



VISIT CENTRAL OREGON

ADVENTURE CALLS

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2018 Visitor Economic Impact Report

Tourism continues to be the single largest industry in Central Oregon, employing more than 9,920 residents and generating total economic impacts that exceed \$1.28 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 Visit Central Oregon is appointed by Travel Oregon 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, industry.traveloregon.com. The Central Oregon summary may be found at Industry.VisitCentralOregon.com, Research / Reports.

Summary of Central Oregon Impacts

- Central Oregon (comprised of Deschutes, Crook, Jefferson and south Wasco counties) welcomes more than 4.5 million overnight visitors annually (source: 2017 Longwood’s Visitor Study | Central Oregon Regional Report)
- Central Oregon Transient Lodging Tax revenues accounted for \$18.9 million in 2018. Of that total, Deschutes County leads the Central region in generating \$17.5 million of the Transient Lodging Tax revenue
- In 2018, employment directly generated by travel spending in Central Oregon was 9,920 jobs, up 5.6%
- In 2018, total direct tourism economic impacts in Central Oregon was nearly \$1.28 billion
- Deschutes County ranked 5th and Central Oregon region ranked 4th in the state in terms of travel expenditures (including air and ground), at \$812.5 million and \$961.2 million, respectively
- Average daily spend, per person, from an overnight visitor is \$211; golf visitor is \$254 (sources: Runyan | IAGTO)

Total Travel Impact (\$ in Millions)

| | <i>Crook</i> | <i>Deschutes</i> | <i>Jefferson</i> | <i>South Wasco</i> | <i>Total Impact</i> |
|----------------------------|---------------|------------------|------------------|--------------------|---------------------|
| Travel Expenditures | \$48.5 | \$812.5 | \$55.1 | \$45.1 | \$ 961.2 |
| Industry Earnings | \$15.6 | \$225.5 | \$18.7 | \$17.1 | \$ 276.9 |
| Local / State Taxes | \$ 1.8 | \$ 36.4 | \$ 2.6 | \$ 1.1 | \$ 41.9 |
| Total Impacts: | \$65.9 | \$1,074.4 | \$76.4 | \$63.3 | \$ 1,280.0 |
| Industry Employment | 650 | 7,560 | 1,010 | 700 | 9,920 |



Summary of Oregon's Statewide Tourism Impacts

The Oregon travel industry continued its post-recessionary expansion in 2018. By most measures, 2018 was the strongest year of travel industry since the 2008-2009 recession. (source: Travel Oregon – Dean Runyan research)

- **Statewide Travel spending:** \$12.3 billion, increased by 4.2% and is the seventh consecutive year of spending growth.
- **Travel Activity:** An estimated 29.1 million overnight visitors traveled to Oregon destinations, an increase of 1.1%. Room demand, as measured by STR Inc., increased by 1.4%.
- **Employment:** Total travel generated employment was 115,400 in 2018, representing a 2.9% increase and the eighth year of growth, following the steep decline from 2008-2010.
- **GDP:** The Gross Domestic Product of the travel industry was \$5.5 billion in 2018. 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, STVR | \$ 503 | \$ 5,576 |
| Private Home | \$ 133 | \$ 2,102 |
| Other Overnight (campgrounds /vac homes) | \$ 101 | \$ 667 |
| Day Travel | \$ 138 | \$ 2,290 |
| Total Spending | \$ 875 | \$10,635 |

Visitor Spending by Commodities Purchased (\$ in Millions)

| | <u>Central Oregon</u> | <u>Oregon</u> |
|---------------------------|-----------------------|-----------------|
| Accommodations | \$ 246.6 | \$ 2,373 |
| Food & Beverage Services | \$ 238.9 | \$ 2,722 |
| Food Stores | \$ 68.3 | \$ 730 |
| Air/Ground Transportation | \$ 134.5 | \$ 2,543 |
| Recreation | \$ 94.4 | \$ 1,107 |
| Shopping | \$ 92.6 | \$ 1,161 |
| Total Spending | \$ 938.6 | \$10,636 |

Direct Travel Impact (\$ in Millions)

| | <u>Central Oregon</u> | <u>Oregon</u> |
|-------------------------------------|-----------------------|-----------------|
| Total Direct Travel Spending | \$ 961.2 | \$12,300 |
| Industry Earnings (wages) | \$ 276.8 | \$ 3,600 |
| Local/State/Federal Taxes | \$ 41.8 | \$ 1,260 |
| Total Impact | \$1,279.8 | \$17,160 |