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MEMORANDUM

To:	Clark Worth & Tamara Schaffert Barney & Worth, Inc.
From:	Eric Hovee & Andrea Logue
Subject:	Yamhill County Tourism / Ag-Tourism Profile
Date:	October 28, 2008

This memorandum is intended to address Task 2.3 of the Yamhill County Agri-Business Economic and Community Development Plan, the purpose of which is to *profile ag-related tourism in Yamhill County.*

The ag-tourism profile provided by this memorandum illustrates that Yamhill County is in the midst of major change. The transition is from a pattern of relatively low level of family-oriented travel similar to the rest of the Willamette Valley toward a much more robust form of visitation – driven largely by the success of Yamhill County's world recognized wineries and offering the prospect of greatly enhanced economic benefits in years to come.

However, to date Yamhill County is not receiving the economic benefits from this *ag-tourism nexus* that have been experienced by other comparable visitor destinations. Whether and how these economic benefits are realized likely depends on strategic intent and resulting planning direction – as part of the countywide Agri-Business Economic and Community Development Plan process now underway.

Scope of Analysis. The remainder of this report is organized to cover the following topics:[1]

Summary Observations & Findings
Yamhill County Tourism Trends
Tourism in Comparable Communities
Lodging Trends
The Willamette Valley Context
Oregon & Yamhill Wine Tourism
Indicators of Yamhill Ag-Tourism
Final Notes

Attached to this report is an *appendix* providing detailed data tables used for this analysis.

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SUMMARY OBSERVATIONS & FINDINGS

What follows is a brief summary of major observations and findings from this ag-tourism profile.

Yamhill County Tourism Trends. In 2007, visitors spent an estimated $92 million in Yamhill County – a 54% increase since 2002. However, per capita visitor spending is only 44% of the statewide average and tax receipts are even further below the Oregon norms. Visitors to Yamhill County are disproportionately day-trippers, with resulting low spending for accommodations, dining, retail, and arts, entertainment and recreation. While below peer communities, Yamhill County travel still supports an estimated 1,120 jobs with annual payroll of $17.2 million.

Tourism in Comparable Communities. For this assessment, comparisons have been made with the wine and non-wine related tourism destinations of Deschutes, Jackson and Lincoln Counties in Oregon; the Tri-Cities, Walla Walla and Yakima Counties in Washington; and Napa and Sonoma Counties in California. In comparison with these eight regions, Yamhill captures the second lowest overall visitor spending and is lowest when considered on a per capita basis. Tourism jobs as a share of total employment and average wage per tourism job are also at the low end of the comparables considered.

Lodging Trends. There are an estimated 656 overnight rooms in 42 lodging properties in Yamhill County – including 12 hotel/motels and 30 B&Bs. However, average occupancies and room rates are below statewide averages – indicating that area lodging has not yet caught up with the higher expectations of the emerging and more affluent wine travel market.

Willamette Valley Context. Historic visitor activity and the current mix of lodging in Yamhill County has been oriented to serve a low-key, family market similar to that of the rest of the Willamette Valley – including attraction to outdoor recreational pursuits. What has been missing is the *buzz* of a more diverse tourism palate – access to unique local cooking, theater and the arts, even live music. These gaps are more pronounced as Yamhill's visitor profile diverges from the rest of the valley, toward a more affluent and discriminating traveler.

Oregon & Yamhill Wine Tourism. As of 2004, Yamhill County accounted for 38% of the wineries in Oregon – by far the most winery oriented county in the state. Wine-related activities generate $1.4 billion of economic value statewide with 24% of revenues attributable to direct sales from wineries. Both rural and urban wine country lodging venues have been considered as a means to better capitalize on the ag-tourism nexus. The Allison Inn & Spa in Newberg represents the first explicitly wine-themed hotel, anticipated to be open by late summer of 2009.

Other Indicators of Yamhill Ag-Tourism. While quantitative data is not readily available, other activities noted include farms with on-site retail outlets, holiday products, horseback trail rides, bicycles, balloon and helicopter tours, and B&Bs situated on working farms – broadening the Yamhill ag-tourism experience.

Final Notes. While Yamhill County is in the midst of a major change in its tourism profile, it has yet to realize the economic benefits experienced by other potentially comparable destinations. Whether and how these benefits are realized depends on a clear planning direction – with special focus on attracting overnight stays as the catalyst to the ag-tourism *value-add.*

YAMHILL COUNTY TOURISM TRENDS

This profile begins with a review of tourism trends pertinent to Yamhill County – in the context of the rest of the state. Topics covered are the county's strategic location in Oregon, community demographics, travel data indicators, visitor spending patterns, tourism earnings and employment, and tourism-related tax receipts.

Oregon Location. Yamhill County is situated in the northwestern portion of Oregon's Willamette Valley at the edge of the Portland metro area. Major highways include 99W connecting to Portland and Highway 18 to the Oregon coast. The Interstate 5 freeway corridor can be accessed just to the east of Yamhill County – through Portland, Salem and in-between.

Figure 1. Yamhill County Setting

Yamhill County in Oregon

Yamhill County Cities

Source: ESRI GIS and E. D. Hovee & Company, LLC.

Community Demographics. With an estimated 93,100 residents as of 2008, Yamhill is the 10th most populous of Oregon's 36 counties – accounting for under 3% of Oregon's population. Yamhill County is part of the 6-county Portland Metropolitan Statistical Area (MSA) with a population of 2.1 million, including Clark County in Washington State. With adjoining Marion and Polk Counties added, the larger 8-County Consolidated Statistical Area has approximately 2.5 million residents.

There are 10 incorporated communities in Yamhill County, with the largest being McMinnville (31,700) followed by Newberg (21,700). Taken together, the county's incorporated cities account for 79% of population countywide, with rural unincorporated areas representing the remaining 21%.

Like virtually all of the counties of the Willamette Valley, Yamhill is both part of a metro area and at the same time has considerable rural, including agricultural, area. It is this combination of urban proximity and rural/agricultural values that creates many of the distinct tourism opportunities available to Yamhill County.

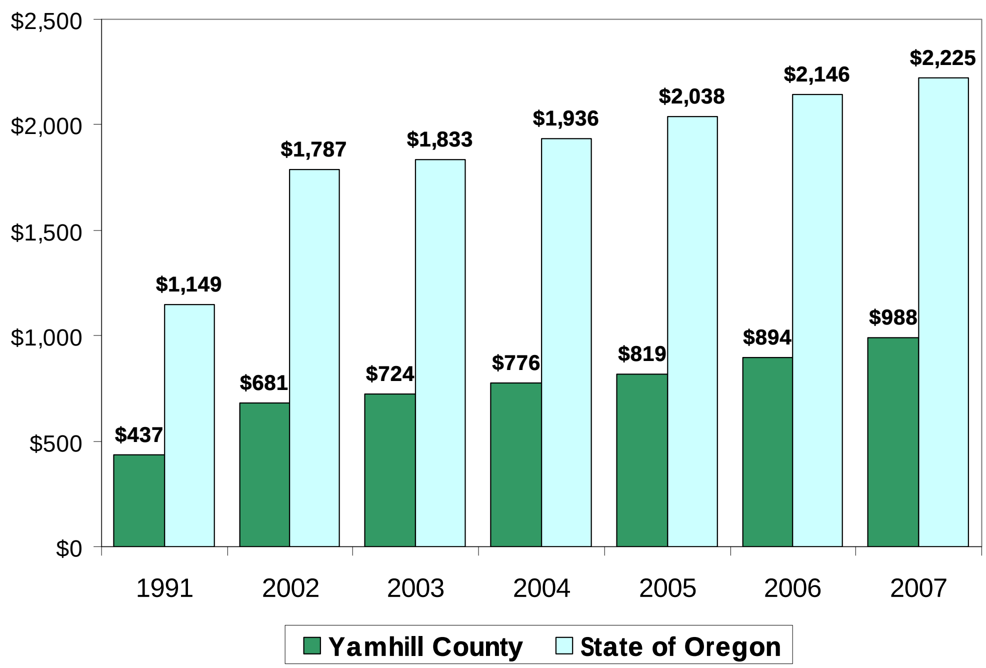
Oregon Travel Data. Estimates of direct economic impacts associated with traveler spending in Oregon are produced using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates.[2] Travel impacts consist of estimates of travel spending and the employment, earnings, and state and local taxes generated by this spending. These estimates are further segmented by type of traveler accommodation and by the type of business in which the expenditures occur.

The focus of the data is on the destination-specific impact of visitors of any origin travelling to and through Oregon for any purpose – business, pleasure, personal, medical, and educational. Also included is travel by Oregon residents to destinations in Oregon other than commuting or routine travel.

Information is available for the entire state of Oregon and for each county over the 1991-2007 time period, providing a useful context for subsequent discussion of prospective future visitor opportunities.

Yamhill & Statewide Visitor Spending. As of 2007, visitors spent an estimated $92 million in Yamhill County. This represents a 54% increase in tourism spending since 2002.

Figure 2. Visitor Spending Per Capita (1991-2007)



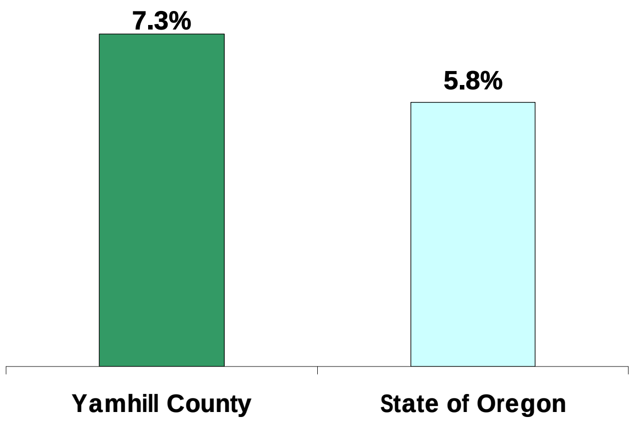
Note: Estimates for 2007 are preliminary.[3]

Source: Dean Runyan Associates, Population Research Center, PSU.

Among 36 Oregon counties, Yamhill County ranks 10th in population and 19th in total visitor spending – with per capita spending at $988 per county resident versus $2,225 spent by visitors statewide. With 2.5% of the state's population, Yamhill County captured only 1.1% of the state's tourism spending.

While starting from a relatively low base, tourism expenditures have experienced considerable growth. From 1991-2007, total direct tourism spending increased by an average of 7.3% annually in Yamhill County versus 5.8% statewide. However, as of 2007, per capita visitor spending in Yamhill County was still only 44% of the statewide average.

Figure 3. Annual % Change in Visitor Spending (1991-2007)



Note: Estimates for 2007 are preliminary.

Source: Dean Runyan Associates.

Visitor Spending by Traveler Accommodation. Analyzing the expenditure of visitors *by type of traveler accommodations* reveals, first, whether visitor trips are for the day or involve an overnight stay and, second, in the instance of an overnight stay, the type of facility in which the stay took place.

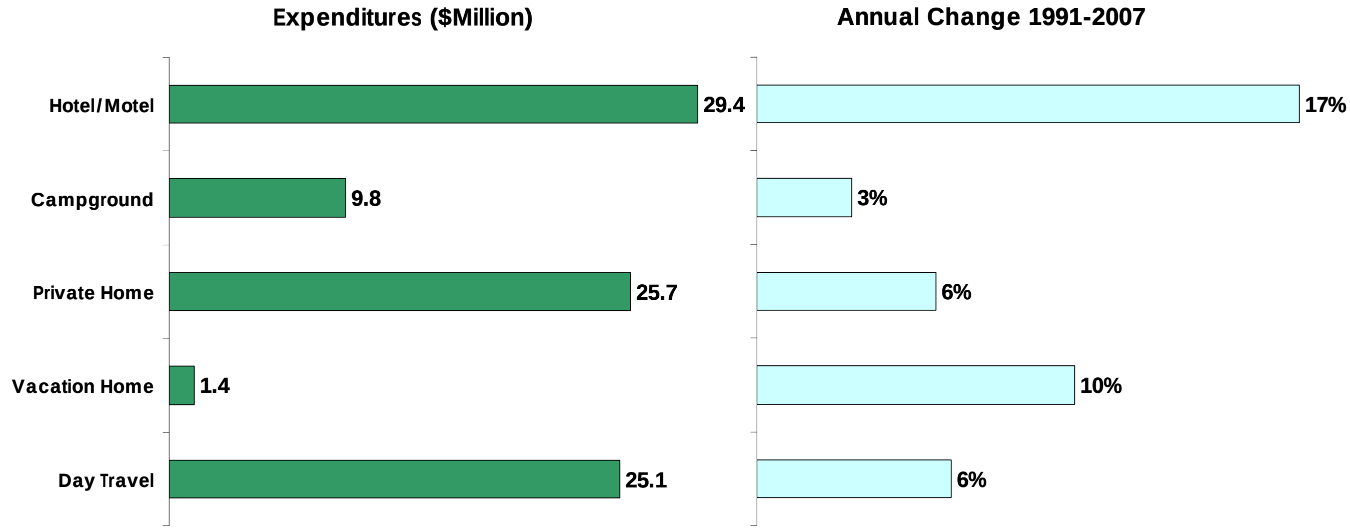
As of 2007, visitors to Yamhill County on a day-trip spend over $25 million, equating to 27% of visitor spending by accommodation. This is a somewhat higher proportion of day-trip activity than occurs statewide, where day-trips represent 23% of total visitor expenditures.

Overnight visitors lodging at hotels/motels are spending the most countywide (more than $29 million), followed closely by those who stay in private homes ($26 million). Proportionately, hotel/motel expenditures comprise 32% of Yamhill County's visitor spending versus 52% statewide. Over 28% of Yamhill County visitor expenditures are associated with stays in private homes with family or friends, compared to 14% of visitors statewide.

While historically underrepresented compared to the rest of the state, the proportion of visitor spending associated with travelers who stay in hotel and related establishments (and in vacation homes) has been growing rapidly in recent years. From 1991-2007, expenditures of lodgers have increased year-to-year an average of 17% at hotels/motels and 10% at vacation homes.

Conversely, growth of spending from those who stay elsewhere has been occurring at much lower rates of increase. Private home stays and day travel exhibit steady but much slower rates of growth, at 6% per year each between 1991-2007 – with expenditure growth related to campground use lagging further behind at a 3% annual average increase.

Figure 4. Visitor Spending by Type of Accommodation (2007)

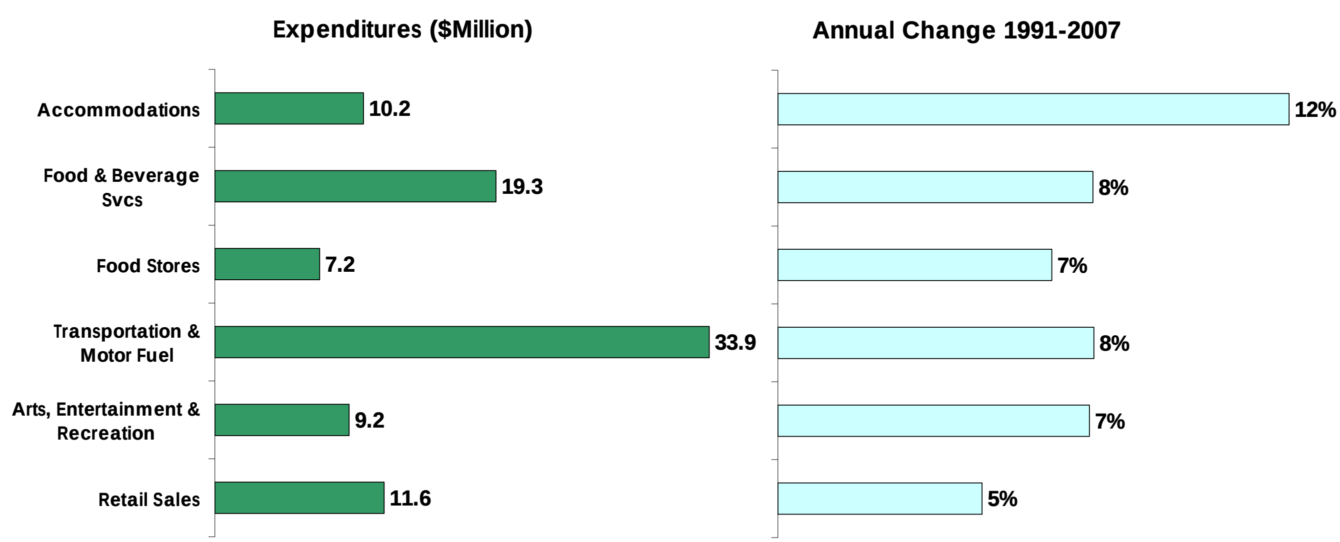


Note: Hotel/Motel includes bed and breakfasts and other commercial accommodations, excluding campgrounds, where a transient lodging tax is collected. Campground includes private and public facilities. Private homes are homes of friends or relatives. Vacation Home includes second homes.

Source: Dean Runyan Associates.

Visitor Spending by Commodity Purchased. A second way of evaluating visitor spending is *by commodity purchases.* Compared to the rest of the state, visitors to Yamhill County spend more of their travel dollars on groceries and ground transportation, and less for accommodations, dining, shopping, and arts, entertainment and recreation. The largest category of tourism-related spending in Yamhill County (as documented by Runyan) is for the combination of ground and air transportation and motor fuel, accounting for 37% of total expenditures versus 27% statewide.

Figure 5. Visitor Spending by Commodity Purchased (2007)



Note: Transportation includes ground and air (visitor only) transportation.

Source: Dean Runyan Associates.

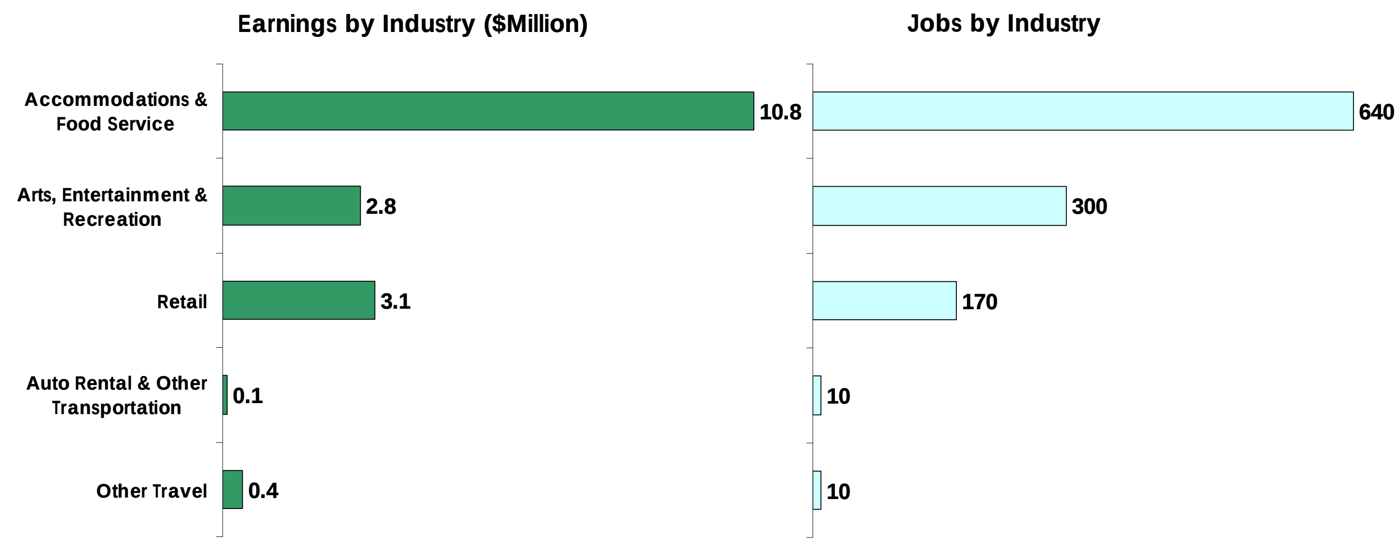
Accommodations account for only 11% of visitor spending in Yamhill County versus 18% statewide. However, this pattern is changing as expenditures for lodging have increased the most during the 1991 to 2007 time period, at an average of 12% per year. Annual increases in visitor spending of 8% have occurred in dining and transportation and motor fuel countywide. Expenditure growth has been slowest for retail sales, up by an average of only 5% per year.

Earnings & Employment. Earnings are defined as wage and salary disbursements, earned benefits and proprietor's income of owners and employees of businesses that receive travel expenditures. Only the portion of business receipts attributable to travel expenditures are included. Employment estimates represent the jobs associated with travel expenditure earnings, including full and part-time wage and salary workers and proprietors.

Yamhill County travel spending supported an estimated 1,120 jobs with earnings of $17.2 million in 2007. The county represents approximately 1% of the state's 91,100 travel expenditure jobs and associated $2 billion in earnings. Between 2002 and 2007, countywide total direct travel industry employment has increased 18% while tourism-related earnings have increased 37%.

The Yamhill County industry with the most travel-related jobs (at 640), as well as the highest earnings ($10.8 million), is accommodations and food service. Arts, entertainment and recreation has the second highest employment in the county, however the sector's earnings of $2.8 million fall behind retail with earnings of $3.1 million.[4]

Figure 6. Earnings & Jobs by Industry (2007)



Note: Retail includes gasoline. Other Travel includes resident air travel and travel agencies.

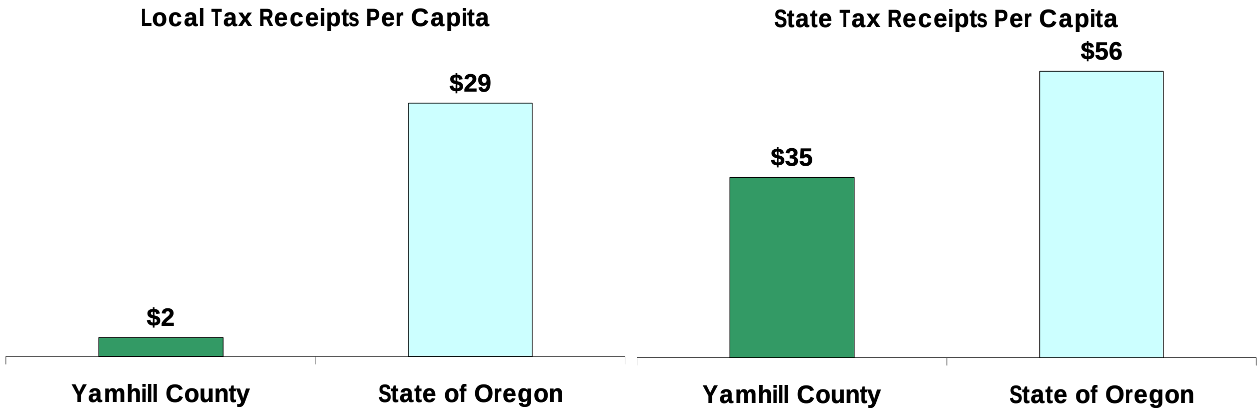
Source: Dean Runyan Associates.

Tax Receipts Generated by Visitor Spending. In Oregon, counties and municipalities collect local tax receipts on applicable travel-related purchases such as room taxes and auto rental taxes. State tax receipts accrue through state motor fuel taxes and business and personal income taxes attributable to travel expenditures.

Yamhill County's tax receipts in 2007 are estimated at $200,000 from local sources and $3.3 million from state, representing 0.2% of local travel-related taxes collected statewide and 2% of state taxes generated from visitor spending in Oregon.

When calculated on a *per capita* basis, Yamhill County local tax receipts are $2 per county resident, rising to $35 per county resident for state receipts. Compared to tax receipts per capita statewide, the county capita figure for local tax receipt is only 7% of the statewide figure and countywide revenues accruing to the state are 63% of statewide averages.

Figure 7. Local & State Tax Receipts Per Capita (2007)



Note: Estimates for 2007 are preliminary.

Source: Dean Runyan Associates.

This low volume of tax receipts received in Yamhill County can be attributed to a combination of three factors: a) relatively low overall visitor spending; b) less than proportional spending for lodging with associated lodging taxes; and c) less than full capture of lodging taxes as Newberg is the only jurisdiction currently levying a transient room tax.

TOURISM IN COMPARABLE COMMUNITIES

As follow-up to the presentation of tourism data specific to Yamhill County, a question that might be raised is: *How does tourism in Yamhill County compare to the state or to other potentially comparable tourism regions of the west coast?*

Comparable Communities Considered. To help address this question, we have compared Runyan tourism data for Yamhill County with the following established and emerging tourism regions (both wine and non-wine related):

- *Oregon Comparables:* Deschutes, Jackson and Lincoln Counties
- *Washington Comparables:* the Tri-Cities (Benton and Franklin Counties) together with Walla Walla and Yakima Counties
- *California Comparables:* Napa and Sonoma Counties

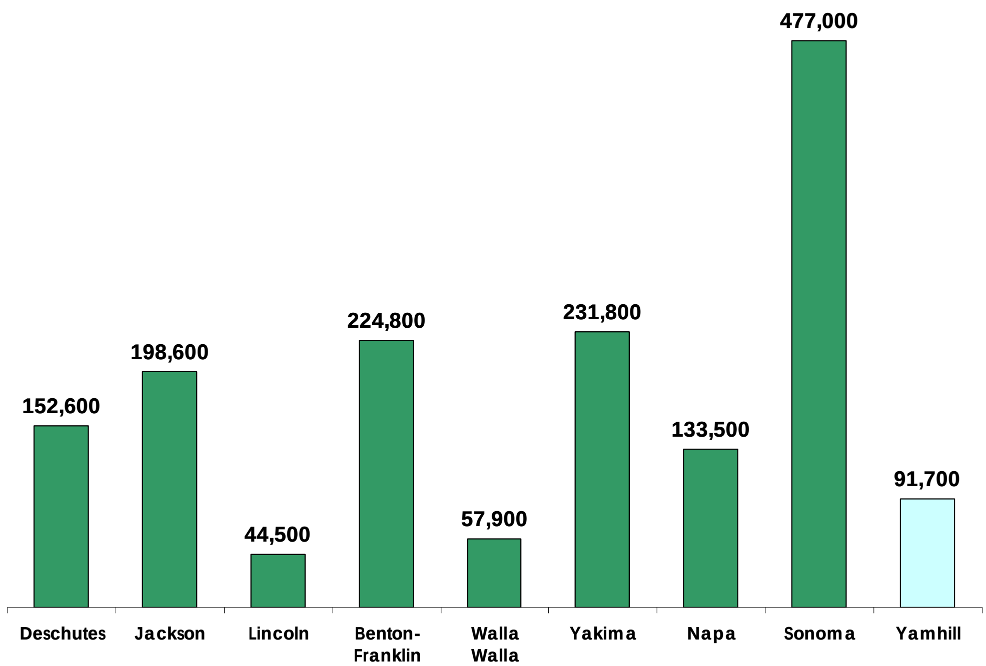
Comparisons have been made in terms of such statistical measures as total visitor spending, spending by commodity purchased, employment, and average wage.

Comparative Populations & Visitor Spending. It is perhaps useful to first get a sense of the scale of the geographies being compared. Not surprisingly, the populations of these nine comparable regions vary widely, from a low of 44,500 in Oregon's coastal Lincoln County to nearly 477,000 in California's Sonoma County.

With a 2006 population of 91,700 residents, Yamhill County ranks as the third least populated comparison region, after Lincoln and Walla Walla Counties. California's Napa County, with 133,500 residents, has a population base 46% larger than that of Yamhill County.

The most populous comparison, Sonoma County, has more than twice the population of the region next in size, Yakima County.

Figure 8. Population of Comparable Regions (2006)

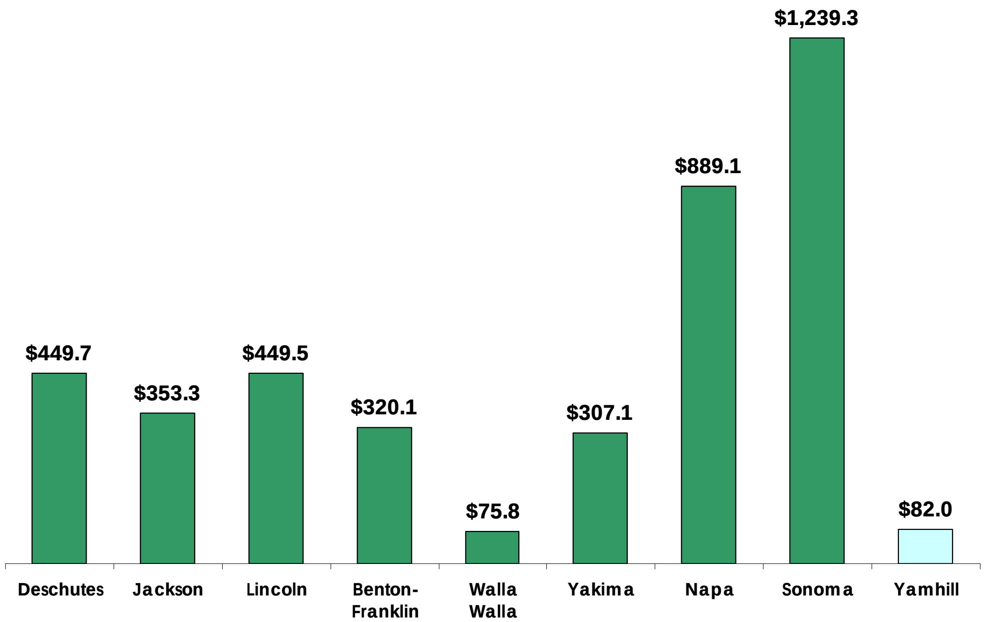


Source: Population Research Center, PSU; Washington Office of Financial Management; and California Department of Finance.

California's Sonoma County is not only the largest in terms of population, it also leads in terms of visitor spending, garnering more than $1.2 billion in 2006. Napa County follows, receiving $889 million, and then Deschutes and Lincoln Counties, each with nearly $450 million.

Visitors to Yamhill County spent $82 million, the lowest level of total travel expenditure in the comparable regions except for Walla Walla (as an emerging wine tourism area), receiving not quite $76 million. Currently, Yamhill County is capturing less than 10% of the visitor spending of California's most noted wine region – Napa Valley.

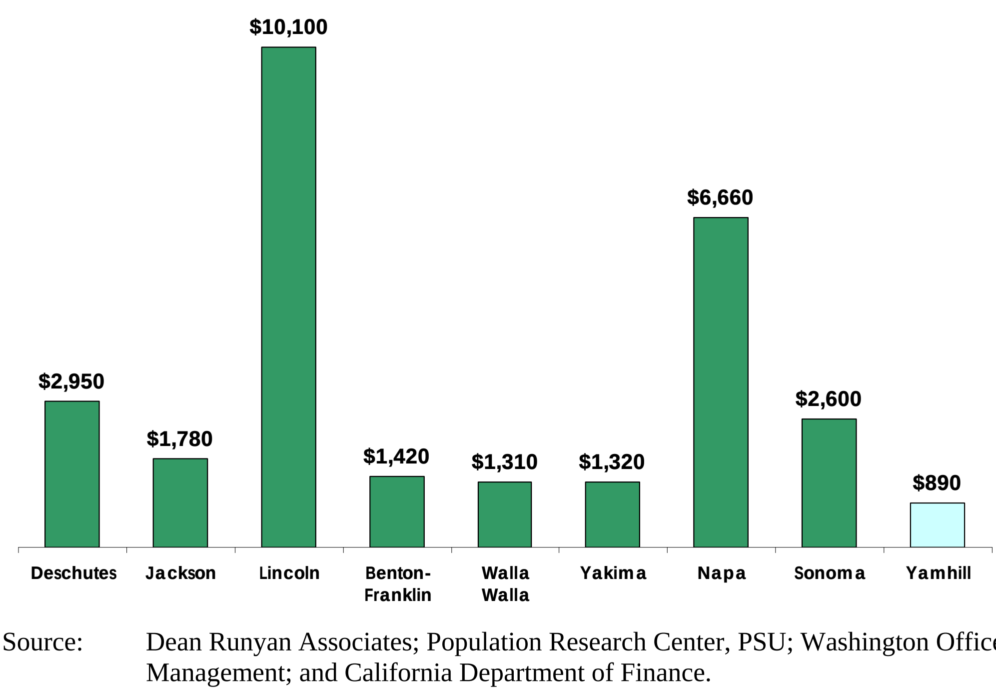
Figure 9. 2006 Visitor Spending in Comparable Regions (in millions of dollars)



Source: Dean Runyan Associates.

Comparative Per Capita Spending. Recognizing that these West Coast tourism destinations regions vary widely in population, we have standardized the remaining comparisons by using per capita or percentage distribution figures.

Figure 10. Comparable Region Visitor Spending Per Capita (2006)



Source: Dean Runyan Associates; Population Research Center, PSU; Washington Office of Financial Management; and California Department of Finance.

When compared with the eight regions, Yamhill County fares least well on a per capita basis – at only $890 in travel expenditures per local resident. On the other end of the spectrum is Yamhill's coastal neighbor Lincoln County – with visitors spending more than $10,000 per resident.

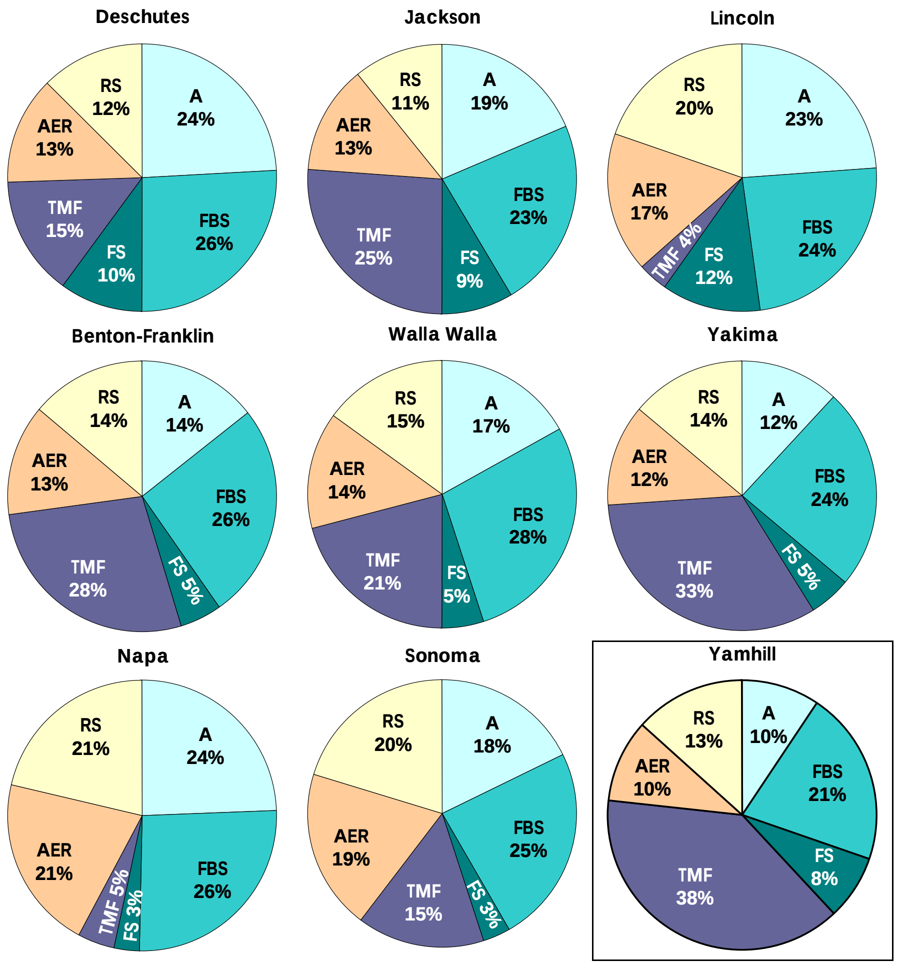
Napa County's visitor expenditures rank #2 on a per capita basis at $6,660 – more the than seven times Yamhill's per capita spending capture.

Comparative Visitor Spending by Commodity Purchased. Comparing the trends in commodities purchased by visitors to the comparative regions offers a more detailed look at the potential composition of opportunities for value-added enhancements to Yamhill County's tourism industry.

In Deschutes, Lincoln and Napa Counties (three of the four regions with the highest travel expenditures), accommodations represent almost 25% of visitor spending. By comparison, accommodations comprise only 10% of visitor spending in Yamhill County. In fact, Yamhill County's proportion of visitor spending for accommodations is lowest out of all the comparative regions.

Food and beverage services represent another key ingredient to tourism spending for major west coast tourism destinations, at about 25% in all the comparative regions. At 21%, Yamhill County has the lowest representation of food and beverage services.

Figure 11. Visitor Spending by Commodity



A = Accommodations | **TMF = Transportation & Motor Fuels**
FSB = Food & Beverage Services | **AER = Arts, Entertainment & Recreation**
FS = Food Stores | **RS = Retail Sales**

Source: Dean Runyan Associates.

Retail sales represent a third type of expenditure integral to the tourism destination regions with high levels of spending. About 20-21% of visitor spending in Lincoln, Sonoma and Napa Counties consists of purchases at retail establishments. Yamhill County falls about in the middle of the spectrum with 13% of travel expenditures attributed to retail sales – somewhat above Jackson and Deschutes Counties in Oregon.

A fourth spending category representing a significant proportion of regions with above average overall expenditures is arts, entertainment and recreation. Napa County has the highest representation (21%), followed closely by Sonoma (19%) and Lincoln (17%). Again, Yamhill County has the lowest proportion of all the regions considered, at 10% of total visitor spending.

Yamhill County's leading expenditure commodity is transportation (ground and air) and motor fuel, comprising 38% of total spending. Transportation and motor fuels represent 25% or more of visitor spending in Yakima, Benton-Franklin and Jackson Counties. In Lincoln and Napa Counties, transportation and motor fuel expenditures garner 4-5%.

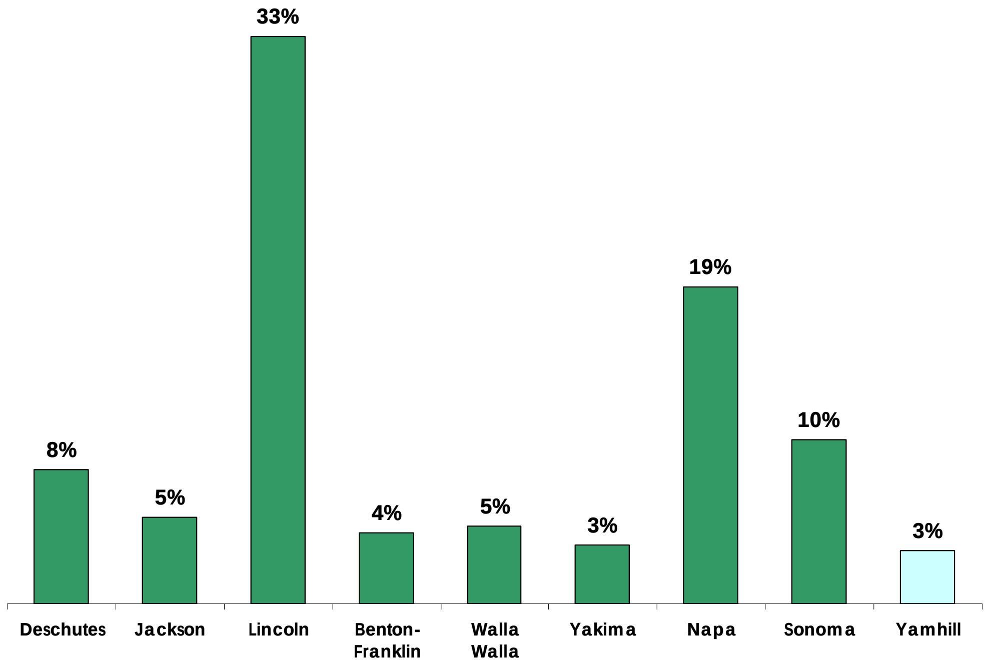
The greatest proportion of spending at food stores (or groceries) stands at about 12% of the visitor's dollar in Lincoln County. Between 8-10% of expenditures in Yamhill, Jackson and Deschutes Counties are at food stores. In the remaining regions, food store purchases represent 5% or less of total spending.

In effect, Yamhill County visitors are disproportionately spending the most for the categories offering the least local economic stimulus – transportation services and grocery purchases. By comparionson, Yamhill remains underrepresented with key value-added sectors of accommodations, retail, food and beverage, other retail sales, and arts, entertainment and recreation.

Tourism-Related Employment & Average Wage. Out of total Yamhill County covered employment, tourism-related jobs represent 3%. While all of the comparative regions exhibit higher proportions of tourism jobs, Yakima, Benton-Franklin, Jackson and Walla Walla Counties are also in the range of Yamhill County, with tourism-related jobs falling between 3-5% of total countywide employment across all job sectors.

Tourism jobs represent 33% of Lincoln County's total employment – by far the largest component of the job base for any of the comparison regions considered. Napa County comes in at #2 – with 19% of total employment accounted for by its tourism industry.

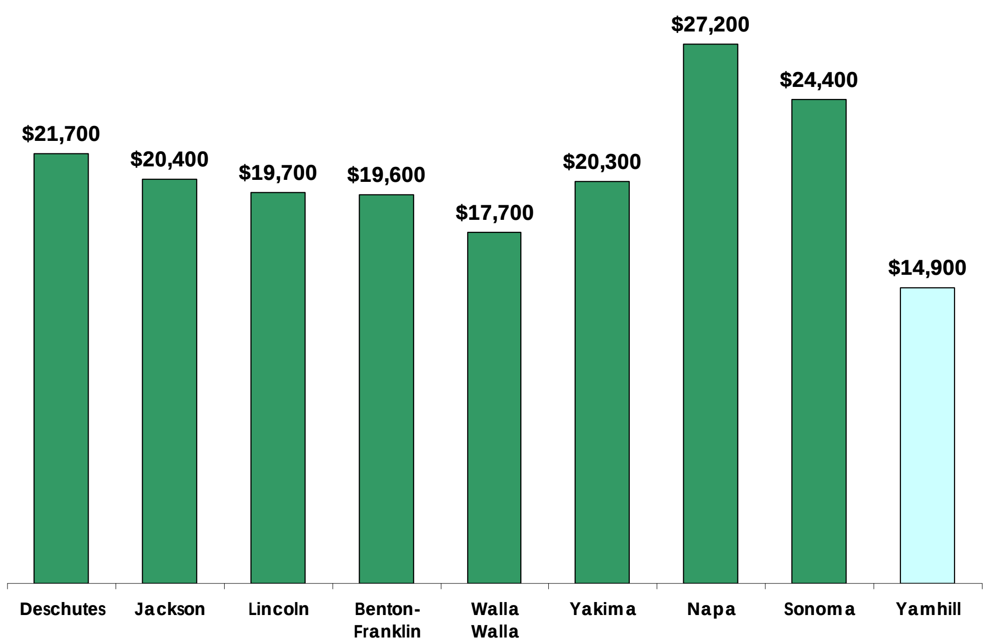
Figure 12. Tourism Jobs as a Percentage of Total Regional Employment (2006)



Source: Dean Runyan Associates; Oregon Employment Department; Washington Employment Security Department; and California Employment Development Department.

Tourism jobs can offer important seasonal and entry-level work – as for students and others seeking part-time employment. However, tourism-related pay appears to vary widely among the nine regions, with Yamhill providing by far the lowest average industry wages at $14,900.

Figure 13. Average Wage Per Tourism Job (2006)



Source: Dean Runyan Associates.

Comparative region average tourism wages range from $17,700 in Walla Walla County to $27,200 in Napa County.

In Yamhill County, tourism-related workers earn about 45% of the countywide average wage for all employment sectors. By comparison, the average tourism wage represents over 70% of total average wages in both Lincoln and Yakima Counties, and 64-67% of region-wide wages in Jackson, Deschutes and Napa Counties. In Benton-Franklin, Walla Walla and Sonoma Counties, average travel industry wages comprise between 50%-60% of regional average wage levels.

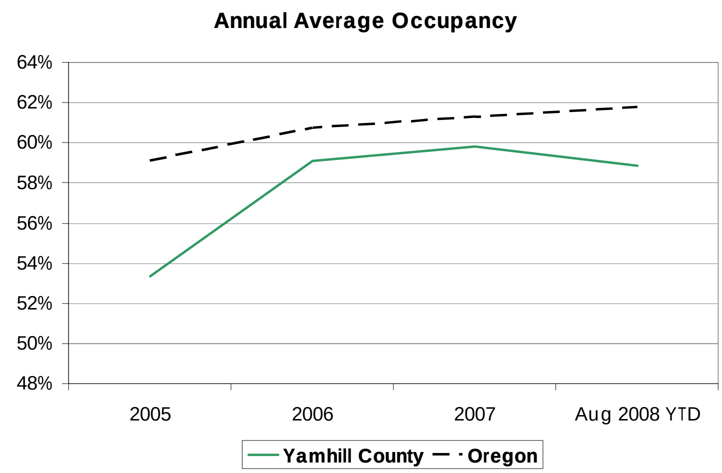
LODGING TRENDS

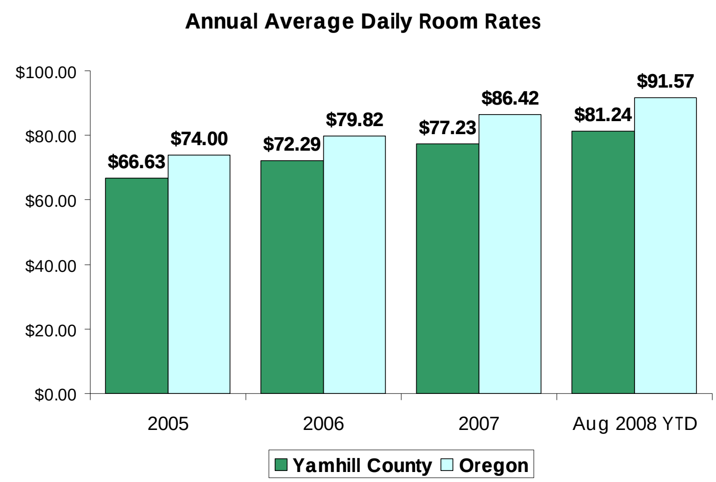
Lodging can be considered as a prime *bellweather* of local tourism activity. In Yamhill County, lodging accounts for about 11% of visitor spending versus 18% statewide and 25% for several comparable visitor destination markets profiled.

Total spending is considerably greater for communities that capture overnight versus day travel. And lodging taxes are often a major contributor to tax receipts received from tourism (especially in a state without a sales tax).

Comparative indicators of lodging activity for Yamhill County and the state of Oregon are noted as follows:

Figure 14. Yamhill County & Oregon Lodging Comparisons (2005-August 2008)





Source: Smith Travel Research.

- Yamhill County has an estimated 656 overnight lodging rooms distributed across 42 properties (averaging 16 rooms per property). The largest single hotel is the Red Lion Inn & Suites McMinnville with just 67 rooms.
- The Yamhill lodging inventory (detailed by the appendix to this report) includes 12 hotel/motel properties (535 rooms) and 30 bed & breakfasts (with 121 rooms).
- Average size of a hotel/motel is 45 rooms, versus an average of 4 rooms for B&Bs.

- Throughout the state, an inventory of competitive properties (conducted by Smith Travel Research) indicates a total of 60,387 rooms in 942 properties. The largest property in Oregon is Hilton Portland & Executive Towers with 782 rooms.
- Yamhill County occupancies have been relatively stable but not outstanding, lagging statewide figures for all of the years profiled since 2005. Occupancies for this year through August 2008 averaged not quite 59% countywide versus 62% statewide. Lower average occupancies locally can be attributed, in part, to dependence on seasonality of tourism activity, with less supplemental business and convention/meeting travel than generally occurs statewide.
- Occupancy for August 2008 in Yamhill County was 72.1% – somewhat below the statewide average of 77.4%. To date, 2008 occupancy appears to be under comparable 2007 levels. Based on the data available, Yamhill County occupancies peaked in August 2006 at 77.7%.
- As noted, there is considerable seasonality of occupancy among Yamhill County properties – ranging from as low as 36% occupancy during winter months to nearly 78% in the summer. Friday and Saturday evenings are the strongest nights of the week – reflecting demand for quick urban get-aways and recreational travel including wine touring.
- Coupled with moderate occupancy levels, Yamhill County room rates also are about 11% below statewide average rates. As of August 2008, the average daily rate (ADR) for the county was just over $81 compared to nearly $92 statewide. Relatively low room rates are somewhat surprising since Yamhill County has become known as a destination for high end travelers visiting wineries.

THE WILLAMETTE VALLEY CONTEXT

A detailed statistical profile of the Yamhill County visitor is not directly available for Yamhill County. However, considerable research has been conducted for the larger Willamette Valley region – as a starting point for depicting visitors of interest to Yamhill County as well.

The State of Oregon commissioned the *Willamette Valley Region: Regional Analysis from the 2004/2006 Oregon Visitors Studies*, a study of the overnight visitor market statewide and within Willamette Valley, as one of seven researched travel regions.[5] According to the study, 4.1 million visitors to the state of Oregon in 2006 spent time in the Willamette Valley region during their travels.

Trip Purpose. More than three-quarters (3.1 million) of these Willamette Valley visitors stayed at least one night in the region, while the remaining 24% (1 million) passed through the region on a day-trip. Regardless of whether these visitors lodged in the region, the overall purpose of their travels can be depicted as follows:

- 56% (2.3 million) to visit friends and relatives.
- 37% (1.5 million) for pleasure.
- 7% (0.3 million) for business.

Visitor Profile. The profile of persons visiting Oregon's Willamette Valley is further detailed by the following observations.

Tourist Demographics:

- Visitors hail primarily from west coast states – led by Oregon (36%), Washington (35%), and California (11%) – followed by Texas (4%), Maryland (3%), and Illinois (2%).
- The communities which these visitors call home are both highly urban and not so – ranging in size from 2.5 million or more residents (36%) to less than 250,000 residents (37%).
- Substantially more males (59%) than females (41%) traveled through the region – a somewhat surprising observation since business travel constitutes only a small share of Willamette Valley visitation.
- Visitors are relatively mature – with an average age of visitors of 44.7 years, but with the 25-44 age cohort representing 42%, and an additional 34% ages 45-64, 16% age 65 and over, and 8% ages 18-24.
- Visitors appear to come from traditional families more so than the total population – as 73% are married versus only 13% divorced or widowed and 14% never married.
- Households of visitors are about evenly split with half having children within the full spectrum of ages under 18 – and the other 50% with no children under age 18 at home.
- Willamette Valley visitors are extremely well-educated – 53% have graduated from college while another 26% have a post-graduate degree.

Visitor Economics:

- Visitors are predominately employed full-time (59%) and part-time (13%), with another 28% retired or never employed. Manager or professional occupations represent 55% of the employed, with 15% other white collar, 22% blue collar, and 8% armed forces or other.
- Based on this profile, it is not surprising that the strongest representation of visitors have incomes above $75,000 (39%), followed by incomes of $50,000-$74,999 (31%), $25,000-$49,999 (13%), and under $25,000 (17%).

Travel Characteristics:

- Visitor party size is relatively large – with a mean of 2.8 adults and 1.0 children (likely reflecting the major trip purpose of visiting friends and relatives).
- 73% of the visitors were traveling with a spouse or partner, and 39% were with children.
- The Internet was used by 40% to plan the trip and by 57% to book reservations.
- On average, 2.2 nights were spent in the Willamette Valley.
- The majority of lodging consisted of 27% of trip nights with a friend or relative, 24% in a hotel, 16% in a motel, and 8% at an RV park site. Another 4-6% stayed in either a rented house or cottage, wilderness camp, timeshare unit, or campground. Approximately 1% sojourned at either a cottage inn or bed and breakfast.

Visitor Activities. The study by Longwoods International separates the activities of visitors into three groups: experiences and sightseeing, entertainment, and sports and recreation.

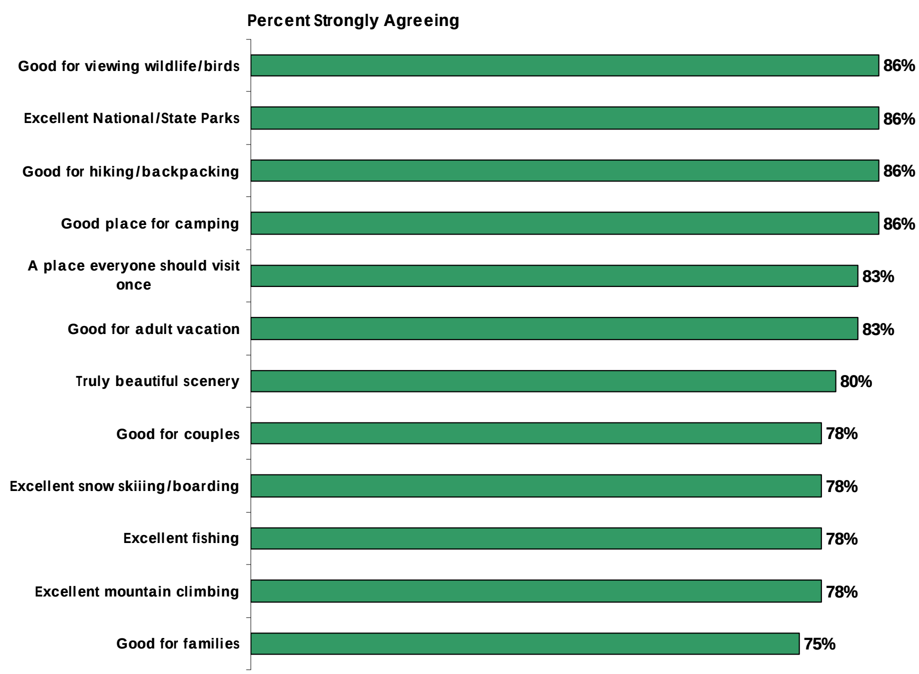
The top experiences and sightseeing were lakes and rivers by 61% of visitors and visiting family and friends by 60%. Between 40% and 50% of visitors went to a national or state park, natural environment, wilderness area, small town or village, or to the mountains. Other experiences of note were visits to historic sites or museums by 33%, short guided tour by 17%, winery or vineyard by 8%, art gallery by 5%, day cruise by 5%, and micro-brewery by 2%.

For entertainment, the most popular activity was shopping by 42% of visitors. Between 10% and 15% of visitors were involved in arts and crafts, unique local foods, an aquarium, fair/exhibition/ festival, or a bar/nightclub. Less than 10% of visitors attended cultural events/plays/exhibits, whale watching, elegant restaurants, entertainment/shows, local music, or theater/dance/ symphony.

Sports and recreation activities were lead by viewing of wildlife and birds by 28% of visitors, followed closely by swimming in a pool by 26%, and then hiking and backpacking by 20%. Another 15% used a sauna or hot tub. Less than 10% of visitors fished, golfed, bicycled, boated, water skied, rode horses, attended a professional or college sports event, or rafted a river.

Quality of The Visitor Experience. Of particular interest is Longwoods International's analysis of visitor priorities and whether expectations were met during their travels in the Willamette Valley region.

Figure 15. Visitation Strengths of the Willamette Valley Region (2006)

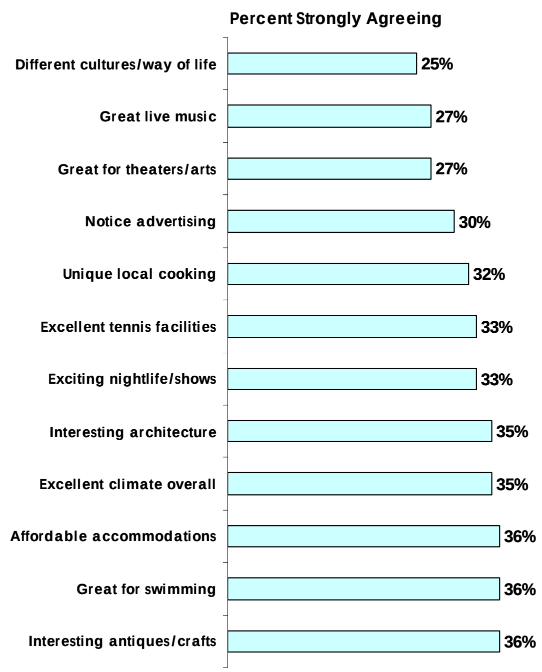


Source: Longwoods International, *Willamette Valley Region: Regional Analysis from the 2004/2006 Oregon Visitors Studies*, September 2007.

As illustrated by the preceding graph, reported strengths of the region are viewing wildlife and birds (cited by 86% of respondents), followed by national and state parks, and hiking, backpacking and camping. The region is thought of as a good travel destination both for couples and families.

On the flip side are the region's perceived weaknesses, represented by the weak approval ratings as indicated by the following chart. The *least positive* characteristic of the Willamette Valley is a perceived lack of different cultures, followed by less than stellar ratings for great live music and theater and arts. Only 32% of visitors agreed they experienced unique local cooking and only 36% reported that they found affordable accommodations.

Figure 16. Visitation Weaknesses of the Willamette Valley Region (2006)



Source: Longwoods International, *Willamette Valley Region: Regional Analysis from the 2004/2006 Oregon Visitors Studies,* September 2007.

Relavance to Yamhill County. A question can be raised as to whether and to what extent this profile of travel throughout the Willamette Valley reliably depicts visitation to Yamhill County. In the absence of comparable data specific to Yamhill County, it is difficult to make definitive statements. However, two general observations are offered as a basis for further research and testing with development of a more clearly articulated ag-tourism program for Yamhill County:

- Most likely, the profile of visitation to Yamhill County historically parallels that of the rest of the Willamette Valley – as evidenced by lack of substantial overnight lodging.
- However, this profile is also likely changing more rapidly than elsewhere in the Willamette Valley – due to the rapid emergence and prominence of wine-related tourism, a subject to which this profile now turns.

OREGON & YAMHILL WINE TOURISM

Considerable research has been conducted in recent years to assess the linkage between state and countywide winery activity and resulting tourism benefits. While not to be construed as a definitive statement regarding all ag-tourism activity, wine tourism can be viewed as the leading indicator of opportunities now available to support added tourism activity both locally and regionally.

This portion of the analysis looks at three different levels of wine-related tourism: statewide and local impacts of the wine industry, followed by summary of observations related to wine-related lodging potentials in Yamhill County.

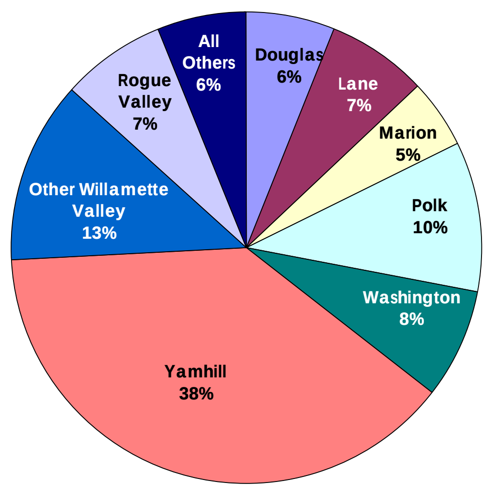
Statewide & Local Impacts of Wine & Wine Grape Industries. Full Glass Research completed a report in January 2006 on *The Economic Impact of the Wine and Wine Grape Industries on the Oregon Economy*. The most notable observation is indicated by the chart below – showing that Yamhill County dominates winery activity in Oregon (with 38% of all wineries statewide).

Other observations pertinent to Yamhill County tourism can be summarized in terms of such indicators as overall winery activity, value of wine grapes, broad economic impacts, and impacts specific to tourism.

Wineries in Oregon:

- Since the establishment of Oregon's viticulture in the 1960s, "grapegrowers and wineries have focused on modest quantity and very high quality." In 2004, Oregon ranked 19th as a wine producing state while it was the 27th in terms of statewide population.
- The Oregon Agricultural Statistics Service estimates 247 wineries were located in Oregon as of 2004. These are often described as "brick and mortar" wineries, though not all are crushing or making wine; some serve as offices or outlets for growers generating the wine at a separate facility.[6]
- On a *per county* basis, Yamhill County had a significant 38% share of wineries statewide (as of 2004). The next largest location of wineries is represented by an aggregation of five counties in close proximity to Yamhill (Benton, Clackamas, Linn, Multnomah and Polk), representing 23% of the state's total. Polk County, with 10% of Oregon wineries, is second to Yamhill in terms of wineries in a single county.

Figure 17. Wineries by County



Notes: Other Willamette Valley includes Benton, Clackamas, Linn and Multnomah Counties. Rogue Valley includes Jackson and Josephine Counties. All Others include Clatsop, Deschutes, Hood River, Tillamook, Wasco, Umatilla and Union Counties, plus coast.

Source: Oregon Agricultural Statistics Service.

Value of Wine Grapes:

- Oregon's wine grape crop is highly valued for its unique qualities. In 2004, wine grapes harvested statewide ranked fourth behind pears, hazelnuts and cherries in terms of value of fruit crop commodity. Concurrent research completed for the Yamhill County Agri-Business Economic and Community Development Plan indicates the value of Oregon's wine grape production has increase nearly 63% from 2004 to 2007.[7]
- Prices per ton of Oregon wine grapes increased steadily from 1994 to 2004, due to greater volume, increased prestige and prices for Oregon wine, emphasis on the high value Pinot noir varietal, and increased demand for higher end wines.[8]

Economic Impacts:

- The economic value of all wine-related activities in Oregon both directly and indirectly was over $1.4 billion in 2004.
- As of 2004, 52% of the wine produced in Oregon was consumed in-state. "In general, Oregon lags California and Washington in terms of expanding market share outside the state borders."
- Of the 4.7 million cases of wine purchased in Oregon in 2004 by residents and visitors, 14% was produced by wineries in Oregon. Oregon sold an estimated $370.8 million in retail sales of wine, not including direct-to-consumer sales from Oregon wineries. Total revenues for Oregon wineries were approximately $157.8 million.
- Many high end and smaller wineries derive a significant portion of their revenue from "direct sales to consumers, via tasting rooms, by mail or websites." Full Glass conducted a survey of Oregon wineries and found an estimated 13% of wine produced in Oregon was sold direct, accounting for 24% of revenues to Oregon wineries. By avoiding wholesale and retail markups, wineries receive higher margins from direct sales.
- Estimates of employment and average wages directly attributed to the wine industry are provided by county, as of 2004.[9] Multnomah County had the most wine industry employment (1,080 jobs) in a single county, coupled with the lowest average wage of $13,500. Yamhill County was next in line in terms of employment with 700 jobs but generated wages that, on average, were higher than any other single county at $28,600.

Wine Industry Impact on Oregon Tourism:

- Expenditures from hotel, restaurant and other wine industry tourism business statewide totaled an estimated $92.2 million, of which $60.5 million is attributed to out of state travelers.[10]
- Full Glass Research indicates wine industry tourism in Oregon directly employed at least 443 workers with a payroll of over $9 million.[11]
- Oregon wineries receive approximately 1.48 million visits each year, with 49% of the visitors Oregon residents and 30% on a day-trip.
- According to research by Travel Oregon, the typical leisure trip involves a party of 2.6 adults spending an average $110 for day-trips and $240 with an overnight stay. Approximately 5% of overnight leisure travel in Oregon includes a winery visit.

Two major events hosted in Yamhill County center around viticulture and serve to illustrate the broader economic impacts to of winery activity to the county and state. These are the International Pinot Noir Celebration (IPNC) for wine and food lovers and Oregon Pinot Camp sponsored by Oregon Pinot producers for wine industry experts.[12]

The IPNC is a ticketed event giving guests the chance to "taste, learn, and dine with the luminaries of the wine world" over the last weekend in July. The celebration is embarking on its 24th year in 2009.[13] According to Full Glass Research's report, IPNC draws at least 650 attendees and 70% are from outside the state. A related Sunday event draws another 600+ attendees. The total estimated impact of the celebration is more than $750,000 each year.

Oregon Pinot Camp is where "fifty wineries from throughout the state join together to bring this adventure into Oregon Pinot noir to invited members of the wine trade." The camp typically includes four days of workshops, seminars and wine tasting. The Full Glass report estimates 250 attendees with a total impact of more than $150,000.

Linking Wine Tourism to Lodging / Resort Potential. As is illustrated by the travel impact data, the availability of lodging is a major determinant of the degree to which Yamhill County captures the economic benefits of tourism-related activity. Over the last 20 years, two studies have been identified as assessing the specific linkage between wine tourism and lodging in Yamhill County.

The first is a 1988 report prepared by Intra titled *A Feasibility Study for Destination Resort Development: Yamhill County, Oregon.* While somewhat dated and prepared in earlier years of Oregon's wine industry, this report nonetheless provides observations that serve as useful context for discussion of lodging needs for wine-related tourism. A key overall conclusion of this now 20-year old report was simply that:

> … the emerging wine industry provides an excellent basis for future tourism development in Yamhill County.

The Intra report noted that a key distinctive of Yamhill County compared to other established wine-growing regions including Napa Valley is its pastoral setting with vineyards amid a diverse "agricultural landscape" of fruit orchards, nut groves, berry patches, and wheat fields. While not perceived of specifically as a tourism destination, Yamhill County's close proximity to Portland was cited as a second important factor in the potential for local tourism development.

However, the Intra report went on to state that "if visitors are to discover the mood and magic of Yamhill County's Wine Country, they must be diverted from the main thoroughfares." Also noted was that overnight accommodations are limited in Yamhill County with very few directly related to wine tourism "in location or character."

This 1988 study concluded by offering *two alternative concept options* for further consideration: (1) a major, self-contained destination resort sponsored by a private development firm; and (2) building Yamhill County as a visitor destination based more on using existing business community resources as "a richer, more colorful, travel experience than any stand-alone destination resort could offer."

The Rural Wine Lodging Option. Many of these themes came up again 18 years later with a 2006 assessment of the *Characteristics of a Luxury Wine Country Hotel in Yamhill County, Oregon* prepared by ECONorthwest. This report was prepared in the context of a site specific proposal for a wine-themed lodging and resort property – proposed to be located outside of an incorporated community. While conducted for a private developer for a then-proposed luxury wine hotel, the public report provides a number of observations that remain important to address in some fashion with this ag-tourism planning process.

The wine country hotel report was predicated on the concept of developing a "luxury wine country hotel based on comparable and competing facilities in California."[14] Key observations and findings suggested by this 2006 study include the following:

Market Demographics:

- The market for wine tourism is growing, due in large part to the increased consumption and interest in wine both regionally and nationally. Specifically cited by the report is the observation that, over the last 35 years, U.S. wine consumption per adult has nearly tripled.
- "Core" wine consumer households are identified by the 2006 study as having above average incomes (of $100,000 per year or more) – also identified as the fastest growing income segment for Oregonians.
- Overall, core wine drinkers (and tourists) are characterized as "older, better educated, and more likely to live in suburban and urban areas than the average American."
- The wine tourism market is underdeveloped in Yamhill County and statewide because of a lack of wine country destinations similar to those of Napa Valley.

Wine Tourism Preferences:

- Wine tourists are described as seeking "luxury accommodations similar to venues found in Napa Valley and elsewhere."
- These accommodations are viewed as offering amenities "similar to a private country estate that provides opportunities for personal indulgence, exploration, romance and relaxation."
- The absence of 4/5 star hotels in the urban areas of Napa Valley is cited by the ECONorthwest study as indicating that urban areas are not an adequate substitute for a rural setting. The report goes on to note that luxury wine hotels "demand more isolated rural settings that foster a feeling of seclusion and relaxation."

Oregon Comparables?

- Oregon is indicated as having no 4 or 5 star accommodations or restaurants, with none of the state's better hotels located in the state's wine country. The closest 3 star hotels (as rated by the 2006 Mobil Travel Guide) are in Lake Oswego or Portland.
- Although bed and breakfast (B&B) places are popular both in Oregon and California wine tourism areas, they are described as "niche products" appealing to only a portion of the potential tourism market. The ECONorthwest study states that: "Most tourists prefer small hotels and resorts where there is more privacy and a wider array of services."[15]

- Also acknowledged is that financial feasibility of Oregon based wine resort properties will be more difficult to achieve than in Napa Valley because of greater seasonality with likelihood of occupancies below 50% for several months of the year. This might be offset, in part by meetings and special private events during the off-season and including indoor features with the wine country hotel.[16]

Currently Missed Opportunities:

- Agricultural tourism is portrayed by this 2006 report as stimulating "more spending at Portland's hotels, spas, restaurants, shops, and galleries than it does in wine country itself."
- Added ag-tourism dollars are "likely going unspent because Oregon's wine country is inconvenient for tourists."

Prospective Future Opportunities:

- Added wine country tourism is indicated as offering potential to stimulate awareness and demand for Oregon wines – by acting as a "marketing and promotion mechanism for the industry."
- Agricultural activities generated are viewed as serving to further increase the value of farmland in Yamhill County.
- A successful wine country hotel could serve to support a range of local businesses cited to include wineries, produce farmers, and restaurants.

Facility Concept:

- Proposed with the 2006 wine country hotel report was an "appropriate development" with approximately 5-15 acres used for buildings and developed site area including landscaping, recreation facilities, parking, and 30-50 acres left undeveloped.
- Also noted is that hotel, restaurant, spa, and other facilities were recommended to be housed in separate buildings tied together with footpaths as a means to serve both hotel guests and day visitors.

The Urban Wine Lodging Option. An alternative to the rural setting embodied by the previously mentioned proposal is the concept urban destination hotel – the first example of which is now under construction in Newberg as the Allison Inn & Spa. The 85-room hotel is planned to anchor Springbrook, a 433-acre residential and commercial development of Joan and Ken Austin.

The Allison Inn & Spa is explicitly aimed to attract and capture overnight travel demand from wine country visitors. As described by one winery owner:

> *The Allison is really going to raise the bar in terms of what facilities need to provide to attract and keep high-end wine tourists. Great wine regions need great ancillary facilities to round out their options. With The Allison, Oregon is finally starting to see some of that.*[17]

In addition to serving wine country tourists, the hotel will have capacity to also host events such as weddings, receptions and meetings. The property also features a "signature restaurant" together with acres of gardens and a working vineyard. The Allison is projected to be ready for opening in August 2009.

What Approach for Yamhill County? This ag-tourism profile is not intended to resolve the question of whether lodging to serve Yamhill County's burgeoning wine-related tourism is best situated within urban or rural settings, or both. Rather, the intent has been to provide background information of value as this discussion unfolds – from market and public policy perspectives.

OTHER INDICATORS OF YAMHILL AG-TOURISM

As evident by the data presented in this profile, the wine industry is an integral if not the most visible component of Yamhill County's emerging ag-tourism industry. However, ag-tourism does not end with winery-related activity. While quantitative data is not readily available for these other activities, a few examples help to illustrate the diversity of agriculture and related tourism opportunity available:

- The Yamhill County Visitors Guide lists seven *farms with retail outlets* on-site to sell their agricultural products to the public. Reflecting the seasonality of the products, the months and hours of operation vary considerably between these facilities.
- *Holiday products* like pumpkins and Christmas trees, wreaths and greenery are sold by eight farms in the county. While only one farm appears to grow and sell both pumpkins and Christmas greenery, there is a holiday culture infused with these agriculture products. Purveyors of holiday ag products offer pre-harvested or u-cut/u-pick options, refreshments, restrooms and gift stores. Pumpkin patches augment with other attractions such as hay rides, mazes of corn or hay, rope swings, and giant carnival slides.
- *Horseback trail rides* are offered by private business operations such as the Flying M Ranch and Wine Country Farm. Bicycle, balloon and helicopter tours of wine country are also available.
- A number of *bed and breakfast* facilities are located on the site of a working farm. As an example, Abbey Road Farm Bed & Breakfast notes on it's website the opportunity to have a "real farm experience"; an interested guest is occasionally allowed to participate in real work tasks in the garden, orchard or stables.

This should be viewed as a *starter list,* to be supplemented from the results of other research with this ag-tourism planning project including stakeholder interviews being conducted through Barney & Worth, Inc.

SUMMARY NOTES

From multiple sources, this ag-tourism profile indicates that Yamhill County is in the midst of major change – from a pattern of relatively low level of family-oriented travel similar to the rest of the Willamette Valley toward a much more robust form of visitation driven by the success of Yamhill County's world recognized wineries and offering greater prospect for economic benefit.

However, Yamhill County is not yet receiving the economic benefits from the ag-tourism nexus that have been experienced by other potentially comparable visitor destinations. Whether and how these economic benefits are realized can be expected to depend on strategic intent and resulting planning direction – with particular focus on how best to attract overnight stays that serve as a catalyst for the ag-tourism *value-add* potential now on the horizon.

APPENDIX. DETAILED DATA TABLES

Figure 18. Yamhill County & Statewide Population Trends (2000-2007)

	Census 2000	2007	% Chg 2000-07
Amity	1,478	1,480	0.1%
Carlton	1,514	1,755	15.9%
Dayton	2,119	2,495	17.7%
Dundee	2,598	3,040	17.0%
Lafayette	2,586	3,730	44.2%
McMinnville	26,499	31,665	19.5%
Newberg	18,064	21,675	20.0%
Sheridan	5,561	5,865	5.5%
Willamina (part)*	1,128	1,165	3.3%
Yamhill	794	820	3.3%
Unincorporated	24,642	19,395	-21.3%
Yamhill County	84,992	93,085	9.5%
Portland-Vancouver MSA	1,918,009	2,149,020	12.0%
Salem MSA	347,214	378,575	9.0%
State of Oregon	3,421,399	3,745,455	9.5%

Notes: As defined by the U.S. Census Bureau, Portland-Vancouver MSA includes Clackamas, Columbia, Multnomah, Washington and Yamhill Counties in Oregon and Clark County, Washington. Salem MSA includes Marion and Polk Counties.

Source: U.S. Census Bureau; Population Research Center, PSU; and Washington State Office of Financial Management.

Figure 19. State of Oregon Travel Impacts (2002-2007)

	2002	2003	2004	2005	2006	2007p
Total Direct Travel Spending ($Million)						
Visitor Spending at Destination	5,693	5,914	6,325	6,744	7,221	7,613
Other Travel*	571	580	610	658	697	719
Total Direct Spending	6,264	6,493	6,935	7,402	7,918	8,333
Visitor Spending by Type of Traveler Accommodation ($Million)						
Hotel, Motel	2,785	2,893	3,141	3,397	3,698	3,943
Private Campground	276	291	311	316	340	346
Public Campground	195	201	211	213	217	221
Private Home	811	858	907	980	1,042	1,096
Vacation Home	209	217	228	241	254	268
Day Travel	1,416	1,452	1,527	1,595	1,671	1,740
Spending at Destination	5,693	5,914	6,325	6,744	7,221	7,613
Visitor Spending by Commodity Purchased ($Million)						
Accommodations	976	984	1,054	1,128	1,245	1,362
Food & Beverage Services	1,339	1,379	1,472	1,552	1,638	1,723
Food Stores	442	458	491	500	516	545
Ground Tran. & Motor Fuel	903	1,046	1,195	1,388	1,570	1,687
Arts, Entertainment & Recreation	782	797	834	853	883	907
Retail Sales	972	960	977	995	1,027	1,036
Air Transportation (visitor only)	278	289	302	328	342	353
Spending at Destination	5,693	5,914	6,325	6,744	7,221	7,613
Industry Earnings Generated by Travel Spending ($Million)						
Accommodations & Food Service	917	937	997	1,053	1,127	1,186
Arts, Entertainment & Recreation	230	234	240	246	260	267
Retail**	189	200	210	215	222	228
Auto Rental & other ground tran.	45	46	48	50	52	53
Air Transportation (visitor only)	79	71	69	68	70	73
Other Travel*	191	171	171	171	179	184
Total Direct Earnings	1,650	1,659	1,736	1,803	1,910	1,992
Industry Employment Generated by Travel Spending (Thousand jobs)						
Accommodations & Food Service	51.9	51.5	53.1	53.8	55.5	56.2
Arts, Entertainment & Recreation	15.7	15.9	16.0	15.9	16.3	16.3
Retail**	9.6	10.1	10.4	10.6	10.6	10.6
Auto Rental & other ground tran.	2.0	2.0	2.0	2.0	2.0	2.1
Air Transportation (visitor only)	2.0	1.7	1.7	1.6	1.6	1.6
Other Travel*	5.1	4.5	4.4	4.2	4.3	4.3
Total Direct Employment	86.3	85.7	87.7	88.1	90.3	91.1
Tax Receipts Generated by Travel Spending ($Million)						
Local Tax Receipts	76	77	83	89	100	109
State Tax Receipts	165	169	186	193	204	211
Federal Tax Receipts	328	335	350	368	391	405
Total Direct Tax Receipts	569	580	619	651	694	725

Notes: p Estimates for 2007 are preliminary. Details may not add to totals due to rounding.
* Other Travel includes resident air travel and travel agencies.
** Retail includes gasoline.

Source: Dean Runyan Associates.

Figure 20. Yamhill County, Oregon Travel Impacts (1991-2007)

	1991	2002	2003	2004	2005	2006	2007p
Total Direct Travel Spending ($Million)							
Visitor Spending at Destination	29.1	58.9	63.3	68.6	73.5	81.4	91.4
Other Travel*	0.6	0.7	0.6	0.6	0.6	0.6	0.6
Total Direct Spending	29.6	59.6	63.8	69.2	74.0	82.0	92.0
Visitor Spending by Type of Traveler Accommodation ($Million)							
Hotel, Motel	2.3	16.3	17.1	18.5	19.1	22.4	29.4
Private Campground	6.1	7.3	7.9	8.6	9.0	9.8	9.7
Public Campground	0.0	0.1	0.1	0.1	0.1	0.1	0.1
Private Home	10.6	16.3	18.1	20.0	22.6	24.7	25.7
Vacation Home	0.3	1.0	1.1	1.2	1.3	1.4	1.4
Day Travel	9.6	18.0	19.0	20.3	21.4	23.1	25.1
Spending at Destination	29.1	58.9	63.3	68.6	73.5	81.4	91.4
Visitor Spending by Commodity Purchased ($Million)							
Accommodations	1.6	6.1	6.1	6.5	6.6	7.8	10.2
Food & Beverage Services	6.0	13.8	14.4	15.2	15.6	16.9	19.3
Food Stores	2.6	5.3	5.6	6.0	6.0	6.3	7.2
Ground Tran. & Motor Fuel	10.5	16.1	19.4	22.9	27.3	31.4	33.9
Arts, Entertainment & Recreation	2.9	7.2	7.4	7.7	7.6	8.1	9.2
Retail Sales	5.4	10.3	10.3	10.4	10.4	10.9	11.6
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spending at Destination	29.1	58.9	63.3	68.6	73.5	81.4	91.4
Industry Earnings Generated by Travel Spending ($Million)							
Accommodations & Food Service	2.9	7.4	7.6	8.1	8.2	9.1	10.8
Arts, Entertainment & Recreation	0.9	2.2	2.2	2.3	2.3	2.5	2.8
Retail**	1.4	2.4	2.6	2.8	2.8	2.9	3.1
Auto Rental & other ground tran.	a	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
Other Travel*	0.3	0.4	0.3	0.3	0.3	0.3	0.4
Total Direct Earnings	5.6	12.6	13.0	13.6	13.8	15.0	17.2
Industry Employment Generated by Travel Spending (Jobs)							
Accommodations & Food Service	320	540	540	550	540	560	640
Arts, Entertainment & Recreation	140	240	230	230	230	270	300
Retail**	140	150	160	160	160	160	170
Auto Rental & other ground tran.	b	10	10	10	10	10	10
Air Transportation (visitor only)	0	0	0	0	0	0	0
Other Travel*	20	20	10	10	10	10	10
Total Direct Employment	620	950	940	960	950	1,010	1,120
Tax Receipts Generated by Travel Spending ($Million)							
Local Tax Receipts	0.0	0.1	0.1	0.1	0.1	0.1	0.2
State Tax Receipts	1.6	2.5	2.7	2.8	2.9	3.1	3.3
Total Direct Tax Receipts	1.7	2.6	2.7	3.0	3.1	3.2	3.5

Notes:
- p Estimates for 2007 are preliminary. Details may not add to totals due to rounding.
- a Denotes less than $50,000 in earnings.
- b Denotes less than 5 employees.
- * Other Travel includes resident air travel and travel agencies.
- ** Retail includes gasoline.

Source: Dean Runyan Associates.

Figure 21. Deschutes County, Oregon Travel Impacts (1991-2007)

	1991	2002	2003	2004	2005	2006	2007p
Total Direct Travel Spending ($Million)							
Visitor Spending at Destination	189.1	347.7	361.0	387.7	411.4	441.8	470.7
Other Travel*	2.5	6.3	6.9	7.2	7.1	7.8	8.1
Total Direct Spending	191.6	354.0	367.9	394.9	418.5	449.7	478.8
Visitor Spending by Type of Traveler Accommodation ($Million)							
Hotel, Motel	111.4	203.7	208.6	223.8	235.5	252.3	268.7
Private Campground	9.0	11.6	12.3	13.1	13.3	14.2	14.4
Public Campground	7.9	10.2	10.6	11.2	11.4	11.6	11.7
Private Home	12.4	25.0	27.1	29.7	33.3	36.4	39.6
Vacation Home	15.7	35.5	38.0	41.3	45.4	49.5	54.2
Day Travel	32.8	61.7	64.4	68.8	72.5	77.8	82.1
Spending at Destination	189.1	347.7	361.0	387.7	411.4	441.8	470.7
Visitor Spending by Commodity Purchased ($Million)							
Accommodations	49.0	88.5	88.1	93.7	99.8	106.2	116.1
Food & Beverage Services	47.4	90.5	94.4	101.5	106.9	115.0	122.4
Food Stores	18.7	35.0	36.8	40.0	41.2	43.5	46.9
Ground Tran. & Motor Fuel	20.5	32.2	38.5	45.0	53.5	61.3	66.2
Arts, Entertainment & Recreation	25.8	49.2	50.7	53.5	54.5	57.8	59.7
Retail Sales	26.2	49.3	49.5	50.8	52.0	54.7	56.0
Air Transportation (visitor only)	1.6	2.9	3.0	3.2	3.5	3.3	3.4
Spending at Destination	189.1	347.7	361.0	387.7	411.4	441.8	470.7
Industry Earnings Generated by Travel Spending ($Million)							
Accommodations & Food Service	35.6	66.2	67.7	72.2	76.1	81.1	85.9
Arts, Entertainment & Recreation	7.7	14.7	15.1	15.7	16.0	17.2	17.8
Retail**	6.3	11.0	11.7	12.5	12.8	13.5	14.1
Auto Rental & other ground tran.	0.2	0.5	0.5	0.5	0.5	0.5	0.5
Air Transportation (visitor only)	0.4	0.7	0.7	0.7	0.7	0.7	0.7
Other Travel*	0.9	2.2	2.3	2.3	2.3	2.5	2.5
Total Direct Earnings	51.0	95.2	98.0	103.9	108.4	115.4	121.6
Industry Employment Generated by Travel Spending (Jobs)							
Accommodations & Food Service	2,730	3,650	3,580	3,700	3,600	3,720	3,800
Arts, Entertainment & Recreation	630	910	930	960	890	860	860
Retail**	440	570	620	630	650	660	670
Auto Rental & other ground tran.	10	20	20	20	20	20	20
Air Transportation (visitor only)	10	20	20	20	20	20	20
Other Travel*	40	70	60	60	50	60	60
Total Direct Employment	3,870	5,240	5,230	5,390	5,230	5,330	5,440
Tax Receipts Generated by Travel Spending ($Million)							
Local Tax Receipts	2.9	5.5	5.4	5.7	6.1	6.5	7.0
State Tax Receipts	5.3	8.6	8.9	10.2	10.6	11.2	11.7
Total Direct Tax Receipts	8.2	14.1	14.4	15.9	16.7	17.7	18.8

Notes: p Estimates for 2007 are preliminary. Details may not add to totals due to rounding.

* Other Travel includes resident air travel and travel agencies.

** Retail includes gasoline.

Source: Dean Runyan Associates.

Figure 22. Jackson County, Oregon Travel Impacts (1991-2007)

	1991	2002	2003	2004	2005	2006	2007p
Total Direct Travel Spending ($Million)							
Visitor Spending at Destination	160.0	276.6	288.7	309.3	325.7	341.6	359.5
Other Travel*	6.2	10.7	10.0	10.9	10.7	11.8	12.1
Total Direct Spending	166.2	287.3	298.7	320.2	336.5	353.3	371.7
Visitor Spending by Type of Traveler Accommodation ($Million)							
Hotel, Motel	84.4	156.3	162.3	174.9	184.2	192.2	204.6
Private Campground	17.9	23.8	25.4	27.2	28.0	30.5	31.1
Public Campground	10.0	13.4	14.0	14.8	15.1	15.6	16.0
Private Home	17.4	28.9	30.7	32.9	36.3	38.8	40.8
Vacation Home	1.8	5.1	5.4	5.8	6.2	6.6	6.9
Day Travel	28.4	49.0	50.9	53.8	56.0	57.9	60.2
Spending at Destination	160.0	276.6	288.7	309.3	325.7	341.6	359.5
Visitor Spending by Commodity Purchased ($Million)							
Accommodations	32.0	54.6	54.9	58.2	60.0	63.4	68.2
Food & Beverage Services	37.0	67.0	69.2	73.8	76.5	78.2	82.1
Food Stores	15.4	26.0	27.0	29.0	29.1	29.4	30.9
Ground Tran. & Motor Fuel	27.7	45.1	53.3	61.8	72.8	83.0	89.6
Arts, Entertainment & Recreation	22.8	41.1	42.0	43.9	44.0	44.3	45.2
Retail Sales	21.6	36.8	36.5	37.1	37.2	37.4	37.5
Air Transportation (visitor only)	3.5	6.0	5.7	5.6	6.0	5.8	6.0
Spending at Destination	160.0	276.6	288.7	309.3	325.7	341.6	359.5
Industry Earnings Generated by Travel Spending ($Million)							
Accommodations & Food Service	28.5	50.0	51.1	54.2	55.9	57.6	60.2
Arts, Entertainment & Recreation	6.6	11.9	12.2	12.5	12.5	12.8	13.1
Retail**	5.7	9.0	9.7	10.2	10.3	10.5	10.8
Auto Rental & other ground tran.	0.5	1.2	1.3	1.3	1.4	1.4	1.5
Air Transportation (visitor only)	0.8	1.4	1.3	1.2	1.3	1.2	1.2
Other Travel*	2.2	3.6	3.2	3.3	3.2	3.4	3.5
Total Direct Earnings	44.3	77.2	78.7	82.6	84.6	86.9	90.2
Industry Employment Generated by Travel Spending (Jobs)							
Accommodations & Food Service	2,300	2,870	2,830	2,900	2,910	2,870	2,890
Arts, Entertainment & Recreation	580	740	730	730	720	720	720
Retail**	410	450	480	490	490	480	480
Auto Rental & other ground tran.	30	60	60	60	60	60	60
Air Transportation (visitor only)	20	40	30	30	30	30	30
Other Travel*	100	110	90	90	90	90	90
Total Direct Employment	3,440	4,260	4,220	4,290	4,280	4,250	4,270
Tax Receipts Generated by Travel Spending ($Million)							
Local Tax Receipts	1.5	3.7	3.7	4.0	4.1	4.3	4.6
State Tax Receipts	5.5	8.4	8.7	9.7	10.0	10.4	10.7
Total Direct Tax Receipts	7.0	12.1	12.5	13.6	14.1	14.7	15.3

Notes: p Estimates for 2007 are preliminary. Details may not add to totals due to rounding.
* Other Travel includes resident air travel and travel agencies.
** Retail includes gasoline.

Source: Dean Runyan Associates.

Figure 23. Lincoln County, Oregon Travel Impacts (1991-2007)

	1991	2002	2003	2004	2005	2006	2007p
Total Direct Travel Spending ($Million)							
Visitor Spending at Destination	193.3	406.1	404.5	421.1	436.7	448.9	463.6
Other Travel*	0.4	0.6	0.5	0.5	0.5	0.5	0.5
Total Direct Spending	193.7	406.7	405.0	421.6	437.2	449.5	464.1
Visitor Spending by Type of Traveler Accommodation ($Million)							
Hotel, Motel	90.7	186.4	184.0	193.5	203.8	211.1	221.0
Private Campground	16.3	15.2	15.7	16.5	16.4	17.3	17.5
Public Campground	16.8	22.7	23.3	23.9	23.7	23.8	24.0
Private Home	5.2	7.8	8.0	8.3	8.6	9.0	9.3
Vacation Home	13.9	26.8	27.3	28.3	29.3	30.3	31.5
Day Travel	50.5	147.2	146.2	150.7	154.9	157.5	160.3
Spending at Destination	193.3	406.1	404.5	421.1	436.7	448.9	463.6
Visitor Spending by Commodity Purchased ($Million)							
Accommodations	47.1	91.2	91.7	96.9	101.1	107.0	113.9
Food & Beverage Services	55.1	95.2	94.7	99.3	104.8	107.3	111.3
Food Stores	20.1	48.7	49.4	52.3	53.2	53.7	56.1
Ground Tran. & Motor Fuel	5.5	8.6	10.3	12.2	14.5	16.6	18.0
Arts, Entertainment & Recreation	26.7	72.7	71.9	73.9	75.3	76.0	76.5
Retail Sales	38.8	89.8	86.4	86.5	87.9	88.4	87.8
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spending at Destination	193.3	406.1	404.5	421.1	436.7	448.9	463.6
Industry Earnings Generated by Travel Spending ($Million)							
Accommodations & Food Service	39.1	70.5	70.4	73.9	77.4	81.5	84.2
Arts, Entertainment & Recreation	7.1	19.2	19.0	19.2	19.5	20.1	20.2
Retail**	7.1	15.9	16.2	16.7	17.0	17.2	17.5
Auto Rental & other ground tran.	0.1	0.2	0.2	0.2	0.2	0.2	0.2
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	0.2	0.4	0.3	0.3	0.3	0.3	0.3
Total Direct Earnings	53.6	106.2	106.1	110.3	114.4	119.2	122.4
Industry Employment Generated by Travel Spending (Jobs)							
Accommodations & Food Service	3,290	3,940	3,840	3,940	3,980	4,000	3,980
Arts, Entertainment & Recreation	580	1,120	1,230	1,250	1,180	1,190	1,170
Retail**	530	860	840	870	860	850	840
Auto Rental & other ground tran.	*b*	10	10	10	10	10	10
Air Transportation (visitor only)	0	0	0	0	0	0	0
Other Travel*	10	20	10	10	10	10	10
Total Direct Employment	4,430	5,940	5,930	6,080	6,040	6,060	6,010
Tax Receipts Generated by Travel Spending ($Million)							
Local Tax Receipts	2.5	5.7	5.8	6.1	6.3	6.7	7.1
State Tax Receipts	3.6	6.8	6.9	7.9	8.2	8.6	8.8
Total Direct Tax Receipts	6.1	12.6	12.6	14.0	14.5	15.3	16.0

Notes: p Estimates for 2007 are preliminary. Details may not add to totals due to rounding.

b Denotes less than 5 employees.

* Other Travel includes resident air travel and travel agencies.

** Retail includes gasoline.

Source: Dean Runyan Associates.

Figure 24. Benton County, Washington Travel Impacts (1991-2007)

	1991	1999	2001	2003	2005	2006	2007
Total Direct Travel Spending ($Million)							
Visitor Spending at Destination	96.7	155.3	180.1	200.4	222.2	237.2	259.7
Other Travel*	2.9	2.4	3.1	0.8	1.0	1.3	1.4
Total Direct Spending	99.6	157.8	183.1	201.2	223.2	238.5	261.1
Visitor Spending by Type of Traveler Accommodation ($Million)							
Hotel, Motel	44.4	81.3	96.0	109.3	116.9	124.5	140.0
Private Campground	1.5	1.5	1.6	1.7	1.9	2.1	2.3
Public Campground	0.9	1.1	1.2	1.0	1.2	1.3	1.3
Private Home	22.4	30.5	34.7	37.4	44.2	47.4	49.3
Vacation Home	0.3	0.4	0.5	0.5	0.6	0.6	0.7
Day Travel	27.2	40.5	46.1	50.5	57.4	61.4	66.1
Spending at Destination	96.7	155.3	180.1	200.4	222.2	237.2	259.7
Visitor Spending by Commodity Purchased ($Million)							
Accommodations	11.9	23.3	28.4	31.9	32.9	34.8	40.3
Food & Beverage Services	25.0	42.3	48.2	54.9	58.1	60.5	66.5
Food Stores	4.6	7.8	8.8	9.9	10.3	10.6	11.6
Ground Tran. & Motor Fuel	22.5	30.7	37.8	42.8	60.0	69.0	75.7
Arts, Entertainment & Recreation	15.0	24.3	27.1	30.0	30.1	30.9	32.9
Retail Sales	17.8	27.0	29.7	31.0	30.8	31.4	32.7
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spending at Destination	96.7	155.3	180.1	200.4	222.2	237.2	259.7
Industry Earnings Generated by Travel Spending ($Million)							
Accommodations & Food Service	12.4	22.5	26.5	31.0	31.4	32.4	36.0
Arts, Entertainment & Recreation	7.1	11.7	13.9	14.9	15.0	15.4	16.4
Retail**	3.7	5.5	6.1	6.8	7.0	7.1	7.5
Auto Rental & Ground Tran.	0.7	1.2	1.5	1.6	1.8	1.9	2.0
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	1.4	1.2	1.5	0.4	0.5	0.6	0.7
Total Direct Earnings	25.3	42.2	49.5	54.8	55.8	57.5	62.6
Industry Employment Generated by Travel Spending (Jobs)							
Accommodations & Food Service	1,150	1,520	1,520	1,700	1,610	1,660	1,790
Arts, Entertainment & Recreation	760	930	920	1,000	820	780	910
Retail**	310	340	340	350	350	340	350
Auto Rental & Ground Tran.	40	60	70	70	80	80	70
Air Transportation (visitor only)	0	0	0	0	0	0	0
Other Travel*	50	50	50	20	20	20	20
Total Direct Employment	2,320	2,900	2,900	3,140	2,880	2,880	3,140
Tax Receipts Generated by Travel Spending ($Million)							
Local Tax Receipts	1.1	2.4	3.1	3.7	4.4	4.6	5.2
State Tax Receipts	6.7	10.1	11.2	12.3	13.1	13.7	14.7
Total Direct Tax Receipts	7.8	12.5	14.3	15.9	17.5	18.3	19.9

Notes: Details may not add to totals due to rounding.

* Other Travel includes resident air travel and travel agencies.

** Retail includes gasoline.

Source: Dean Runyan Associates.

Figure 25. Franklin County, Washington Travel Impacts (1991-2007)

	1991	1999	2001	2003	2005	2006	2007
Total Direct Travel Spending ($Million)							
Visitor Spending at Destination	48.2	51.9	58.2	59.3	74.4	79.2	88.0
Other Travel*	2.0	1.7	1.7	2.0	2.1	2.3	2.6
Total Direct Spending	50.3	53.6	59.9	61.3	76.5	81.6	90.6
Visitor Spending by Type of Traveler Accommodation ($Million)							
Hotel, Motel	24.3	22.6	25.6	24.5	32.0	33.4	38.6
Private Campground	3.0	3.2	3.5	3.7	4.0	4.2	4.6
Public Campground	1.1	1.5	1.6	1.6	1.7	1.8	1.8
Private Home	6.9	10.3	11.7	13.2	16.3	18.0	19.2
Vacation Home	0.1	0.2	0.2	0.2	0.3	0.3	0.3
Day Travel	12.7	14.2	15.7	16.2	20.1	21.5	23.4
Spending at Destination	48.2	51.9	58.2	59.3	74.4	79.2	88.0
Visitor Spending by Commodity Purchased ($Million)							
Accommodations	7.6	7.4	8.6	8.1	10.6	11.0	13.2
Food & Beverage Services	13.4	14.3	15.8	16.1	20.5	21.5	24.2
Food Stores	2.7	3.2	3.5	3.6	4.4	4.6	5.1
Ground Tran. & Motor Fuel	5.8	8.0	9.9	11.2	15.0	17.2	18.9
Arts, Entertainment & Recreation	8.2	8.3	9.0	9.0	10.8	11.2	12.2
Retail Sales	9.3	9.9	10.6	10.3	11.9	12.4	13.2
Air Transportation (visitor only)	1.1	0.9	0.9	1.0	1.2	1.3	1.4
Spending at Destination	48.2	51.9	58.2	59.3	74.4	79.2	88.0
Industry Earnings Generated by Travel Spending ($Million)							
Accommodations & Food Service	6.9	7.3	8.3	8.5	10.6	10.9	12.4
Arts, Entertainment & Recreation	2.9	3.0	3.4	3.3	4.0	4.2	4.5
Retail**	1.6	1.8	2.0	2.1	2.5	2.6	2.8
Auto Rental & Ground Tran.	0.2	0.2	0.3	0.3	0.3	0.3	0.4
Air Transportation (visitor only)	0.4	0.3	0.4	0.5	0.5	0.5	0.5
Other Travel*	0.7	0.6	0.7	0.9	0.9	0.9	1.0
Total Direct Earnings	12.7	13.3	15.2	15.7	18.9	19.5	21.6
Industry Employment Generated by Travel Spending (Jobs)							
Accommodations & Food Service	660	550	540	520	620	590	640
Arts, Entertainment & Recreation	410	350	290	280	330	290	390
Retail**	130	100	100	100	110	120	130
Auto Rental & Ground Tran.	10	10	10	10	10	10	10
Air Transportation (visitor only)	10	10	10	10	10	10	10
Other Travel*	30	20	20	30	20	20	20
Total Direct Employment	1,250	1,040	980	950	1,100	1,050	1,200
Tax Receipts Generated by Travel Spending ($Million)							
Local Tax Receipts	0.6	0.8	1.0	0.9	1.3	1.4	1.6
State Tax Receipts	2.8	3.3	3.6	3.7	4.3	4.6	5.0
Total Direct Tax Receipts	3.5	4.1	4.5	4.6	5.7	6.0	6.6

Notes: Details may not add to totals due to rounding.

* Other Travel includes resident air travel and travel agencies.

** Retail includes gasoline.

Source: Dean Runyan Associates.

Figure 26. Walla Walla County, Washington Travel Impacts (1991-2007)

	1991	1999	2001	2003	2005	2006	2007
Total Direct Travel Spending ($Million)							
Visitor Spending at Destination	34.4	45.0	56.6	60.0	71.0	75.1	83.2
Other Travel*	0.5	0.5	0.6	0.5	0.6	0.7	0.8
Total Direct Spending	34.9	45.5	57.2	60.5	71.6	75.8	84.0
Visitor Spending by Type of Traveler Accommodation ($Million)							
Hotel, Motel	14.6	19.6	28.0	30.1	37.1	39.4	45.6
Private Campground	1.0	1.0	1.1	1.1	1.2	1.3	1.4
Public Campground	0.4	0.4	0.5	0.5	0.5	0.6	0.6
Private Home	8.3	11.2	12.0	12.7	14.0	14.7	15.1
Vacation Home	0.4	0.4	0.4	0.5	0.5	0.5	0.5
Day Travel	9.7	12.3	14.5	15.2	17.7	18.6	19.9
Spending at Destination	34.4	45.0	56.6	60.0	71.0	75.1	83.2
Visitor Spending by Commodity Purchased ($Million)							
Accommodations	4.3	6.0	8.8	9.3	11.8	12.8	15.7
Food & Beverage Services	9.7	12.7	16.0	17.3	20.3	21.0	23.1
Food Stores	1.9	2.6	3.1	3.3	3.8	3.9	4.2
Ground Tran. & Motor Fuel	5.2	7.3	9.0	10.2	13.4	15.3	16.8
Arts, Entertainment & Recreation	5.9	7.4	9.1	9.5	10.6	10.8	11.5
Retail Sales	7.2	8.9	10.4	10.3	11.0	11.2	11.6
Air Transportation (visitor only)	0.1	0.2	0.2	0.1	0.2	0.2	0.2
Spending at Destination	34.4	45.0	56.6	60.0	71.0	75.1	83.2
Industry Earnings Generated by Travel Spending ($Million)							
Accommodations & Food Service	5.1	6.9	9.3	10.2	12.0	12.5	14.2
Arts, Entertainment & Recreation	2.3	2.9	3.8	3.9	4.3	4.4	4.7
Retail**	1.4	1.8	2.1	2.3	2.5	2.5	2.6
Auto Rental & Ground Tran.	0.2	0.4	0.5	0.5	0.5	0.5	0.6
Air Transportation (visitor only)	0.1	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.2	0.2	0.3	0.2	0.3	0.3	0.4
Total Direct Earnings	9.2	12.2	16.0	17.2	19.7	20.3	22.5
Industry Employment Generated by Travel Spending (Jobs)							
Accommodations & Food Service	470	480	540	580	670	680	730
Arts, Entertainment & Recreation	330	240	290	310	290	310	340
Retail**	110	100	120	120	130	130	130
Auto Rental & Ground Tran.	10	20	20	20	20	20	20
Air Transportation (visitor only)	*b*	*b*	*b*	*b*	*b*	*b*	*b*
Other Travel*	10	10	10	10	10	10	10
Total Direct Employment	930	860	990	1,040	1,120	1,150	1,230
Tax Receipts Generated by Travel Spending ($Million)							
Local Tax Receipts	0.4	0.6	0.8	0.9	1.1	1.1	1.3
State Tax Receipts	2.0	2.7	3.2	3.4	3.9	4.1	4.5
Total Direct Tax Receipts	2.4	3.3	4.1	4.3	5.0	5.2	5.8

Notes: b Denotes less than 5 employees. Details may not add to totals due to rounding.

* Other Travel includes resident air travel and travel agencies.

** Retail includes gasoline.

Source: Dean Runyan Associates.

Figure 27. Yakima County, Washington Travel Impacts (1991-2007)

	1991	1999	2001	2003	2005	2006	2007
Total Direct Travel Spending ($Million)							
Visitor Spending at Destination	177.8	217.4	238.1	247.9	281.7	306.5	326.4
Other Travel*	2.1	1.8	2.1	1.3	0.5	0.6	0.6
Total Direct Spending	179.9	219.2	240.2	249.2	282.3	307.1	327.0
Visitor Spending by Type of Traveler Accommodation ($Million)							
Hotel, Motel	75.9	89.9	97.3	99.6	109.5	121.2	130.4
Private Campground	7.3	7.8	8.7	9.2	10.8	11.5	12.7
Public Campground	5.8	6.6	7.3	7.5	8.9	9.6	10.0
Private Home	34.8	47.9	54.0	57.6	67.2	71.9	75.8
Vacation Home	2.0	2.2	2.2	2.4	2.6	2.8	2.9
Day Travel	51.9	63.0	68.6	71.6	82.6	89.5	94.6
Spending at Destination	177.8	217.4	238.1	247.9	281.7	306.5	326.4
Visitor Spending by Commodity Purchased ($Million)							
Accommodations	23.6	29.0	32.0	32.0	33.4	36.9	40.7
Food & Beverage Services	47.6	58.2	61.7	64.4	69.2	73.5	77.4
Food Stores	9.8	12.5	13.4	13.9	14.7	15.3	16.2
Ground Tran. & Motor Fuel	32.2	42.9	53.4	60.4	86.6	100.1	110.0
Arts, Entertainment & Recreation	29.1	33.9	35.3	35.9	36.6	38.2	39.1
Retail Sales	34.9	40.6	42.0	40.9	40.9	42.2	42.6
Air Transportation (visitor only)	0.5	0.4	0.3	0.3	0.3	0.4	0.4
Spending at Destination	177.8	217.4	238.1	247.9	281.7	306.5	326.4
Industry Earnings Generated by Travel Spending ($Million)							
Accommodations & Food Service	27.5	34.4	37.4	39.6	40.9	43.2	45.9
Arts, Entertainment & Recreation	9.8	11.6	12.9	12.7	13.0	13.5	13.9
Retail**	7.3	8.9	9.4	10.0	10.3	10.6	10.8
Auto Rental & Ground Tran.	0.3	0.4	0.5	0.6	0.6	0.6	0.7
Air Transportation (visitor only)	0.2	0.1	0.1	0.1	0.1	0.1	0.1
Other Travel*	0.9	0.8	1.0	0.7	0.2	0.2	0.3
Total Direct Earnings	45.9	56.3	61.3	63.7	65.1	68.3	71.7
Industry Employment Generated by Travel Spending (Jobs)							
Accommodations & Food Service	2,310	2,090	2,080	1,970	1,950	1,970	2,040
Arts, Entertainment & Recreation	1,190	840	1,040	980	890	880	860
Retail**	540	510	490	480	490	500	490
Auto Rental & Ground Tran.	20	20	20	20	20	20	20
Air Transportation (visitor only)	10	*b*	*b*	*b*	*b*	*b*	*b*
Other Travel*	50	40	40	30	10	10	10
Total Direct Employment	4,120	3,500	3,680	3,480	3,370	3,370	3,420
Tax Receipts Generated by Travel Spending ($Million)							
Local Tax Receipts	2.2	3.3	3.7	3.7	4.6	5.1	5.5
State Tax Receipts	11.5	14.3	15.1	15.6	16.9	17.8	18.6
Total Direct Tax Receipts	13.7	17.6	18.8	19.3	21.5	22.9	24.1

Notes: b Denotes less than 5 employees. Details may not add to totals due to rounding.

* Other Travel includes resident air travel and travel agencies.

** Retail includes gasoline.

Source: Dean Runyan Associates.

Figure 28. Napa County, California Travel Impacts (1992-2006)

	1992	2001	2002	2003	2004	2005	2006
Total Direct Travel Spending ($Million)							
Visitor Spending at Destination	356.5	642.1	659.0	662.6	732.6	823.8	885.6
Other Travel*	4.5	4.9	4.4	3.8	3.5	3.9	3.5
Total Direct Spending	361.1	647.0	663.4	666.5	736.2	827.7	889.1
Visitor Spending by Type of Traveler Accommodation ($Million)							
Hotel, Motel	201.9	404.0	416.4	418.2	468.2	536.1	585.2
Private Campground	15.6	19.6	19.6	20.0	22.5	22.6	22.5
Public Campground	1.4	1.7	1.7	1.7	1.8	1.8	1.8
Private Home	14.7	19.6	20.1	20.8	21.4	22.2	22.7
Vacation Home	13.2	17.2	17.5	18.0	18.6	19.4	19.9
Day Travel	109.8	180.0	183.6	183.9	200.2	221.8	233.5
Spending at Destination	356.5	642.1	659.0	662.6	732.6	823.8	885.6
Visitor Spending by Commodity Purchased ($Million)							
Accommodations	73.4	140.6	146.1	147.2	167.9	191.7	216.3
Food & Beverage Services	90.4	159.5	167.3	169.2	188.3	214.6	229.3
Food Stores	11.7	19.7	20.4	20.8	23.2	25.0	25.9
Ground Tran. & Motor Fuel	15.5	22.5	21.0	25.5	30.3	36.3	40.5
Arts, Entertainment & Recreation	77.5	141.2	145.2	145.4	158.4	174.8	183.9
Retail Sales	88.1	158.7	158.9	154.4	164.5	181.3	189.7
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spending at Destination	356.5	642.1	659.0	662.6	732.6	823.8	885.6
Industry Earnings Generated by Travel Spending ($Million)							
Accommodations & Food Service	60.9	114.1	121.8	126.2	141.9	158.7	173.4
Arts, Entertainment & Recreation	32.2	58.7	60.4	60.4	65.8	73.4	79.5
Retail**	13.5	24.0	24.2	23.9	25.6	28.0	29.7
Auto Rental & Ground Tran.	0.5	0.9	0.9	1.0	1.0	1.1	1.1
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	3.1	3.8	3.5	3.0	2.8	2.6	2.4
Total Direct Earnings	110.2	201.4	210.8	214.5	237.2	263.7	286.1
Industry Employment Generated by Travel Spending (Jobs)							
Accommodations & Food Service	3,310	4,270	4,470	4,540	4,880	5,200	5,420
Arts, Entertainment & Recreation	1,890	2,340	3,420	3,510	3,950	4,000	4,050
Retail**	740	850	870	860	890	940	990
Auto Rental & Ground Tran.	20	30	30	30	30	40	40
Air Transportation (visitor only)	0	0	0	0	0	0	0
Other Travel*	80	80	60	50	40	40	30
Total Direct Employment	6,040	7,580	8,860	8,980	9,790	10,210	10,530
Tax Receipts Generated by Travel Spending ($Million)							
Local Tax Receipts	8.3	19.0	19.6	19.1	21.0	23.7	27.5
State Tax Receipts	13.1	22.4	23.6	23.7	26.3	29.8	31.7
Total Direct Tax Receipts	21.4	41.4	43.2	42.8	47.3	53.5	59.2

Notes: Details may not add to totals due to rounding.

* Other Travel includes resident air travel and travel agencies.

** Retail includes gasoline.

Source: Dean Runyan Associates.

Figure 29. Sonoma County, California (1992-2006)

	1992	2001	2002	2003	2004	2005	2006
Total Direct Travel Spending ($Million)							
Visitor Spending at Destination	653.9	969.8	977.3	1,006.0	1,072.1	1,144.0	1,233.8
Other Travel*	14.6	16.8	13.2	10.7	10.8	3.9	5.5
Total Direct Spending	668.6	986.6	990.4	1,016.7	1,082.9	1,147.9	1,239.3
Visitor Spending by Type of Traveler Accommodation ($Million)							
Hotel, Motel	232.3	404.7	408.4	418.6	453.5	494.8	555.9
Private Campground	21.2	27.3	27.0	28.2	30.3	31.4	31.6
Public Campground	10.9	13.5	13.4	14.1	14.9	15.6	15.7
Private Home	84.6	116.1	117.8	123.0	128.5	135.2	138.9
Vacation Home	68.8	88.7	89.2	92.4	97.2	103.0	106.4
Day Travel	236.1	319.5	321.5	329.7	347.6	364.1	385.3
Spending at Destination	653.9	969.8	977.3	1,006.0	1,072.1	1,144.0	1,233.8
Visitor Spending by Commodity Purchased ($Million)							
Accommodations	92.9	160.0	162.5	165.4	176.0	196.6	220.5
Food & Beverage Services	161.8	230.1	239.2	244.4	260.9	274.5	294.5
Food Stores	24.2	35.0	35.9	37.0	39.3	40.0	41.2
Ground Tran. & Motor Fuel	71.8	102.7	95.7	116.9	139.4	167.8	188.1
Arts, Entertainment & Recreation	140.5	205.6	209.5	212.0	221.4	225.6	238.2
Retail Sales	162.8	236.3	234.5	230.3	235.1	239.5	251.3
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Spending at Destination	653.9	969.8	977.3	1,006.0	1,072.1	1,144.0	1,233.8
Industry Earnings Generated by Travel Spending ($Million)							
Accommodations & Food Service	98.4	155.3	164.3	172.4	183.8	194.3	212.6
Arts, Entertainment & Recreation	71.7	104.9	106.9	108.2	113.0	116.3	126.5
Retail**	26.5	38.2	38.4	38.7	39.9	40.3	42.7
Auto Rental & Ground Tran.	1.3	2.6	2.7	2.8	3.0	3.1	3.2
Air Transportation (visitor only)	0.0	0.0	0.0	0.0	0.0	0.0	0.0
Other Travel*	9.4	11.9	10.0	8.2	8.1	2.0	2.8
Total Direct Earnings	207.3	313.0	322.2	330.3	347.9	356.1	387.8
Industry Employment Generated by Travel Spending (Jobs)							
Accommodations & Food Service	6,260	6,990	7,110	7,350	7,690	7,840	8,270
Arts, Entertainment & Recreation	6,300	6,510	6,340	6,280	6,200	6,070	6,000
Retail**	1,430	1,410	1,410	1,410	1,420	1,390	1,450
Auto Rental & Ground Tran.	70	90	90	100	100	100	100
Air Transportation (visitor only)	0	0	0	0	0	0	0
Other Travel*	370	340	250	190	180	60	70
Total Direct Employment	14,430	15,340	15,200	15,330	15,590	15,460	15,900
Tax Receipts Generated by Travel Spending ($Million)							
Local Tax Receipts	10.7	18.8	19.0	19.4	19.8	23.0	26.2
State Tax Receipts	27.6	38.5	39.8	40.8	43.7	46.2	49.0
Total Direct Tax Receipts	38.3	57.3	58.8	60.2	63.5	69.2	75.2

Notes: Details may not add to totals due to rounding.

* Other Travel includes resident air travel and travel agencies.

** Retail includes gasoline.

Source: Dean Runyan Associates.

Figure 30. Yamhill County Lodging Inventory

Name of Establishment	City	Rooms	Key Features
Hotel/Motel			
Best Western Newberg Inn	Newberg	51	Well-appointed guest rooms & suites, with cable satellite television & HBO® & high-speed Internet access; complimentary deluxe breakfast; indoor swimming pool, hot tub & steam room; exercise facility, laundry services & limited business services.
Best Western Vineyard Inn Motel	McMinnville	65	Well-appointed guest rooms with free high-speed Internet access, television, free long distance access, toiletries, iron/ironing board, coffee/tea maker & hairdryer, complimentary continental breakfast, & indoor pool & spa.
Comfort Inn & Suites McMinnville	McMinnville	66	Free deluxe continental breakfast, free wireless high-speed Internet access, free local calls, indoor heated pool & hot tub, fitness center.
Martha's Cottage	Dayton	1	On the National Register of Historic Places located in downtown; perfect for corporate hospitality as well as a vacation with family & friends & celebration of weddings, anniversaries, & other special occasions; full guest conveniences, including DSL & cable TV.
McMenamins Hotel Oregon	McMinnville	42	In town, 1905 hotel with first floor pub & pool tables, subterranean bistro-style Cellar Bar, magnificent Rooftop Bar, European-style guestrooms upstairs.
Paragon Motel	McMinnville	55	Affordable motel with newly upgraded room furniture & pillow-top mattresses; Microwave & Refrigerator; Cable TV & HBO; Hair Dryers; Guest coin-operated Laundry Facilities; Pet Friendly; Courtesy Ironing Board & Iron; Free wireless DSL Internet Access; Complimentary Breakfast & Coffee.
Red Lion Inn & Suites McMinnville	McMinnville	67	100% non-smoking, color TV with remote, telephone dataports, a microwave & refrigerator; free Net4Guests high-speed wireless Internet access in the lobby & breakfast area, email, fax & copy machines; indoor pool & whirlpool; complimentary continental breakfast.
Safari Motor Inn	McMinnville	59	Handicapped Rooms/Facilities; FAX; Free Parking; Hairdryers Available; High speed internet access; Iron & Ironing Board; King Bed; Maid Service; Microwave; Smoking & No Smoking Rooms/Facilities; Pets Allowed; Phone Service; Picnic Area/Tables; Refrigerator; TV with Cable.
Shilo Inn Suites Newberg	Newberg	61	Conveniently located off Hwy 99; Children 12 & under always stay free with an adult; Dogs welcome.
Towne & Country Motel	Newberg	22	Best price; Cable TV & Showtime; Kitchenettes & Micros; Senior Discounts.
Travelodge Suites Newberg	Newberg	40	Free Bear Bites Breakfast; Gym/Fitness Center; Free High Speed Internet; Pets Allowed; Pool.
Wildwood Hotel	Willamina	6	Restored turn of the century hotel with fully stocked guest-use kitchen & library.

Name of Establishment	City	Rooms	Key Features
Bed & Breakfast			
A'Tuscan Estate	McMinnville	5	1928 colonial Estate remodeled with a European flair; hardwood floors, fireplace, private baths, & beautiful grounds with Bocce/Petanque court complement a convenient location a few blocks from the historic downtown district. Private dining & cooking classes available.
Abbey Road Farm	Carlton	5	Hearty breakfasts, king beds, air conditioning, Jacuzzi tubs, conference facilities & breathtaking views await you at this real working farm; Silo suites.
Avellan Inn	Newberg	2	Converted farmhouse surrounded by 12 acres of landscaped gardens, a pond, woods, & a working hazelnut orchard. Pet friendly "Bed & Biscuit."
Baker Street Bed & Breakfast	McMinnville	4	Guest rooms or private cottage; our "Le petite Chateau" cottage is perfect for couples, families or extended work situations; fully equipped with TV/DVD, kitchen, air conditioning, laundry & private parking. Located downtown, only three blocks from Linfield College, historic Third Street, fine restaurants & shopping, you can walk to dinner after a full day of wine tasting!
Black Walnut Inn & Vineyard	Dundee	9	Newly constructed & reminiscent of Tuscan villas of old; luxurious linens, soaking tubs, king & queen size beds & breath-taking views.
Brookside Inn	Carlton	9	On 22 acres; available for events including weddings, retreats & private dinners.
Chehalem Ridge Bed & Breakfast	Newberg	4	On eight acres, contemporary house with n-room details like fireplaces, jetted tubs & private decks with expansive views complete the experience.
Dundee Manor Bed & Breakfast	Dundee	4	Built in 1908, with all the simple architecture of a four square Edwardian estate.
Gahr Farm Cottage	McMinnville	1	Small home has a large fully equipped kitchen with a washer & dryer, queen bed in the master bedroom, twin beds in the annex bedroom, high speed Internet, free USA & Canada phone, TV, DVD, VCR, CD player.
Hide A Way Hill Bed & Breakfast	Yamhill	4	Luxurious rooms feature private baths, feather-beds, & the finest linens; 2 rooms with fireplaces.
Hopewell Bed & Breakfast	Hopewell	2	On 12 acre farm, 2 cottages offering: kitchenettes, hot tub, queen or king bed & convertible sofa, satellite TV, DVD, Wi-Fi, private decks & BBQ, full baths, breakfast served in your room or on your deck, individual heating & air conditioning.
Kelty Estate	Lafayette	5	Early Colonial style home is listed on the National Register of Historic Places built in 1872 surrounded with lawns, gardens, & mature trees across the street from the School House Antique Mall.
Lobenhaus	Carlton	6	Peaceful rural setting, surrounded by woods, Millican Creek & vineyards.
Martha's Vineyard West	McMinnville	3	Owner operated B&B in fully renovated 1906 house close to Linfield College & within walking distance of downtown.
Mattey House	McMinnville	4	Queen Anne mansion on 10 acres, nestled between its own vineyard & orchard. Relax on the porch swing, the more energetic can play croquet or bocce ball.
Mill Creek Gardens	Sheridan	2	Offering fine lodging accommodations, wedding & catering services in a quiet, secluded getaway

Name of Establishment	City	Rooms	Key Features
			overlooking the serenity of Mill Creek.
R.R. Thompson House	Carlton	5	In town; private, marble tile baths with whirlpool tubs, quality beds & linens & thick towels are features of each suite & room; wireless Internet access available.
Red Ridge Farms	Dayton	1	Furnished guest suite available for your enjoyment by the night, weekend or week with two balconies, a full kitchen, separate bedroom which sleeps two & lots of windows. Event facilties: patio for 50 guests & Oregon Olive Mill Building Event Center for 50+ guests. Offers occasional classes on creative ways to use herbs in art, crafts & cooking.
Springbrook Hazelnut Farm	Newberg	2	Carriage House & Rose Cottage overlook the meadow & pond on a 1912 estate listed on the National Register of Historic Places is surrounded by orchards & vineyards.
Steiger Haus	McMinnville	5	Relax in classic European ambiance with NW breakfasts, comfortable beds & certified commercial kitchen & private dining space that is perfect for smaller events, business retreats, wine dinners, & cocktail parties.
Summit Suites	Dayton	2	Two-level, luxury house suitable for two couples located in a woodsy setting but overlooking our own (Wine Country Farm's), as well as Domaine Drouhin's, vineyards.
The Carlton Inn	Carlton	4	1915 restored country home in town, within easy walking distance to many wineries, unique shops & restaurants; high-speed Wi-Fi, fax & copier service available.
The Dream Giver’s Inn	Newberg	4	On 10 acres overlooking beautiful vineyards, the Inn was designed to be a place of relaxation & pampering located just minutes from the I-5 Freeway, wineries, shopping & golf.
The Dwelling Place	Newberg	2	Christ-centered bed & breakfast in a lovely cottage-style home built in 2000 located less than a mile to Hazelden, George Fox University & downtown Newberg.
The Lion’s Gate Inn	Newberg	4	Built in 1911, craftsman style B&B with covered outdoor living space & large grass courtyard provide an ideal venue for small weddings & events
Twisted Willow Inn	McMinnville	2	1892 Dutch colonial in the heart of the downtown shopping district. Facials, massages, bicycles, picnics & wine tasting - available on site.
University House of Newberg	Newberg	3	B&B offers a private home away from home with no other guests during your stay located directly across from George Fox University; large fireplace, AC, laundry, secluded hot tub, wireless internet, cable, DVD, massage therapy available, luxury amenities; equipped with fax, copier & computer; airport service available for a fee.

Name of Establishment	City	Rooms	Key Features
Wine Country Farm	Dayton	9	An historic French style house on 13 acres; on-site winery produces 5 varieties, sold out of tasting room; raise Arabian horses on-site & offer horseback trail riding; 4 rooms with fireplaces.
Yamhill Vineyards Bed & Breakfast	Yamhill	2	Enjoy quiet country life with indoor spa, queen beds & reading area.
Youngberg Hill Vineyards & Inn	McMinnville	7	Located on 50 acres & surrounded by 17 acres of award-winning Pinot Noir, the Inn provides guests the opportunity to explore the 18 year old organic vineyard & to begin tasting Oregon's amazing wines.
	Total Properties	656	

Source: Smith Travel Research, Yamhill Valley News-Register *Yamhill Valley Visitors Guide 2008-2009*, Yamhill Valley Visitors Association website, and websites of individual establishments.

Figure 31. Number of Wineries & Tons Crushed in Oregon by County (2004)

County	Tons Crushed	# of Wineries
Douglas	458	15
Lane	2,089	17
Marion	1,238	12
Polk	2,567	25
Washington	1,601	19
Yamhill	8,272	95
Other Willamette Valley*	1,601	31
Rogue Valley**	1,803	18
All Others***	330	15

Notes: * Other Willamette Valley includes Benton, Clackamas, Linn and Multnomah Counties.

** Rogue Valley includes Jackson and Josephine Counties.

*** All Others include Clatsop, Deschutes, Hood River, Tillamook, Wasco, Umatilla and Union Counties, plus coast.

Source: Oregon Agricultural Statistics Service, Full Glass Research, *The Economic Impact of the Wine and Wine Grape Industries on the Oregon Economy*, January 2006.

Figure 32. Totals for Wine Grapes Only

Year	1995	2000	2001	2002	2003	2004	2005	2006	2007
Acres	1,697	2,600	2,730	2,780	2,990	3,125	3,315	4,142	5,177
Value of Production ($000)	$4,363	$8,674	$9,971	$10,342	$10,419	$10,205	$11,851	$14,114	$16,614
Value per Acre	$2,571	$3,336	$3,652	$3,720	$3,485	$3,266	$3,575	$3,408	$3,209

Source: Oregon Agricultural Information Network, OSU, various years, provided by Bruce Prengruber of Globalwise, Inc.

Figure 33. Estimated Direct Wine Industry Employees by County (2004)

County	Jobs	Wages	Avg Wage
Benton	120	$1,792,492	$14,937
Douglas	143	$2,210,346	$15,457
Jackson	226	$3,928,022	$17,381
Lane	478	$6,746,170	$14,113
Marion	419	$7,737,733	$18,467
Multnomah	1,084	$14,683,096	$13,545
Polk	218	$5,416,780	$24,848
Washington	597	$9,066,189	$15,186
Yamhill	702	$20,055,119	$28,569
Others counties or not traceable	1,596	$46,432,371	$29,093
Total	5,583	$118,068,318	$21,148

Source: Oregon Employment Department, Full Glass Research, *The Economic Impact of the Wine and Wine Grape Industries on the Oregon Economy*, January 2006.

END NOTES

1 Information for this economic profile has been compiled from sources generally deemed to be reliable. However, E. D. Hovee & Company, LLC does not guarantee the accuracy of data from third party sources. Information can be subject to change without notice.

Findings and conclusions are those of the authors. They should not be construed as representing the opinion of any other party prior to their express approval, whether in whole or part.

2 The economic impacts of the Oregon travel industry are based on input data compiled from various local, state and federal sources. These estimates are comparable to the U.S. Travel and Tourism Satellite Accounts produced by the U.S. Bureau of Economic Analysis.

3 Using the most current available data, Dean Runyan Associates prepared preliminary estimates for 2007 at the state and county level. Since full-year data was not available in all cases, these estimates are subject to subsequent revision as additional information relating to travel and its economic impact in 2007 becomes available.

4 While both auto rental and other transportation and other travel each have employment of 10, earnings in other travel are four times greater than earnings in auto rental and other transportation.

5 The Willamette Valley study was conducted by Longwoods International based on the company's annual syndicated survey of the U.S. travel market.

6 There are also "virtual" wineries which are establishments possessing a winery license but also manufacture sake, beer, or cider.

7 Data was provided by Bruce Prenguber of Globalwise, Inc.

8 Demand for grapes means that not all harvest is processed locally. Wineries outside the state purchased 474 tons of Oregon wine grapes in 2004, valued at $572,000.

9 These estimates include the sectors of winery, vineyard, and the portion of jobs in distribution, retail and on-premise directly supported by wine revenues.

10 These expenditures do not include tasting room and tour-related business at wineries.

11 Employment and payroll do not include employees of wine tasting rooms or other wine hospitality because they are included in winery spending and employment.

12 A third event not included in the Full Glass Research report is Carlton's Walk in the Park, a benefit for local charities in it's 6th year, combining artists and musicians with local restaurants and wineries for one weekend in August. According to the event's website, the 2007 event drew nearly 4,000 visitors.

13 This past year's celebration involved more than 60 of the world's "premier Pinot noir producers," 40 guest chefs, wine journalists, and winemaker Francois Millet from the Burgundian estate of Domaine Comte de Vogüé. Information from International Pinot Noir Celebration's website www.ipnc.org.

14 Specifically cited by ECONorthwest as examples of Napa Valley luxury destination hotels and inns are Auberge du Soleil, Calistoga Ranch, and Meadowood.

15 *Washington Wine Country Visitor Profile 2003* is cited by ECONorthwest is indicating that tourists choose hotels over B&Bs by a 10:1 ratio.

16 Examples of possible indoor features cited by the ECONorthwest report include a billiard room, conservatory and indoor pool, as well as full service spa/fitness center and 4-star restaurant.

17 Ronni Lacroute, co-owner of WillaKenzie Estate in Yamhill, as quoted by *The Oregonian*, "Allison Inn will uncork luxury," September 28, 2008.