> | <b>105.7</b> | <b>121.4</b> | <b>14.9%</b> | <b>-15.4%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 2,200        | 2,610        | 2,690        | 2,830        | 2,910        | 2,980        | 3,000        | 3,000        | 2,470        | 2,640        | 6.9%         | -17.7%        |
| Arts, Ent. & Rec.   | 840          | 920          | 950          | 930          | 970          | 950          | 950          | 1,090        | 770          | 820          | 5.7%         | -29.5%        |
| Retail**  | 450          | 490          | 500          | 520          | 520          | 530          | 530          | 550          | 500          | 520          | 5.6%         | -9.2%         |
| Ground Tran.  | 50           | 50           | 50           | 50           | 50           | 50           | 50           | 60           | 40           | 40           | 6.5%         | -32.7%        |
| Other Travel*   | 180          | 150          | 160          | 160          | 210          | 210          | 220          | 220          | 200          | 170          | -15.2%       | -9.5%         |
| <b>TOTAL</b>  | <b>3,730</b> | <b>4,230</b> | <b>4,340</b> | <b>4,490</b> | <b>4,660</b> | <b>4,720</b> | <b>4,760</b> | <b>4,910</b> | <b>3,970</b> | <b>4,180</b> | <b>5.3%</b>  | <b>-19.1%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Local Tax Receipts  | 1.9          | 3.1          | 3.4          | 3.8          | 4.2          | 4.5          | 4.4          | 4.8          | 3.2          | 6.0          | 85.9%        | -32.3%        |
| State Tax Receipts  | 7.8          | 11.5         | 11.7         | 12.3         | 13.0         | 14.8         | 15.3         | 15.9         | 10.5         | 15.0         | 42.6%        | -34.0%        |
| <b>TOTAL</b>  | <b>9.6</b>   | <b>14.7</b>  | <b>15.1</b>  | <b>16.1</b>  | <b>17.2</b>  | <b>19.2</b>  | <b>19.7</b>  | <b>20.7</b>  | <b>13.8</b>  | <b>21.0</b>  | <b>52.8%</b> | <b>-33.6%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Marion County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Marion County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$121  | \$239 | \$335 | \$662 | 2.8        | 2.0            |
| Private Home       | \$37   | \$131 | \$88  | \$315 | 2.4        | 3.6            |
| Other Overnight    | \$56   | \$180 | \$149 | \$476 | 2.6        | 3.2            |
| All Overnight      | \$88   | \$261 | \$220 | \$663 | 2.5        | 3.0            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 1,196,110     | 633,530   | 1,358,790 | 489,300      | 233,680   | 490,540   |
| Private Home       | 3,864,410     | 1,974,130 | 3,832,540 | 1,483,060    | 821,640   | 1,595,120 |
| Other Overnight    | 565,660       | 351,320   | 373,790   | 167,420      | 132,920   | 141,440   |
| All Overnight      | 5,626,170     | 2,958,990 | 5,565,110 | 2,139,790    | 1,188,240 | 2,227,090 |

|                    | Person-Trips |         |           | Party-Trips |         |         |
|--------------------|--------------|---------|-----------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021      | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 632,350      | 322,760 | 685,970   | 258,680     | 117,990 | 247,930 |
| Private Home       | 1,270,640    | 554,380 | 1,076,260 | 487,640     | 230,740 | 447,940 |
| Other Overnight    | 174,130      | 110,320 | 117,370   | 51,430      | 41,610  | 44,270  |
| All Overnight      | 2,077,120    | 987,460 | 1,879,600 | 797,750     | 390,330 | 740,150 |

# Morrow County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$54,985 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$42 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$5 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 3% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 6% |
|--|----|

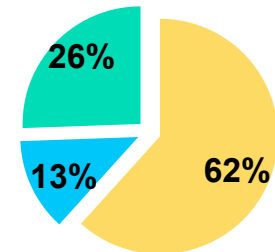
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

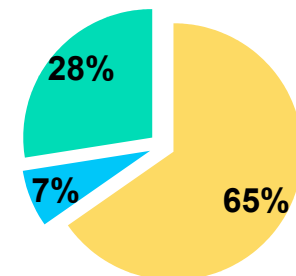
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Morrow County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Morrow County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 10.8 | 14.7 | 14.4 | 14.5 | 14.9 | 15.8 | 16.5 | 17.1 | 9.2  | 13.9 | ▲ 50.8%            | ▲ 1.4%  |
| Other                          | 1.0  | 1.8  | 1.7  | 1.4  | 1.3  | 1.4  | 1.6  | 1.7  | 0.8  | 1.5  | ▲ 86.6%            | ▲ 2.3%  |
| Visitor                        | 9.8  | 12.9 | 12.6 | 13.2 | 13.6 | 14.4 | 14.8 | 15.4 | 8.4  | 12.4 | ▲ 47.5%            | ▲ 1.3%  |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 2.7  | 3.4  | 3.4  | 3.6  | 3.8  | 4.1  | 4.7  | 5.2  | 4.5  | 5.4  | ▲ 18.5%            | ▲ 3.9%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 200  | 170  | 180  | 170  | 180  | 190  | 220  | 250  | 200  | 230  | ▲ 14.0%            | ▲ 0.8%  |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 0.3  | 0.4  | 0.4  | 0.4  | 0.5  | 0.5  | 0.6  | 0.6  | 0.4  | 0.6  | ▲ 31.0%            | ▲ 3.4%  |
| Local                          | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | ▲ 55.8%            | ▲ 16.3% |
| State                          | 0.3  | 0.4  | 0.4  | 0.4  | 0.5  | 0.5  | 0.6  | 0.6  | 0.4  | 0.6  | ▲ 30.9%            | ▲ 3.3%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Morrow County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2020-21 | 2019-20 |
|--|------|------|------|------|------|------|------|------|------|------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |      |      |      |      |      |      |      |      |      |      |         |         |
| Destination Spending   | 9.8  | 12.9 | 12.6 | 13.2 | 13.6 | 14.4 | 14.8 | 15.4 | 8.4  | 12.4 | 47.5%   | -45.3%  |
| Other Travel*  | 1.0  | 1.8  | 1.7  | 1.4  | 1.3  | 1.4  | 1.6  | 1.7  | 0.8  | 1.5  | 86.6%   | -52.5%  |
| <b>TOTAL</b>   | 10.8 | 14.7 | 14.4 | 14.5 | 14.9 | 15.8 | 16.5 | 17.1 | 9.2  | 13.9 | 50.8%   | -46.0%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |      |      |      |      |      |      |      |      |      |      |         |         |
| Hotel, Motel, STVR**   | 4.5  | 6.6  | 6.5  | 6.9  | 7.3  | 7.9  | 8.1  | 8.5  | 3.9  | 6.4  | 64.5%   | -54.0%  |
| Hotel, Motel   |      |      |      |      |      |      |      |      |      | 6.0  |         |         |
| STVR   |      |      |      |      |      |      |      |      |      | 0.4  |         |         |
| Private Home   | 1.8  | 2.3  | 2.2  | 2.3  | 2.3  | 2.3  | 2.4  | 2.5  | 2.1  | 2.7  | 26.1%   | -14.8%  |
| Campground   | 0.5  | 0.7  | 0.7  | 0.7  | 0.7  | 0.7  | 0.7  | 0.8  | 0.6  | 0.7  | 13.0%   | -17.0%  |
| 2nd Home   | 0.4  | 0.6  | 0.6  | 0.6  | 0.6  | 0.6  | 0.6  | 0.6  | 0.5  | 0.6  | 14.6%   | -15.3%  |
| Day Travel   | 2.5  | 2.7  | 2.7  | 2.7  | 2.8  | 2.9  | 3.0  | 3.1  | 1.3  | 2.0  | 61.6%   | -59.2%  |
| <b>TOTAL</b>   | 9.8  | 12.9 | 12.6 | 13.2 | 13.6 | 14.4 | 14.8 | 15.4 | 8.4  | 12.4 | 47.5%   | -45.3%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |      |      |      |      |      |      |      |      |      |      |         |         |
| Accommodations   | 2.0  | 3.2  | 3.2  | 3.5  | 3.8  | 4.1  | 4.2  | 4.3  | 2.2  | 3.6  | 59.4%   | -48.5%  |
| Food Service   | 2.5  | 3.4  | 3.4  | 3.6  | 3.8  | 4.0  | 4.1  | 4.4  | 2.7  | 3.8  | 43.3%   | -39.4%  |
| Food Stores  | 1.2  | 1.5  | 1.5  | 1.5  | 1.5  | 1.5  | 1.6  | 1.6  | 1.0  | 1.3  | 30.9%   | -36.4%  |
| Local Tran. & Gas  | 0.8  | 1.4  | 1.3  | 1.1  | 1.1  | 1.2  | 1.3  | 1.3  | 0.7  | 1.1  | 58.6%   | -47.2%  |
| Arts, Ent. & Rec.  | 1.7  | 1.9  | 1.8  | 1.9  | 2.0  | 2.0  | 2.1  | 2.1  | 1.0  | 1.4  | 43.8%   | -52.8%  |
| Retail Sales   | 1.5  | 1.5  | 1.5  | 1.5  | 1.5  | 1.5  | 1.5  | 1.6  | 0.8  | 1.1  | 43.9%   | -50.6%  |
| <b>TOTAL</b>   | 9.8  | 12.9 | 12.6 | 13.2 | 13.6 | 14.4 | 14.8 | 15.4 | 8.4  | 12.4 | 47.5%   | -45.3%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Morrow County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018       | 2019       | 2020       | 2021       | 2020-21      | 2019-20       |
|---|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |            |            |            |            |            |            |            |            |            |            |              |               |
| Accom. & Food Serv.   | 1.5        | 2.1        | 2.1        | 2.3        | 2.4        | 2.6        | 3.2        | 3.6        | 3.1        | 4.0        | 29.0%        | -13.4%        |
| Arts, Ent. & Rec.   | 0.6        | 0.6        | 0.6        | 0.7        | 0.7        | 0.7        | 0.8        | 0.8        | 0.6        | 0.6        | -3.0%        | -26.5%        |
| Retail**  | 0.4        | 0.5        | 0.5        | 0.5        | 0.5        | 0.6        | 0.6        | 0.6        | 0.6        | 0.6        | -7.6%        | 4.6%          |
| Ground Tran.  | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | -7.0%        | -21.0%        |
| Other Travel*   | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 0.1        | 11.6%        | 3.3%          |
| <b>TOTAL</b>  | <b>2.7</b> | <b>3.4</b> | <b>3.4</b> | <b>3.6</b> | <b>3.8</b> | <b>4.1</b> | <b>4.7</b> | <b>5.2</b> | <b>4.5</b> | <b>5.4</b> | <b>18.5%</b> | <b>-13.2%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |            |            |            |            |            |            |            |            |            |            |              |               |
| Accom. & Food Serv.   | 130        | 120        | 120        | 110        | 120        | 130        | 160        | 180        | 150        | 180        | 21.1%        | -16.8%        |
| Arts, Ent. & Rec.   | 30         | 30         | 40         | 30         | 30         | 40         | 40         | 40         | 30         | 30         | -6.6%        | -30.5%        |
| Retail**  | 30         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | 20         | -5.5%        | -4.5%         |
| Ground Tran.  | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | -12.7%       | -18.1%        |
| Other Travel*   | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 0          | 5.9%         | -6.1%         |
| <b>TOTAL</b>  | <b>200</b> | <b>170</b> | <b>180</b> | <b>170</b> | <b>180</b> | <b>190</b> | <b>220</b> | <b>250</b> | <b>200</b> | <b>230</b> | <b>15.0%</b> | <b>-20.0%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |            |            |            |            |            |            |            |            |            |            |              |               |
| Local Tax Receipts  | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 0.0        | 55.8%        | -48.5%        |
| State Tax Receipts  | 0.3        | 0.4        | 0.4        | 0.4        | 0.5        | 0.5        | 0.6        | 0.6        | 0.4        | 0.6        | 30.9%        | -30.4%        |
| <b>TOTAL</b>  | <b>0.3</b> | <b>0.4</b> | <b>0.4</b> | <b>0.4</b> | <b>0.5</b> | <b>0.5</b> | <b>0.6</b> | <b>0.6</b> | <b>0.4</b> | <b>0.6</b> | <b>31.0%</b> | <b>-30.6%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Morrow County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Morrow County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$86   | \$147 | \$239 | \$408 | 2.8        | 1.7            |
| Private Home       | \$23   | \$68  | \$53  | \$160 | 2.4        | 3.0            |
| Other Overnight    | \$26   | \$74  | \$68  | \$191 | 2.6        | 2.8            |
| All Overnight      | \$69   | \$167 | \$175 | \$429 | 2.5        | 2.4            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |        |        |
|--------------------|---------------|---------|---------|--------------|--------|--------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020   | 2021   |
| Hotel, Motel, STVR | 92,320        | 47,230  | 74,370  | 37,630       | 17,100 | 26,790 |
| Private Home       | 115,050       | 99,290  | 117,100 | 44,970       | 42,130 | 49,690 |
| Other Overnight    | 67,730        | 47,360  | 50,420  | 20,470       | 18,210 | 19,390 |
| All Overnight      | 275,090       | 193,880 | 241,880 | 103,070      | 77,450 | 95,870 |

|                    | Person-Trips |        |         | Party-Trips |        |        |
|--------------------|--------------|--------|---------|-------------|--------|--------|
|                    | 2019         | 2020   | 2021    | 2019        | 2020   | 2021   |
| Hotel, Motel, STVR | 55,500       | 28,340 | 43,660  | 22,620      | 10,250 | 15,740 |
| Private Home       | 44,750       | 33,030 | 38,950  | 17,490      | 14,020 | 16,530 |
| Other Overnight    | 23,570       | 16,850 | 17,940  | 7,170       | 6,510  | 6,940  |
| All Overnight      | 123,820      | 78,220 | 100,550 | 47,290      | 30,770 | 39,200 |



# Multnomah County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

Amount of Visitor Spending that supports 1 Job \$169,952

Employee Earnings generated by \$100 Visitor Spending \$22

Local & State Tax Revenues generated by \$100 Visitor Spending \$7

### Visitor Shares

Travel Share of Total Employment (2021) 3%

Overnight Visitor Day Share of Resident Population\*\* 4%

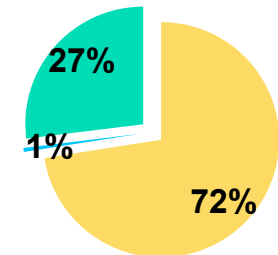
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

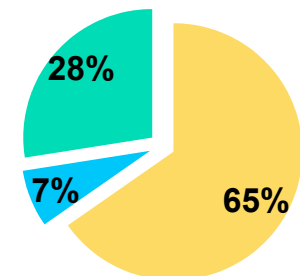
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Multnomah County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Multnomah County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003    | 2013    | 2014    | 2015    | 2016    | 2017    | 2018    | 2019    | 2020    | 2021    | Avg. Annual % Chg. |         |
|--------------------------------|---------|---------|---------|---------|---------|---------|---------|---------|---------|---------|--------------------|---------|
|                                |         |         |         |         |         |         |         |         |         |         | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |         |         |         |         |         |         |         |         |         |         |                    |         |
| Total (Current \$)             | 1,987.7 | 3,231.8 | 3,432.5 | 3,670.7 | 3,784.2 | 3,972.4 | 4,165.4 | 4,381.2 | 1,630.8 | 2,837.2 | ▲ 74.0%            | ▲ 2.0%  |
| Other                          | 664.2   | 1,025.6 | 1,077.0 | 1,114.9 | 1,141.3 | 1,217.4 | 1,294.5 | 1,432.2 | 480.5   | 840.1   | ▲ 74.9%            | ▲ 1.3%  |
| Visitor                        | 1,323.5 | 2,206.2 | 2,355.6 | 2,555.9 | 2,642.9 | 2,755.0 | 2,870.8 | 2,949.0 | 1,150.3 | 1,997.0 | ▲ 73.6%            | ▲ 2.3%  |
| <b>Earnings (\$Million)</b>    |         |         |         |         |         |         |         |         |         |         |                    |         |
| Earnings (Current \$)          | 481.7   | 718.0   | 774.5   | 846.0   | 911.7   | 999.7   | 1,079.6 | 1,152.4 | 823.3   | 844.7   | ▲ 2.6%             | ▲ 3.2%  |
| <b>Employment (Jobs)</b>       |         |         |         |         |         |         |         |         |         |         |                    |         |
| Employment                     | 16,930  | 20,380  | 21,130  | 21,970  | 22,760  | 23,010  | 23,750  | 23,920  | 16,660  | 16,650  | ▼ 0.0%             | ▼ -0.1% |
| <b>Tax Revenue (\$Million)</b> |         |         |         |         |         |         |         |         |         |         |                    |         |
| Total (Current \$)             | 81.0    | 143.8   | 156.5   | 176.3   | 183.3   | 198.5   | 207.0   | 212.4   | 110.1   | 144.7   | ▲ 31.5%            | ▲ 3.3%  |
| Local                          | 44.2    | 83.8    | 92.9    | 107.8   | 109.6   | 114.0   | 117.2   | 118.0   | 51.9    | 76.6    | ▲ 47.7%            | ▲ 3.1%  |
| State                          | 36.7    | 59.9    | 63.5    | 68.5    | 73.7    | 84.4    | 89.8    | 94.4    | 58.2    | 68.1    | ▲ 17.0%            | ▲ 3.5%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Multnomah County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003           | 2013           | 2014           | 2015           | 2016           | 2017           | 2018           | 2019           | 2020           | 2021           | 2020-21      | 2019-20       |
|--|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|----------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |                |                |                |                |                |                |                |                |                |                |              |               |
| Destination Spending   | 1,323.5        | 2,206.2        | 2,355.6        | 2,555.9        | 2,642.9        | 2,755.0        | 2,870.8        | 2,949.0        | 1,150.3        | 1,997.0        | 73.6%        | -61.0%        |
| Other Travel*  | 664.2          | 1,025.6        | 1,077.0        | 1,114.9        | 1,141.3        | 1,217.4        | 1,294.5        | 1,432.2        | 480.5          | 840.1          | 74.9%        | -66.5%        |
| <b>TOTAL</b>   | <b>1,987.7</b> | <b>3,231.8</b> | <b>3,432.5</b> | <b>3,670.7</b> | <b>3,784.2</b> | <b>3,972.4</b> | <b>4,165.4</b> | <b>4,381.2</b> | <b>1,630.8</b> | <b>2,837.2</b> | <b>74.0%</b> | <b>-62.8%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |                |                |                |                |                |                |                |                |                |                |              |               |
| Hotel, Motel, STVR**   | 807.9          | 1,432.0        | 1,541.8        | 1,692.5        | 1,760.5        | 1,839.5        | 1,914.1        | 1,963.6        | 708.8          | 1,264.3        | 78.4%        | -63.9%        |
| Hotel, Motel   |                |                |                |                |                |                |                |                |                | 1,112.8        |              |               |
| STVR   |                |                |                |                |                |                |                |                |                | 151.4          |              |               |
| Private Home   | 325.3          | 500.6          | 530.4          | 567.6          | 576.1          | 598.3          | 625.8          | 643.1          | 298.3          | 467.9          | 56.9%        | -53.6%        |
| Campground   | 10.9           | 13.0           | 13.2           | 13.5           | 13.9           | 14.0           | 14.6           | 15.2           | 12.6           | 7.9            | -37.1%       | -16.8%        |
| 2nd Home   | 3.1            | 4.4            | 4.5            | 4.5            | 4.6            | 4.7            | 4.9            | 5.0            | 3.8            | 4.3            | 14.0%        | -24.9%        |
| Day Travel   | 176.3          | 256.1          | 265.7          | 277.7          | 287.9          | 298.5          | 311.6          | 322.2          | 126.9          | 252.7          | 99.2%        | -60.6%        |
| <b>TOTAL</b>   | <b>1,323.5</b> | <b>2,206.2</b> | <b>2,355.6</b> | <b>2,555.9</b> | <b>2,642.9</b> | <b>2,755.0</b> | <b>2,870.8</b> | <b>2,949.0</b> | <b>1,150.3</b> | <b>1,997.0</b> | <b>73.6%</b> | <b>-61.0%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |                |                |                |                |                |                |                |                |                |                |              |               |
| Accommodations   | 254.2          | 503.9          | 562.3          | 646.9          | 693.1          | 723.8          | 741.0          | 747.2          | 274.2          | 496.5          | 81.1%        | -63.3%        |
| Food Service   | 242.9          | 430.0          | 450.5          | 484.2          | 516.5          | 544.4          | 574.6          | 607.1          | 266.1          | 434.7          | 63.4%        | -56.2%        |
| Food Stores  | 45.2           | 69.4           | 72.9           | 76.9           | 78.2           | 79.2           | 81.0           | 83.4           | 50.4           | 85.0           | 68.6%        | -39.6%        |
| Local Tran. & Gas  | 165.2          | 279.9          | 293.0          | 295.6          | 283.8          | 300.0          | 322.9          | 326.2          | 172.1          | 245.1          | 42.4%        | -47.2%        |
| Arts, Ent. & Rec.  | 90.8           | 122.3          | 125.7          | 131.8          | 137.8          | 141.7          | 146.0          | 149.9          | 41.4           | 64.6           | 56.0%        | -72.4%        |
| Retail Sales   | 152.6          | 202.6          | 206.0          | 214.2          | 220.0          | 223.8          | 228.3          | 233.6          | 114.2          | 187.1          | 63.9%        | -51.1%        |
| Visitor Air Tran.  | 372.5          | 598.0          | 645.1          | 706.3          | 713.5          | 742.3          | 777.2          | 801.6          | 231.8          | 484.0          | 108.8%       | -71.1%        |
| <b>TOTAL</b>   | <b>1,323.5</b> | <b>2,206.2</b> | <b>2,355.6</b> | <b>2,555.9</b> | <b>2,642.9</b> | <b>2,755.0</b> | <b>2,870.8</b> | <b>2,949.0</b> | <b>1,150.3</b> | <b>1,997.0</b> | <b>73.6%</b> | <b>-61.0%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.



# Multnomah County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003   | 2013   | 2014   | 2015   | 2016   | 2017   | 2018    | 2019    | 2020   | 2021   | 2020-21 | 2019-20 |
|---|--------|--------|--------|--------|--------|--------|---------|---------|--------|--------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |        |        |        |        |        |        |         |         |        |        |         |         |
| Accom. & Food Serv.   | 175.2  | 317.0  | 339.6  | 368.9  | 399.1  | 428.5  | 467.2   | 492.9   | 295.8  | 324.3  | 9.6%    | -40.0%  |
| Arts, Ent. & Rec.   | 25.1   | 37.8   | 39.9   | 42.2   | 43.7   | 46.1   | 49.0    | 52.2    | 37.0   | 36.7   | -1.0%   | -29.1%  |
| Retail**  | 24.2   | 34.4   | 36.0   | 38.5   | 40.7   | 43.0   | 45.2    | 46.5    | 44.8   | 46.8   | 4.4%    | -3.7%   |
| Ground Tran.  | 21.2   | 27.6   | 30.1   | 33.5   | 32.6   | 34.5   | 35.8    | 38.9    | 38.1   | 36.5   | -4.3%   | -1.8%   |
| Other Travel*   | 235.9  | 301.2  | 328.9  | 362.9  | 395.6  | 447.7  | 482.3   | 521.9   | 407.5  | 400.5  | -1.7%   | -21.9%  |
| <b>TOTAL</b>  | 481.7  | 718.0  | 774.5  | 846.0  | 911.7  | 999.7  | 1,079.6 | 1,152.4 | 823.3  | 844.7  | 2.6%    | -28.6%  |
| <b>Travel Industry Employment (Jobs)</b>                      |        |        |        |        |        |        |         |         |        |        |         |         |
| Accom. & Food Serv.   | 8,660  | 12,300 | 12,710 | 13,080 | 13,520 | 13,700 | 14,090  | 14,000  | 8,610  | 8,760  | 1.7%    | -38.5%  |
| Arts, Ent. & Rec.   | 840    | 1,100  | 1,140  | 1,160  | 1,220  | 1,170  | 1,170   | 1,230   | 800    | 820    | 1.8%    | -34.6%  |
| Retail**  | 970    | 1,200  | 1,220  | 1,260  | 1,290  | 1,320  | 1,330   | 1,310   | 1,180  | 1,190  | 1.5%    | -10.4%  |
| Ground Tran.  | 930    | 940    | 970    | 1,050  | 960    | 980    | 980     | 1,020   | 1,090  | 980    | -10.0%  | 6.9%    |
| Other Travel*   | 5,530  | 4,840  | 5,080  | 5,430  | 5,770  | 5,830  | 6,180   | 6,360   | 4,970  | 4,900  | -1.4%   | -21.8%  |
| <b>TOTAL</b>  | 16,930 | 20,380 | 21,130 | 21,970 | 22,760 | 23,010 | 23,750  | 23,920  | 16,660 | 16,650 | -0.1%   | -30.4%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |        |        |        |        |        |        |         |         |        |        |         |         |
| Local Tax Receipts  | 44.2   | 83.8   | 92.9   | 107.8  | 109.6  | 114.0  | 117.2   | 118.0   | 51.9   | 76.6   | 47.7%   | -56.0%  |
| State Tax Receipts  | 36.7   | 59.9   | 63.5   | 68.5   | 73.7   | 84.4   | 89.8    | 94.4    | 58.2   | 68.1   | 17.0%   | -38.3%  |
| <b>TOTAL</b>  | 81.0   | 143.8  | 156.5  | 176.3  | 183.3  | 198.5  | 207.0   | 212.4   | 110.1  | 144.7  | 31.5%   | -48.2%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Multnomah County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Multnomah County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |         | Party Size | Length of Stay |
|--------------------|--------|-------|-------|---------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip    |            |                |
| Hotel, Motel, STVR | \$191  | \$421 | \$484 | \$1,069 | 2.5        | 2.2            |
| Private Home       | \$84   | \$303 | \$148 | \$553   | 1.8        | 3.7            |
| Other Overnight    | \$46   | \$155 | \$107 | \$364   | 2.3        | 3.4            |
| All Overnight      | \$241  | \$650 | \$511 | \$1,459 | 2.1        | 2.9            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |            | Party-Nights |           |           |
|--------------------|---------------|-----------|------------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021       | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 7,071,140     | 3,183,300 | 6,617,210  | 3,357,090    | 1,391,100 | 2,614,780 |
| Private Home       | 5,603,560     | 5,503,450 | 5,599,440  | 2,945,100    | 2,845,450 | 3,154,280 |
| Other Overnight    | 485,350       | 333,360   | 265,320    | 156,490      | 137,580   | 113,960   |
| All Overnight      | 13,160,060    | 9,020,110 | 12,481,970 | 6,458,690    | 4,374,130 | 5,883,020 |

|                    | Person-Trips |           |           | Party-Trips |           |           |
|--------------------|--------------|-----------|-----------|-------------|-----------|-----------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020      | 2021      |
| Hotel, Motel, STVR | 3,477,430    | 1,534,550 | 3,004,110 | 1,608,960   | 649,820   | 1,183,010 |
| Private Home       | 1,807,500    | 1,519,550 | 1,545,830 | 915,280     | 782,190   | 846,100   |
| Other Overnight    | 145,660      | 101,680   | 79,240    | 46,560      | 41,520    | 33,670    |
| All Overnight      | 5,430,580    | 3,155,790 | 4,629,180 | 2,570,800   | 1,473,530 | 2,062,780 |

# Polk County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$72,989 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$38 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$3 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 8% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 4% |
|--|----|

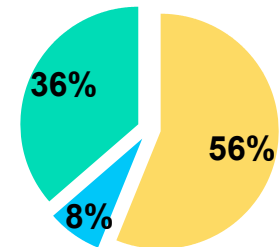
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

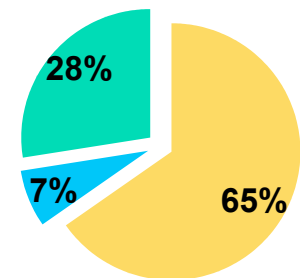
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Polk County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Polk County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 128.5 | 164.2 | 165.4 | 170.1 | 170.6 | 177.8 | 178.2 | 183.7 | 81.2  | 191.7 | ▲ 136.1%           | ▲ 2.2%  |
| Other                          | 5.7   | 12.5  | 12.2  | 9.8   | 9.4   | 10.6  | 12.3  | 12.5  | 5.9   | 11.0  | ▲ 86.6%            | ▲ 3.7%  |
| Visitor                        | 122.8 | 151.7 | 153.2 | 160.2 | 161.2 | 167.2 | 165.9 | 171.1 | 75.3  | 180.7 | ▲ 140.0%           | ▲ 2.2%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 39.2  | 41.8  | 41.8  | 45.9  | 48.5  | 51.2  | 55.7  | 59.9  | 55.2  | 69.7  | ▲ 26.3%            | ▲ 3.2%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 2,010 | 1,890 | 1,900 | 2,070 | 2,120 | 2,190 | 2,380 | 2,470 | 2,100 | 2,500 | ▲ 19.1%            | ▲ 1.2%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 3.0   | 3.7   | 3.7   | 4.0   | 4.2   | 4.6   | 4.9   | 5.1   | 3.9   | 5.6   | ▲ 43.9%            | ▲ 3.5%  |
| State                          | 3.0   | 3.7   | 3.7   | 4.0   | 4.2   | 4.6   | 4.9   | 5.1   | 3.9   | 5.6   | ▲ 43.9%            | ▲ 3.5%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Polk County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020 | 2021  | 2020-21 | 2019-20 |
|--|-------|-------|-------|-------|-------|-------|-------|-------|------|-------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |       |       |       |       |       |       |       |       |      |       |         |         |
| Destination Spending   | 122.8 | 151.7 | 153.2 | 160.2 | 161.2 | 167.2 | 165.9 | 171.1 | 75.3 | 180.7 | 140.0%  | -56.0%  |
| Other Travel*  | 5.7   | 12.5  | 12.2  | 9.8   | 9.4   | 10.6  | 12.3  | 12.5  | 5.9  | 11.0  | 86.6%   | -53.0%  |
| <b>TOTAL</b>   | 128.5 | 164.2 | 165.4 | 170.1 | 170.6 | 177.8 | 178.2 | 183.7 | 81.2 | 191.7 | 136.1%  | -55.8%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |       |       |       |       |       |       |       |       |      |       |         |         |
| Hotel, Motel, STVR**   | 14.1  | 22.2  | 22.4  | 24.4  | 24.8  | 25.4  | 18.3  | 19.0  | 7.4  | 32.0  | 330.1%  | -60.9%  |
| Hotel, Motel   |       |       |       |       |       |       |       |       |      | 18.5  |         |         |
| STVR   |       |       |       |       |       |       |       |       |      | 13.5  |         |         |
| Private Home   | 10.3  | 15.2  | 15.5  | 15.8  | 15.9  | 16.8  | 17.6  | 18.2  | 12.6 | 20.8  | 64.5%   | -30.7%  |
| Campground   | 2.9   | 3.7   | 3.7   | 3.8   | 3.9   | 3.9   | 4.1   | 4.3   | 3.6  | 4.0   | 11.4%   | -15.2%  |
| 2nd Home   | 0.2   | 0.3   | 0.3   | 0.3   | 0.3   | 0.3   | 0.3   | 0.3   | 0.3  | 0.3   | 14.7%   | -17.0%  |
| Day Travel   | 95.4  | 110.2 | 111.3 | 115.9 | 116.3 | 120.7 | 125.5 | 129.3 | 51.3 | 123.6 | 140.7%  | -60.3%  |
| <b>TOTAL</b>   | 122.8 | 151.7 | 153.2 | 160.2 | 161.2 | 167.2 | 165.9 | 171.1 | 75.3 | 180.7 | 140.0%  | -56.0%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |       |       |       |       |       |       |       |       |      |       |         |         |
| Accommodations   | 8.6   | 14.1  | 14.4  | 16.0  | 16.8  | 17.4  | 9.9   | 10.1  | 6.0  | 21.1  | 250.4%  | -40.6%  |
| Food Service   | 20.6  | 29.3  | 30.1  | 32.1  | 32.8  | 34.5  | 36.5  | 38.4  | 16.6 | 38.4  | 131.3%  | -56.8%  |
| Food Stores  | 8.9   | 12.2  | 12.6  | 13.3  | 13.0  | 13.3  | 13.6  | 14.0  | 8.2  | 15.9  | 95.0%   | -41.8%  |
| Local Tran. & Gas  | 5.0   | 9.0   | 8.6   | 7.4   | 6.9   | 7.6   | 8.7   | 8.8   | 3.6  | 9.1   | 153.6%  | -59.1%  |
| Arts, Ent. & Rec.  | 76.7  | 83.4  | 84.0  | 87.7  | 87.9  | 90.6  | 93.4  | 95.8  | 38.3 | 91.2  | 138.0%  | -60.0%  |
| Retail Sales   | 3.1   | 3.7   | 3.6   | 3.8   | 3.7   | 3.8   | 3.9   | 4.0   | 2.6  | 4.9   | 90.4%   | -35.1%  |
| <b>TOTAL</b>   | 122.8 | 151.7 | 153.2 | 160.2 | 161.2 | 167.2 | 165.9 | 171.1 | 75.3 | 180.7 | 140.0%  | -56.0%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.



# Polk County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 11.6  | 16.3  | 16.7  | 19.4  | 21.4  | 22.6  | 25.2  | 27.6  | 28.2  | 39.9  | 41.2%   | 2.4%    |
| Arts, Ent. & Rec.   | 25.2  | 22.3  | 21.9  | 23.1  | 23.6  | 25.0  | 26.6  | 28.3  | 23.0  | 25.7  | 11.6%   | -18.5%  |
| Retail**  | 1.7   | 2.3   | 2.3   | 2.5   | 2.5   | 2.6   | 2.8   | 2.9   | 2.9   | 3.1   | 6.6%    | 2.3%    |
| Ground Tran.  | 0.3   | 0.4   | 0.4   | 0.5   | 0.5   | 0.5   | 0.6   | 0.6   | 0.4   | 0.4   | 10.5%   | -38.0%  |
| Other Travel*   | 0.3   | 0.4   | 0.4   | 0.4   | 0.4   | 0.5   | 0.5   | 0.6   | 0.6   | 0.5   | -9.6%   | 2.2%    |
| <b>TOTAL</b>  | 39.2  | 41.8  | 41.8  | 45.9  | 48.5  | 51.2  | 55.7  | 59.9  | 55.2  | 69.7  | 26.3%   | -7.9%   |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 880   | 910   | 920   | 990   | 1,010 | 1,060 | 1,100 | 1,170 | 1,110 | 1,470 | 32.6%   | -5.3%   |
| Arts, Ent. & Rec.   | 990   | 820   | 830   | 920   | 950   | 970   | 1,110 | 1,130 | 840   | 880   | 4.5%    | -25.9%  |
| Retail**  | 100   | 110   | 110   | 120   | 120   | 120   | 120   | 120   | 110   | 120   | 4.9%    | -6.8%   |
| Ground Tran.  | 10    | 10    | 10    | 10    | 10    | 10    | 10    | 10    | 10    | 10    | 3.7%    | -35.8%  |
| Other Travel*   | 30    | 30    | 30    | 30    | 30    | 30    | 30    | 30    | 30    | 30    | -11.7%  | -1.9%   |
| <b>TOTAL</b>  | 2,010 | 1,890 | 1,900 | 2,070 | 2,120 | 2,190 | 2,380 | 2,470 | 2,100 | 2,500 | 19.0%   | -15.0%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| State Tax Receipts  | 3.0   | 3.7   | 3.7   | 4.0   | 4.2   | 4.6   | 4.9   | 5.1   | 3.9   | 5.6   | 43.9%   | -24.2%  |
| <b>TOTAL</b>  | 3.0   | 3.7   | 3.7   | 4.0   | 4.2   | 4.6   | 4.9   | 5.1   | 3.9   | 5.6   | 43.9%   | -24.2%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Polk County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Polk County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$108  | \$201 | \$301 | \$559 | 2.8        | 1.9            |
| Private Home       | \$24   | \$72  | \$56  | \$169 | 2.4        | 3.0            |
| Other Overnight    | \$54   | \$161 | \$145 | \$434 | 2.7        | 3.0            |
| All Overnight      | \$71   | \$187 | \$176 | \$469 | 2.5        | 2.7            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |           | Party-Nights |         |         |
|--------------------|---------------|---------|-----------|--------------|---------|---------|
|                    | 2019          | 2020    | 2021      | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 205,800       | 65,910  | 295,500   | 83,890       | 25,490  | 106,050 |
| Private Home       | 848,680       | 563,980 | 868,760   | 331,720      | 239,320 | 368,640 |
| Other Overnight    | 113,320       | 76,090  | 80,920    | 32,950       | 28,160  | 29,950  |
| All Overnight      | 1,167,790     | 705,990 | 1,245,180 | 448,560      | 292,970 | 504,640 |

|                    | Person-Trips |         |         | Party-Trips |         |         |
|--------------------|--------------|---------|---------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 123,730      | 32,300  | 158,840 | 50,430      | 12,170  | 57,120  |
| Private Home       | 330,130      | 187,600 | 288,990 | 129,040     | 79,610  | 122,630 |
| Other Overnight    | 36,730       | 25,410  | 27,020  | 10,720      | 9,430   | 10,030  |
| All Overnight      | 490,590      | 245,310 | 474,850 | 190,190     | 101,200 | 189,780 |

# Tillamook County / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job                 | \$99,175 |
| Employee Earnings generated by \$100 Visitor Spending          | \$46     |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$7      |
| Visitor Shares   |          |
| Travel Share of Total Employment (2021)                        | 14%      |
| Overnight Visitor Day Share of Resident Population**           | 20%      |

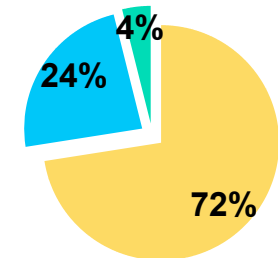
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

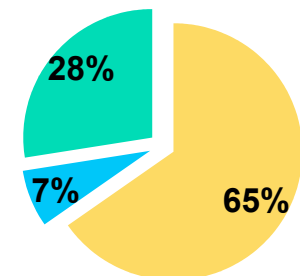
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Tillamook County



### Oregon



■ Hotel, Motel, STR
 ■ Private Home (VFR)
 ■ Other Overnight

# Tillamook County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 129.0 | 212.8 | 220.9 | 229.2 | 227.4 | 232.7 | 241.7 | 249.4 | 113.6 | 202.7 | ▲ 78.3%            | ▲ 2.5%  |
| Other                          | 2.1   | 4.1   | 3.9   | 3.2   | 3.0   | 3.4   | 3.9   | 3.9   | 1.9   | 3.5   | ▲ 86.6%            | ▲ 2.7%  |
| Visitor                        | 126.9 | 208.7 | 216.9 | 226.0 | 224.4 | 229.3 | 237.8 | 245.5 | 111.8 | 199.2 | ▲ 78.2%            | ▲ 2.5%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 36.1  | 60.2  | 66.1  | 68.3  | 72.4  | 77.2  | 82.9  | 92.2  | 71.5  | 92.4  | ▲ 29.2%            | ▲ 5.4%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 1,720 | 2,060 | 2,150 | 2,180 | 2,190 | 2,210 | 2,180 | 2,350 | 1,700 | 2,020 | ▲ 18.6%            | ▲ 0.9%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 3.3   | 5.9   | 7.3   | 7.9   | 8.4   | 9.4   | 10.4  | 11.4  | 9.1   | 13.0  | ▲ 43.1%            | ▲ 7.9%  |
| Local                          | 0.6   | 1.2   | 2.3   | 2.8   | 3.0   | 3.3   | 4.0   | 4.5   | 4.3   | 6.3   | ▲ 47.6%            | ▲ 13.9% |
| State                          | 2.7   | 4.7   | 5.0   | 5.2   | 5.4   | 6.1   | 6.4   | 6.9   | 4.8   | 6.7   | ▲ 39.1%            | ▲ 5.1%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Tillamook County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|--|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |       |       |       |       |       |       |       |       |       |       |         |         |
| Destination Spending   | 126.9 | 208.7 | 216.9 | 226.0 | 224.4 | 229.3 | 237.8 | 245.5 | 111.8 | 199.2 | 78.2%   | -54.5%  |
| Other Travel*  | 2.1   | 4.1   | 3.9   | 3.2   | 3.0   | 3.4   | 3.9   | 3.9   | 1.9   | 3.5   | 86.6%   | -53.0%  |
| <b>TOTAL</b>   | 129.0 | 212.8 | 220.9 | 229.2 | 227.4 | 232.7 | 241.7 | 249.4 | 113.6 | 202.7 | 78.3%   | -54.4%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Hotel, Motel, STVR**   | 24.9  | 71.5  | 76.0  | 82.0  | 81.2  | 83.3  | 86.1  | 88.4  | 50.6  | 112.0 | 121.2%  | -42.7%  |
| Hotel, Motel   |       |       |       |       |       |       |       |       |       | 10.6  |         |         |
| STVR   |       |       |       |       |       |       |       |       |       | 101.4 |         |         |
| Private Home   | 3.8   | 5.2   | 5.2   | 5.2   | 5.1   | 5.4   | 5.7   | 5.8   | 4.7   | 5.9   | 26.6%   | -19.5%  |
| Campground   | 25.9  | 31.6  | 32.0  | 32.6  | 33.5  | 33.7  | 35.1  | 36.5  | 20.1  | 22.3  | 11.0%   | -44.9%  |
| 2nd Home   | 10.0  | 13.0  | 13.3  | 13.4  | 13.5  | 14.1  | 14.6  | 15.0  | 12.4  | 14.3  | 14.7%   | -17.0%  |
| Day Travel   | 62.3  | 87.4  | 90.3  | 92.7  | 91.1  | 92.8  | 96.4  | 99.8  | 23.9  | 44.7  | 86.8%   | -76.0%  |
| <b>TOTAL</b>   | 126.9 | 208.7 | 216.9 | 226.0 | 224.4 | 229.3 | 237.8 | 245.5 | 111.8 | 199.2 | 78.2%   | -54.5%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |       |       |       |       |       |       |       |       |       |       |         |         |
| Accommodations   | 17.4  | 40.2  | 42.1  | 46.3  | 49.0  | 51.0  | 52.5  | 53.4  | 48.0  | 90.9  | 89.3%   | -10.1%  |
| Food Service   | 34.2  | 59.4  | 62.9  | 66.8  | 66.6  | 68.6  | 71.8  | 75.7  | 22.9  | 39.7  | 73.5%   | -69.8%  |
| Food Stores  | 18.9  | 26.7  | 27.9  | 29.1  | 28.4  | 28.3  | 28.8  | 29.8  | 14.8  | 23.1  | 55.9%   | -50.2%  |
| Local Tran. & Gas  | 8.5   | 18.2  | 17.8  | 15.2  | 13.8  | 15.0  | 16.9  | 17.2  | 5.8   | 11.3  | 95.0%   | -66.2%  |
| Arts, Ent. & Rec.  | 23.0  | 33.2  | 34.6  | 36.1  | 35.0  | 35.1  | 35.9  | 36.9  | 9.6   | 14.7  | 53.0%   | -73.9%  |
| Retail Sales   | 25.0  | 31.0  | 31.6  | 32.5  | 31.5  | 31.4  | 31.8  | 32.5  | 10.6  | 19.4  | 82.9%   | -67.4%  |
| <b>TOTAL</b>   | 126.9 | 208.7 | 216.9 | 226.0 | 224.4 | 229.3 | 237.8 | 245.5 | 111.8 | 199.2 | 78.2%   | -54.5%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Tillamook County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 23.4         | 43.2         | 48.0         | 49.3         | 52.8         | 57.0         | 62.5         | 70.6         | 55.3         | 71.7         | 29.8%        | -21.8%        |
| Arts, Ent. & Rec.   | 6.3          | 8.2          | 8.9          | 9.3          | 9.8          | 10.0         | 9.9          | 10.5         | 8.5          | 11.4         | 34.8%        | -19.6%        |
| Retail**  | 5.8          | 7.8          | 8.2          | 8.6          | 8.7          | 8.9          | 9.3          | 9.6          | 7.0          | 8.5          | 22.4%        | -27.8%        |
| Ground Tran.  | 0.5          | 0.8          | 0.9          | 1.0          | 1.0          | 1.1          | 1.1          | 1.2          | 0.6          | 0.5          | -16.9%       | -53.5%        |
| Other Travel*   | 0.1          | 0.1          | 0.1          | 0.2          | 0.2          | 0.2          | 0.2          | 0.2          | 0.2          | 0.2          | 5.8%         | 2.2%          |
| <b>TOTAL</b>  | <b>36.1</b>  | <b>60.2</b>  | <b>66.1</b>  | <b>68.3</b>  | <b>72.4</b>  | <b>77.2</b>  | <b>82.9</b>  | <b>92.2</b>  | <b>71.5</b>  | <b>92.4</b>  | <b>29.2%</b> | <b>-22.5%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 980          | 1,260        | 1,340        | 1,370        | 1,400        | 1,400        | 1,420        | 1,510        | 1,120        | 1,330        | 18.6%        | -26.1%        |
| Arts, Ent. & Rec.   | 370          | 380          | 380          | 370          | 370          | 390          | 350          | 410          | 300          | 370          | 22.5%        | -26.9%        |
| Retail**  | 340          | 380          | 400          | 400          | 390          | 380          | 380          | 380          | 260          | 300          | 16.9%        | -32.3%        |
| Ground Tran.  | 20           | 30           | 30           | 30           | 30           | 30           | 30           | 30           | 10           | 10           | -22.0%       | -51.8%        |
| Other Travel*   | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 10           | -3.8%        | -7.1%         |
| <b>TOTAL</b>  | <b>1,720</b> | <b>2,060</b> | <b>2,150</b> | <b>2,180</b> | <b>2,190</b> | <b>2,210</b> | <b>2,180</b> | <b>2,350</b> | <b>1,700</b> | <b>2,020</b> | <b>18.8%</b> | <b>-27.7%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Local Tax Receipts  | 0.6          | 1.2          | 2.3          | 2.8          | 3.0          | 3.3          | 4.0          | 4.5          | 4.3          | 6.3          | 47.6%        | -5.3%         |
| State Tax Receipts  | 2.7          | 4.7          | 5.0          | 5.2          | 5.4          | 6.1          | 6.4          | 6.9          | 4.8          | 6.7          | 39.1%        | -30.4%        |
| <b>TOTAL</b>  | <b>3.3</b>   | <b>5.9</b>   | <b>7.3</b>   | <b>7.9</b>   | <b>8.4</b>   | <b>9.4</b>   | <b>10.4</b>  | <b>11.4</b>  | <b>9.1</b>   | <b>13.0</b>  | <b>43.1%</b> | <b>-20.5%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Tillamook County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Tillamook County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |         | Party Size | Length of Stay |
|--------------------|--------|-------|-------|---------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip    |            |                |
| Hotel, Motel, STVR | \$145  | \$388 | \$408 | \$1,094 | 2.8        | 2.7            |
| Private Home       | \$22   | \$65  | \$51  | \$153   | 2.4        | 3.0            |
| Other Overnight    | \$38   | \$104 | \$97  | \$265   | 2.6        | 2.7            |
| All Overnight      | \$132  | \$364 | \$347 | \$956   | 2.6        | 2.8            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |         |         |
|--------------------|---------------|-----------|-----------|--------------|---------|---------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 761,740       | 256,830   | 774,680   | 310,500      | 100,870 | 274,390 |
| Private Home       | 270,350       | 230,670   | 272,840   | 105,670      | 97,880  | 115,780 |
| Other Overnight    | 1,595,810     | 913,000   | 972,360   | 482,280      | 355,310 | 378,440 |
| All Overnight      | 2,627,900     | 1,400,500 | 2,019,890 | 898,450      | 554,060 | 768,610 |

|                    | Person-Trips |         |         | Party-Trips |         |         |
|--------------------|--------------|---------|---------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 457,960      | 118,970 | 288,690 | 186,670     | 45,380  | 102,410 |
| Private Home       | 105,170      | 76,730  | 90,760  | 41,110      | 32,560  | 38,510  |
| Other Overnight    | 555,060      | 331,140 | 352,720 | 168,810     | 129,490 | 137,940 |
| All Overnight      | 1,118,180    | 526,850 | 732,170 | 396,590     | 207,430 | 278,860 |

# Umatilla County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

Amount of Visitor Spending that supports 1 Job \$67,609

Employee Earnings generated by \$100 Visitor Spending \$39

Local & State Tax Revenues generated by \$100 Visitor Spending \$5

### Visitor Shares

Travel Share of Total Employment (2021) 6%

Overnight Visitor Day Share of Resident Population\*\* 6%

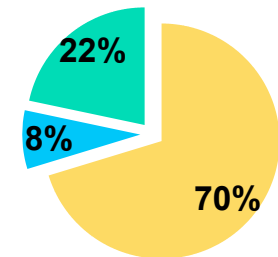
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

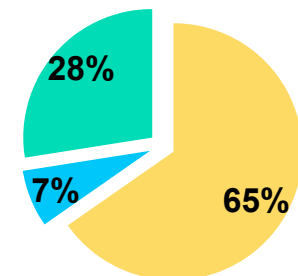
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Umatilla County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight



# Umatilla County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 114.9 | 146.8 | 150.1 | 150.8 | 148.7 | 164.5 | 175.1 | 180.1 | 116.2 | 173.9 | ▲ 49.7%            | ▲ 2.3%  |
| Other                          | 8.0   | 13.0  | 12.7  | 10.0  | 9.6   | 11.8  | 13.0  | 13.8  | 6.5   | 10.9  | ▲ 67.9%            | ▲ 1.7%  |
| Visitor                        | 106.9 | 133.9 | 137.4 | 140.7 | 139.2 | 152.8 | 162.1 | 166.2 | 109.7 | 163.1 | ▲ 48.7%            | ▲ 2.4%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 31.3  | 42.4  | 46.0  | 49.5  | 50.5  | 53.4  | 58.5  | 61.7  | 55.4  | 65.1  | ▲ 17.6%            | ▲ 4.1%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 2,060 | 2,230 | 2,320 | 2,410 | 2,460 | 2,520 | 2,600 | 2,710 | 2,210 | 2,470 | ▲ 11.7%            | ▲ 1.0%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 3.9   | 5.7   | 5.9   | 6.2   | 6.3   | 7.3   | 7.7   | 8.0   | 6.5   | 8.3   | ▲ 27.5%            | ▲ 4.2%  |
| Local                          | 0.8   | 1.4   | 1.4   | 1.5   | 1.5   | 1.8   | 1.8   | 1.9   | 1.8   | 2.3   | ▲ 25.9%            | ▲ 6.0%  |
| State                          | 3.1   | 4.4   | 4.5   | 4.7   | 4.8   | 5.5   | 5.9   | 6.1   | 4.7   | 6.0   | ▲ 28.1%            | ▲ 3.7%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Umatilla County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 106.9        | 133.9        | 137.4        | 140.7        | 139.2        | 152.8        | 162.1        | 166.2        | 109.7        | 163.1        | 48.7%        | -34.0%        |
| Other Travel*  | 8.0          | 13.0         | 12.7         | 10.0         | 9.6          | 11.8         | 13.0         | 13.8         | 6.5          | 10.9         | 67.9%        | -53.2%        |
| <b>TOTAL</b>   | <b>114.9</b> | <b>146.8</b> | <b>150.1</b> | <b>150.8</b> | <b>148.7</b> | <b>164.5</b> | <b>175.1</b> | <b>180.1</b> | <b>116.2</b> | <b>173.9</b> | <b>49.7%</b> | <b>-35.5%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 41.4         | 59.8         | 62.9         | 65.7         | 64.7         | 73.5         | 79.2         | 81.9         | 55.9         | 92.2         | 64.9%        | -31.8%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 88.5         |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 3.7          |              |               |
| Private Home   | 18.9         | 24.7         | 24.8         | 24.4         | 24.1         | 25.7         | 26.8         | 26.9         | 25.1         | 28.5         | 13.4%        | -6.8%         |
| Campground   | 4.9          | 5.9          | 5.9          | 6.1          | 6.2          | 6.3          | 6.5          | 6.8          | 6.3          | 7.0          | 11.1%        | -7.9%         |
| 2nd Home   | 2.5          | 3.2          | 3.2          | 3.2          | 3.3          | 3.4          | 3.5          | 3.6          | 3.0          | 3.4          | 14.3%        | -16.1%        |
| Day Travel   | 39.2         | 40.3         | 40.5         | 41.3         | 40.9         | 43.9         | 46.1         | 47.0         | 19.4         | 32.0         | 64.9%        | -58.7%        |
| <b>TOTAL</b>   | <b>106.9</b> | <b>133.9</b> | <b>137.4</b> | <b>140.7</b> | <b>139.2</b> | <b>152.8</b> | <b>162.1</b> | <b>166.2</b> | <b>109.7</b> | <b>163.1</b> | <b>48.7%</b> | <b>-34.0%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 18.4         | 27.9         | 30.7         | 33.7         | 33.7         | 38.3         | 40.0         | 41.6         | 31.7         | 49.8         | 57.2%        | -23.9%        |
| Food Service   | 26.7         | 35.2         | 36.0         | 38.1         | 38.5         | 42.2         | 45.0         | 46.8         | 32.9         | 47.6         | 44.7%        | -29.8%        |
| Food Stores  | 10.5         | 13.0         | 13.3         | 13.7         | 13.4         | 13.9         | 14.2         | 14.5         | 9.6          | 12.3         | 28.1%        | -33.8%        |
| Local Tran. & Gas  | 10.2         | 17.7         | 16.8         | 14.1         | 12.8         | 14.9         | 17.3         | 17.4         | 9.8          | 16.8         | 72.2%        | -43.8%        |
| Arts, Ent. & Rec.  | 24.0         | 23.7         | 23.7         | 24.4         | 24.2         | 25.8         | 26.7         | 27.0         | 15.0         | 21.2         | 41.2%        | -44.4%        |
| Retail Sales   | 16.4         | 16.5         | 16.4         | 16.7         | 16.3         | 17.1         | 17.6         | 17.7         | 10.3         | 14.2         | 37.8%        | -42.0%        |
| Visitor Air Tran.  | 0.8          | 0.0          | 0.6          | 0.1          | 0.2          | 0.6          | 1.2          | 1.1          | 0.4          | 1.1          | 165.3%       | -61.2%        |
| <b>TOTAL</b>   | <b>106.9</b> | <b>133.9</b> | <b>137.4</b> | <b>140.7</b> | <b>139.2</b> | <b>152.8</b> | <b>162.1</b> | <b>166.2</b> | <b>109.7</b> | <b>163.1</b> | <b>48.7%</b> | <b>-34.0%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Umatilla County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 19.9         | 30.6         | 32.9         | 35.9         | 36.3         | 37.8         | 42.5         | 44.9         | 40.7         | 47.1         | 15.8%        | -9.4%         |
| Arts, Ent. & Rec.   | 6.3          | 6.6          | 7.1          | 7.4          | 7.8          | 8.5          | 8.6          | 9.0          | 6.3          | 8.9          | 41.3%        | -29.6%        |
| Retail**  | 3.6          | 4.0          | 4.1          | 4.3          | 4.4          | 4.7          | 5.0          | 5.1          | 5.9          | 6.2          | 6.5%         | 14.1%         |
| Ground Tran.  | 0.5          | 0.6          | 0.7          | 0.7          | 0.7          | 0.8          | 0.9          | 0.9          | 0.9          | 1.2          | 35.2%        | -7.6%         |
| Other Travel*   | 1.0          | 0.6          | 1.1          | 1.2          | 1.4          | 1.5          | 1.6          | 1.8          | 1.6          | 1.6          | -0.1%        | -8.8%         |
| <b>TOTAL</b>  | <b>31.3</b>  | <b>42.4</b>  | <b>46.0</b>  | <b>49.5</b>  | <b>50.5</b>  | <b>53.4</b>  | <b>58.5</b>  | <b>61.7</b>  | <b>55.4</b>  | <b>65.1</b>  | <b>17.6%</b> | <b>-10.3%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 1,210        | 1,400        | 1,440        | 1,500        | 1,540        | 1,570        | 1,650        | 1,670        | 1,440        | 1,520        | 5.2%         | -13.6%        |
| Arts, Ent. & Rec.   | 590          | 600          | 640          | 660          | 660          | 680          | 680          | 750          | 480          | 650          | 36.3%        | -36.0%        |
| Retail**  | 180          | 170          | 170          | 180          | 180          | 190          | 190          | 200          | 210          | 210          | 2.7%         | 5.5%          |
| Ground Tran.  | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 20           | 30           | 26.9%        | -4.2%         |
| Other Travel*   | 70           | 30           | 50           | 50           | 60           | 60           | 60           | 70           | 60           | 60           | -2.7%        | -12.5%        |
| <b>TOTAL</b>  | <b>2,060</b> | <b>2,230</b> | <b>2,320</b> | <b>2,410</b> | <b>2,460</b> | <b>2,520</b> | <b>2,600</b> | <b>2,710</b> | <b>2,210</b> | <b>2,470</b> | <b>11.8%</b> | <b>-18.5%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Local Tax Receipts  | 0.8          | 1.4          | 1.4          | 1.5          | 1.5          | 1.8          | 1.8          | 1.9          | 1.8          | 2.3          | 25.9%        | -6.4%         |
| State Tax Receipts  | 3.1          | 4.4          | 4.5          | 4.7          | 4.8          | 5.5          | 5.9          | 6.1          | 4.7          | 6.0          | 28.1%        | -23.2%        |
| <b>TOTAL</b>  | <b>3.9</b>   | <b>5.7</b>   | <b>5.9</b>   | <b>6.2</b>   | <b>6.3</b>   | <b>7.3</b>   | <b>7.7</b>   | <b>8.0</b>   | <b>6.5</b>   | <b>8.3</b>   | <b>27.5%</b> | <b>-19.2%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Umatilla County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Umatilla County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                      | Person       |              | Party        |              | Party Size | Length of Stay |
|----------------------|--------------|--------------|--------------|--------------|------------|----------------|
|                      | Day          | Trip         | Day          | Trip         |            |                |
| Hotel, Motel, STVR   | \$106        | \$177        | \$293        | \$492        | 2.8        | 1.7            |
| Private Home         | \$36         | \$109        | \$85         | \$257        | 2.4        | 3.0            |
| Other Overnight      | \$50         | \$143        | \$132        | \$372        | 2.6        | 2.8            |
| <b>All Overnight</b> | <b>\$120</b> | <b>\$261</b> | <b>\$307</b> | <b>\$684</b> | <b>2.6</b> | <b>2.2</b>     |

### Overnight Visitor Volume, 2019-2021

|                      | Person-Nights    |                  |                  | Party-Nights   |                |                |
|----------------------|------------------|------------------|------------------|----------------|----------------|----------------|
|                      | 2019             | 2020             | 2021             | 2019           | 2020           | 2021           |
| Hotel, Motel, STVR   | 737,730          | 552,050          | 872,190          | 300,710        | 199,810        | 314,460        |
| Private Home         | 780,550          | 748,160          | 786,660          | 305,090        | 317,470        | 333,810        |
| Other Overnight      | 265,980          | 194,070          | 206,570          | 80,000         | 74,100         | 78,890         |
| <b>All Overnight</b> | <b>1,784,250</b> | <b>1,494,290</b> | <b>1,865,420</b> | <b>685,810</b> | <b>591,390</b> | <b>727,160</b> |

|                      | Person-Trips   |                |                | Party-Trips    |                |                |
|----------------------|----------------|----------------|----------------|----------------|----------------|----------------|
|                      | 2019           | 2020           | 2021           | 2019           | 2020           | 2021           |
| Hotel, Motel, STVR   | 443,520        | 331,890        | 519,660        | 180,790        | 119,940        | 187,430        |
| Private Home         | 303,630        | 248,870        | 261,680        | 118,680        | 105,600        | 111,040        |
| Other Overnight      | 91,730         | 68,250         | 72,660         | 27,770         | 26,190         | 27,890         |
| <b>All Overnight</b> | <b>838,890</b> | <b>649,010</b> | <b>853,990</b> | <b>327,230</b> | <b>251,740</b> | <b>326,350</b> |

# Union County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

Amount of Visitor Spending that supports 1 Job \$64,346

Employee Earnings generated by \$100 Visitor Spending \$43

Local & State Tax Revenues generated by \$100 Visitor Spending \$6

### Visitor Shares

Travel Share of Total Employment (2021) 4%

Overnight Visitor Day Share of Resident Population\*\* 6%

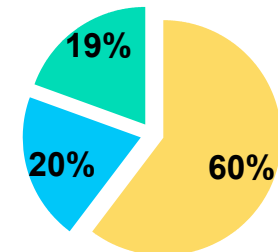
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

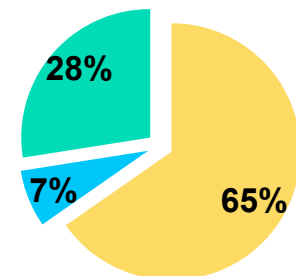
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Union County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Union County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 28.9 | 31.3 | 33.0 | 33.0 | 33.3 | 35.2 | 36.8 | 38.0 | 24.0 | 41.4 | ▲ 72.5%            | ▲ 2.0%  |
| Other                          | 2.1  | 4.2  | 4.0  | 3.2  | 3.0  | 3.3  | 3.8  | 3.9  | 1.8  | 3.4  | ▲ 86.6%            | ▲ 2.7%  |
| Visitor                        | 26.8 | 27.2 | 29.0 | 29.8 | 30.3 | 31.9 | 33.0 | 34.1 | 22.2 | 38.0 | ▲ 71.3%            | ▲ 2.0%  |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 9.3  | 9.8  | 10.4 | 11.2 | 11.8 | 12.3 | 14.3 | 15.4 | 14.1 | 16.7 | ▲ 18.3%            | ▲ 3.3%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 610  | 560  | 570  | 580  | 600  | 610  | 660  | 670  | 560  | 610  | ▲ 8.6%             | ▼ 0.0%  |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 1.1  | 1.4  | 1.5  | 1.5  | 1.6  | 1.8  | 1.9  | 2.0  | 1.5  | 2.2  | ▲ 42.5%            | ▲ 3.7%  |
| Local                          | 0.4  | 0.4  | 0.5  | 0.5  | 0.6  | 0.6  | 0.6  | 0.6  | 0.5  | 0.8  | ▲ 58.8%            | ▲ 4.5%  |
| State                          | 0.8  | 0.9  | 1.0  | 1.0  | 1.1  | 1.2  | 1.3  | 1.3  | 1.0  | 1.4  | ▲ 34.3%            | ▲ 3.2%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Union County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003        | 2013        | 2014        | 2015        | 2016        | 2017        | 2018        | 2019        | 2020        | 2021        | 2020-21      | 2019-20       |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |             |             |             |             |             |             |             |             |             |             |              |               |
| Destination Spending   | 26.8        | 27.2        | 29.0        | 29.8        | 30.3        | 31.9        | 33.0        | 34.1        | 22.2        | 38.0        | 71.3%        | -35.0%        |
| Other Travel*  | 2.1         | 4.2         | 4.0         | 3.2         | 3.0         | 3.3         | 3.8         | 3.9         | 1.8         | 3.4         | 86.6%        | -52.8%        |
| <b>TOTAL</b>   | <b>28.9</b> | <b>31.3</b> | <b>33.0</b> | <b>33.0</b> | <b>33.3</b> | <b>35.2</b> | <b>36.8</b> | <b>38.0</b> | <b>24.0</b> | <b>41.4</b> | <b>72.5%</b> | <b>-36.8%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |             |             |             |             |             |             |             |             |             |             |              |               |
| Hotel, Motel, STVR**   | 12.2        | 10.4        | 11.6        | 12.4        | 12.6        | 13.7        | 14.1        | 14.6        | 9.4         | 19.0        | 102.4%       | -35.8%        |
| Hotel, Motel   |             |             |             |             |             |             |             |             |             | 17.0        |              |               |
| STVR   |             |             |             |             |             |             |             |             |             | 2.0         |              |               |
| Private Home   | 3.8         | 5.0         | 5.3         | 5.2         | 5.2         | 5.4         | 5.6         | 5.7         | 3.8         | 6.1         | 62.3%        | -34.1%        |
| Campground   | 3.8         | 5.4         | 5.5         | 5.6         | 5.8         | 5.8         | 6.1         | 6.3         | 5.3         | 5.9         | 11.0%        | -15.5%        |
| 2nd Home   | 0.3         | 0.4         | 0.4         | 0.4         | 0.4         | 0.5         | 0.5         | 0.5         | 0.4         | 0.5         | 14.6%        | -15.3%        |
| Day Travel   | 6.6         | 5.8         | 6.2         | 6.2         | 6.3         | 6.5         | 6.7         | 7.0         | 3.3         | 6.5         | 98.2%        | -53.0%        |
| <b>TOTAL</b>   | <b>26.8</b> | <b>27.2</b> | <b>29.0</b> | <b>29.8</b> | <b>30.3</b> | <b>31.9</b> | <b>33.0</b> | <b>34.1</b> | <b>22.2</b> | <b>38.0</b> | <b>71.3%</b> | <b>-35.0%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |             |             |             |             |             |             |             |             |             |             |              |               |
| Accommodations   | 5.7         | 5.9         | 6.5         | 7.1         | 7.4         | 8.0         | 8.2         | 8.4         | 6.3         | 11.4        | 80.5%        | -25.3%        |
| Food Service   | 6.8         | 7.1         | 7.7         | 8.1         | 8.4         | 8.8         | 9.2         | 9.7         | 6.5         | 11.1        | 72.6%        | -33.7%        |
| Food Stores  | 3.5         | 4.1         | 4.4         | 4.5         | 4.5         | 4.5         | 4.6         | 4.8         | 3.2         | 4.6         | 43.7%        | -32.3%        |
| Local Tran. & Gas  | 2.0         | 2.7         | 2.7         | 2.3         | 2.2         | 2.4         | 2.7         | 2.8         | 1.5         | 2.9         | 96.2%        | -46.0%        |
| Arts, Ent. & Rec.  | 4.9         | 3.9         | 4.2         | 4.3         | 4.4         | 4.5         | 4.6         | 4.7         | 2.8         | 4.6         | 65.4%        | -41.8%        |
| Retail Sales   | 3.9         | 3.3         | 3.5         | 3.5         | 3.5         | 3.6         | 3.6         | 3.7         | 2.0         | 3.4         | 72.6%        | -46.8%        |
| <b>TOTAL</b>   | <b>26.8</b> | <b>27.2</b> | <b>29.0</b> | <b>29.8</b> | <b>30.3</b> | <b>31.9</b> | <b>33.0</b> | <b>34.1</b> | <b>22.2</b> | <b>38.0</b> | <b>71.3%</b> | <b>-35.0%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Union County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003       | 2013       | 2014        | 2015        | 2016        | 2017        | 2018        | 2019        | 2020        | 2021        | 2020-21      | 2019-20       |
|---|------------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |            |            |             |             |             |             |             |             |             |             |              |               |
| Accom. & Food Serv.   | 6.5        | 7.0        | 7.4         | 8.1         | 8.4         | 8.7         | 10.4        | 11.2        | 10.4        | 12.5        | 20.5%        | -7.5%         |
| Arts, Ent. & Rec.   | 1.5        | 1.6        | 1.7         | 1.7         | 1.9         | 2.0         | 2.3         | 2.5         | 1.9         | 2.2         | 16.0%        | -24.3%        |
| Retail**  | 1.0        | 1.0        | 1.1         | 1.1         | 1.1         | 1.2         | 1.2         | 1.3         | 1.4         | 1.5         | 6.8%         | 12.0%         |
| Ground Tran.  | 0.2        | 0.1        | 0.2         | 0.2         | 0.2         | 0.2         | 0.2         | 0.2         | 0.2         | 0.2         | 19.1%        | -18.3%        |
| Other Travel*   | 0.1        | 0.1        | 0.1         | 0.2         | 0.2         | 0.2         | 0.2         | 0.2         | 0.2         | 0.3         | 11.6%        | 2.7%          |
| <b>TOTAL</b>  | <b>9.3</b> | <b>9.8</b> | <b>10.4</b> | <b>11.2</b> | <b>11.8</b> | <b>12.3</b> | <b>14.3</b> | <b>15.4</b> | <b>14.1</b> | <b>16.7</b> | <b>18.3%</b> | <b>-8.6%</b>  |
| <b>Travel Industry Employment (Jobs)</b>                      |            |            |             |             |             |             |             |             |             |             |              |               |
| Accom. & Food Serv.   | 360        | 320        | 330         | 340         | 360         | 360         | 400         | 410         | 350         | 390         | 10.9%        | -14.9%        |
| Arts, Ent. & Rec.   | 190        | 180        | 180         | 170         | 180         | 190         | 200         | 190         | 130         | 140         | 5.4%         | -31.1%        |
| Retail**  | 50         | 50         | 50          | 50          | 50          | 50          | 50          | 50          | 60          | 60          | 2.5%         | 8.4%          |
| Ground Tran.  | 10         | 0          | 0           | 0           | 0           | 10          | 0           | 10          | 0           | 0           | 11.8%        | -15.4%        |
| Other Travel*   | 10         | 10         | 10          | 10          | 10          | 10          | 10          | 10          | 10          | 20          | 4.6%         | 14.1%         |
| <b>TOTAL</b>  | <b>610</b> | <b>560</b> | <b>570</b>  | <b>580</b>  | <b>600</b>  | <b>610</b>  | <b>660</b>  | <b>670</b>  | <b>560</b>  | <b>610</b>  | <b>8.9%</b>  | <b>-16.4%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |            |            |             |             |             |             |             |             |             |             |              |               |
| Local Tax Receipts  | 0.4        | 0.4        | 0.5         | 0.5         | 0.6         | 0.6         | 0.6         | 0.6         | 0.5         | 0.8         | 58.8%        | -19.3%        |
| State Tax Receipts  | 0.8        | 0.9        | 1.0         | 1.0         | 1.1         | 1.2         | 1.3         | 1.3         | 1.0         | 1.4         | 34.3%        | -24.6%        |
| <b>TOTAL</b>  | <b>1.1</b> | <b>1.4</b> | <b>1.5</b>  | <b>1.5</b>  | <b>1.6</b>  | <b>1.8</b>  | <b>1.9</b>  | <b>2.0</b>  | <b>1.5</b>  | <b>2.2</b>  | <b>42.5%</b> | <b>-22.9%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.



# Union County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Union County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$93   | \$161 | \$257 | \$446 | 2.8        | 1.7            |
| Private Home       | \$23   | \$68  | \$53  | \$160 | 2.4        | 3.0            |
| Other Overnight    | \$54   | \$161 | \$146 | \$434 | 2.7        | 3.0            |
| All Overnight      | \$85   | \$204 | \$217 | \$529 | 2.6        | 2.4            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |         |         |
|--------------------|---------------|---------|---------|--------------|---------|---------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 150,220       | 101,980 | 204,800 | 61,230       | 37,090  | 73,730  |
| Private Home       | 267,340       | 178,420 | 270,820 | 104,490      | 75,710  | 114,920 |
| Other Overnight    | 166,270       | 111,670 | 118,760 | 48,350       | 41,330  | 43,960  |
| All Overnight      | 583,830       | 392,070 | 594,380 | 214,080      | 154,130 | 232,600 |

|                    | Person-Trips |         |         | Party-Trips |        |        |
|--------------------|--------------|---------|---------|-------------|--------|--------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020   | 2021   |
| Hotel, Motel, STVR | 90,310       | 60,500  | 117,980 | 36,810      | 21,920 | 42,510 |
| Private Home       | 103,990      | 59,350  | 90,080  | 40,650      | 25,180 | 38,230 |
| Other Overnight    | 53,920       | 37,300  | 39,670  | 15,730      | 13,850 | 14,730 |
| All Overnight      | 248,220      | 157,150 | 247,740 | 93,200      | 60,950 | 95,470 |

# Wallowa County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

Amount of Visitor Spending that supports 1 Job \$35,830

Employee Earnings generated by \$100 Visitor Spending \$71

Local & State Tax Revenues generated by \$100 Visitor Spending \$6

### Visitor Shares

Travel Share of Total Employment (2021) 14%

Overnight Visitor Day Share of Resident Population\*\* 14%

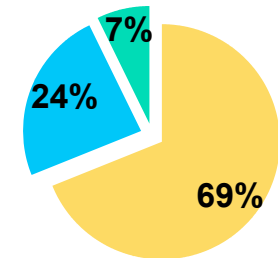
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

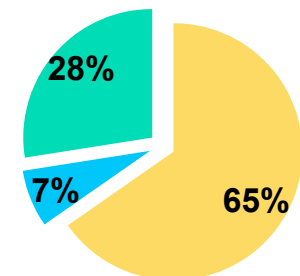
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Wallowa County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Wallowa County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 20.4 | 26.1 | 27.6 | 28.3 | 29.3 | 30.9 | 32.0 | 33.2 | 12.4 | 26.8 | ▲ 117.0%           | ▲ 1.5%  |
| Other                          | 0.6  | 1.1  | 1.1  | 0.8  | 0.8  | 0.9  | 1.0  | 1.0  | 0.5  | 0.9  | ▲ 86.6%            | ▲ 2.3%  |
| Visitor                        | 19.8 | 25.0 | 26.5 | 27.5 | 28.5 | 30.0 | 30.9 | 32.2 | 11.9 | 25.9 | ▲ 118.3%           | ▲ 1.5%  |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 6.5  | 9.4  | 10.5 | 11.8 | 12.7 | 12.8 | 14.5 | 14.3 | 13.3 | 18.5 | ▲ 39.4%            | ▲ 5.9%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 500  | 530  | 550  | 580  | 590  | 630  | 670  | 630  | 560  | 730  | ▲ 29.6%            | ▲ 2.1%  |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 0.7  | 1.0  | 1.0  | 1.1  | 1.2  | 1.3  | 1.4  | 1.4  | 0.9  | 1.6  | ▲ 67.4%            | ▲ 4.8%  |
| Local                          | 0.2  | 0.3  | 0.3  | 0.3  | 0.4  | 0.4  | 0.4  | 0.4  | 0.2  | 0.4  | ▲ 125.3%           | ▲ 3.9%  |
| State                          | 0.5  | 0.7  | 0.7  | 0.8  | 0.8  | 0.9  | 1.0  | 1.0  | 0.7  | 1.1  | ▲ 52.6%            | ▲ 5.1%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Wallowa County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003        | 2013        | 2014        | 2015        | 2016        | 2017        | 2018        | 2019        | 2020        | 2021        | 2020-21       | 2019-20       |
|--|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|---------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |             |             |             |             |             |             |             |             |             |             |               |               |
| Destination Spending   | 19.8        | 25.0        | 26.5        | 27.5        | 28.5        | 30.0        | 30.9        | 32.2        | 11.9        | 25.9        | 118.3%        | -63.1%        |
| Other Travel*  | 0.6         | 1.1         | 1.1         | 0.8         | 0.8         | 0.9         | 1.0         | 1.0         | 0.5         | 0.9         | 86.6%         | -52.6%        |
| <b>TOTAL</b>   | <b>20.4</b> | <b>26.1</b> | <b>27.6</b> | <b>28.3</b> | <b>29.3</b> | <b>30.9</b> | <b>32.0</b> | <b>33.2</b> | <b>12.4</b> | <b>26.8</b> | <b>117.0%</b> | <b>-62.8%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |             |             |             |             |             |             |             |             |             |             |               |               |
| Hotel, Motel, STVR**   | 6.7         | 10.3        | 11.3        | 12.0        | 12.7        | 13.8        | 14.1        | 14.7        | 4.3         | 15.6        | 267.6%        | -71.1%        |
| Hotel, Motel   |             |             |             |             |             |             |             |             |             | 10.5        |               |               |
| STVR   |             |             |             |             |             |             |             |             |             | 5.2         |               |               |
| Private Home   | 1.1         | 1.3         | 1.4         | 1.4         | 1.4         | 1.5         | 1.5         | 1.5         | 1.3         | 1.6         | 26.5%         | -15.2%        |
| Campground   | 5.4         | 6.4         | 6.5         | 6.6         | 6.8         | 6.8         | 7.1         | 7.4         | 3.5         | 3.9         | 11.2%         | -52.1%        |
| 2nd Home   | 1.1         | 1.3         | 1.3         | 1.3         | 1.3         | 1.4         | 1.4         | 1.5         | 1.3         | 1.4         | 14.7%         | -15.3%        |
| Day Travel   | 5.6         | 5.7         | 6.0         | 6.1         | 6.3         | 6.5         | 6.8         | 7.0         | 1.5         | 3.2         | 114.3%        | -78.5%        |
| <b>TOTAL</b>   | <b>19.8</b> | <b>25.0</b> | <b>26.5</b> | <b>27.5</b> | <b>28.5</b> | <b>30.0</b> | <b>30.9</b> | <b>32.2</b> | <b>11.9</b> | <b>25.9</b> | <b>118.3%</b> | <b>-63.1%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |             |             |             |             |             |             |             |             |             |             |               |               |
| Accommodations   | 3.9         | 6.1         | 6.6         | 7.2         | 7.7         | 8.4         | 8.5         | 8.8         | 3.9         | 10.0        | 153.3%        | -55.3%        |
| Food Service   | 4.9         | 6.3         | 6.8         | 7.2         | 7.6         | 8.0         | 8.3         | 8.8         | 3.0         | 6.6         | 117.0%        | -65.6%        |
| Food Stores  | 3.1         | 3.6         | 3.8         | 4.0         | 4.0         | 4.0         | 4.1         | 4.2         | 1.9         | 2.9         | 48.8%         | -54.4%        |
| Local Tran. & Gas  | 1.4         | 2.3         | 2.3         | 1.9         | 1.9         | 2.0         | 2.3         | 2.4         | 0.7         | 1.8         | 139.5%        | -68.9%        |
| Arts, Ent. & Rec.  | 3.6         | 3.8         | 4.0         | 4.1         | 4.3         | 4.4         | 4.5         | 4.7         | 1.2         | 2.7         | 124.9%        | -74.3%        |
| Retail Sales   | 3.0         | 2.9         | 3.0         | 3.1         | 3.1         | 3.1         | 3.2         | 3.3         | 1.0         | 2.0         | 94.9%         | -69.0%        |
| <b>TOTAL</b>   | <b>19.8</b> | <b>25.0</b> | <b>26.5</b> | <b>27.5</b> | <b>28.5</b> | <b>30.0</b> | <b>30.9</b> | <b>32.2</b> | <b>11.9</b> | <b>25.9</b> | <b>118.3%</b> | <b>-63.1%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Wallowa County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003       | 2013       | 2014        | 2015        | 2016        | 2017        | 2018        | 2019        | 2020        | 2021        | 2020-21      | 2019-20       |
|---|------------|------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|-------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |            |            |             |             |             |             |             |             |             |             |              |               |
| Accom. & Food Serv.   | 4.3        | 6.7        | 7.5         | 8.7         | 9.5         | 9.4         | 10.7        | 10.3        | 9.4         | 13.3        | 41.1%        | -8.9%         |
| Arts, Ent. & Rec.   | 1.1        | 1.5        | 1.6         | 1.7         | 1.7         | 1.8         | 2.2         | 2.4         | 2.8         | 4.0         | 43.4%        | 15.7%         |
| Retail**  | 1.0        | 1.2        | 1.2         | 1.3         | 1.3         | 1.4         | 1.3         | 1.4         | 0.9         | 1.1         | 11.8%        | -30.7%        |
| Ground Tran.  | 0.1        | 0.1        | 0.1         | 0.1         | 0.1         | 0.2         | 0.2         | 0.2         | 0.1         | 0.1         | 60.8%        | -59.4%        |
| Other Travel*   | 0.0        | 0.0        | 0.1         | 0.1         | 0.1         | 0.1         | 0.1         | 0.1         | 0.1         | 0.1         | 11.6%        | 3.0%          |
| <b>TOTAL</b>  | <b>6.5</b> | <b>9.4</b> | <b>10.5</b> | <b>11.8</b> | <b>12.7</b> | <b>12.8</b> | <b>14.5</b> | <b>14.3</b> | <b>13.3</b> | <b>18.5</b> | <b>39.4%</b> | <b>-7.4%</b>  |
| <b>Travel Industry Employment (Jobs)</b>                      |            |            |             |             |             |             |             |             |             |             |              |               |
| Accom. & Food Serv.   | 340        | 330        | 360         | 380         | 390         | 410         | 420         | 390         | 320         | 420         | 30.7%        | -16.9%        |
| Arts, Ent. & Rec.   | 100        | 150        | 150         | 140         | 150         | 170         | 200         | 200         | 210         | 270         | 30.4%        | 6.1%          |
| Retail**  | 50         | 50         | 50          | 50          | 50          | 50          | 40          | 40          | 30          | 30          | 11.9%        | -36.7%        |
| Ground Tran.  | 0          | 0          | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 51.0%        | -57.9%        |
| Other Travel*   | 0          | 0          | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 0           | 1.4%         | 2.7%          |
| <b>TOTAL</b>  | <b>500</b> | <b>530</b> | <b>550</b>  | <b>580</b>  | <b>590</b>  | <b>630</b>  | <b>670</b>  | <b>630</b>  | <b>560</b>  | <b>730</b>  | <b>30.4%</b> | <b>-11.1%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |            |            |             |             |             |             |             |             |             |             |              |               |
| Local Tax Receipts  | 0.2        | 0.3        | 0.3         | 0.3         | 0.4         | 0.4         | 0.4         | 0.4         | 0.2         | 0.4         | 125.3%       | -53.9%        |
| State Tax Receipts  | 0.5        | 0.7        | 0.7         | 0.8         | 0.8         | 0.9         | 1.0         | 1.0         | 0.7         | 1.1         | 52.6%        | -27.7%        |
| <b>TOTAL</b>  | <b>0.7</b> | <b>1.0</b> | <b>1.0</b>  | <b>1.1</b>  | <b>1.2</b>  | <b>1.3</b>  | <b>1.4</b>  | <b>1.4</b>  | <b>0.9</b>  | <b>1.6</b>  | <b>67.4%</b> | <b>-35.2%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Wallowa County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Wallowa County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$96   | \$181 | \$267 | \$504 | 2.8        | 1.9            |
| Private Home       | \$23   | \$68  | \$53  | \$160 | 2.4        | 3.0            |
| Other Overnight    | \$43   | \$123 | \$113 | \$318 | 2.6        | 2.8            |
| All Overnight      | \$106  | \$248 | \$280 | \$658 | 2.6        | 2.4            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |        |         |
|--------------------|---------------|---------|---------|--------------|--------|---------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020   | 2021    |
| Hotel, Motel, STVR | 153,740       | 33,860  | 163,470 | 62,670       | 13,020 | 58,630  |
| Private Home       | 71,640        | 61,500  | 72,740  | 28,000       | 26,100 | 30,870  |
| Other Overnight    | 239,660       | 116,450 | 123,970 | 71,080       | 44,640 | 47,530  |
| All Overnight      | 465,030       | 211,800 | 360,190 | 161,750      | 83,760 | 137,030 |

|                    | Person-Trips |        |         | Party-Trips |        |        |
|--------------------|--------------|--------|---------|-------------|--------|--------|
|                    | 2019         | 2020   | 2021    | 2019        | 2020   | 2021   |
| Hotel, Motel, STVR | 92,430       | 16,930 | 86,360  | 37,670      | 6,350  | 31,040 |
| Private Home       | 27,870       | 20,460 | 24,200  | 10,890      | 8,680  | 10,270 |
| Other Overnight    | 80,570       | 41,220 | 43,890  | 24,030      | 15,880 | 16,910 |
| All Overnight      | 200,870      | 78,610 | 154,450 | 72,600      | 30,910 | 58,220 |

# Wasco County / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job                 | \$54,302 |
| Employee Earnings generated by \$100 Visitor Spending          | \$54     |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$6      |
| Visitor Shares   |          |
| Travel Share of Total Employment (2021)                        | 9%       |
| Overnight Visitor Day Share of Resident Population**           | 9%       |

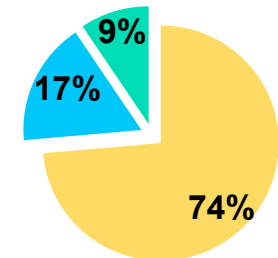
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

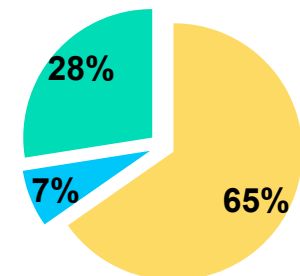
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Wasco County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Wasco County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 71.4  | 90.3  | 102.2 | 108.3 | 115.1 | 122.3 | 122.3 | 105.1 | 62.9  | 78.3  | ▲ 24.3%            | ▲ 0.5%  |
| Other                          | 2.0   | 4.2   | 4.0   | 3.2   | 3.0   | 3.4   | 3.8   | 3.9   | 1.8   | 3.4   | ▲ 86.6%            | ▲ 2.9%  |
| Visitor                        | 69.4  | 86.2  | 98.2  | 105.1 | 112.1 | 119.0 | 118.4 | 101.2 | 61.1  | 74.9  | ▲ 22.5%            | ▲ 0.4%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 21.2  | 29.9  | 33.3  | 36.6  | 40.0  | 42.7  | 44.2  | 39.7  | 34.2  | 40.5  | ▲ 18.4%            | ▲ 3.6%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 1,350 | 1,540 | 1,590 | 1,770 | 1,810 | 1,880 | 1,840 | 1,600 | 1,260 | 1,390 | ▲ 10.5%            | ▲ 0.2%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 2.0   | 3.0   | 3.4   | 3.7   | 4.2   | 4.8   | 4.8   | 4.5   | 4.2   | 4.7   | ▲ 12.1%            | ▲ 4.9%  |
| Local                          | 0.4   | 0.7   | 0.9   | 0.9   | 1.2   | 1.3   | 1.2   | 1.3   | 1.6   | 1.7   | ▲ 1.5%             | ▲ 8.5%  |
| State                          | 1.6   | 2.3   | 2.6   | 2.8   | 3.0   | 3.5   | 3.6   | 3.2   | 2.5   | 3.0   | ▲ 18.9%            | ▲ 3.6%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.



# Wasco County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003 | 2013 | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020 | 2021 | 2020-21 | 2019-20 |
|--|------|------|-------|-------|-------|-------|-------|-------|------|------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |      |      |       |       |       |       |       |       |      |      |         |         |
| Destination Spending   | 69.4 | 86.2 | 98.2  | 105.1 | 112.1 | 119.0 | 118.4 | 101.2 | 61.1 | 74.9 | 22.5%   | -39.6%  |
| Other Travel*  | 2.0  | 4.2  | 4.0   | 3.2   | 3.0   | 3.4   | 3.8   | 3.9   | 1.8  | 3.4  | 86.6%   | -53.1%  |
| <b>TOTAL</b>   | 71.4 | 90.3 | 102.2 | 108.3 | 115.1 | 122.3 | 122.3 | 105.1 | 62.9 | 78.3 | 24.3%   | -40.1%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |      |      |       |       |       |       |       |       |      |      |         |         |
| Hotel, Motel, STVR**   | 30.7 | 40.9 | 49.2  | 54.7  | 59.7  | 64.4  | 63.3  | 45.7  | 36.6 | 42.4 | 15.8%   | -19.9%  |
| Hotel, Motel   |      |      |       |       |       |       |       |       |      | 37.3 |         |         |
| STVR   |      |      |       |       |       |       |       |       |      | 5.1  |         |         |
| Private Home   | 3.7  | 5.0  | 5.3   | 5.2   | 5.3   | 5.5   | 5.5   | 5.8   | 4.3  | 5.4  | 26.9%   | -26.0%  |
| Campground   | 6.9  | 8.6  | 8.7   | 8.8   | 9.0   | 9.1   | 9.5   | 9.9   | 6.8  | 7.6  | 11.8%   | -31.2%  |
| 2nd Home   | 1.3  | 2.0  | 2.0   | 2.0   | 2.0   | 2.1   | 2.2   | 2.2   | 1.8  | 2.1  | 14.7%   | -17.0%  |
| Day Travel   | 26.9 | 29.7 | 33.1  | 34.3  | 36.0  | 37.8  | 37.9  | 37.7  | 11.6 | 17.3 | 49.3%   | -69.2%  |
| <b>TOTAL</b>   | 69.4 | 86.2 | 98.2  | 105.1 | 112.1 | 119.0 | 118.4 | 101.2 | 61.1 | 74.9 | 22.5%   | -39.6%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |      |      |       |       |       |       |       |       |      |      |         |         |
| Accommodations   | 18.2 | 24.6 | 29.0  | 33.0  | 36.5  | 39.1  | 37.4  | 26.0  | 24.4 | 28.7 | 17.4%   | -6.0%   |
| Food Service   | 16.7 | 22.0 | 25.4  | 27.4  | 29.5  | 31.6  | 32.3  | 30.2  | 15.3 | 18.8 | 22.8%   | -49.3%  |
| Food Stores  | 7.2  | 8.9  | 9.9   | 10.4  | 10.6  | 10.8  | 10.8  | 10.5  | 6.2  | 7.8  | 24.7%   | -40.7%  |
| Local Tran. & Gas  | 4.3  | 7.1  | 7.5   | 6.5   | 6.4   | 7.2   | 7.9   | 7.1   | 3.9  | 5.5  | 41.1%   | -45.1%  |
| Arts, Ent. & Rec.  | 12.0 | 12.6 | 14.3  | 15.2  | 16.1  | 16.9  | 16.9  | 15.0  | 5.6  | 6.5  | 15.9%   | -62.8%  |
| Retail Sales   | 11.1 | 10.9 | 12.1  | 12.5  | 13.0  | 13.4  | 13.2  | 12.5  | 5.7  | 7.7  | 34.7%   | -54.5%  |
| <b>TOTAL</b>   | 69.4 | 86.2 | 98.2  | 105.1 | 112.1 | 119.0 | 118.4 | 101.2 | 61.1 | 74.9 | 22.5%   | -39.6%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Wasco County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|---|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 15.0         | 21.6         | 24.2         | 26.8         | 29.3         | 31.2         | 32.8         | 29.0         | 26.2         | 30.6         | 17.1%        | -9.7%         |
| Arts, Ent. & Rec.   | 3.6          | 5.2          | 5.7          | 6.1          | 6.8          | 7.3          | 7.2          | 6.6          | 4.0          | 5.8          | 43.7%        | -39.1%        |
| Retail**  | 2.2          | 2.5          | 2.8          | 3.0          | 3.2          | 3.4          | 3.5          | 3.4          | 3.2          | 3.4          | 4.8%         | -3.3%         |
| Ground Tran.  | 0.3          | 0.4          | 0.4          | 0.5          | 0.5          | 0.6          | 0.6          | 0.5          | 0.5          | 0.4          | -23.5%       | -6.6%         |
| Other Travel*   | 0.1          | 0.1          | 0.1          | 0.1          | 0.2          | 0.2          | 0.2          | 0.2          | 0.2          | 0.2          | 6.4%         | 1.9%          |
| <b>TOTAL</b>  | <b>21.2</b>  | <b>29.9</b>  | <b>33.3</b>  | <b>36.6</b>  | <b>40.0</b>  | <b>42.7</b>  | <b>44.2</b>  | <b>39.7</b>  | <b>34.2</b>  | <b>40.5</b>  | <b>18.4%</b> | <b>-14.0%</b> |
| <b>Travel Industry Employment (Jobs)</b>                      |              |              |              |              |              |              |              |              |              |              |              |               |
| Accom. & Food Serv.   | 910          | 1,020        | 1,050        | 1,150        | 1,170        | 1,210        | 1,170        | 980          | 860          | 910          | 6.7%         | -12.1%        |
| Arts, Ent. & Rec.   | 310          | 400          | 400          | 470          | 490          | 510          | 510          | 480          | 260          | 340          | 30.7%        | -44.6%        |
| Retail**  | 100          | 100          | 110          | 120          | 120          | 130          | 120          | 120          | 110          | 110          | -1.8%        | -7.9%         |
| Ground Tran.  | 10           | 10           | 10           | 10           | 10           | 20           | 10           | 10           | 10           | 10           | -28.2%       | -3.2%         |
| Other Travel*   | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 10           | 10           | -1.1%        | -0.9%         |
| <b>TOTAL</b>  | <b>1,350</b> | <b>1,540</b> | <b>1,590</b> | <b>1,770</b> | <b>1,810</b> | <b>1,880</b> | <b>1,840</b> | <b>1,600</b> | <b>1,260</b> | <b>1,390</b> | <b>10.3%</b> | <b>-21.3%</b> |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Local Tax Receipts  | 0.4          | 0.7          | 0.9          | 0.9          | 1.2          | 1.3          | 1.2          | 1.3          | 1.6          | 1.7          | 1.5%         | 29.0%         |
| State Tax Receipts  | 1.6          | 2.3          | 2.6          | 2.8          | 3.0          | 3.5          | 3.6          | 3.2          | 2.5          | 3.0          | 18.9%        | -21.6%        |
| <b>TOTAL</b>  | <b>2.0</b>   | <b>3.0</b>   | <b>3.4</b>   | <b>3.7</b>   | <b>4.2</b>   | <b>4.8</b>   | <b>4.8</b>   | <b>4.5</b>   | <b>4.2</b>   | <b>4.7</b>   | <b>12.1%</b> | <b>-7.3%</b>  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Wasco County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Wasco County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$110  | \$190 | \$305 | \$529 | 2.8        | 1.7            |
| Private Home       | \$20   | \$61  | \$47  | \$143 | 2.4        | 3.0            |
| Other Overnight    | \$36   | \$105 | \$96  | \$278 | 2.7        | 2.9            |
| All Overnight      | \$108  | \$247 | \$282 | \$653 | 2.6        | 2.3            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |         | Party-Nights |         |         |
|--------------------|---------------|---------|---------|--------------|---------|---------|
|                    | 2019          | 2020    | 2021    | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 385,220       | 360,100 | 386,050 | 157,030      | 130,490 | 138,980 |
| Private Home       | 269,290       | 227,650 | 269,270 | 105,260      | 96,600  | 114,260 |
| Other Overnight    | 407,300       | 251,060 | 267,150 | 120,280      | 94,710  | 100,790 |
| All Overnight      | 1,061,810     | 838,800 | 922,470 | 382,560      | 321,800 | 354,030 |

|                    | Person-Trips |         |         | Party-Trips |         |         |
|--------------------|--------------|---------|---------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 231,600      | 215,810 | 222,540 | 94,400      | 78,040  | 80,190  |
| Private Home       | 104,750      | 75,730  | 89,570  | 40,940      | 32,130  | 38,010  |
| Other Overnight    | 135,850      | 86,560  | 92,120  | 40,330      | 32,810  | 34,920  |
| All Overnight      | 472,200      | 378,090 | 404,230 | 175,680     | 142,980 | 153,120 |

# Washington County / Insights

## Direct Travel Impacts 2021p

### Visitor Spending Impacts

|  |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job | \$92,430 |
|--|----------|

|   |      |
|---|------|
| Employee Earnings generated by \$100 Visitor Spending | \$38 |
|---|------|

|  |     |
|--|-----|
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$6 |
|--|-----|

### Visitor Shares

|   |    |
|---|----|
| Travel Share of Total Employment (2021) | 2% |
|---|----|

|  |    |
|--|----|
| Overnight Visitor Day Share of Resident Population** | 4% |
|--|----|

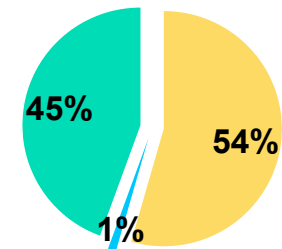
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

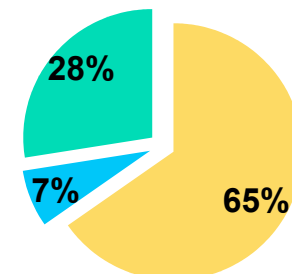
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Washington County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Washington County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 427.6 | 666.2 | 670.8 | 686.8 | 754.7 | 828.8 | 863.7 | 894.3 | 418.7 | 725.5 | ▲ 73.3%            | ▲ 3.0%  |
| Other                          | 80.9  | 129.7 | 130.0 | 115.8 | 121.6 | 131.6 | 143.0 | 145.2 | 82.9  | 110.4 | ▲ 33.1%            | ▲ 1.7%  |
| Visitor                        | 346.7 | 536.5 | 540.7 | 571.0 | 633.1 | 697.2 | 720.7 | 749.1 | 335.7 | 615.2 | ▲ 83.2%            | ▲ 3.2%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 113.4 | 172.9 | 184.0 | 202.3 | 235.4 | 255.9 | 273.4 | 286.6 | 224.6 | 254.6 | ▲ 13.3%            | ▲ 4.6%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 5,390 | 6,750 | 7,070 | 7,480 | 8,300 | 8,640 | 8,750 | 8,750 | 6,660 | 7,070 | ▲ 6.1%             | ▲ 1.5%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 16.3  | 29.0  | 29.7  | 32.8  | 37.3  | 45.4  | 47.0  | 49.0  | 28.6  | 39.4  | ▲ 37.8%            | ▲ 5.0%  |
| Local                          | 3.7   | 8.8   | 9.1   | 10.9  | 12.7  | 16.8  | 17.2  | 18.1  | 8.7   | 13.2  | ▲ 51.8%            | ▲ 7.3%  |
| State                          | 12.6  | 20.2  | 20.7  | 21.9  | 24.6  | 28.6  | 29.9  | 31.0  | 19.9  | 26.2  | ▲ 31.7%            | ▲ 4.1%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Washington County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003         | 2013         | 2014         | 2015         | 2016         | 2017         | 2018         | 2019         | 2020         | 2021         | 2020-21      | 2019-20       |
|--|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |              |              |              |              |              |              |              |              |              |              |              |               |
| Destination Spending   | 346.7        | 536.5        | 540.7        | 571.0        | 633.1        | 697.2        | 720.7        | 749.1        | 335.7        | 615.2        | 83.2%        | -55.2%        |
| Other Travel*  | 80.9         | 129.7        | 130.0        | 115.8        | 121.6        | 131.6        | 143.0        | 145.2        | 82.9         | 110.4        | 33.1%        | -42.9%        |
| <b>TOTAL</b>   | <b>427.6</b> | <b>666.2</b> | <b>670.8</b> | <b>686.8</b> | <b>754.7</b> | <b>828.8</b> | <b>863.7</b> | <b>894.3</b> | <b>418.7</b> | <b>725.5</b> | <b>73.3%</b> | <b>-53.2%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |              |              |              |              |              |              |              |              |              |              |              |               |
| Hotel, Motel, STVR**   | 125.3        | 218.9        | 221.4        | 241.2        | 285.7        | 333.5        | 347.5        | 364.2        | 145.6        | 258.0        | 77.2%        | -60.0%        |
| Hotel, Motel   |              |              |              |              |              |              |              |              |              | 223.2        |              |               |
| STVR   |              |              |              |              |              |              |              |              |              | 34.9         |              |               |
| Private Home   | 120.0        | 176.8        | 177.9        | 183.2        | 191.2        | 198.3        | 203.3        | 209.3        | 120.7        | 211.2        | 75.0%        | -42.3%        |
| Campground   | 2.0          | 2.6          | 2.7          | 2.7          | 2.8          | 2.8          | 2.9          | 3.0          | 2.6          | 2.9          | 10.7%        | -15.1%        |
| 2nd Home   | 1.7          | 2.5          | 2.5          | 2.5          | 2.6          | 2.6          | 2.8          | 2.8          | 2.1          | 2.4          | 13.9%        | -25.8%        |
| Day Travel   | 97.7         | 135.6        | 136.3        | 141.3        | 150.9        | 159.9        | 164.2        | 169.7        | 64.7         | 140.7        | 117.3%       | -61.9%        |
| <b>TOTAL</b>   | <b>346.7</b> | <b>536.5</b> | <b>540.7</b> | <b>571.0</b> | <b>633.1</b> | <b>697.2</b> | <b>720.7</b> | <b>749.1</b> | <b>335.7</b> | <b>615.2</b> | <b>83.2%</b> | <b>-55.2%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |              |              |              |              |              |              |              |              |              |              |              |               |
| Accommodations   | 54.3         | 100.1        | 103.2        | 118.7        | 144.5        | 169.3        | 173.1        | 181.9        | 78.0         | 136.4        | 75.0%        | -57.1%        |
| Food Service   | 105.5        | 171.2        | 174.6        | 187.2        | 208.0        | 227.9        | 237.4        | 250.0        | 116.5        | 210.7        | 80.8%        | -53.4%        |
| Food Stores  | 27.8         | 41.5         | 42.6         | 45.0         | 46.8         | 48.2         | 48.5         | 49.9         | 27.4         | 52.4         | 91.5%        | -45.2%        |
| Local Tran. & Gas  | 40.0         | 75.8         | 73.2         | 67.0         | 70.1         | 79.8         | 88.1         | 89.8         | 41.1         | 79.8         | 93.9%        | -54.2%        |
| Arts, Ent. & Rec.  | 44.9         | 56.3         | 56.4         | 59.0         | 63.7         | 67.5         | 68.6         | 70.2         | 19.3         | 35.1         | 81.6%        | -72.5%        |
| Retail Sales   | 74.2         | 91.6         | 90.8         | 94.2         | 100.0        | 104.6        | 105.1        | 107.3        | 53.4         | 100.8        | 88.7%        | -50.2%        |
| <b>TOTAL</b>   | <b>346.7</b> | <b>536.5</b> | <b>540.7</b> | <b>571.0</b> | <b>633.1</b> | <b>697.2</b> | <b>720.7</b> | <b>749.1</b> | <b>335.7</b> | <b>615.2</b> | <b>83.2%</b> | <b>-55.2%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Washington County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 64.5  | 112.3 | 120.1 | 134.5 | 158.5 | 173.1 | 187.5 | 196.9 | 154.7 | 184.1 | 19.0%   | -21.4%  |
| Arts, Ent. & Rec.   | 12.8  | 17.5  | 18.5  | 19.6  | 22.0  | 23.9  | 25.1  | 26.6  | 17.8  | 20.6  | 15.5%   | -33.2%  |
| Retail**  | 12.2  | 16.5  | 16.8  | 18.0  | 19.6  | 21.2  | 22.1  | 22.7  | 21.6  | 23.3  | 7.8%    | -4.9%   |
| Ground Tran.  | 5.1   | 7.5   | 7.8   | 8.4   | 9.7   | 11.0  | 11.4  | 12.4  | 8.6   | 8.2   | -4.5%   | -30.6%  |
| Other Travel*   | 18.7  | 19.2  | 20.7  | 21.9  | 25.7  | 26.8  | 27.4  | 27.9  | 21.9  | 18.4  | -15.8%  | -21.6%  |
| <b>TOTAL</b>  | 113.4 | 172.9 | 184.0 | 202.3 | 235.4 | 255.9 | 273.4 | 286.6 | 224.6 | 254.6 | 13.3%   | -21.6%  |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 3,270 | 4,440 | 4,700 | 5,050 | 5,690 | 5,870 | 5,970 | 5,970 | 4,650 | 5,050 | 8.6%    | -22.1%  |
| Arts, Ent. & Rec.   | 800   | 940   | 980   | 1,010 | 1,120 | 1,190 | 1,180 | 1,190 | 720   | 790   | 9.3%    | -39.2%  |
| Retail**  | 500   | 590   | 590   | 610   | 640   | 680   | 690   | 690   | 600   | 620   | 4.8%    | -13.2%  |
| Ground Tran.  | 220   | 240   | 240   | 240   | 270   | 290   | 290   | 300   | 210   | 190   | -10.3%  | -28.1%  |
| Other Travel*   | 590   | 530   | 560   | 560   | 580   | 610   | 630   | 610   | 480   | 410   | -14.7%  | -20.7%  |
| <b>TOTAL</b>  | 5,390 | 6,750 | 7,070 | 7,480 | 8,300 | 8,640 | 8,750 | 8,750 | 6,660 | 7,070 | 6.2%    | -23.9%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Local Tax Receipts  | 3.7   | 8.8   | 9.1   | 10.9  | 12.7  | 16.8  | 17.2  | 18.1  | 8.7   | 13.2  | 51.8%   | -51.8%  |
| State Tax Receipts  | 12.6  | 20.2  | 20.7  | 21.9  | 24.6  | 28.6  | 29.9  | 31.0  | 19.9  | 26.2  | 31.7%   | -35.8%  |
| <b>TOTAL</b>  | 16.3  | 29.0  | 29.7  | 32.8  | 37.3  | 45.4  | 47.0  | 49.0  | 28.6  | 39.4  | 37.8%   | -41.7%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Washington County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Washington County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$118  | \$253 | \$294 | \$634 | 2.5        | 2.2            |
| Private Home       | \$34   | \$123 | \$62  | \$229 | 1.8        | 3.7            |
| Other Overnight    | \$41   | \$141 | \$92  | \$319 | 2.2        | 3.5            |
| All Overnight      | \$86   | \$264 | \$168 | \$544 | 2.0        | 3.2            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |           |           | Party-Nights |           |           |
|--------------------|---------------|-----------|-----------|--------------|-----------|-----------|
|                    | 2019          | 2020      | 2021      | 2019         | 2020      | 2021      |
| Hotel, Motel, STVR | 2,440,310     | 1,168,530 | 2,192,350 | 1,159,510    | 508,420   | 878,250   |
| Private Home       | 6,207,240     | 3,999,840 | 6,236,950 | 3,154,200    | 2,079,340 | 3,412,540 |
| Other Overnight    | 166,350       | 118,960   | 126,740   | 58,440       | 53,310    | 56,810    |
| All Overnight      | 8,813,900     | 5,287,330 | 8,556,040 | 4,372,160    | 2,641,070 | 4,347,600 |

|                    | Person-Trips |           |           | Party-Trips |         |           |
|--------------------|--------------|-----------|-----------|-------------|---------|-----------|
|                    | 2019         | 2020      | 2021      | 2019        | 2020    | 2021      |
| Hotel, Motel, STVR | 1,195,940    | 563,980   | 1,020,890 | 554,370     | 239,260 | 406,680   |
| Private Home       | 2,001,390    | 1,103,830 | 1,721,200 | 991,970     | 571,370 | 923,880   |
| Other Overnight    | 48,250       | 34,820    | 37,090    | 16,810      | 15,450  | 16,460    |
| All Overnight      | 3,245,590    | 1,702,630 | 2,779,180 | 1,563,140   | 826,090 | 1,347,020 |



# Wheeler County / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |           |
|--|-----------|
| Amount of Visitor Spending that supports 1 Job                 | \$101,965 |
| Employee Earnings generated by \$100 Visitor Spending          | \$20      |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$3       |
| Visitor Shares   |           |
| Travel Share of Total Employment (2021)                        | 5%        |
| Overnight Visitor Day Share of Resident Population**           | 14%       |

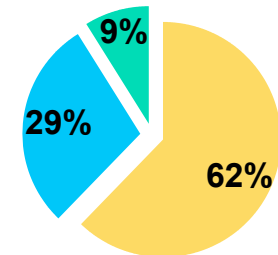
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

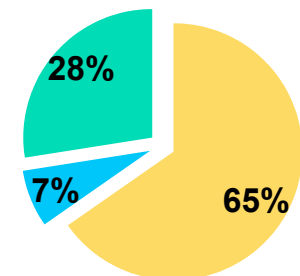
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Wheeler County



### Oregon



Hotel, Motel, STR Private Home (VFR) Other Overnight

# Wheeler County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | Avg. Annual % Chg. |         |
|--------------------------------|------|------|------|------|------|------|------|------|------|------|--------------------|---------|
|                                |      |      |      |      |      |      |      |      |      |      | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 2.4  | 2.8  | 2.8  | 2.8  | 2.8  | 3.0  | 3.1  | 3.2  | 2.2  | 4.2  | ▲ 90.2%            | ▲ 3.1%  |
| Other                          | 0.1  | 0.2  | 0.2  | 0.2  | 0.2  | 0.2  | 0.2  | 0.2  | 0.1  | 0.2  | ▲ 86.6%            | ▲ 1.6%  |
| Visitor                        | 2.3  | 2.5  | 2.6  | 2.6  | 2.7  | 2.8  | 2.9  | 3.0  | 2.1  | 4.1  | ▲ 90.3%            | ▲ 3.2%  |
| <b>Earnings (\$Million)</b>    |      |      |      |      |      |      |      |      |      |      |                    |         |
| Earnings (Current \$)          | 0.6  | 0.6  | 0.6  | 0.6  | 0.6  | 0.7  | 0.7  | 0.8  | 0.6  | 0.8  | ▲ 29.7%            | ▲ 2.1%  |
| <b>Employment (Jobs)</b>       |      |      |      |      |      |      |      |      |      |      |                    |         |
| Employment                     | 40   | 40   | 40   | 30   | 30   | 30   | 40   | 40   | 30   | 40   | ▲ 18.0%            | ▼ -0.5% |
| <b>Tax Revenue (\$Million)</b> |      |      |      |      |      |      |      |      |      |      |                    |         |
| Total (Current \$)             | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | ▲ 60.3%            | ▲ 3.5%  |
| State                          | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | ▲ 60.3%            | ▲ 3.5%  |

**Notes:**  
 Calendar year 2020 has been revised since the release of the April 2021 report.  
 (Current \$) reflects dollar amounts that are not adjusted for inflation.  
 CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.  
 The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.  
 Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).  
 State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Wheeler County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003       | 2013       | 2014       | 2015       | 2016       | 2017       | 2018       | 2019       | 2020       | 2021       | 2020-21      | 2019-20       |
|--|------------|------------|------------|------------|------------|------------|------------|------------|------------|------------|--------------|---------------|
| <b>Direct Travel Spending (\$Millions)</b>                             |            |            |            |            |            |            |            |            |            |            |              |               |
| Destination Spending   | 2.3        | 2.5        | 2.6        | 2.6        | 2.7        | 2.8        | 2.9        | 3.0        | 2.1        | 4.1        | 90.3%        | -28.8%        |
| Other Travel*  | 0.1        | 0.2        | 0.2        | 0.2        | 0.2        | 0.2        | 0.2        | 0.2        | 0.1        | 0.2        | 86.6%        | -54.6%        |
| <b>TOTAL</b>   | <b>2.4</b> | <b>2.8</b> | <b>2.8</b> | <b>2.8</b> | <b>2.8</b> | <b>3.0</b> | <b>3.1</b> | <b>3.2</b> | <b>2.2</b> | <b>4.2</b> | <b>90.2%</b> | <b>-30.4%</b> |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |            |            |            |            |            |            |            |            |            |            |              |               |
| Hotel, Motel, STVR**   | 0.6        | 0.7        | 0.7        | 0.7        | 0.8        | 0.8        | 0.9        | 0.9        | 0.7        | 2.1        | 195.1%       | -18.8%        |
| Hotel, Motel   |            |            |            |            |            |            |            |            |            | 0.9        |              |               |
| STVR   |            |            |            |            |            |            |            |            |            | 1.3        |              |               |
| Private Home   | 0.2        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 0.2        | 0.3        | 55.3%        | -33.8%        |
| Campground   | 0.5        | 0.7        | 0.7        | 0.7        | 0.7        | 0.7        | 0.7        | 0.7        | 0.6        | 0.7        | 13.0%        | -16.9%        |
| 2nd Home   | 0.2        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 14.6%        | -15.3%        |
| Day Travel   | 0.7        | 0.7        | 0.7        | 0.7        | 0.7        | 0.7        | 0.7        | 0.8        | 0.3        | 0.6        | 84.3%        | -55.3%        |
| <b>TOTAL</b>   | <b>2.3</b> | <b>2.5</b> | <b>2.6</b> | <b>2.6</b> | <b>2.7</b> | <b>2.8</b> | <b>2.9</b> | <b>3.0</b> | <b>2.1</b> | <b>4.1</b> | <b>90.3%</b> | <b>-28.8%</b> |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |            |            |            |            |            |            |            |            |            |            |              |               |
| Accommodations   | 0.4        | 0.4        | 0.5        | 0.5        | 0.5        | 0.6        | 0.6        | 0.6        | 0.7        | 1.6        | 116.1%       | 18.3%         |
| Food Service   | 0.6        | 0.7        | 0.7        | 0.7        | 0.8        | 0.8        | 0.8        | 0.9        | 0.5        | 1.0        | 87.2%        | -38.4%        |
| Food Stores  | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.5        | 0.5        | 0.3        | 0.5        | 48.7%        | -28.5%        |
| Local Tran. & Gas  | 0.2        | 0.3        | 0.3        | 0.3        | 0.2        | 0.3        | 0.3        | 0.3        | 0.2        | 0.3        | 96.7%        | -45.8%        |
| Arts, Ent. & Rec.  | 0.4        | 0.3        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.4        | 0.2        | 0.4        | 78.6%        | -50.7%        |
| Retail Sales   | 0.4        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 0.3        | 0.4        | 0.2        | 0.3        | 81.0%        | -47.1%        |
| <b>TOTAL</b>   | <b>2.3</b> | <b>2.5</b> | <b>2.6</b> | <b>2.6</b> | <b>2.7</b> | <b>2.8</b> | <b>2.9</b> | <b>3.0</b> | <b>2.1</b> | <b>4.1</b> | <b>90.3%</b> | <b>-28.8%</b> |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.

# Wheeler County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003 | 2013 | 2014 | 2015 | 2016 | 2017 | 2018 | 2019 | 2020 | 2021 | 2020-21 | 2019-20 |
|---|------|------|------|------|------|------|------|------|------|------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |      |      |      |      |      |      |      |      |      |      |         |         |
| Accom. & Food Serv.   | 0.3  | 0.4  | 0.4  | 0.4  | 0.4  | 0.4  | 0.5  | 0.5  | 0.4  | 0.5  | 44.7%   | -25.7%  |
| Arts, Ent. & Rec.   | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 19.4%   | -24.8%  |
| Retail**  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | -2.6%   | 12.0%   |
| Ground Tran.  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 29.0%   | -32.7%  |
| Other Travel*   | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 0.0  | 11.6%   | -1.3%   |
| <b>TOTAL</b>  | 0.6  | 0.6  | 0.6  | 0.6  | 0.6  | 0.7  | 0.7  | 0.8  | 0.6  | 0.8  | 29.7%   | -19.8%  |
| <b>Travel Industry Employment (Jobs)</b>                      |      |      |      |      |      |      |      |      |      |      |         |         |
| Accom. & Food Serv.   | 30   | 20   | 30   | 20   | 20   | 20   | 30   | 30   | 20   | 30   | 25.2%   | -13.7%  |
| Arts, Ent. & Rec.   | 10   | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 18.4%   | -16.5%  |
| Retail**  | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | 10   | -6.4%   | 2.9%    |
| Ground Tran.  | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 21.1%   | -30.3%  |
| Other Travel*   | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 0    | 4.6%    | -7.0%   |
| <b>TOTAL</b>  | 40   | 40   | 40   | 30   | 30   | 30   | 40   | 40   | 30   | 40   | 33.3%   | -25.0%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |      |      |      |      |      |      |      |      |      |      |         |         |
| State Tax Receipts  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 60.3%   | -24.7%  |
| <b>TOTAL</b>  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 0.1  | 60.3%   | -24.7%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Wheeler County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Wheeler County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$106  | \$223 | \$296 | \$623 | 2.8        | 2.1            |
| Private Home       | \$23   | \$68  | \$53  | \$160 | 2.4        | 3.0            |
| Other Overnight    | \$27   | \$78  | \$71  | \$205 | 2.7        | 2.9            |
| All Overnight      | \$79   | \$208 | \$207 | \$549 | 2.6        | 2.6            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |        |        | Party-Nights |        |        |
|--------------------|---------------|--------|--------|--------------|--------|--------|
|                    | 2019          | 2020   | 2021   | 2019         | 2020   | 2021   |
| Hotel, Motel, STVR | 9,800         | 5,130  | 20,320 | 4,000        | 2,040  | 7,260  |
| Private Home       | 13,820        | 9,260  | 13,440 | 5,400        | 3,930  | 5,700  |
| Other Overnight    | 50,980        | 34,900 | 37,130 | 15,100       | 13,160 | 14,000 |
| All Overnight      | 74,610        | 49,290 | 70,890 | 24,500       | 19,120 | 26,960 |

|                    | Person-Trips |        |        | Party-Trips |       |        |
|--------------------|--------------|--------|--------|-------------|-------|--------|
|                    | 2019         | 2020   | 2021   | 2019        | 2020  | 2021   |
| Hotel, Motel, STVR | 5,890        | 2,270  | 9,620  | 2,400       | 870   | 3,440  |
| Private Home       | 5,380        | 3,080  | 4,470  | 2,100       | 1,310 | 1,900  |
| Other Overnight    | 17,090       | 12,020 | 12,790 | 5,090       | 4,550 | 4,840  |
| All Overnight      | 28,360       | 17,360 | 26,880 | 9,590       | 6,730 | 10,190 |

# Yamhill County / Insights

## Direct Travel Impacts 2021p

| Visitor Spending Impacts                                       |          |
|--|----------|
| Amount of Visitor Spending that supports 1 Job                 | \$89,178 |
| Employee Earnings generated by \$100 Visitor Spending          | \$30     |
| Local & State Tax Revenues generated by \$100 Visitor Spending | \$4      |
| Visitor Shares   |          |
| Travel Share of Total Employment (2021)                        | 3%       |
| Overnight Visitor Day Share of Resident Population**           | 5%       |

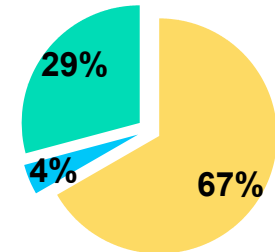
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*\*Annual Overnight Visitor Days divided by Resident Population multiplied by 365. On an average day approximately X% of the population is added to the amount of people in the area.

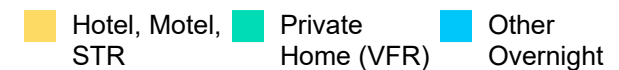
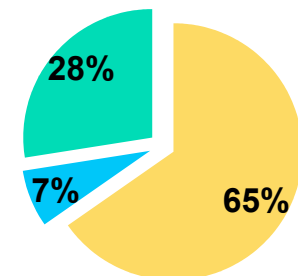
Visitors staying in hotel, motel, or short term rentals account for 65% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 35%. Generally, areas that are primarily rural or suburban have higher shares of private home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short term vacation rentals. "Other Overnight" includes camping and 2nd home spending.

## 2021 Share of Overnight Visitor Spending

### Yamhill County



### Oregon



# Yamhill County / Summary Trend

## Direct Travel Impacts 2003-2021p

|                                | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | Avg. Annual % Chg. |         |
|--------------------------------|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|--------------------|---------|
|                                |       |       |       |       |       |       |       |       |       |       | 2020-21            | 2003-21 |
| <b>Spending (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 61.5  | 115.7 | 115.7 | 117.7 | 119.8 | 126.0 | 136.6 | 138.8 | 57.9  | 140.9 | ▲ 143.4%           | ▲ 4.7%  |
| Other                          | 8.3   | 17.5  | 17.0  | 13.8  | 13.1  | 14.5  | 16.6  | 17.0  | 8.4   | 15.0  | ▲ 79.2%            | ▲ 3.3%  |
| Visitor                        | 53.2  | 98.3  | 98.7  | 103.9 | 106.7 | 111.5 | 120.0 | 121.8 | 49.5  | 126.0 | ▲ 154.3%           | ▲ 4.9%  |
| <b>Earnings (\$Million)</b>    |       |       |       |       |       |       |       |       |       |       |                    |         |
| Earnings (Current \$)          | 14.1  | 27.9  | 28.8  | 31.5  | 33.8  | 36.0  | 40.2  | 43.1  | 35.1  | 39.2  | ▲ 11.5%            | ▲ 5.8%  |
| <b>Employment (Jobs)</b>       |       |       |       |       |       |       |       |       |       |       |                    |         |
| Employment                     | 1,030 | 1,550 | 1,560 | 1,590 | 1,660 | 1,680 | 1,820 | 1,860 | 1,460 | 1,460 | ▼ -0.2%            | ▲ 1.9%  |
| <b>Tax Revenue (\$Million)</b> |       |       |       |       |       |       |       |       |       |       |                    |         |
| Total (Current \$)             | 2.0   | 4.1   | 4.1   | 4.4   | 4.7   | 5.3   | 5.7   | 5.9   | 3.6   | 5.5   | ▲ 52.6%            | ▲ 5.8%  |
| Local                          | 0.1   | 0.5   | 0.6   | 0.6   | 0.7   | 0.8   | 0.8   | 0.8   | 0.4   | 0.9   | ▲ 146.1%           | ▲ 14.3% |
| State                          | 1.9   | 3.6   | 3.6   | 3.8   | 4.0   | 4.6   | 4.9   | 5.1   | 3.2   | 4.6   | ▲ 42.0%            | ▲ 5.0%  |

### Notes:

Calendar year 2020 has been revised since the release of the April 2021 report.

(Current \$) reflects dollar amounts that are not adjusted for inflation.

CARES Act support is included in 2020, and any additional stimulus supporting jobs in 2021 would be included.

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

# Yamhill County / Detail Trend

## Direct Travel Impacts 2003-2021p

|  | 2003 | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020 | 2021  | 2020-21 | 2019-20 |
|--|------|-------|-------|-------|-------|-------|-------|-------|------|-------|---------|---------|
| <b>Direct Travel Spending (\$Millions)</b>                             |      |       |       |       |       |       |       |       |      |       |         |         |
| Destination Spending   | 53.2 | 98.3  | 98.7  | 103.9 | 106.7 | 111.5 | 120.0 | 121.8 | 49.5 | 126.0 | 154.3%  | -59.3%  |
| Other Travel*  | 8.3  | 17.5  | 17.0  | 13.8  | 13.1  | 14.5  | 16.6  | 17.0  | 8.4  | 15.0  | 79.2%   | -50.9%  |
| <b>TOTAL</b>   | 61.5 | 115.7 | 115.7 | 117.7 | 119.8 | 126.0 | 136.6 | 138.8 | 57.9 | 140.9 | 143.4%  | -58.3%  |
| <b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b> |      |       |       |       |       |       |       |       |      |       |         |         |
| Hotel, Motel, STVR**   | 15.4 | 41.8  | 42.2  | 46.1  | 47.9  | 50.8  | 55.7  | 56.5  | 15.4 | 59.2  | 284.0%  | -72.7%  |
| Hotel, Motel   |      |       |       |       |       |       |       |       |      | 37.9  |         |         |
| STVR   |      |       |       |       |       |       |       |       |      | 21.2  |         |         |
| Private Home   | 13.8 | 20.5  | 20.6  | 20.7  | 21.0  | 21.7  | 22.9  | 23.1  | 15.9 | 25.8  | 62.1%   | -31.0%  |
| Campground   | 2.2  | 2.8   | 2.8   | 3.0   | 3.0   | 3.0   | 3.2   | 3.3   | 2.8  | 3.1   | 11.2%   | -16.0%  |
| 2nd Home   | 0.3  | 0.5   | 0.5   | 0.5   | 0.5   | 0.5   | 0.5   | 0.6   | 0.5  | 0.5   | 14.7%   | -17.0%  |
| Day Travel   | 21.5 | 32.7  | 32.6  | 33.6  | 34.2  | 35.4  | 37.7  | 38.4  | 15.0 | 37.4  | 149.6%  | -61.0%  |
| <b>TOTAL</b>   | 53.2 | 98.3  | 98.7  | 103.9 | 106.7 | 111.5 | 120.0 | 121.8 | 49.5 | 126.0 | 154.3%  | -59.3%  |
| <b>Visitor Spending by Commodity Purchased (\$Millions)</b>            |      |       |       |       |       |       |       |       |      |       |         |         |
| Accommodations   | 7.1  | 19.4  | 20.1  | 23.1  | 24.5  | 26.2  | 28.5  | 28.5  | 11.8 | 34.7  | 193.0%  | -58.4%  |
| Food Service   | 15.0 | 28.3  | 28.7  | 30.5  | 31.8  | 33.4  | 36.2  | 37.5  | 14.1 | 35.4  | 151.3%  | -62.5%  |
| Food Stores  | 7.3  | 11.6  | 11.8  | 12.4  | 12.4  | 12.5  | 13.0  | 13.2  | 7.8  | 15.3  | 96.4%   | -41.0%  |
| Local Tran. & Gas  | 4.4  | 10.2  | 9.6   | 8.4   | 8.0   | 8.8   | 10.2  | 10.2  | 3.7  | 9.9   | 170.7%  | -64.1%  |
| Arts, Ent. & Rec.  | 9.2  | 14.8  | 14.7  | 15.4  | 15.7  | 16.1  | 17.1  | 17.4  | 5.3  | 14.5  | 176.0%  | -69.7%  |
| Retail Sales   | 10.3 | 14.0  | 13.8  | 14.2  | 14.3  | 14.4  | 15.0  | 15.1  | 6.9  | 16.2  | 134.1%  | -54.2%  |
| <b>TOTAL</b>   | 53.2 | 98.3  | 98.7  | 103.9 | 106.7 | 111.5 | 120.0 | 121.8 | 49.5 | 126.0 | 154.3%  | -59.3%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*Other spending includes resident air travel, travel arrangement and convention services, and ground transportation of visitors traveling to other Oregon destinations.

\*\*Starting in 2021 we have additional information regarding the impacts of short term vacation rentals (STVR) and hotel, motels. Trend for these breakouts not available.



# Yamhill County / Detail Trend

## Direct Travel Impacts 2003-2021p

|   | 2003  | 2013  | 2014  | 2015  | 2016  | 2017  | 2018  | 2019  | 2020  | 2021  | 2020-21 | 2019-20 |
|---|-------|-------|-------|-------|-------|-------|-------|-------|-------|-------|---------|---------|
| <b>Travel Industry Earnings (\$Millions)</b>                  |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 8.3   | 18.1  | 18.9  | 21.0  | 23.1  | 24.6  | 27.9  | 30.3  | 24.1  | 28.3  | 17.4%   | -20.5%  |
| Arts, Ent. & Rec.   | 2.8   | 5.1   | 5.1   | 5.4   | 5.5   | 5.8   | 6.4   | 6.7   | 5.8   | 5.2   | -10.1%  | -13.0%  |
| Retail**  | 2.1   | 3.2   | 3.2   | 3.4   | 3.5   | 3.7   | 3.9   | 3.9   | 3.6   | 3.9   | 8.5%    | -8.4%   |
| Ground Tran.  | 0.3   | 0.6   | 0.6   | 0.7   | 0.7   | 0.8   | 0.8   | 0.9   | 0.4   | 0.5   | 9.6%    | -51.6%  |
| Other Travel*   | 0.6   | 1.0   | 1.0   | 1.0   | 1.0   | 1.1   | 1.2   | 1.3   | 1.2   | 1.3   | 8.0%    | -7.2%   |
| <b>TOTAL</b>  | 14.1  | 27.9  | 28.8  | 31.5  | 33.8  | 36.0  | 40.2  | 43.1  | 35.1  | 39.2  | 11.5%   | -18.4%  |
| <b>Travel Industry Employment (Jobs)</b>                      |       |       |       |       |       |       |       |       |       |       |         |         |
| Accom. & Food Serv.   | 580   | 900   | 910   | 950   | 990   | 1,010 | 1,110 | 1,160 | 900   | 960   | 6.8%    | -22.0%  |
| Arts, Ent. & Rec.   | 290   | 450   | 450   | 430   | 460   | 460   | 490   | 480   | 380   | 310   | -18.3%  | -20.9%  |
| Retail**  | 110   | 140   | 140   | 140   | 140   | 140   | 150   | 150   | 120   | 130   | 7.3%    | -16.5%  |
| Ground Tran.  | 10    | 20    | 20    | 20    | 20    | 20    | 20    | 20    | 10    | 10    | 2.9%    | -49.8%  |
| Other Travel*   | 50    | 50    | 50    | 50    | 50    | 50    | 50    | 60    | 50    | 50    | -7.4%   | -10.1%  |
| <b>TOTAL</b>  | 1,030 | 1,550 | 1,560 | 1,590 | 1,660 | 1,680 | 1,820 | 1,860 | 1,460 | 1,460 | 0.0%    | -21.5%  |
| <b>Tax Receipts Generated by Travel Spending (\$Millions)</b> |       |       |       |       |       |       |       |       |       |       |         |         |
| Local Tax Receipts  | 0.1   | 0.5   | 0.6   | 0.6   | 0.7   | 0.8   | 0.8   | 0.8   | 0.4   | 0.9   | 146.1%  | -55.5%  |
| State Tax Receipts  | 1.9   | 3.6   | 3.6   | 3.8   | 4.0   | 4.6   | 4.9   | 5.1   | 3.2   | 4.6   | 42.0%   | -36.2%  |
| <b>TOTAL</b>  | 2.0   | 4.1   | 4.1   | 4.4   | 4.7   | 5.3   | 5.7   | 5.9   | 3.6   | 5.5   | 52.6%   | -38.9%  |

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

\*\*Retail includes gasoline.

\*Other Travel includes resident air travel, travel arrangement and convention/ trade shows.

# Yamhill County / Visitor Details

## Visitor Details 2021p

Overnight visitor volume for Yamhill County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates therefore will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric to visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

### Average Expenditure for Overnight Visitors, 2021

|                    | Person |       | Party |       | Party Size | Length of Stay |
|--------------------|--------|-------|-------|-------|------------|----------------|
|                    | Day    | Trip  | Day   | Trip  |            |                |
| Hotel, Motel, STVR | \$94   | \$175 | \$261 | \$487 | 2.8        | 1.9            |
| Private Home       | \$24   | \$72  | \$56  | \$169 | 2.4        | 3.0            |
| Other Overnight    | \$51   | \$148 | \$135 | \$392 | 2.7        | 2.9            |
| All Overnight      | \$83   | \$205 | \$207 | \$522 | 2.5        | 2.5            |

### Overnight Visitor Volume, 2019-2021

|                    | Person-Nights |         |           | Party-Nights |         |         |
|--------------------|---------------|---------|-----------|--------------|---------|---------|
|                    | 2019          | 2020    | 2021      | 2019         | 2020    | 2021    |
| Hotel, Motel, STVR | 597,860       | 129,920 | 632,620   | 243,700      | 50,600  | 226,990 |
| Private Home       | 1,077,330     | 712,080 | 1,080,840 | 421,090      | 302,160 | 458,640 |
| Other Overnight    | 97,230        | 66,450  | 70,710    | 28,750       | 25,020  | 26,620  |
| All Overnight      | 1,772,430     | 908,460 | 1,784,170 | 693,550      | 377,780 | 712,240 |

|                    | Person-Trips |         |         | Party-Trips |         |         |
|--------------------|--------------|---------|---------|-------------|---------|---------|
|                    | 2019         | 2020    | 2021    | 2019        | 2020    | 2021    |
| Hotel, Motel, STVR | 359,440      | 62,080  | 338,120 | 146,510     | 23,520  | 121,570 |
| Private Home       | 419,080      | 236,870 | 359,530 | 163,800     | 100,510 | 152,560 |
| Other Overnight    | 32,520       | 22,830  | 24,290  | 9,670       | 8,630   | 9,190   |
| All Overnight      | 811,030      | 321,780 | 721,950 | 319,990     | 132,660 | 283,320 |

# Glossary

| Term   | Definition   |
|--|--|
| Hotel, Motel, STVR                                 | Accommodation types that house transient lodging activity.   |
| Private Home                                       | Unpaid overnight accommodations used to host visiting friends and family overnight.  |
| Other Overnight                                    | Combination of other overnight visitors who stay in campgrounds or 2nd homes.  |
| Day Travel   | Greater than 50 miles traveled non-routine to the destination.   |
| Visitor Spending                                   | Direct spending made by visitors in a destination.   |
| Other Spending                                     | Spending by residents on travel arrangement services, or spending for convention activity.   |
| Direct Spending                                    | Expenditures made by consumers, combination of Visitor Spending and Other Spending.  |
| Direct Earnings                                    | Total after-tax net income from travel. It includes wage and salary disbursements, proprietor income, and other earned income or benefits.   |
| Direct Employment                                  | Employment generated by direct spending; Includes full time, part time, seasonal, and proprietors.   |
| Local Taxes  | City and county taxes generated by travel spending.  |
| State Taxes  | State taxes generated by travel spending.  |
| Destination Spending                               | Interchangeable with Visitor Spending. Direct spending made by visitors in a destination.  |
| STVR   | Short Term Vacation Rental, private and semi-private lodging rented by owners or property management companies (e.g. Airbnb, VRBO).  |
| 2nd Home   | Homes under private ownership for personal use as a seasonal property where a lodging tax is not collected. Only includes spending during trip.  |
| Overnight Visitor Day Share of Resident Population | A measure indicating the percent additional population in an area on an average day. For example a place with 5% visitor day share and a resident population of 10,000 would have 10,500 total people in which 500 are visitors. |
| Travel Share of Total Employment                   | A measure indicating the percent of travel generated employment in an area.  |

# Assumptions / Methodology

## Travel Impacts Methodology

Primary travel impact analysis will make use of the Regional Travel Impact Model (RTIM), prepared and maintained by Dean Runyan Associates and used for most of our travel impact analysis since 1985. This model was developed to provide robust impact findings at small geography without reliance on annual survey research. This is a “bottom up” approach whereby analysis is conducted at the county level, then aggregated to regions and the state, allowing us to use the most detailed tax, employment, wages, and other data that are available. Our clients have selected this approach to provide particularly detailed and defensible findings for all parts of their constituency.

Because the model does not rely on annual survey research for its primary inputs, we work in other states with a variety of other visitor profile providers, including national panel managers or those making use of intercept or regional web methodology. Analysis is conducted separately by type of visitor lodging, making use of data and modeling appropriate to each. Impact analysis associated with visitors staying in commercial lodging makes use of lodging tax data to calculate lodging sales, then employs expenditure distribution data for these types of visitors to calculate total sales and the distribution among expenditure categories. We maintain our own expenditure distribution database for each state we work in, but also make use of historic and current expenditure data, as available. Rental cabins, condos and other property are included in this category if lodging tax has been applied to sales.

Earnings, employment, and tax receipts are calculated using employment and wage data by business category, for each county, plus the applicable taxes on each type of expenditure. Tax impacts, such as for restaurant, fuel, and retail purchases, are calculated from spending amounts; totals will be checked against data from state sources.

Sales attributed to campers are calculated from campground inventory (separately for public and commercial campgrounds), camping occupancy data and average expenditures for camping parties. Expenditure data will be from expenditure databases that we maintain, augmented by visitor survey data available for Oregon, as available.

Other impacts are calculated in a manner like those for commercial accommodation travelers. Sales attributable to travelers staying in their own second homes, or in rented condo, cabin, and other accommodations, are calculated from inventories of these types of lodging and the associated utilization and expenditure data. Findings are made consistent if some of these sales have been subject to lodging tax. Second home inventories are from US Census sources and any local/regional data available. Other impacts are calculated in a manner like those for commercial accommodation travelers.

Day travel spending is calculated as a factor of overnight spending, with the proportions based on visitor data for Oregon travelers. This analysis will rely the most on visitor profile data provided by the profile contractor. Other impacts are calculated in a similar way as those for commercial accommodation travelers.

All spending estimates are summed for each county and separately for each business category with applicable data then used to calculate earnings, employment, and tax receipts. County totals will be mapped to regions using address and other location data for lodging, camping, and other rental accommodations using separate methods for each type of lodging.

In all cases, our data and methodology are transparent, allowing for reliable error trapping and effective review of findings. All findings are also checked against available comparable data, such as county-level employment data by industry from the US Bureau of Labor Statistics and lodging sales data from STR and Key Data.