



STATE OF OREGON

Tourism and Oregon's Economy

July 11th, 2016

Oregon Office of Economic Analysis

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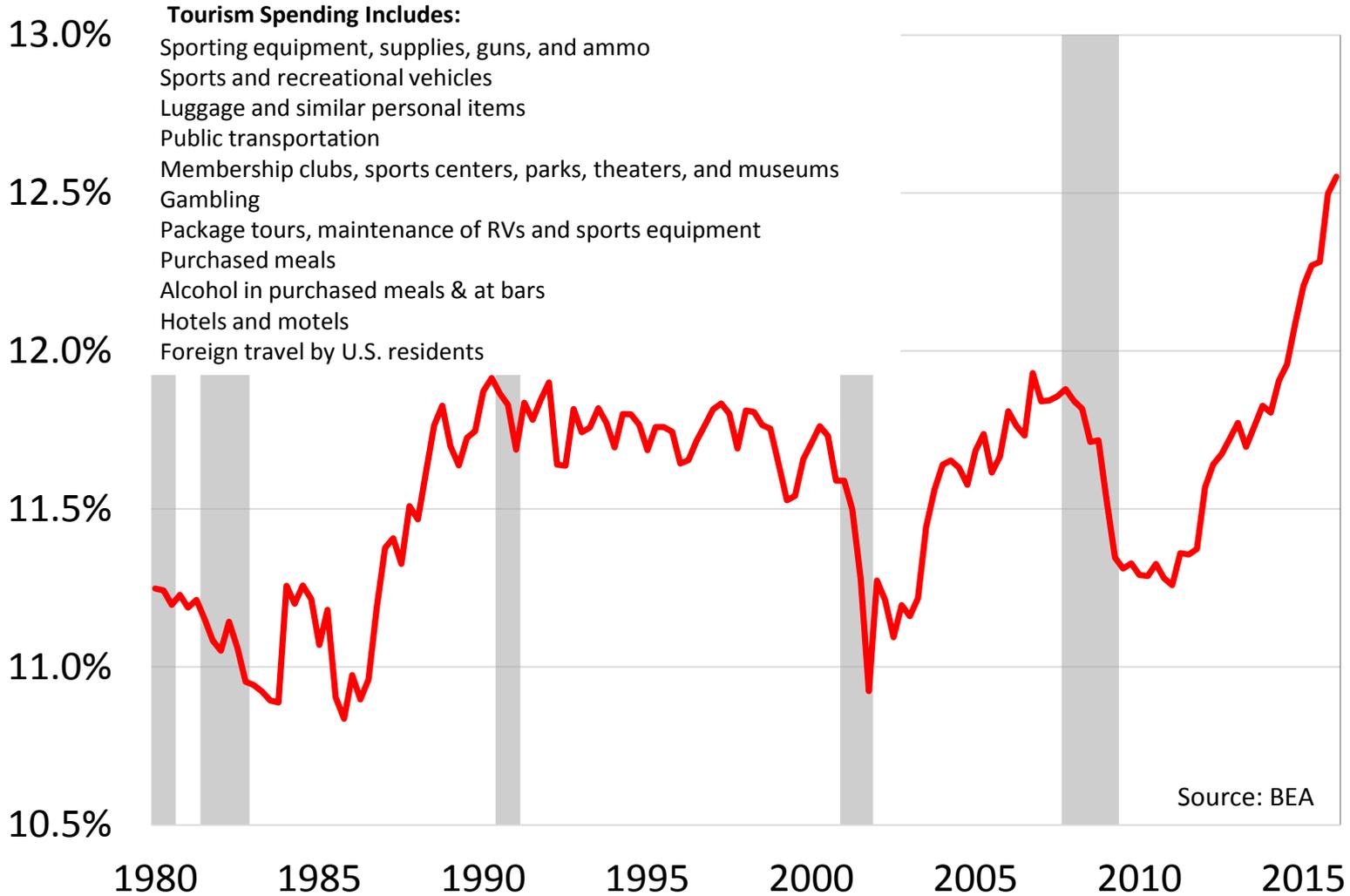
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Macro Trends



Hitting the Road

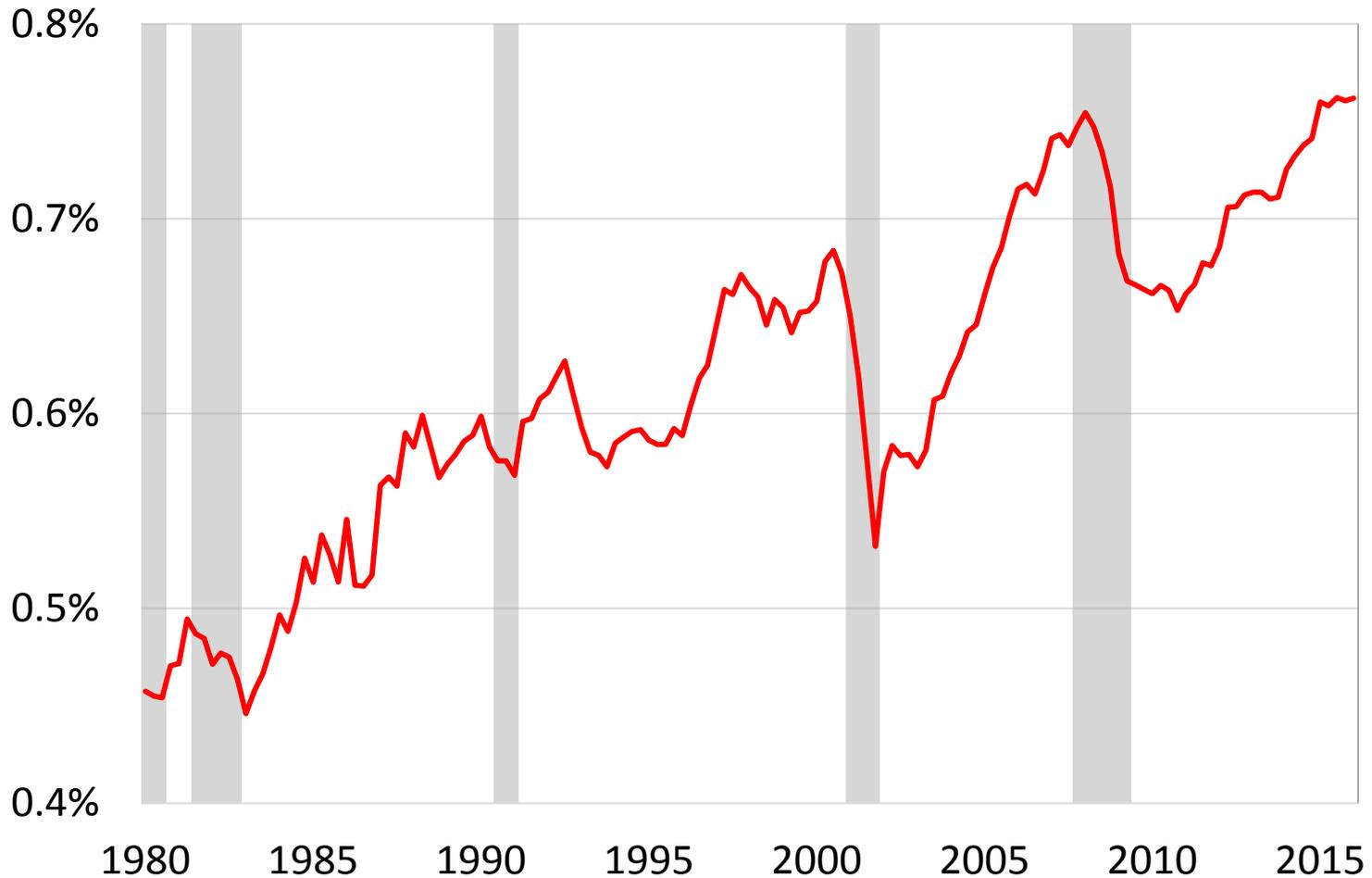
Tourism Share of Personal Consumption Expenditures, %





Hotel & Motel Spending

Hotel & Motel Share of Personal Consumption Expenditures, %





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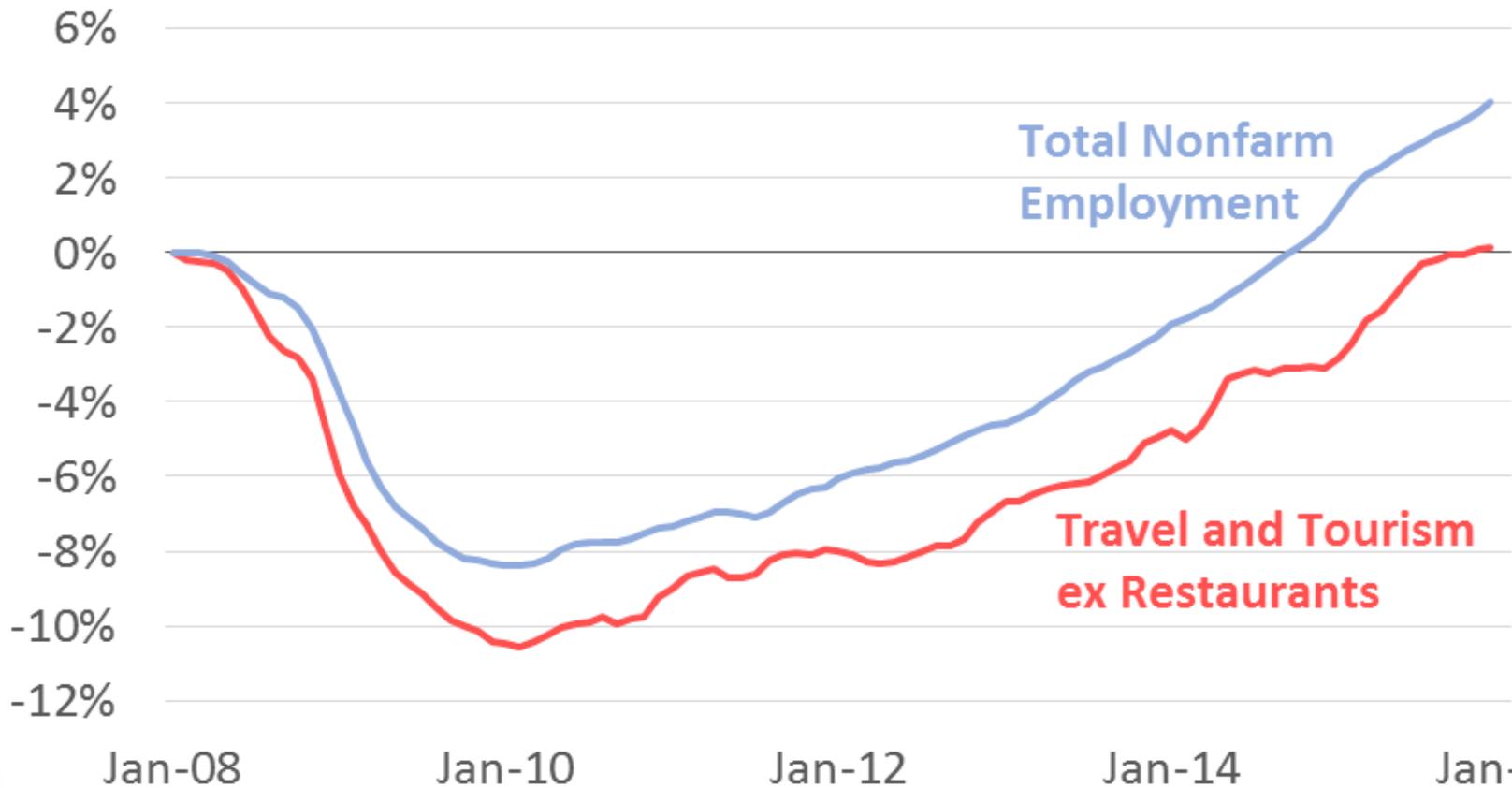
Oregon Trends



Back to Peak Employment

Travel and the Great Recession

Oregon Employment Change from Pre-Recession Peak

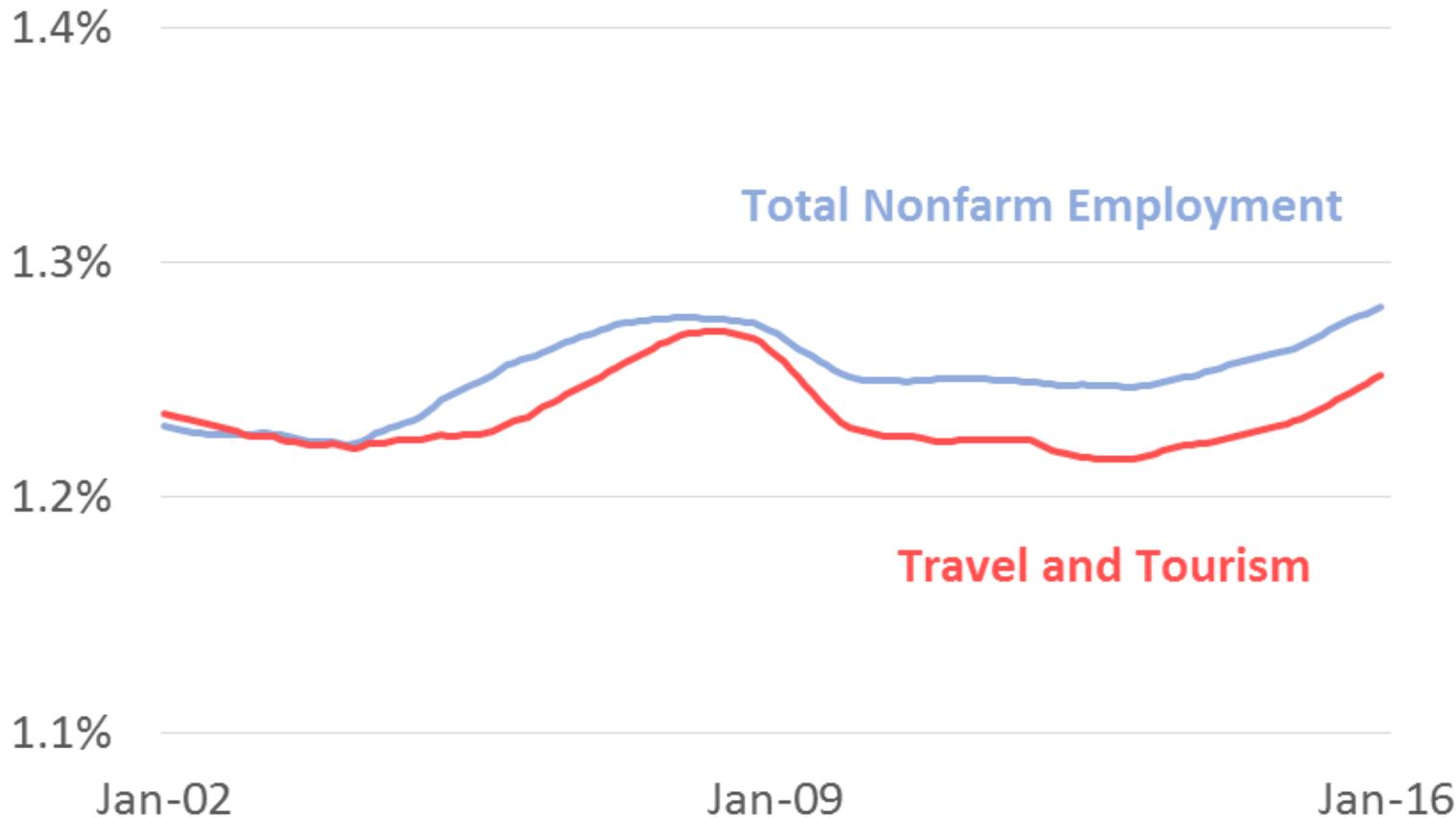




Oregon Boom & Bust

Oregon in Perspective

Oregon as a Share of U.S. Employment





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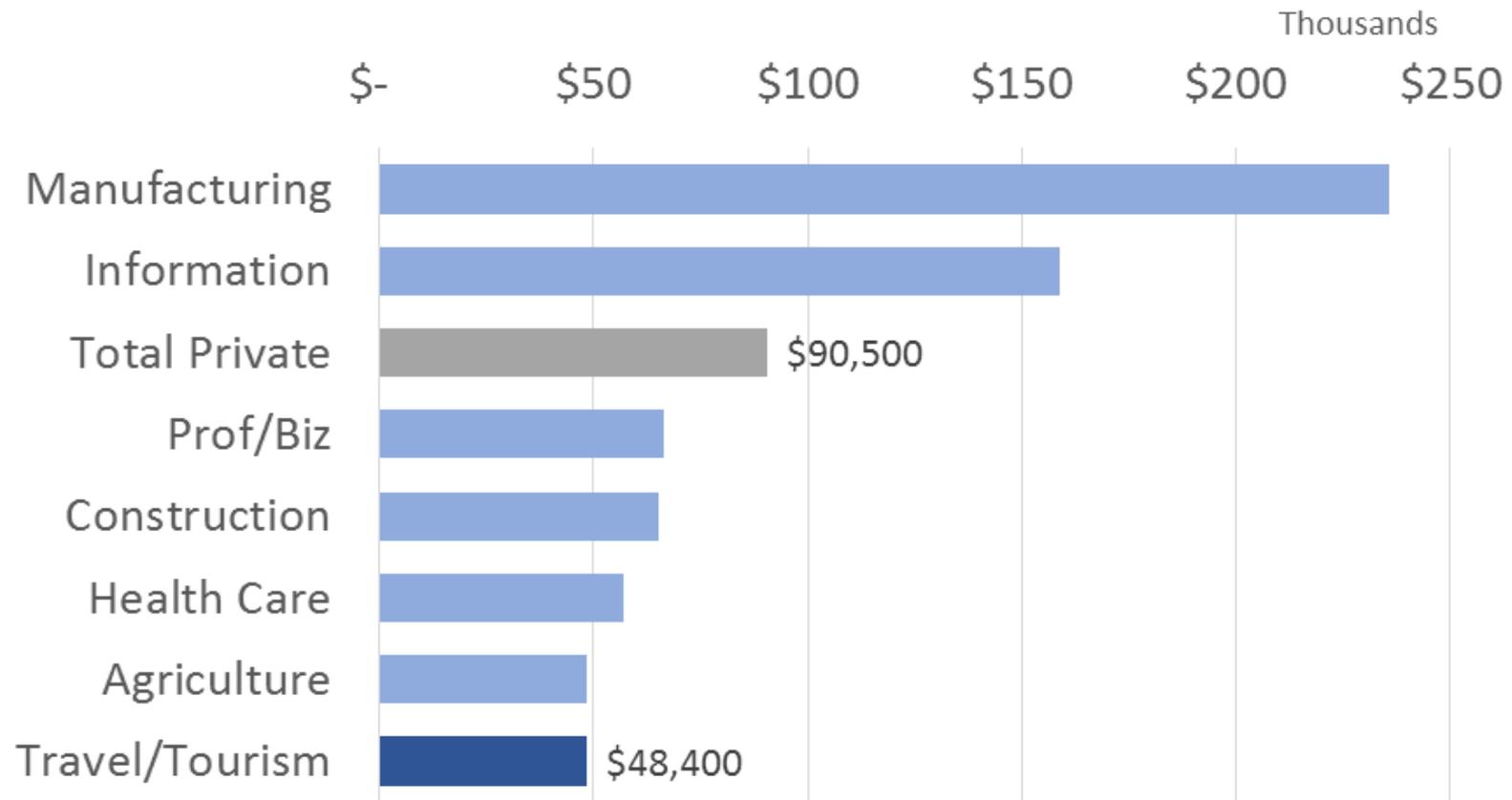
Regional Overview



Manual Work is Low Productivity

Oregon Value-Added Per Worker

2014 State GDP and Employment Data

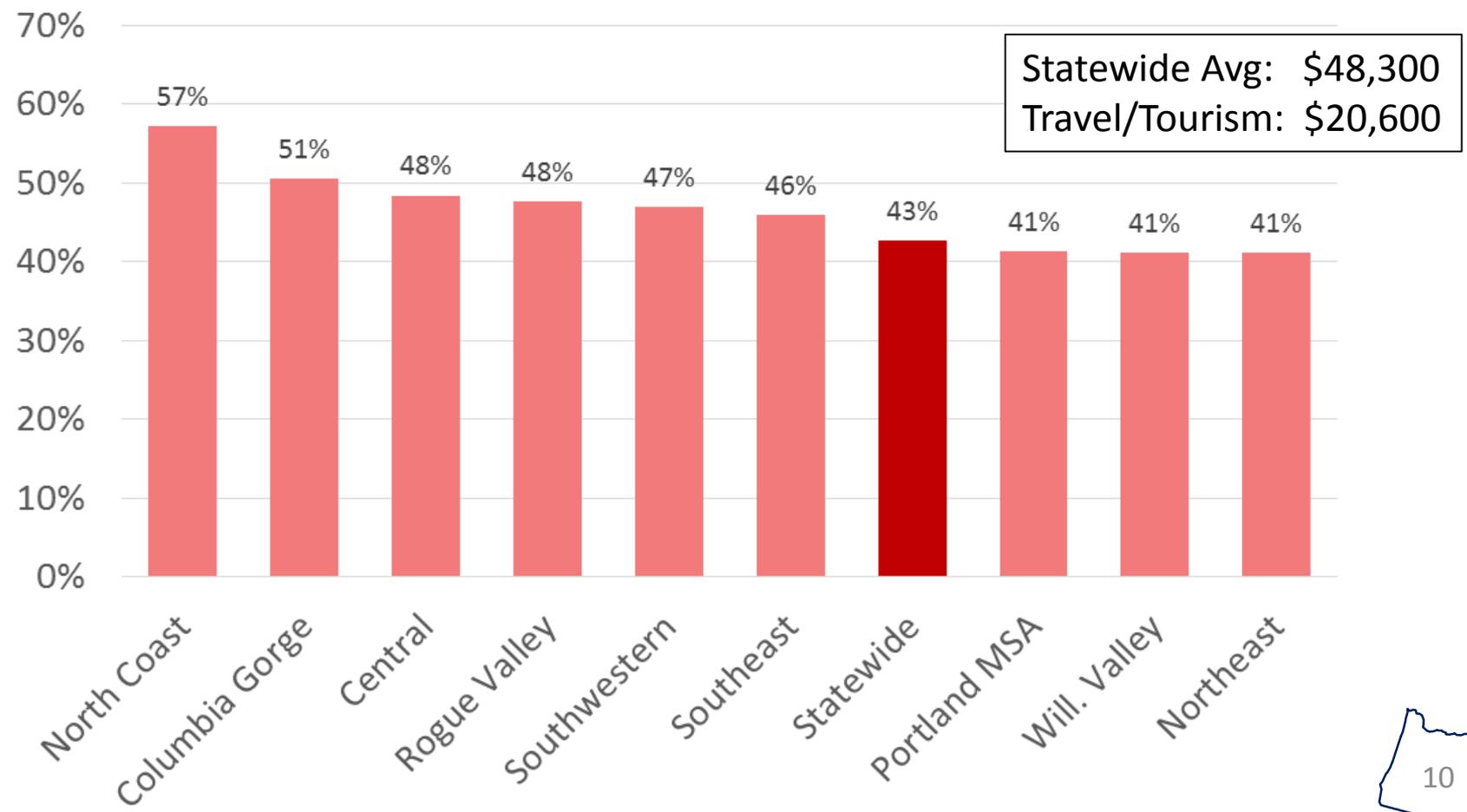




Result is (Very) Low Wages

Travel and Tourism Average Wages by Region

Share of Local Average Wage, 2015

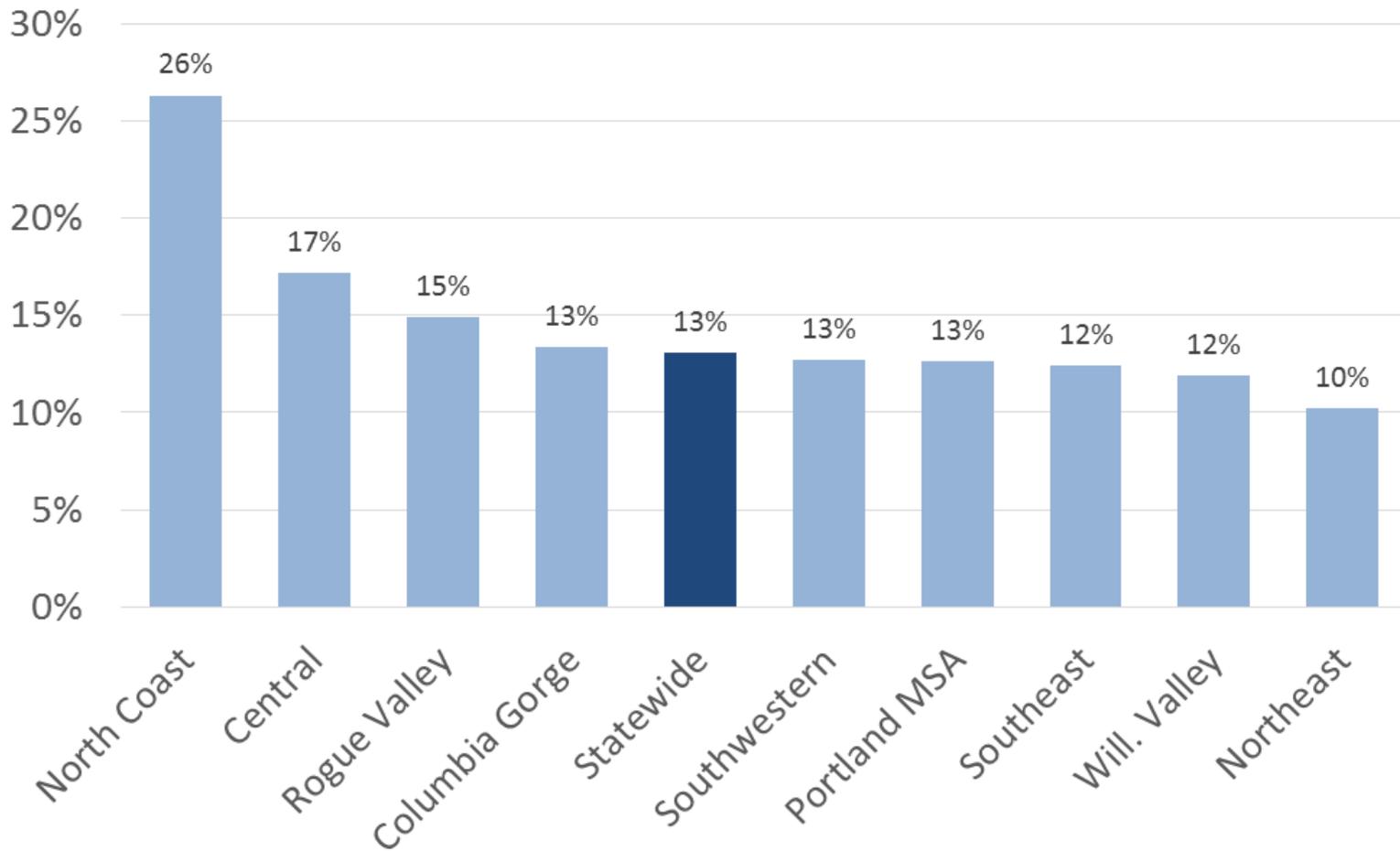




Large Employment Sector

Travel and Tourism Employment by Region

Share of All Local Employment, 2015

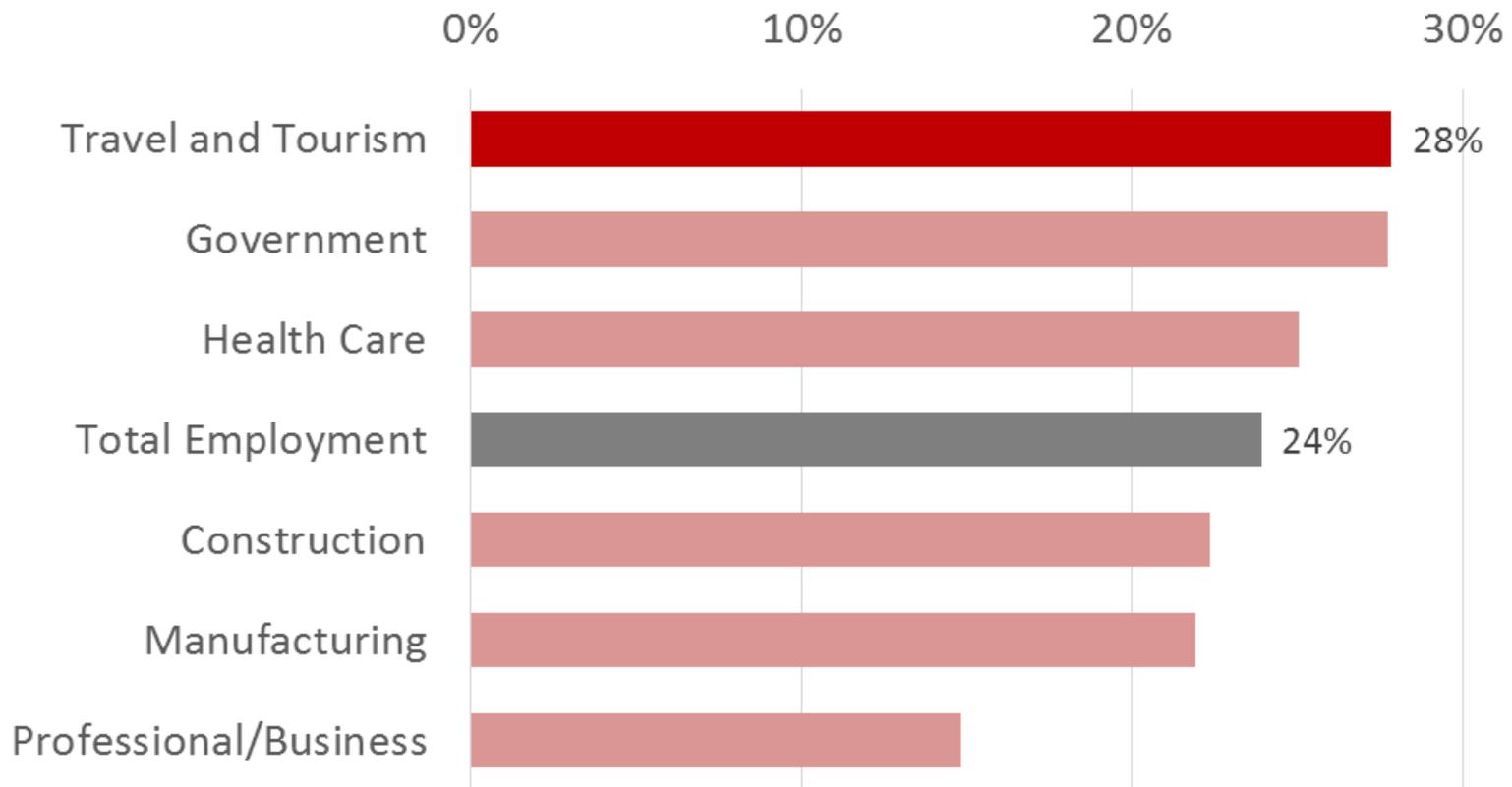




Spread Throughout the State

Geographic Footprint is Large

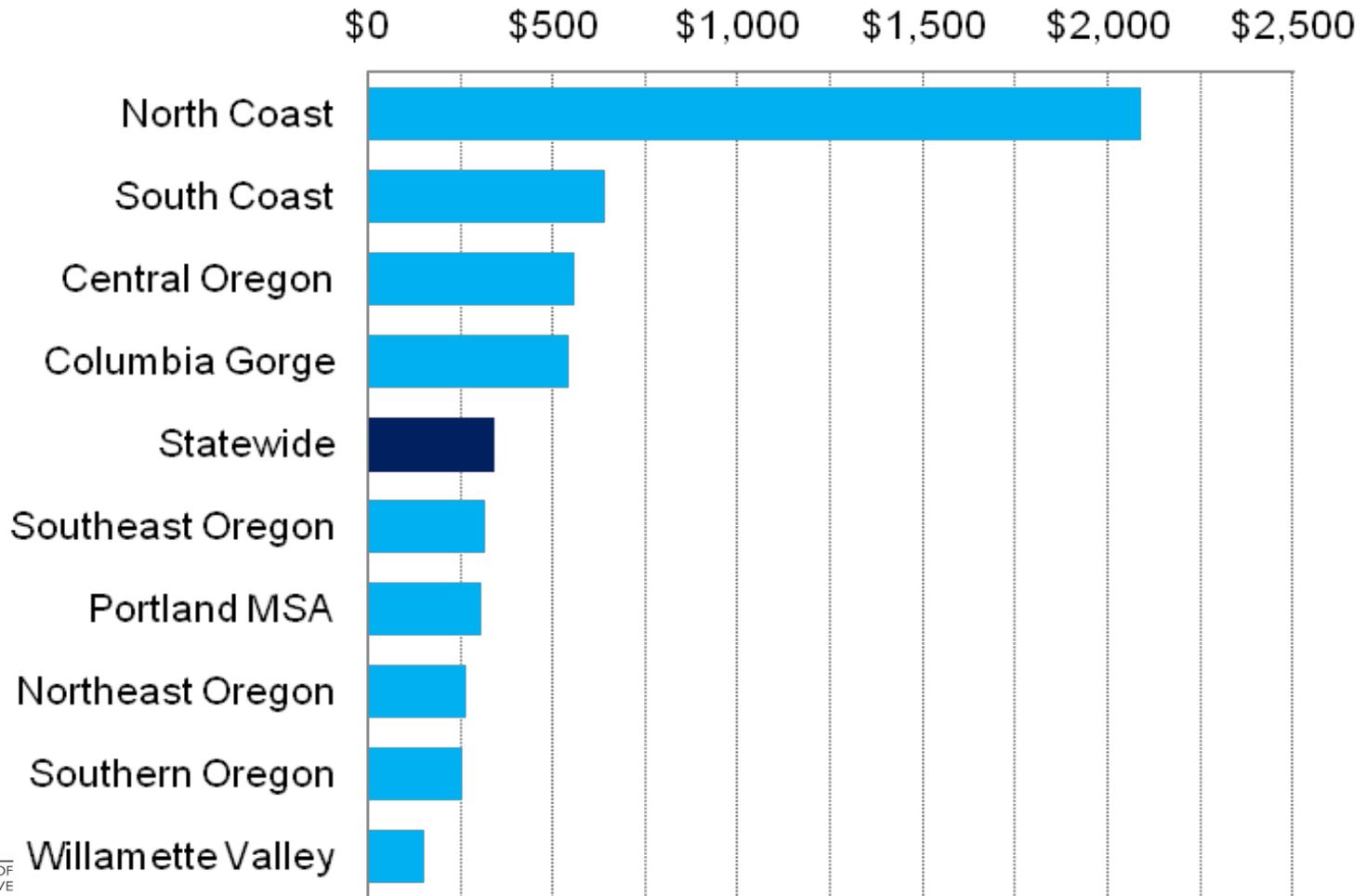
Share of All Oregon Jobs by Sector that are Outside of the Portland Metro and the Willamette Valley





Can Be Very Important Sector

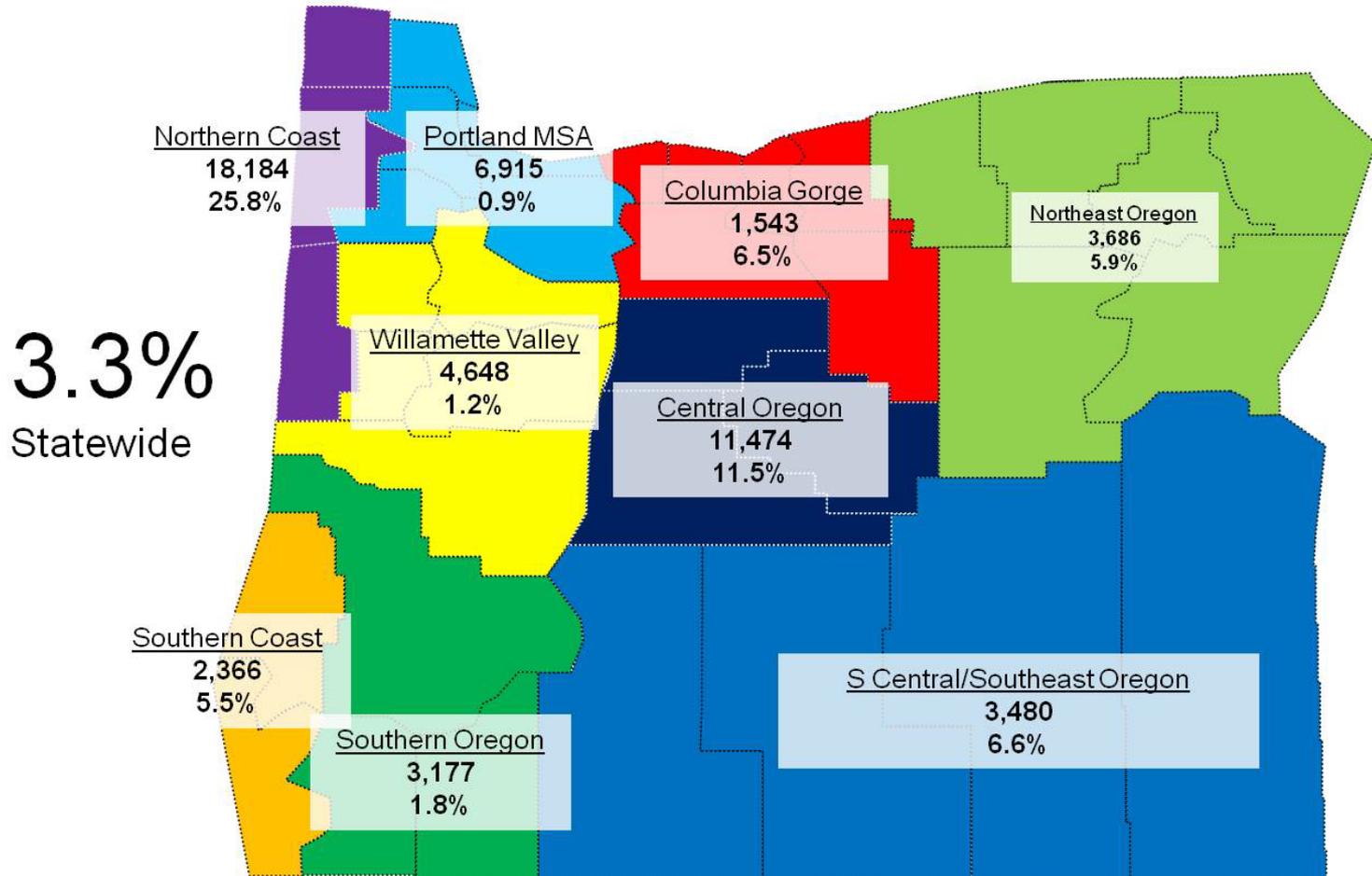
Taxable Lodging Sales per Capita, 2012





Broader Impacts Too

Share of Housing Units Vacant for Seasonal, Recreational or Occasional Use





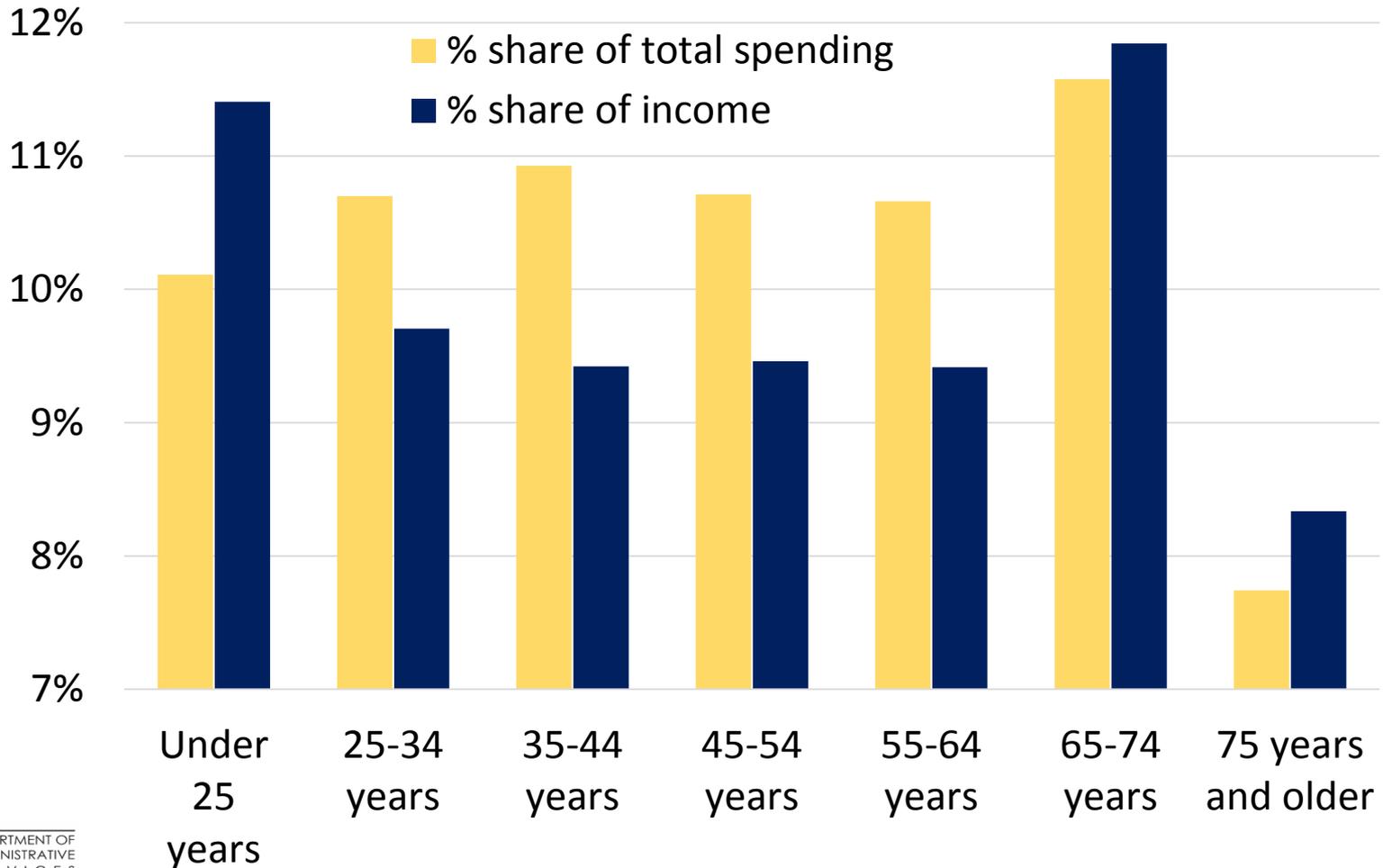
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Outlook



Tourism Spending By Age

Total Tourism Spending, 2014



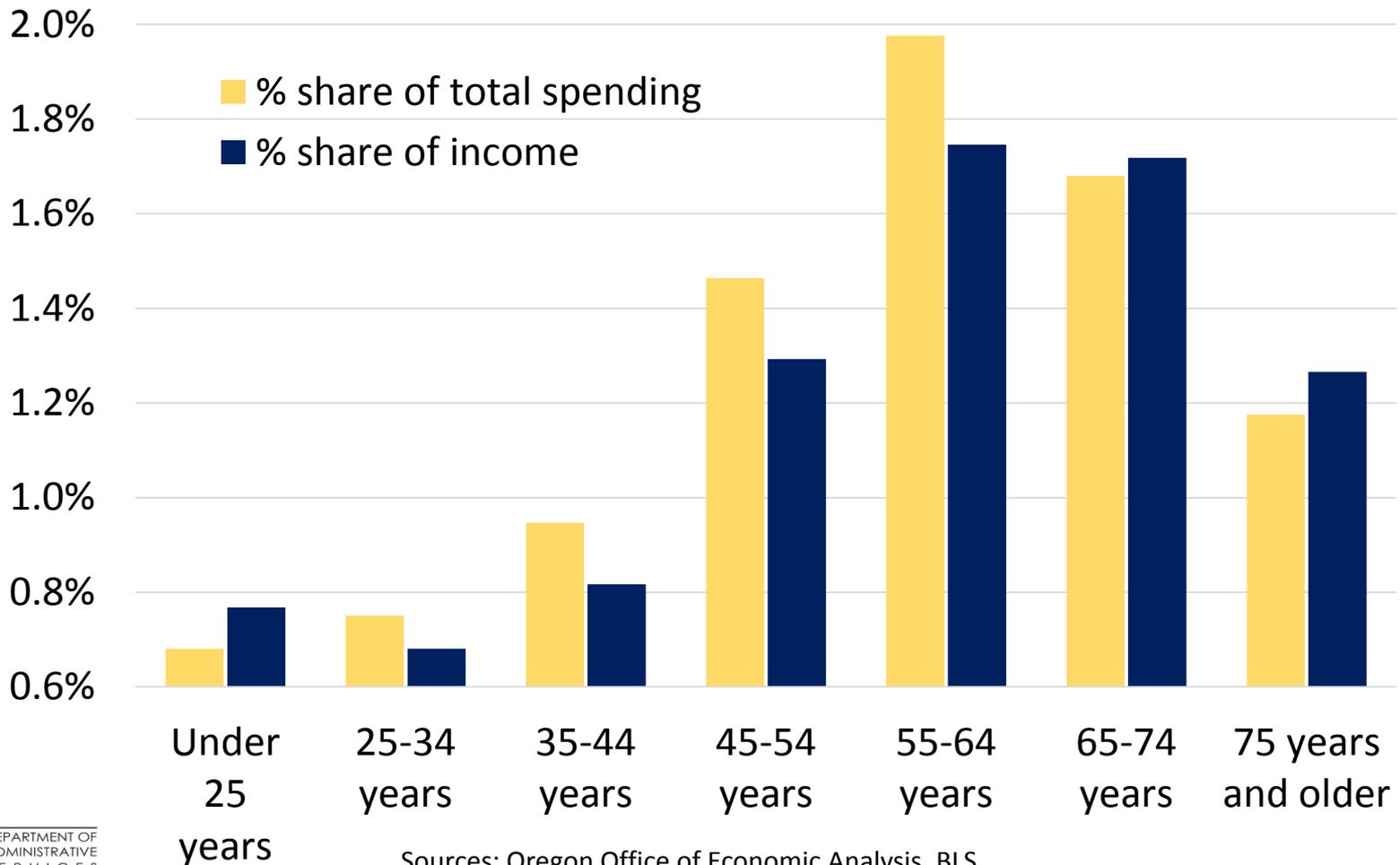
Sources: Oregon Office of Economic Analysis, BLS





Lodging Spending by Age

Spending on Lodging Away from Home

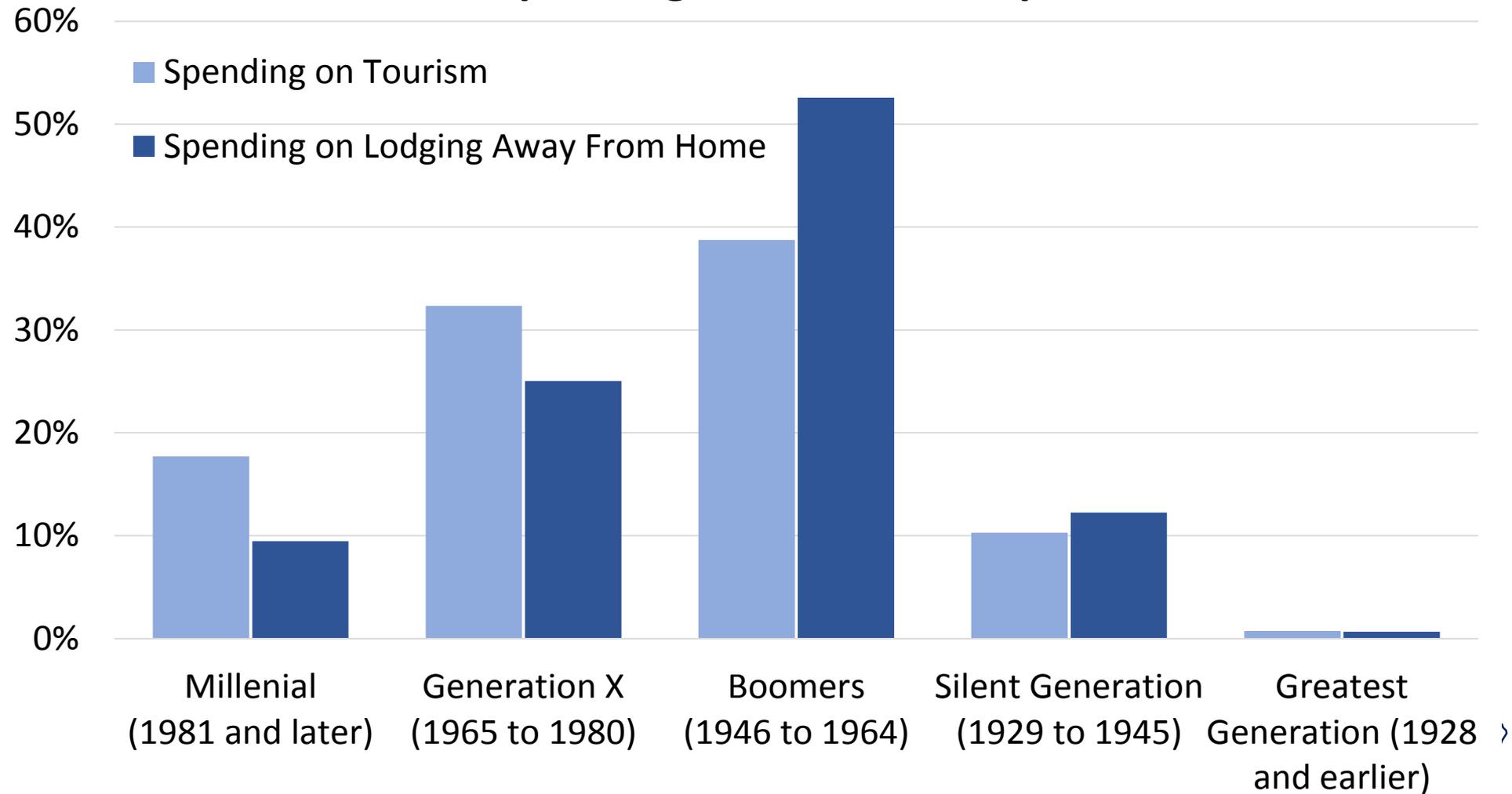


Sources: Oregon Office of Economic Analysis, BLS



Boomers Account For Half of Spending on Lodging

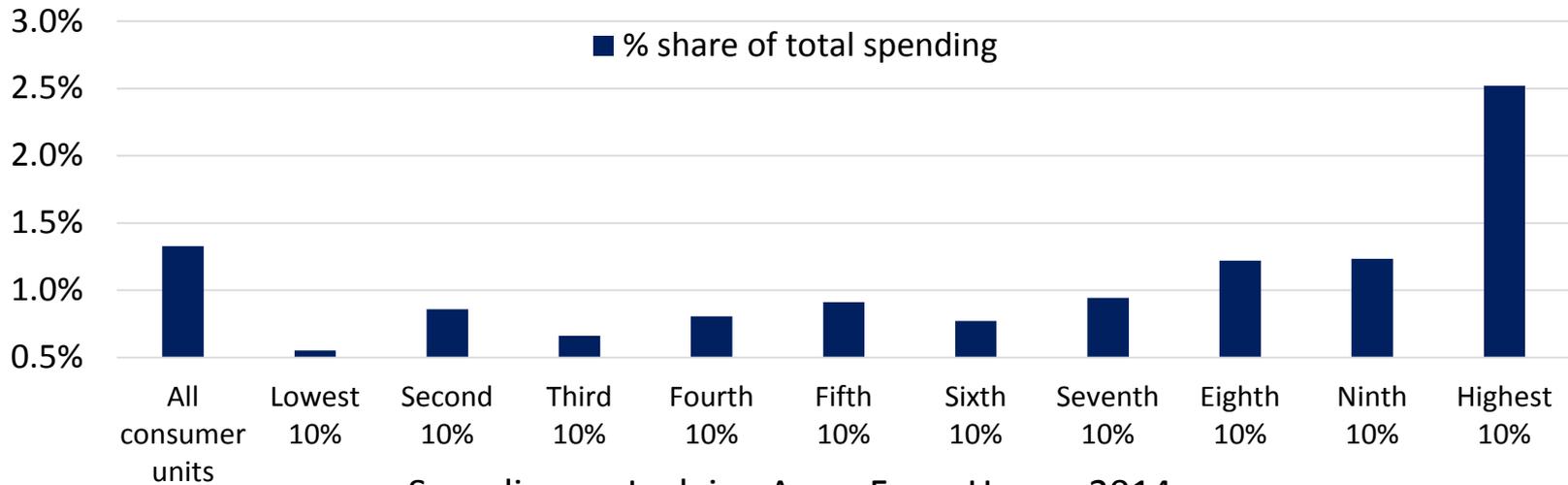
Share of Spending Across All Groups, 2014



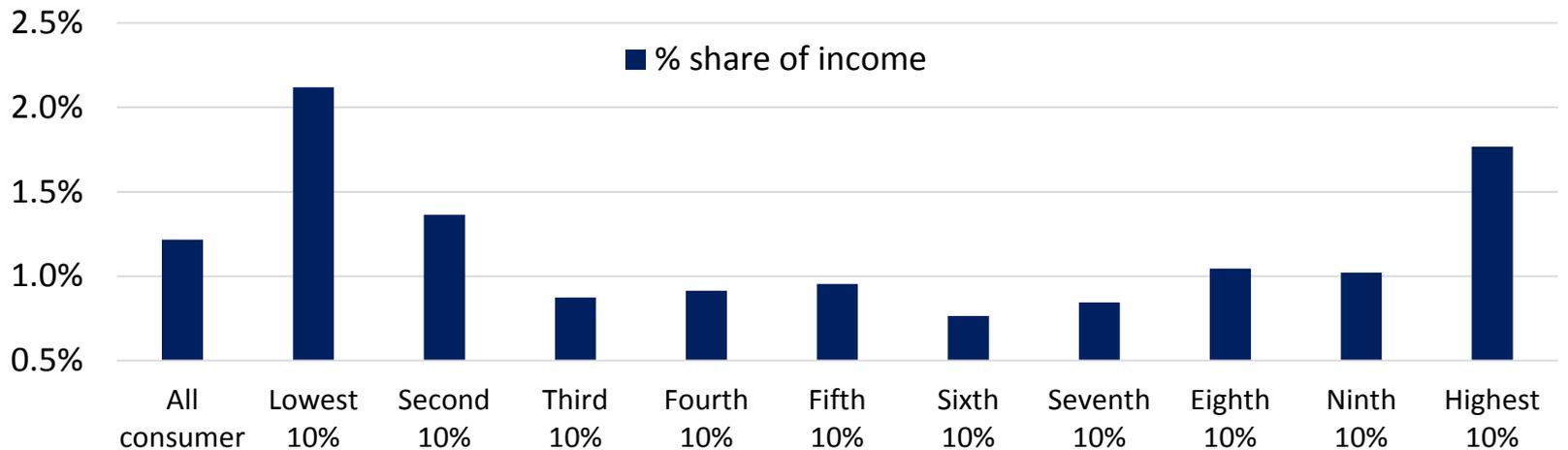


Lodging Taxes Are Less Regressive Than Most Other Sales Taxes...

Spending on Lodging Away From Home, 2014



Spending on Lodging Away From Home, 2014

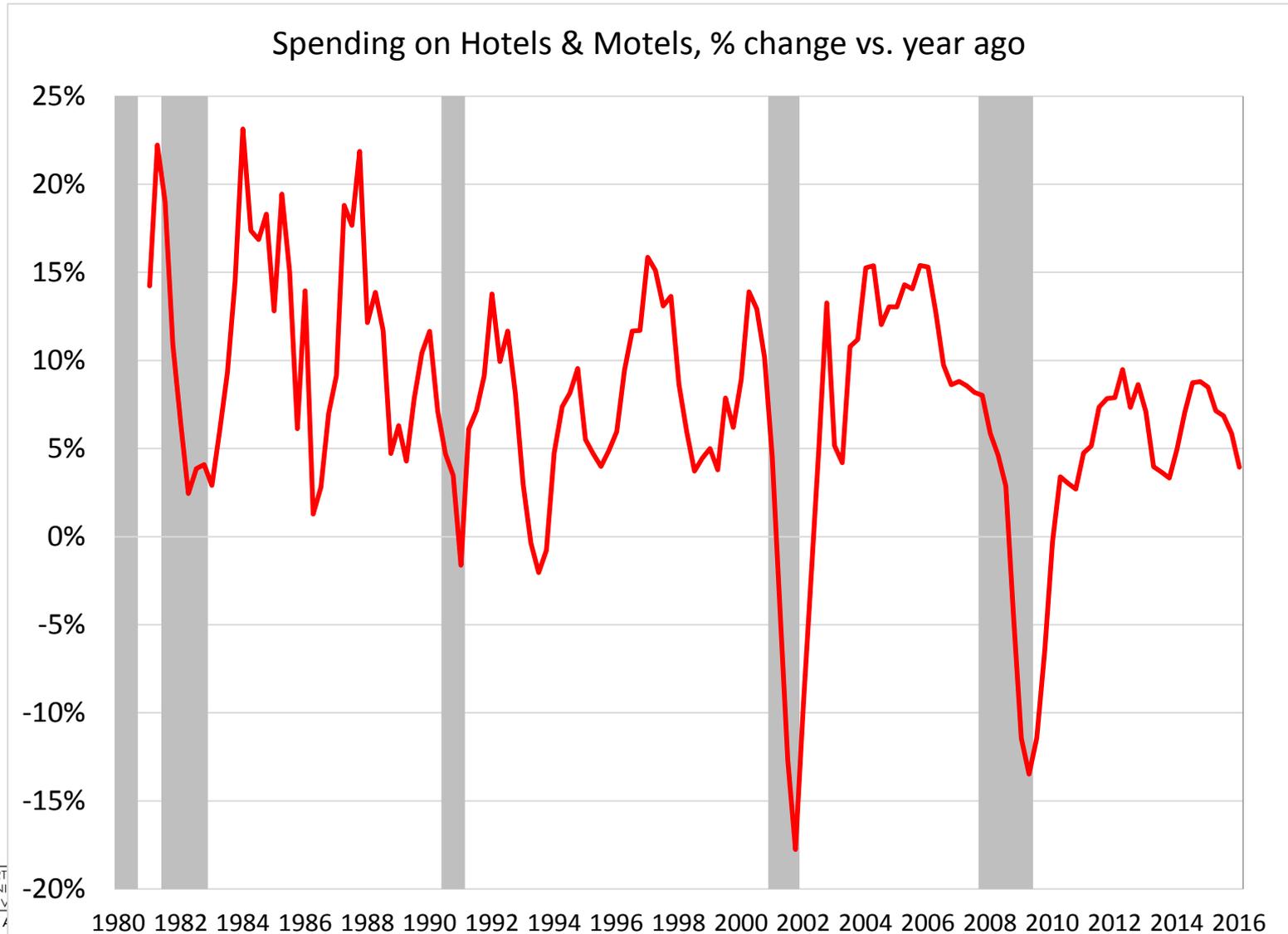


Sources: Oregon Office of Economic Analysis, BLS





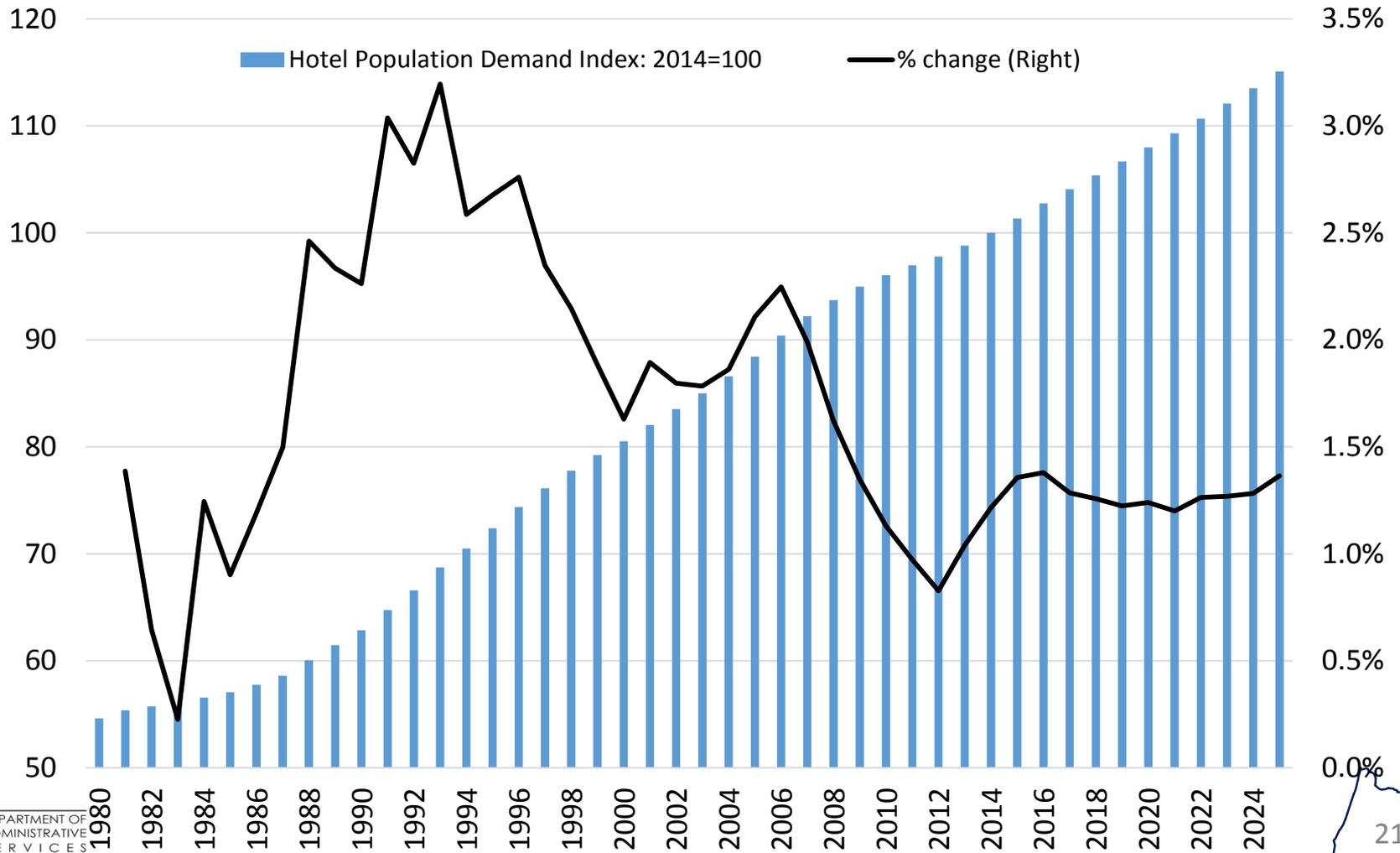
...But More Volatile





Demographics and the Outlook

Hotel Spending Profile Based on Age Mix Over Time





For More Information

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