

2016 Visitor Economic Impact Report

Tourism continues to be the single largest industry in Central Oregon, employing more than 9,230 residents and generating total economic impacts that exceed \$1.1 billion annually. The tourism industry is an equally powerful driver for Central Oregon's economic diversification, new business recruitment and overall quality of life.

The Central Oregon Visitors Association is appointed as the Regional Destination Management Organization for Central Oregon, partnering with our local and statewide Stakeholders on tourism marketing and development initiatives. For economic impact research, COVA extrapolates regional data from research reports prepared for the Oregon Tourism Commission by Dean Runyan Associates ([Oregon Travel Impacts](#)) and the [Longwood's Visitor Profile](#). The primary objective of the state research is to provide reliable, detailed figures to allow comparisons from year-to-year for both state and county levels.

Both reports are available in entirety at the Travel Oregon website, <http://industry.traveloregon.com/research/>. All COVA research may also be found at VisitCentralOregon.com, Research / Reports.

Summary of Central Oregon Impacts

- Central Oregon (comprised of Deschutes, Crook, Jefferson and south Wasco counties) welcomes more than 4.3 million overnight visitors annually (source: 2015 Longwood's Visitor Study | Central Oregon Regional Report)
- Central Oregon Transient Lodging Tax revenues accounted for \$16.8 million in 2016. Of that total, Deschutes County leads the Central region in generating \$14.9 million of the Transient Lodging Tax revenue
- In 2016, employment directly generated by travel spending in Central Oregon was 9,230 jobs, up 3.0%
- In 2016, total direct travel expenditures in Central Oregon was \$924.2 million
- Deschutes County ranked 5th in the state in terms of travel expenditures (including air and ground), at \$713.4 million
- Average daily spend, per person, from an overnight visitor is \$143; golf visitor is \$254 (sources: Runyan | IAGTO)

Total Travel Impact (\$ in Millions)

	<i>Crook</i>	<i>Deschutes</i>	<i>Jefferson</i>	<i>Wasco (South)</i>	<i>Total Impact</i>
Travel Expenditures	\$ 44.2	\$713.4	\$ 47.8	\$ 42.9	\$ 848.3
Industry Earnings	\$ 13.0	\$186.6	\$ 16.6	\$ 15.5	\$ 231.7
Local / State Taxes	\$ 1.5	\$ 31.9	\$ 2.3	\$ 1.0	\$ 36.7
Total Impacts:	\$58.7	\$931.9	\$ 67.7	\$ 59.4	\$ 1,116.7
Industry Employment/Jobs	580	6,930	1,020	700	9,230

Travel Expenditures by Type of Business (\$ in Millions)

<i>Business</i>	<i>Crook</i>	<i>Deschutes</i>	<i>Jefferson</i>	<i>Wasco (South)</i>	<i>Total Impact</i>
Accommodations	\$ 11.4	\$ 187.4	\$ 9.3	\$ 37.4	\$ 245.5
Food / Beverage	\$ 11.2	\$ 181.3	\$ 13.7	\$ 29.5	\$ 235.7
Food Stores	\$ 5.5	\$ 50.3	\$ 7.1	\$ 10.6	\$ 73.5
Air / Ground Transportation	\$ 2.8	\$ 49.1	\$ 4.4	\$ 6.4	\$ 62.7
Recreation / Entertainment	\$ 6.1	\$ 70.2	\$ 7.3	\$ 16.1	\$ 99.7
Retail Sales	\$ 4.6	\$ 75.0	\$ 6.1	\$ 13.0	\$ 98.7
Other Travel	\$ 2.6	\$ 100.1	\$ 2.7	\$ 3.0	\$ 108.3
Total Expenditures:	\$ 44.2	\$ 713.4	\$ 50.5	\$ 116.0	\$ 924.2

Summary of Oregon's Statewide Tourism Impacts

The Oregon travel industry continued its post-recessionary expansion in 2016. By most measures, 2016 was the strongest year of travel industry since the 2008-2009 recession. (source: Travel Oregon – Dean Runyan research)

- **Statewide Travel spending:** \$11.3 billion, increased by 5.2% and is the seventh consecutive year of spending growth.
- **Travel Activity:** An estimated 28.4 million overnight visitors traveled to Oregon destination, an increase of 2.5%. Room demand, as measured by STR Inc., increased by 4.8%.
- **Employment:** Total travel generated employment was 109,500 in 2016, representing a 3.5% increase and the sixth year of growth, following the steep decline from 2008-2010.
- **GDP:** The Gross Domestic Product of the travel industry was \$4.7 billion in 2016. The travel industry is one of the three largest export-oriented industries in rural Oregon counties (the other two being agriculture/food processing and logging/wood products).

Visitor Spending by Type of Traveler Accommodation (\$ in Millions)

	<u>Central Oregon</u>	<u>Oregon</u>
Hotel, Motel, B&B	\$ 453	\$ 5,117
Campgrounds, Private/Public	\$ 50	\$ 454
Private Home	\$ 115	\$ 1,934
Vacation Home	\$ 46	\$ 178
Day Travel / Other	\$ 126	\$ 2,137
Total Spending	\$ 790	\$ 9,820

Visitor Spending by Commodities Purchased (\$ in Millions)

	<u>Central Oregon</u>	<u>Oregon</u>
Accommodations	\$ 228	\$ 2,205
Food & Beverage Services	\$ 215	\$ 2,482
Food Stores	\$ 66	\$ 715
Air/Ground Transportation	\$ 164	\$ 2,226
Recreation	\$ 89	\$ 1,059
Shopping	\$ 89	\$ 1,132
Total Spending	\$ 851	\$ 9,819

Direct Travel Impact (\$ in Millions)

	<u>Central Oregon</u>	<u>Oregon</u>
Total Direct Travel Spending	\$ 851.0	\$11,256
Industry Earnings (wages)	\$ 231.8	\$ 3,078
Local/State/Federal Taxes	\$ 36.7	\$ 1,132
Total Impact	\$ 1,119.5	\$15,466

Information extrapolated from the Oregon Travel Impacts report produced by Dean Runyan Associates and Longwood's International for the Oregon Tourism Commission. Every effort was made to ensure accuracy; the publisher assumes no responsibility for the accuracy of contents. Figures may vary, due to rounding. This report documents the economic significance of the travel industry in Oregon for 2016.