

Lane County Travel Impacts ***1991-2006p***

January 2007



Prepared for the

Convention and Visitors Association of Lane County
Eugene, Oregon

**LANE COUNTY
TRAVEL IMPACTS, 1991-2006P**

Prepared for the

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INTRODUCTION

This study, prepared for the Convention and Visitors Association of Lane County, documents the economic significance of the travel industry in Lane County from 1991 through 2006. The principal aim of this study was to prepare preliminary estimates of travel spending during 2006 as well as to provide estimates of the earnings, employment and tax revenues generated by these expenditures.

MEASUREMENT OF TRAVEL IMPACTS

The impact estimates associated with traveler spending in Lane County area were measured using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The RTIM was calibrated specifically to represent the unique characteristics of the travel industry in Lane County.

TRANSPORTATION IMPACTS

The focus of this analysis is on the destination-specific impacts of visitors. This is straightforward with respect to the spending on commodities such as accommodations, food services, recreation and retail purchases. It is less obvious with respect to ground and air transportation services, in that transportation provides a link between an origin and destination. In this report, the impacts related to spending on transportation are allocated to the location (i.e., county) in which those spending impacts occur, regardless of whether that location is the ultimate destination of the visitor. For this reason, more urbanized counties, including East Lane county, will tend to have relatively greater transportation impacts, even though some of that spending on transportation will be related to visits at other destinations.

IMPACT ESTIMATES FOR 2005 AND 2006

The 2006 estimates contained in this report are *preliminary*. The preliminary estimates are based on the 2005 economic impact analysis prepared for the Oregon Tourism Commission and updated with the most current information collected for Lane County. This approach is consistent with the methodology used to produce travel economic impact figures for the state of Oregon.

INTERPRETATION OF IMPACT ESTIMATES

Users of this report should be aware of other issues regarding the interpretation of reported impact estimates

- All estimates contained in this report supersede those previously published.
- The estimates in this report are expressed in *current* dollars. There is no adjustment for inflation.
- Economic impact measurements reported herein represent only direct economic impacts. Direct economic impacts include only the spending by travelers and the employment generated by that spending. Secondary effects related to the additional spending of businesses and employees are not included.
- The employment estimates in this report are estimates of the total number of full and part-time number of jobs directly generated by travel spending, rather than the number of individuals employed. Both payroll and self-employment is included in these estimates. Caution should therefore be used in comparing these estimates with other employment data series.

A description of the RTIM methodology can be found in Appendix A. Definitions of the travel terms used in this report can be found in Appendix B. Appendix C provides a listing of the relevant business classifications (NAICS codes) used to represent travel industry businesses.

RECENT TRAVEL SPENDING TRENDS

Visitors to Lane County spent \$553 million in 2006, generating 7,570 jobs with earnings of \$138 million and \$23.0 million in state and local tax receipts. Travel spending increased by 7.5 percent in 2006. This represents the third straight year that the growth in travel spending has exceeded 6 percent (see graph, page 4). It also exceeds the longer-term average annual rate of increase (4.8 percent from 1991 to 2006).

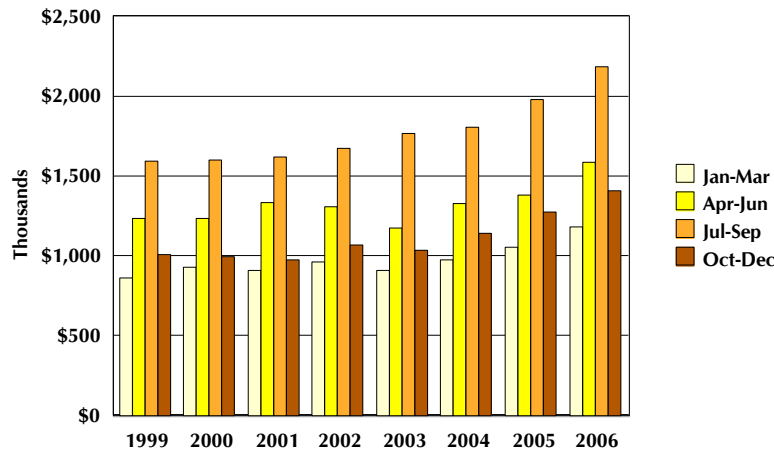
Lane County Travel Trends, 1991-2006p

	Spending	Earnings	Employment	Tax Receipts (\$Million)		
	(\$Million)	(\$Million)	(jobs)	Local	State	Total
1991	273	73	6,240	2.5	8.1	10.6
1992	287	77	6,110	2.7	8.7	11.4
1993	306	82	6,250	3.7	9.2	13.0
1994	321	86	6,400	4.2	9.7	14.0
1995	338	91	6,500	4.6	10.1	14.7
1996	360	96	6,670	5.0	10.4	15.4
1997	374	101	6,640	5.2	10.6	15.9
1998	378	105	6,760	5.3	10.9	16.2
1999	401	110	6,880	5.5	11.3	16.8
2000	430	114	6,950	5.7	12.2	17.9
2001	437	116	7,140	5.8	12.3	18.1
2002	448	120	7,260	6.1	12.2	18.3
2003	452	119	7,050	5.9	12.4	18.3
2004	485	125	7,310	6.7	13.6	20.3
2005	514	130	7,360	7.2	14.2	21.4
2006p	553	138	7,570	8.1	14.9	23.0
<i>Annual Percentage Change</i>						
05-06p	7.5	5.8	2.9	12.4	5.2	7.6
91-06p	4.8	4.3	1.3	8.3	4.1	5.3

Note: Employment includes payroll employees and proprietors. Earnings include payroll, other earned benefits and proprietor income. Tax receipts include room taxes, gasoline taxes, auto rental taxes, and personal and corporate income taxes. Property taxes are not included. All estimates for 2006 are preliminary.

A portion of the increase in travel spending is due to higher gasoline prices and room rates. Still, both earnings and employment have increased. The graphic representations of quarterly transient lodging tax receipts in Lane County shown on the following page indicate that the increased travel activity in Lane County was broad-based. Transient lodging tax receipts have increased in every quarter from 2004 to 2006.

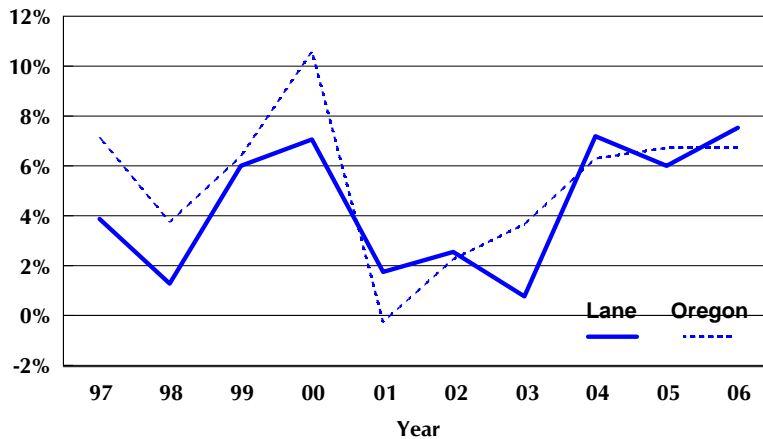
Lane County Quarterly Transient Lodging Tax Receipts



Source: City of Eugene Financial Services Division.
Oct-Dec 2006 receipts are estimated.

The Lane County travel industry has also performed well relative to the state. Prior to 2001, the annual percent change in travel spending in Lane County was typically below the statewide rate of change. During the past three years, Lane County's performance has been similar to Oregon.

Year over Year Percent Change in Travel Spending Current Dollars



Source: Dean Runyan Associates.

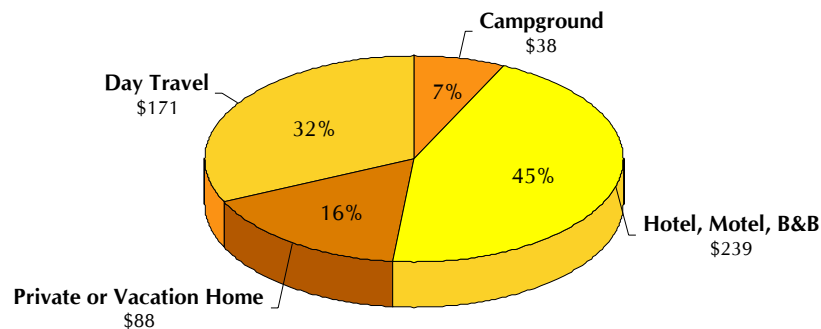
SUMMARY OF LANE COUNTY TRAVEL IMPACTS

Highlights of the travel impacts in Lane County in 2006 include:

- **Visitor Spending by Type of Traveler Accommodation**

The pie chart below provides a breakout of destination spending (which excludes spending on air transportation) by the type of accommodation used in Lane County. Forty-five percent of all destination spending in Lane County was made by travelers that stayed in paid overnight accommodations such as a hotel, motel or bed & breakfast. Lane County also has a high proportion of spending by day travelers (32 percent). This is due the large number of day travelers to Eugene from Portland, Salem and other areas, as well as day travel to the Coast.

**Lane County Travel Spending
by Type of Accommodation, 2006p**
(\$ Million)



Note: Travel spending by type of accommodation includes one-way airfares to Eugene.

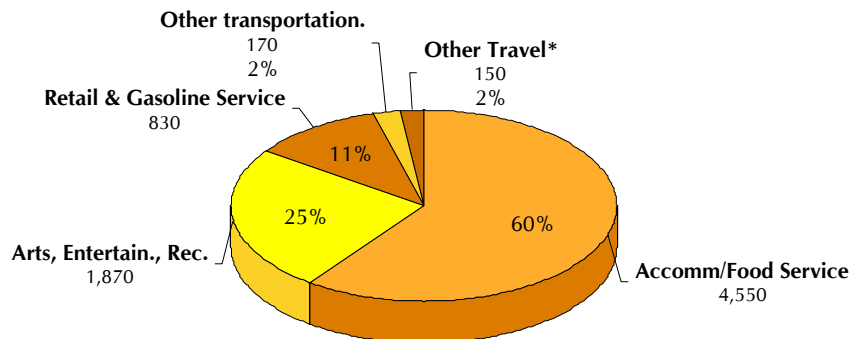
- **Visitor Spending by Commodity Purchased**

Visitors to Lane County spent \$133.3 million on food and beverage services in 2006. Spending on accommodations totaled \$82.3 million. Visitors to Lane county area also spent \$76.2 million on retail goods (excluding gasoline) shopping, and \$72.3 million on arts, entertainment and recreation.

- **Employment and Earnings Generated by Travel Spending**

Travel spending generated 7,570 jobs in Lane county in 2006 with total earnings of \$138.1 million. More than three-fourths of these jobs were in the leisure and hospitality sector, which includes accommodations, food services, and arts, entertainment and recreation (see graph, page 6.)

Lane County Travel-Generated Employment by Industry, 2006p



Note: Other travel includes resident air travel from Eugene and travel agencies.

- **Tax Revenues Generated by Travel Spending**

Travel spending in Lane County generated \$23.0 million in local and state taxes. Local taxes include county and city room taxes and the county auto-rental tax. Property taxes are not included. State tax receipts generated by travel spending include gasoline taxes, income taxes applied to individuals and businesses, and the one percent state lodging tax.

Detailed economic impacts for 1991 through 2006p can be found on pages 7 through 9.

**East Lane County
Travel Impacts, 1991-2006p**

	1991	2000	2001	2002	2003	2004	2005	2006p
Total Direct Travel Spending (\$Million)								
Visitor Spending at Destination	200.9	317.6	325.2	335.6	344.5	369.2	395.3	430.6
Other Travel*	12.6	21.4	19.6	18.1	14.4	15.4	15.2	15.8
Total Direct Spending	213.5	339.0	344.7	353.7	358.9	384.6	410.5	446.4
Visitor Spending by Type of Traveler Accommodation (\$Million)								
Hotel, Motel	94.1	156.4	159.8	167.5	169.5	184.1	199.0	222.4
Private Campground	8.8	11.9	12.0	12.0	12.8	13.8	14.1	14.9
Public Campground	3.4	4.6	4.7	4.7	4.7	5.1	5.2	5.3
Private Home	36.9	56.6	57.4	56.6	60.2	63.9	69.6	74.1
Vacation Home	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Day Travel	57.7	88.2	91.2	94.8	97.2	102.3	107.3	114.1
Spending at Destination	200.9	317.6	325.2	335.6	344.5	369.2	395.3	430.6
Visitor Spending by Commodity Purchased (\$Million)								
Accommodations	32.9	50.5	51.4	53.7	52.4	56.5	61.3	70.1
Food & Beverage Services	48.7	74.8	77.8	83.3	84.3	89.5	93.8	100.4
Food Stores	17.0	25.2	26.5	27.9	28.4	30.5	31.1	32.5
Ground Tran. & Motor Fuel	38.2	68.9	68.3	64.8	75.6	86.4	100.7	114.1
Arts, Entertainment & Recreation	27.9	43.4	45.2	48.2	48.2	50.3	51.1	54.0
Retail Sales	31.0	46.2	48.1	50.6	49.4	49.9	50.5	52.5
Air Transportation (visitor only)	5.2	8.5	7.9	7.2	6.1	6.1	6.7	7.1
Spending at Destination	200.9	317.6	325.2	335.6	344.5	369.2	395.3	430.6
Industry Earnings Generated by Travel Spending (\$Million)								
Accommodations & Food Service	34.8	53.2	54.9	58.4	58.4	62.0	65.5	71.0
Arts, Entertainment & Recreation	8.2	12.7	13.2	14.1	14.1	14.4	14.7	15.5
Retail**	7.1	10.6	10.8	10.9	11.5	12.0	12.3	12.9
Auto Rental & other ground tran.	1.1	2.7	2.7	2.9	3.0	3.2	3.3	3.5
Air Transportation (visitor only)	1.2	1.9	2.1	1.7	1.4	1.3	1.4	1.3
Other Travel*	4.4	7.1	7.1	6.2	4.6	4.7	4.5	4.4
Total Direct Earnings	56.8	88.3	90.9	94.1	93.0	97.6	101.8	108.6
Industry Employment Generated by Travel Spending (Jobs)								
Accommodations & Food Service	2,730	3,080	3,170	3,300	3,230	3,340	3,400	3,570
Arts, Entertainment & Recreation	1,110	1,280	1,330	1,380	1,340	1,370	1,360	1,400
Retail**	530	590	600	580	610	620	620	630
Auto Rental & other ground tran.	80	120	130	130	130	130	130	130
Air Transportation (visitor only)	30	50	50	40	30	30	30	30
Other Travel*	190	230	220	180	140	140	140	130
Total Direct Employment	4,670	5,340	5,500	5,620	5,480	5,640	5,680	5,900
Tax Receipts Generated by Travel Spending (\$Million)								
Local Tax Receipts	2.2	5.1	5.2	5.4	5.3	6.0	6.5	7.3
State Tax Receipts	7.1	10.6	10.7	10.6	10.8	11.8	12.3	13.0
Total Direct Tax Receipts	9.3	15.7	15.9	16.0	16.1	17.8	18.8	20.3

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and travel agency services. **Retail includes gasoline.

West Lane County Travel Impacts, 1991-2006p

	1991	2000	2001	2002	2003	2004	2005	2006p
Total Direct Travel Spending (\$Million)								
Visitor Spending at Destination	58.8	88.9	90.8	93.3	92.3	99.2	102.5	105.4
Other Travel*	1.1	1.7	1.7	1.4	0.9	1.0	1.0	1.0
Total Direct Spending	59.9	90.6	92.5	94.8	93.2	100.2	103.5	106.4
Visitor Spending by Type of Traveler Accommodation (\$Million)								
Hotel, Motel	7.1	13.8	13.5	13.8	12.2	14.2	15.8	17.0
Private Campground	3.9	5.1	5.2	5.3	5.5	5.9	5.9	6.1
Public Campground	8.3	10.6	11.0	11.3	11.6	12.1	12.0	11.8
Private Home	1.7	2.4	2.5	2.6	2.7	2.8	3.0	3.1
Vacation Home	5.1	8.4	8.7	9.0	9.3	9.7	10.1	10.5
Day Travel	32.7	48.5	49.8	51.3	51.0	54.4	55.8	56.9
Spending at Destination	58.8	88.9	90.8	93.3	92.3	99.2	102.5	105.4
Visitor Spending by Commodity Purchased (\$Million)								
Accommodations	5.9	9.9	9.8	10.1	9.6	10.6	11.3	12.1
Food & Beverage Services	18.0	27.0	27.7	28.7	28.5	30.4	31.9	32.9
Food Stores	8.0	11.4	11.9	12.2	12.4	13.3	13.4	13.5
Ground Tran. & Motor Fuel	1.6	3.0	2.9	2.8	3.3	3.7	4.3	4.9
Arts, Entertainment & Recreation	10.0	14.9	15.3	15.7	15.6	17.9	18.1	18.3
Retail Sales	15.3	22.6	23.2	23.9	23.0	23.3	23.5	23.7
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spending at Destination	58.8	88.9	90.8	93.3	92.3	99.2	102.5	105.4
Industry Earnings Generated by Travel Spending (\$Million)								
Accommodations & Food Service	10.4	15.9	16.2	16.7	16.5	17.7	18.6	19.2
Arts, Entertainment & Recreation	2.9	4.4	4.5	4.6	4.6	5.1	5.2	5.3
Retail**	2.7	3.9	3.9	4.0	4.0	4.2	4.3	4.3
Auto Rental & other ground tran.	0.0	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.6	1.0	0.9	0.8	0.5	0.5	0.5	0.6
Total Direct Earnings	16.6	25.3	25.6	26.3	25.7	27.7	28.7	29.5
Industry Employment Generated by Travel Spending (Jobs)								
Accommodations & Food Service	910	930	950	960	920	960	970	980
Arts, Entertainment & Recreation	430	440	450	450	430	490	480	470
Retail**	190	200	200	200	200	200	200	190
Auto Rental & other ground tran.	b	10	10	10	10	10	10	10
Air Transportation (visitor only)	0	0	0	0	0	0	0	0
Other Travel*	30	40	30	30	20	20	20	20
Total Direct Employment	1,580	1,610	1,640	1,640	1,570	1,670	1,680	1,670
Tax Receipts Generated by Travel Spending (\$Million)								
Local Tax Receipts	0.3	0.6	0.6	0.6	0.6	0.7	0.8	0.8
State Tax Receipts	1.0	1.6	1.6	1.6	1.6	1.8	1.9	1.9
Total Direct Tax Receipts	1.3	2.2	2.2	2.2	2.2	2.5	2.6	2.7

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and travel agency services. **Retail includes gasoline.

Less than \$50,000 in spending, earnings or tax receipts = 'a'. Less than 5 employees = 'b'.

**Lane County
Travel Impacts, 1991-2006p**

	1991	2000	2001	2002	2003	2004	2005	2006p
Total Direct Travel Spending (\$Million)								
Visitor Spending at Destination	259.7	406.5	416.0	428.9	436.8	468.4	497.8	536.0
Other Travel*	13.7	23.1	21.2	19.6	15.4	16.4	16.2	16.8
Total Direct Spending	273.4	429.6	437.2	448.5	452.1	484.8	514.0	552.8
Visitor Spending by Type of Traveler Accommodation (\$Million)								
Hotel, Motel	101.2	170.2	173.3	181.3	181.8	198.3	214.9	239.4
Private Campground	12.7	17.0	17.2	17.3	18.4	19.7	20.0	21.0
Public Campground	11.7	15.2	15.7	16.0	16.3	17.2	17.3	17.1
Private Home	38.6	59.0	60.0	59.3	62.9	66.7	72.5	77.1
Vacation Home	5.1	8.4	8.7	9.0	9.3	9.7	10.1	10.5
Day Travel	90.4	136.7	141.0	146.1	148.1	156.8	163.1	171.0
Spending at Destination	259.7	406.5	416.0	428.9	436.8	468.4	497.8	536.0
Visitor Spending by Commodity Purchased (\$Million)								
Accommodations	38.8	60.4	61.2	63.7	62.0	67.2	72.7	82.3
Food & Beverage Services	66.7	101.8	105.5	112.0	112.8	119.9	125.7	133.3
Food Stores	25.0	36.7	38.4	40.0	40.8	43.8	44.4	45.9
Ground Tran. & Motor Fuel	39.8	71.9	71.3	67.6	78.9	90.1	105.1	119.0
Arts, Entertainment & Recreation	37.9	58.4	60.5	63.9	63.7	68.2	69.2	72.3
Retail Sales	46.4	68.8	71.3	74.5	72.4	73.2	74.0	76.2
Air Transportation (visitor only)	5.2	8.5	7.9	7.2	6.1	6.1	6.7	7.1
Spending at Destination	259.7	406.5	416.0	428.9	436.8	468.4	497.8	536.0
Industry Earnings Generated by Travel Spending (\$Million)								
Accommodations & Food Service	45.2	69.1	71.1	75.1	74.9	79.7	84.1	90.2
Arts, Entertainment & Recreation	11.1	17.1	17.7	18.7	18.7	19.6	19.8	20.7
Retail**	9.8	14.5	14.7	14.8	15.5	16.3	16.6	17.2
Auto Rental & other ground tran.	1.2	2.8	2.9	3.1	3.1	3.3	3.4	3.6
Air Transportation (visitor only)	1.2	1.9	2.1	1.7	1.4	1.3	1.4	1.3
Other Travel*	5.0	8.1	8.0	7.0	5.1	5.2	5.1	5.0
Total Direct Earnings	73.4	113.6	116.5	120.4	118.7	125.4	130.5	138.1
Industry Employment Generated by Travel Spending (Jobs)								
Accommodations & Food Service	3,640	4,010	4,110	4,250	4,140	4,300	4,380	4,550
Arts, Entertainment & Recreation	1,540	1,720	1,790	1,830	1,770	1,860	1,840	1,870
Retail**	720	790	800	780	810	820	820	830
Auto Rental & other ground tran.	80	130	140	140	140	140	140	140
Air Transportation (visitor only)	30	50	50	40	30	30	30	30
Other Travel*	220	260	250	210	160	160	160	150
Total Direct Employment	6,240	6,950	7,140	7,260	7,050	7,310	7,360	7,570
Tax Receipts Generated by Travel Spending (\$Million)								
Local Tax Receipts	2.5	5.7	5.8	6.1	5.9	6.7	7.2	8.1
State Tax Receipts	8.1	12.2	12.3	12.2	12.4	13.6	14.2	14.9
Total Direct Tax Receipts	10.6	17.9	18.1	18.3	18.3	20.3	21.4	23.0

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and travel agency services. **Retail includes gasoline.

APPENDICES

Appendix A. RTIM Methodology

Appendix B. Definition of Terms

Appendix C. NAICS Revisions

Appendix D: Travel Impact Industries Matched to 1997 NAICS

**REGIONAL TRAVEL IMPACT MODEL (RTIM)
TRAVEL IMPACT ESTIMATION PROCEDURES****TRAVEL SPENDING**

Hotel, Motel, B&B. Spending on commercial accommodations by hotel and motel guests is estimated from transient lodging tax collections at the city/county jurisdictional level. Spending by hotel and motel guests in other business categories, such as food and transportation, is estimated using spending distributions reported in the visitor survey data. The spending distribution shows how travelers divide their spending between lodging and other purchases.

Private Campground. Spending by campers using commercial campgrounds is estimated from the number of commercial campsites, the average occupancy of these campsites and the average daily expenditures of visitor camp parties reported in survey data. Spending in other business categories is estimated in the same way as for hotel guests.

Public Campground. Spending by campers using public campgrounds is estimated from visitor counts at national and state parks, national forests, and state and federally managed recreation areas and then multiplying the visitation by daily spending estimates from the visitor survey.

Private Home. Spending by private home guests is determined from visitor survey data estimating the number of visitors staying as guests of friends and relatives and applying these rates to the household population base in individual counties.

Vacation Home. Estimated spending by vacation home renters and owners is based on a ratio derived between the number of visitors staying in commercial accommodations and those staying in vacation homes and the relative expenditure levels for each type of visitor. The state total is distributed among the counties using housing data from the U.S. Bureau of the Census.

Day Travel. The share of day visits as a percentage of total travel is estimated from visitor survey data and applied to average daily spending estimates to produce day visitor spending.

Note: The visitor survey data referenced above was provided by Dean Runyan Associates and Longwoods International under separate contracts to the Oregon Tourism Commission. Detailed findings can be requested from the Oregon Tourism Commission.

Air Transportation. Visitor spending estimates for air transportation are derived from the Origin-Destination survey conducted for the Bureau of Transportation Statistics.

Employment and earnings estimates are derived from industry receipts, payroll, and employment data for passenger traffic. The impacts of air cargo operations on scheduled passenger flights are not included in these estimates.

Travel Arrangement Services. This category consists of travel agents, tour operators, and other travel arrangement and reservation services. Employment and earnings are estimated from covered employment and wage data.

RELATED TRAVEL IMPACTS

Spending by travelers generates jobs, payroll, and state and local tax revenue.

Earnings generated directly from traveler expenditures are estimated from a payroll-to-receipts ratio obtained from the 2002 Economic Census and earnings estimates from the Bureau of Economic Analysis.

Employment in each business category is calculated from county level wage data supplied by the Bureau of Labor Statistics and earnings estimates from the Bureau of Economic Analysis.

Local Taxes consist of local room taxes, or transient lodging taxes and the county excise tax on automobile rentals.

State Taxes consist of corporate income taxes and gasoline taxes attributable to travel expenditures, personal income taxes based on the associated travel-generated employment, and the state one percent lodging tax (effective January 2004).

Personal income taxes are estimated by applying the average state personal income tax rate to payrolls resulting from traveler spending. Corporate income taxes are estimated by applying the applicable corporate tax rate to the business receipts, or sales, generated from traveler spending.

DEFINITION OF TERMS

Accommodation: Spending for lodging by hotel and motel guests, campers and vacation home users.

Air Transportation: One-way airfares and related impacts for visitors traveling to the Lane County region. Outbound and resident air travel is included in “other travel” category.

Campers: Travelers staying at RV parks and commercial campgrounds or at public campgrounds such as those in National Forests.

Day Travel: Day travel is defined as a trip of 50 miles or more (one way) that does not include an overnight stay away from home. Day travel does not include routine commutes for business or school.

Earnings: Total earnings include wage and salary disbursements, other earned benefits and proprietor income. Only the earnings attributable to travel expenditures are included.

Employment: Industry employment (jobs) associated with travel-generated payroll and proprietor income. This includes both full- and part-time positions.

Expenditures: Purchases by travelers during their trip, including lodging taxes and other applicable local and state taxes paid by the traveler at the point of sale.

Food and Beverage Services: Businesses serving food and beverages for immediate consumption. In addition to table-service restaurants, this category includes fast-food outlets and refreshment stands.

Food Stores: Grocery stores, food markets, liquor and wine stores, and other businesses selling food or beverages for consumption off the premises.

Ground Transportation: Spending on car rentals, gasoline and other vehicle operating expenses and on local transportation such as taxi, bus and train.

Hotel and Motel Guests: Travelers staying in hotels, motels, resorts, bed & breakfast establishments, condominiums and other lodging places where the Transient Lodging Tax is collected.

Local Tax Receipts: Tax revenue collected by counties and municipalities, as levied on applicable travel-related businesses. Consists of transient lodging taxes and local use taxes.

Private Home Guests: Travelers staying as guests with friends or relatives.

Receipts: Travel expenditures less the sales and excise taxes imposed on those expenditures. Also referred to as business receipts.

Recreation: Spending on amusement and recreation, such as admissions to tourist attractions.

Retail Sales: Spending for gifts, souvenirs and other items. Excludes spending listed separately, such as food stores or recreation.

Spending Distributions: Information from visitor surveys showing how spending by each type of visitor is divided among various business categories.

State Tax Receipts: Personal income taxes based on the associated travel-generated employment; state corporate income taxes and motor fuel taxes attributable to travel expenditures; and, one percent state lodging tax (beginning January 2004).

Transient Lodging Tax: A tax charged on lodging. Also referred to as room tax, transient occupancy tax, hotel tax or lodging tax.

Travel: A day or overnight trip that is not of a local or commuting nature. Travel may be for business or pleasure purposes.

Travel Arrangement: Fees paid to travel agents and tour operators and related impacts are included in "other travel" category.

Traveler: A person traveling in Lane county. A traveler may be an Oregon resident or a resident of another state. The terms traveler and visitor have the same meaning in this report.

Vacation Home User: Travelers using their own vacation home or timeshare and those renting a vacation home or privately owned cabin where transient lodging tax is not collected.

Visitor Spending. Spending by travelers at or near their destinations. This excludes outbound airfares spending on travel arrangement services. All automobile operating expenses are included in the ground transportation component of destination spending.

TRAVEL IMPACT INDUSTRIES MATCHED TO 1997 NAICS

TRAVEL IMPACT INDUSTRY	NAICS INDUSTRIES* (code)
Accommodation & Food Services	Accommodation (721) Food Services and Drinking Places (722) Residential Property Managers (531311)
Arts, Entertainment & Recreation	Performing Arts, Spectator Sports (711) Museums (712) Amusement, Gambling (713) Scenic and Sightseeing Transportation (487) Miscellaneous Industries (see note**)
Retail	Food & Beverage Stores (445) Gasoline Stations (447) Clothing and Clothing Accessories Stores (448) Sporting Goods, Hobby, Book and Music Stores (451) General Merchandise Stores (452) Miscellaneous Store Retailers (453)
Ground Transportation	Interurban and rural bus transportation (4852) Taxi and Limousine Service (4853) Charter Bus Industry (4855) Passenger Car Rental (532111) Parking Lots and Garages (812930)
Air Transportation	Scheduled Air Passenger Transportation (481111) Support Activities for Air Transportation (4881)
Travel Agencies	Travel Agencies (56151)

Notes: *Government enterprises (e.g., park systems) are included in this classification.

**Includes parts of industries in other sectors (e.g., accommodation, charter bus).

A more detailed description of these industries can be found at <http://www.ntis.gov/naics>.