

# The Economic Impact of Travel

## Oregon

Calendar Year 2023 Preliminary

April 2024

**PREPARED FOR**  
Travel Oregon





# Region Impacts

2023p

# Washington County / Insights

## Direct Travel Impacts, 2023p

Visitor Spending Impacts	
Amount of Visitor Spending That Supports 1 Job	\$93,284
Employee & Proprietor Earnings Generated by \$100 in Visitor Spending	\$40
Local & State Tax Revenues Generated by \$100 in Visitor Spending	\$7
Local & State Tax Revenues Generated per County Household	\$219
Visitor Shares	
Travel Share of Total Employment (2023)	2%
Overnight-Visitor Day Share of Resident Population*	4%

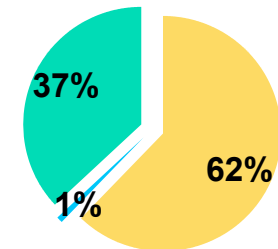
**Source:** Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

\*Overnight Visitor Day Share of Resident Population is equal to the annual overnight visitor days divided by 365 divided by the resident population. On an average day, approximately 4% of the population is added to the amount of people in the area.

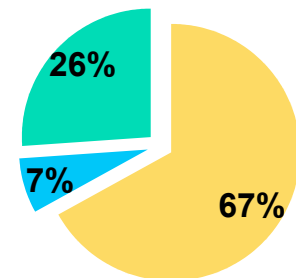
Visitors staying in hotel, motel or short-term rentals account for 67% of overnight-visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 33%. Generally, areas that are primarily rural or suburban have higher shares 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 second-home spending.

## 2023 Share of Overnight Visitor Spending

### Washington County



### Oregon



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

Percentages may not sum to 100% due to rounding.

# Washington County / Summary Trend

## Direct Travel Impacts, 2003-2023p

	2003	2015	2016	2017	2018	2019	2020	2021	2022	2023	Avg. Annual % Chg.	
											2022-23	2003-23*
<b>Spending (\$Millions)</b>												
Total	427.6	686.8	754.7	828.8	863.7	894.3	418.7	710.7	867.9	901.0	▲ 3.8%	▲ 3.8%
Other	80.9	115.8	121.6	131.6	143.0	145.2	82.9	106.6	147.6	144.6	▼ -2.0%	▲ 3.0%
Visitor	346.7	571.0	633.1	697.2	720.7	749.1	335.7	604.1	720.4	756.4	▲ 5.0%	▲ 4.0%
<b>Earnings (\$Millions)</b>												
Earnings	113.4	202.3	235.4	255.9	273.4	286.6	224.6	240.5	317.2	333.5	▲ 5.2%	▲ 5.5%
<b>Employment (Jobs)</b>												
Employment	5,390	7,480	8,300	8,640	8,750	8,750	6,660	6,920	8,470	8,700	▲ 2.7%	▲ 2.4%
<b>Tax Revenue (\$Millions)</b>												
Total	16.3	32.8	37.3	45.4	47.0	49.0	28.6	38.6	48.3	49.8	▲ 3.3%	▲ 5.7%
Local	3.7	10.9	12.7	16.8	17.2	18.1	8.7	13.2	17.0	17.9	▲ 5.0%	▲ 8.2%
State	12.6	21.9	24.6	28.6	29.9	31.0	19.9	25.4	31.3	32.0	▲ 2.4%	▲ 4.8%

**Notes:** House Bill 2267 established Travel Oregon in 2003; we include this year to track the long-term growth of the industry. Calendar year 2021 and 2022 has been revised with the release of this report.

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 and beverage tax (where applicable), auto-rental tax (where applicable), and airport facility charges (where applicable).

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

\*Compound Annual Growth Rate (Ending Value / Starting Value)<sup>1/(Number of Periods)</sup>-1.

# Washington County / Detail Trend

## Direct Travel Impacts, 2003-2023p

	2003	2015	2016	2017	2018	2019	2020	2021	2022	2023	Annual % Chg.	
											2022-23	2019-23
<b>Direct Travel Spending (\$Millions)</b>												
Destination Spending	346.7	571.0	633.1	697.2	720.7	749.1	335.7	604.1	720.4	756.4	5.0%	1.0%
Other Travel*	80.9	115.8	121.6	131.6	143.0	145.2	82.9	106.6	147.6	144.6	-2.0%	-0.4%
<b>TOTAL</b>	<b>427.6</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>710.7</b>	<b>867.9</b>	<b>901.0</b>	<b>3.8%</b>	<b>0.8%</b>
<b>Visitor Spending by Type of Traveler Accommodation (\$Millions)</b>												
Hotel, Motel, STVR	125.3	241.2	285.7	333.5	347.5	364.2	145.6	257.4	347.8	374.3	7.6%	2.8%
Hotel, Motel**								222.5	312.6	339.1	8.5%	
STVR**								34.9	35.2	35.2	0.0%	
Private Home	120.0	183.2	191.2	198.3	203.3	209.3	120.7	205.5	218.4	222.0	1.6%	6.0%
Campground	2.0	2.7	2.8	2.8	2.9	3.0	2.6	2.9	3.2	3.5	10.1%	14.9%
Second Home	1.7	2.5	2.6	2.6	2.8	2.8	2.1	1.4	1.5	1.6	3.6%	-44.3%
Day Travel	97.7	141.3	150.9	159.9	164.2	169.7	64.7	137.0	149.5	155.0	3.7%	-8.6%
<b>TOTAL</b>	<b>346.7</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>604.1</b>	<b>720.4</b>	<b>756.4</b>	<b>5.0%</b>	<b>1.0%</b>
<b>Visitor Spending by Commodity Purchased (\$Millions)</b>												
Accommodations	54.3	118.7	144.5	169.3	173.1	181.9	78.0	136.0	176.0	183.1	4.1%	0.7%
Food Service	105.5	187.2	208.0	227.9	237.4	250.0	116.5	206.3	239.4	260.8	8.9%	4.3%
Food Stores	27.8	45.0	46.8	48.2	48.5	49.9	27.4	51.0	56.8	59.4	4.5%	18.9%
Local Tran. & Gas	40.0	67.0	70.1	79.8	88.1	89.8	41.1	78.1	101.1	102.0	0.9%	13.6%
Arts, Ent. & Rec.	44.9	59.0	63.7	67.5	68.6	70.2	19.3	34.2	37.2	39.6	6.3%	-43.7%
Retail Sales	74.2	94.2	100.0	104.6	105.1	107.3	53.4	98.4	109.9	111.5	1.5%	3.9%
<b>TOTAL</b>	<b>346.7</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>604.1</b>	<b>720.4</b>	<b>756.4</b>	<b>5.0%</b>	<b>1.0%</b>

**Notes:** House Bill 2267 established Travel Oregon in 2003; we include this year to track the long-term growth of the industry.

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

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

\*\*We have additional information regarding the impacts of short-term vacation rentals (STVR) and hotels, motels. Trend for these breakouts not available.

# Washington County / Detail Trend

## Direct Travel Impacts, 2003-2023p

	2003	2015	2016	2017	2018	2019	2020	2021	2022	2023	Annual % Chg.	
											2022-23	2019-23
<b>Travel Industry Earnings (\$Millions)</b>												
Accom. & Food Serv.	64.5	134.5	158.5	173.1	187.5	196.9	154.7	172.0	226.1	236.8	4.7%	20.3%
Arts, Ent. & Rec.	12.8	19.6	22.0	23.9	25.1	26.6	17.8	19.3	26.6	27.7	4.2%	4.2%
Retail**	12.2	18.0	19.6	21.2	22.1	22.7	21.6	23.1	27.8	28.3	1.8%	24.8%
Ground Tran.	5.1	8.4	9.7	11.0	11.4	12.4	8.6	9.1	11.5	12.7	10.8%	2.3%
Other Travel*	18.7	21.9	25.7	26.8	27.4	27.9	21.9	17.1	25.2	28.0	11.2%	0.2%
<b>TOTAL</b>	<b>113.4</b>	<b>202.3</b>	<b>235.4</b>	<b>255.9</b>	<b>273.4</b>	<b>286.6</b>	<b>224.6</b>	<b>240.5</b>	<b>317.2</b>	<b>333.5</b>	<b>5.2%</b>	<b>10.7%</b>
<b>Travel Industry Employment (Jobs)</b>												
Accom. & Food Serv.	3,270	5,050	5,690	5,870	5,970	5,970	4,650	4,920	5,950	6,070	2.0%	1.8%
Arts, Ent. & Rec.	800	1,010	1,120	1,190	1,180	1,190	720	740	1,030	1,100	7.3%	-7.5%
Retail**	500	610	640	680	690	690	600	620	690	690	-0.3%	0.6%
Ground Tran.	220	240	270	290	290	300	210	210	230	240	4.3%	-18.2%
Other Travel*	590	560	580	610	630	610	480	430	570	600	4.7%	-1.8%
<b>TOTAL</b>	<b>5,390</b>	<b>7,480</b>	<b>8,300</b>	<b>8,640</b>	<b>8,750</b>	<b>8,750</b>	<b>6,660</b>	<b>6,920</b>	<b>8,470</b>	<b>8,700</b>	<b>2.7%</b>	<b>-3.2%</b>
<b>Tax Receipts Generated by Travel Spending (\$Millions)</b>												
Local Tax Receipts	3.7	10.9	12.7	16.8	17.2	18.1	8.7	13.2	17.0	17.9	5.0%	-1.1%
State Tax Receipts	12.6	21.9	24.6	28.6	29.9	31.0	19.9	25.4	31.3	32.0	2.4%	3.3%
<b>TOTAL</b>	<b>16.3</b>	<b>32.8</b>	<b>37.3</b>	<b>45.4</b>	<b>47.0</b>	<b>49.0</b>	<b>28.6</b>	<b>38.6</b>	<b>48.3</b>	<b>49.8</b>	<b>3.3%</b>	<b>-1.6%</b>

**Notes:** House Bill 2267 established Travel Oregon in 2003; we include this year to track the long-term growth of the industry. 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 station employment and earnings.

# Washington County / Visitor Details

## Visitor Details, 2023p

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 than 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.

Additional years available at [www.travelstats.com/impacts/oregon](http://www.travelstats.com/impacts/oregon)

### Average Expenditure for Overnight Visitors, 2023

	Person		Party		Party Size	Length of Stay
	Day	Trip	Day	Trip		
Hotel, Motel, STVR	\$162	\$330	\$353	\$736	2.2	2.1
Private Home	\$36	\$117	\$70	\$232	1.9	3.3
Other Overnight	\$44	\$150	\$124	\$425	2.8	3.4
<b>All Overnight</b>	<b>\$67</b>	<b>\$189</b>	<b>\$137</b>	<b>\$396</b>	<b>2.0</b>	<b>2.9</b>

### Overnight Visitor Volume, 2021-2023

	Person-Nights			Party-Nights		
	2021	2022	2023	2021	2022	2023
Hotel, Motel, STVR	2,192,350	2,571,190	2,655,740	876,110	1,106,080	1,180,440
Private Home	6,158,310	6,151,800	6,143,070	3,319,850	3,220,060	3,154,820
Other Overnight	91,160	104,600	114,060	39,370	39,750	40,740
<b>All Overnight</b>	<b>8,441,820</b>	<b>8,827,590</b>	<b>8,912,870</b>	<b>4,235,330</b>	<b>4,365,890</b>	<b>4,375,990</b>

	Person-Trips			Party-Trips		
	2021	2022	2023	2021	2022	2023
Hotel, Motel, STVR	1,020,890	1,213,470	1,252,570	405,780	516,510	550,010
Private Home	1,699,500	1,829,520	1,900,700	902,620	938,740	955,750
Other Overnight	27,230	31,020	33,760	11,620	11,670	11,940
<b>All Overnight</b>	<b>2,747,610</b>	<b>3,074,010</b>	<b>3,187,040</b>	<b>1,320,030</b>	<b>1,466,920</b>	<b>1,517,700</b>

# Glossary

<b>Term</b>	<b>Definition</b>
State Taxes	State taxes generated by travel spending.
Local Taxes	City and county taxes generated by travel spending.
Hotel, Motel, STVR	Accommodation types that house transient lodging activity.
Direct Spending	Expenditures made by consumers, combination of Visitor Spending and Other Spending.
NAICS	North American Industry Classification System.
Other Overnight	Combination of other overnight visitors who stay in campgrounds or second homes.
Seasonal Home	Homes under private ownership for personal use as a seasonal property where a lodging tax is not collected. Only includes spending during trip.
2nd Home	Homes under private ownership for personal use as a seasonal property where a lodging tax is not collected.
Day Travel	A trip that involves non-routine travel of greater than 50 miles to the destination and but no overnight stay in the destination.
Destination Spending	Direct spending made by visitors in a destination. Interchangeable with “Visitor Spending.”
Direct Employment	Employment generated by direct travel spending. It includes full-time employees, part-time employees, seasonal employees, and proprietors.
Direct Earnings	Total after-tax net income from travel. It includes wage and salary disbursements, proprietor income, and other earned income or benefits.
Other Spending	Spending by residents on travel arrangement services and/or spending for convention activity.
Visitor Spending	Spending by visitors in a destination.
Private Home (VFR)	Personal residences used to host visiting friends and family overnight.
Person Trips	A trip made by a person to the destination.
Vacation Home Rental	Privately owned homes for personal use as a seasonal property.
STVR	STVR stands for “short term vacation rental.” The category includes private and semi-private lodging rented by owners or property management companies (e.g., Airbnb & VRBO).

## Specific terms to this report

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.



# 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 U.S. Census sources and any local/regional data available. Other impacts are calculated in a manner like those for commercial-accommodation travelers.

(Continued on next page)

# Methodology / Continued

## Travel Impacts Methodology

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 U.S. Bureau of Labor Statistics and lodging sales data from STR and Key Data.

# Methodology / Continued

## RTIM Industries mapped to NAICS

The following categorization is intended as a high level overview of how our reported industries map to the North American Industry Classification System. It should be noted the NAICS codes are based on responses from individual organizations and are not always a perfect 1:1 alignment with our analysis.

<b>Travel Impact Industry</b>	<b>NAICS Industry Code</b>
<b>Accommodation &amp; Food Service</b>	Accommodation (721) Food services and drinking places (722) Residential property managers (531311) Breweries, wineries, distilleries (312120, 312130, 312140)**Notes on next page
<b>Arts, Entertainment &amp; Recreation</b>	Arts, entertainment, and recreation (71) Scenic and sightseeing transportation (487) Motion picture and video exhibition (51213) Recreational goods rental (532292) Tour operators (56152)
<b>Retail</b>	Food & beverage stores (445) Gasoline stations (447) Clothing and clothing accessories (448) Sporting goods, hobby, book and music stores (451) General merchandise stores (452) Miscellaneous store retailers (453)
<b>Transportation</b>	Rail transportation (482114) Water transportation (4831) Urban transit systems (4851) Interurban and rural bus transportation (4852) Taxi and limousine service (4853) Charter bus industry (4855) Passenger car rental (532111) Truck, trailer, and RV rental and leasing (53212) Parking lots and garages (812930)
<b>Air Transportation</b>	Scheduled passenger air transportation (481111) Support activities for air transportation (4881)
<b>Others</b>	Travel agencies (56151) Convention and trade show organizers (56192)

\*\*Travel spending on breweries (312120), wineries (312130) and distilleries (312140) are included within the food-service, retail, food-stores, and recreation industries. It is likely that the bulk of travel-related spending on these alcohol-related NAICS codes occurs within the food-service category. However, because experiences at breweries, wineries, and distilleries often include a significant experiential component, as well as opportunities for retail purchases, we are unable to allocate exact percentages to the above travel impact categories.