

The Economic Impact of Travel

Oregon

2022p (preliminary)

May 2023

PREPARED FOR
Travel Oregon



Klamath County / Insights

Direct Travel Impacts, 2022p

Visitor Spending Impacts	
Amount of Visitor Spending That Supports 1 Job	\$103,686
Employee Earnings Generated by \$100 Visitor Spending	\$31
Local & State Tax Revenues Generated by \$100 Visitor Spending	\$4
Visitor Shares	
Travel Share of Total Employment (2022)	7%
Overnight Visitor Day Share of Resident Population*	12%

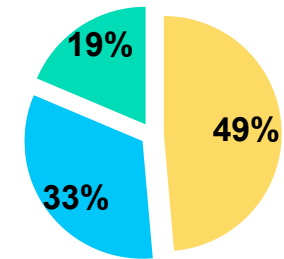
Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.

*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 12% of the population is added to the amount of people in the area.

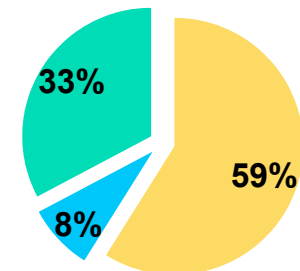
Visitors staying in hotel, motel, or short-term rentals account for 59% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 41%. Generally, areas that are primarily rural or suburban have higher shares 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.

2022 Share of Overnight Visitor Spending

Klamath County



Oregon



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

Percentages may not sum to 100% due to rounding.

Klamath County / Summary Trend

Direct Travel Impacts, 2003-2022p

	2003	2014	2015	2016	2017	2018	2019	2020	2021	2022	Avg. Annual % Chg.	
											2021-22	2003-22*
Spending (\$Millions)												
Total (Current \$)	117.4	139.8	139.5	141.2	153.9	156.1	162.3	110.1	213.1	242.4	▲ 13.8%	▲ 3.9%
Other	8.9	11.4	8.6	8.3	10.7	10.5	10.7	5.2	9.3	12.9	▲ 38.6%	▲ 2.0%
Visitor	108.6	128.4	131.0	132.9	143.1	145.6	151.7	104.8	203.7	229.4	▲ 12.6%	▲ 4.0%
Earnings (\$Millions)												
Earnings (Current \$)	32.8	43.4	45.7	46.5	51.9	55.4	56.3	52.0	59.4	72.2	▲ 21.5%	▲ 4.2%
Employment (Jobs)												
Employment	1,810	1,850	1,890	1,920	2,080	2,170	2,140	1,880	2,010	2,250	▲ 11.6%	▲ 1.1%
Tax Revenue (\$Millions)												
Total (Current \$)	4.1	5.8	6.0	6.2	7.2	7.4	7.6	6.0	8.9	9.9	▲ 11.4%	▲ 4.7%
Local	1.0	1.6	1.7	1.8	2.0	2.0	2.0	1.7	2.9	3.0	▲ 3.2%	▲ 5.9%
State	3.1	4.2	4.3	4.4	5.2	5.4	5.6	4.2	5.9	6.9	▲ 15.5%	▲ 4.2%

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 has been revised with the release of this report.

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

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.

*Compound Annual Growth Rate (Ending Value / Starting Value)^(1/(Number of Periods))-1



Klamath County / Detail Trend

Direct Travel Impacts, 2003-2022p

	2003	2014	2015	2016	2017	2018	2019	2020	2021	2022	Annual % Chg.	
											2021-22	2019-22
Direct Travel Spending (\$Millions)												
Destination Spending	108.6	128.4	131.0	132.9	143.1	145.6	151.7	104.8	203.7	229.4	12.6%	51.3%
Other Travel*	8.9	11.4	8.6	8.3	10.7	10.5	10.7	5.2	9.3	12.9	38.6%	21.5%
TOTAL	117.4	139.8	139.5	141.2	153.9	156.1	162.3	110.1	213.1	242.4	13.8%	49.3%
Visitor Spending by Type of Traveler Accommodation (\$Millions)												
Hotel, Motel, STVR	48.0	59.0	61.2	62.4	69.3	70.5	73.9	45.9	85.6	90.5	5.7%	22.4%
Hotel, Motel**									72.0	76.4	6.1%	
STVR**									13.6	14.1	3.5%	
Private Home	23.1	26.6	26.4	26.5	28.2	28.1	29.0	22.2	32.7	34.8	6.3%	19.9%
Campground	8.3	11.1	11.2	11.5	11.6	12.1	12.6	16.6	46.3	53.6	15.8%	325.0%
Second Home	5.1	6.5	6.6	6.6	6.8	7.0	7.2	5.9	6.7	6.8	2.0%	-5.0%
Day Travel	24.0	25.3	25.6	25.9	27.3	27.9	28.9	14.3	32.5	43.8	34.9%	51.3%
TOTAL	108.6	128.4	131.0	132.9	143.1	145.6	151.7	104.8	203.7	229.4	12.6%	51.3%
Visitor Spending by Commodity Purchased (\$Millions)												
Accommodations	21.5	27.2	29.8	31.0	33.9	34.0	35.5	28.1	54.1	55.8	3.2%	57.3%
Food Service	26.3	34.3	36.1	37.5	40.4	41.6	44.2	29.8	55.8	62.9	12.7%	42.5%
Food Stores	11.1	14.0	14.5	14.4	14.7	14.8	15.3	13.6	28.3	33.4	17.8%	118.0%
Local Tran. & Gas	11.4	17.8	14.8	13.9	15.9	17.7	18.1	9.4	20.3	26.0	27.8%	43.0%
Arts, Ent. & Rec.	17.8	17.8	18.2	18.6	19.4	19.5	20.1	11.5	21.8	24.5	12.3%	21.7%
Retail Sales	17.6	17.1	17.4	17.4	18.0	17.9	18.4	12.5	23.3	26.8	15.0%	45.8%
Visitor Air Tran.	2.8	0.3	0.0	0.0	0.9	0.0	0.0	0.0	0.0	0.0	0.0%	0.0%
TOTAL	108.6	128.4	131.0	132.9	143.1	145.6	151.7	104.8	203.7	229.4	12.6%	51.3%

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 & convention services, and transportation of visitors traveling to other Oregon destinations.

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

Klamath County / Detail Trend

Direct Travel Impacts, 2003-2022p

	2003	2014	2015	2016	2017	2018	2019	2020	2021	2022	Annual % Chg.	
											2021-22	2019-22
Travel Industry Earnings (\$Millions)												
Accom. & Food Serv.	22.0	31.7	34.1	34.8	38.6	41.7	41.8	37.3	44.1	53.9	22.2%	29.1%
Arts, Ent. & Rec.	5.5	5.6	5.8	5.6	6.0	6.9	7.4	5.8	5.7	7.1	23.5%	-4.4%
Retail**	3.8	4.3	4.5	4.6	4.9	5.2	5.4	7.4	8.0	9.0	12.3%	67.0%
Ground Tran.	0.6	0.7	0.7	0.8	0.9	0.9	1.0	0.8	0.8	1.3	51.5%	31.8%
Other Travel*	1.0	1.1	0.6	0.7	1.5	0.7	0.8	0.7	0.6	0.9	34.5%	11.4%
TOTAL	32.8	43.4	45.7	46.5	51.9	55.4	56.3	52.0	59.4	72.2	21.5%	14.2%
Travel Industry Employment (Jobs)												
Accom. & Food Serv.	1,070	1,160	1,210	1,210	1,310	1,340	1,270	1,100	1,230	1,370	11.0%	7.8%
Arts, Ent. & Rec.	470	450	440	450	500	560	600	450	450	520	17.2%	-12.5%
Retail**	200	180	190	200	210	210	220	270	280	290	3.6%	35.9%
Ground Tran.	20	20	20	20	20	20	20	20	20	30	27.1%	9.1%
Other Travel*	50	40	30	30	50	40	40	30	30	30	20.4%	-8.4%
TOTAL	1,810	1,850	1,890	1,920	2,080	2,170	2,140	1,880	2,010	2,250	11.9%	6.9%
Tax Receipts Generated by Travel Spending (\$Millions)												
Local Tax Receipts	1.0	1.6	1.7	1.8	2.0	2.0	2.0	1.7	2.9	3.0	3.2%	47.6%
State Tax Receipts	3.1	4.2	4.3	4.4	5.2	5.4	5.6	4.2	5.9	6.9	15.5%	23.4%
TOTAL	4.1	5.8	6.0	6.2	7.2	7.4	7.6	6.0	8.9	9.9	11.4%	48.2%

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.

Klamath County / Visitor Details

Visitor Details, 2022p

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 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/oregon

Average Expenditure for Overnight Visitors, 2022

	Person		Party		Party Size	Length of Stay
	Day	Trip	Day	Trip		
Hotel, Motel, STVR	\$116	\$232	\$305	\$609	2.6	2.0
Private Home	\$39	\$129	\$98	\$322	2.5	3.3
Other Overnight	\$42	\$133	\$128	\$409	3.1	3.2
All Overnight	\$60	\$167	\$165	\$459	2.8	2.8

Overnight Visitor Volume, 2020-2022

	Person-Nights			Party-Nights		
	2020	2021	2022	2020	2021	2022
Hotel, Motel, STVR	462,860	832,610	782,610	169,890	300,510	296,620
Private Home	635,720	880,800	891,820	264,590	366,590	356,130
Other Overnight	555,150	1,212,840	1,443,060	210,330	449,860	470,310
All Overnight	1,653,730	2,926,240	3,117,490	644,820	1,116,970	1,123,060

	Person-Trips			Party-Trips		
	2020	2021	2022	2020	2021	2022
Hotel, Motel, STVR	238,750	418,930	390,220	87,060	151,390	148,540
Private Home	178,520	247,350	270,150	74,300	102,950	107,880
Other Overnight	174,140	386,710	454,470	65,770	143,170	147,890
All Overnight	591,410	1,052,990	1,114,850	227,130	397,510	404,320