



LANE TRANSIT DISTRICT
COMMUNITY STEERING COUNCIL (CSC)
MEETING NO. 3
Wednesday, October 25th, 2023
5:30pm-7:30pm

LTD Board Room
3500 E. 17th Avenue
Eugene, OR

PRE-MEETING PACKET

- I. AGENDA**
- II. RESPONSIVE DATA REQUESTS**
 - a. Tourist/visitor population trends: See attached sections from “*The Economic Impact of Travel in Oregon, 2022*”

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AGENDA

Zoom: Link to watch live (no participation) provided on the web calendar at www.LTD.org.

5:30pm	Welcome & Housekeeping
5:35pm	Review of CSC Purpose and Charge
5:45pm	Community Engagement Survey Results
6:05pm	Core Values – Recap of Meeting No. 2 Discussion
6:20pm	Large Group Discussion: LTD's Stakeholders
6:40pm	Breakout Groups: Strategies & Tactics
7:10pm	Reconvene & Share Out
7:30pm	Adjourn

Lane County / Insights

Direct Travel Impacts, 2022p

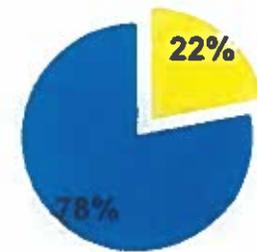
Visitor Spending Impacts	
Amount of Visitor Spending That Supports 1 Job	\$111,027
Employee Earnings Generated by \$100 Visitor Spending	\$27
Local & State Tax Revenues Generated by \$100 Visitor Spending	\$5
Visitor Shares	
Travel Share of Total Employment (2022)	5%
Overnight Visitor Day Share of Resident Population*	7%

Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates. Visitor spending that supports one job does not include employment in Other Travel.
 *Overnight Visitor Day Share of Resident Population is equal to the annual overnight visitor days divided by 365 divided by the resident population. On an average day, approximately 7% of the population is added to the amount of people in the area.

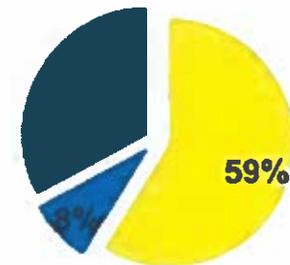
Visitors staying in hotel, motel, or short-term rentals account for 59% of overnight visitor spending for the state of Oregon, while private home (staying with friends and family or VFR) and other overnight together account for 41%. Generally, areas that are primarily rural or suburban have higher shares of private-home visitation and other overnight stays, while urban areas have a greater share of stays in hotels, motels, and short-term vacation rentals. "Other Overnight" includes camping and second-home spending.

2022 Share of Overnight Visitor Spending

Lane County



Oregon



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

Percentages may not sum to 100% due to rounding.

Lane County / Summary Trend

Direct Travel Impacts, 2003-2022p

	2003	2014	2015	2016	2017	2018	2019	2020	2021	2022	Avg. Annual % Chg.	
											2021-22	2003-22*
Spending (\$Millions)												
Total (Current \$)	520.5	842.7	868.6	928.7	950.8	1,024.1	1,041.1	566.0	1,064.8	1,393.6	▲ 30.9%	▲ 5.3%
Other	74.8	194.5	195.4	211.5	225.9	258.3	258.2	151.6	205.5	290.7	▲ 41.4%	▲ 7.4%
Visitor	445.7	648.2	673.2	717.2	724.8	765.8	782.9	414.3	859.3	1,102.9	▲ 28.4%	▲ 4.9%
Earnings (\$Millions)												
Earnings (Current \$)	126.2	220.0	238.6	261.8	273.7	297.6	308.4	252.9	278.2	352.2	▲ 26.6%	▲ 5.6%
Employment (Jobs)												
Employment	7,510	9,770	10,160	10,630	10,800	11,110	11,140	8,530	9,060	10,750	▲ 18.7%	▲ 1.9%
Tax Revenue (\$Millions)												
Total (Current \$)	18.2	31.1	33.7	36.6	39.2	41.5	42.1	29.1	42.3	53.9	▲ 27.3%	▲ 5.9%
Local	5.8	10.5	11.9	12.9	13.0	13.6	13.6	9.2	15.8	20.7	▲ 30.9%	▲ 6.9%
State	12.4	20.7	21.8	23.7	26.2	27.9	28.5	19.9	26.5	33.1	▲ 25.2%	▲ 5.3%

Notes:

House Bill 2267 established Travel Oregon in 2003, we include this year to track the long-term growth of the industry.

Calendar year 2021 has been revised with the release of this report.

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

The category "Other" represents a portion of resident spending on air travel to leave Oregon and travel arrangement activity.

Local taxes include lodging tax (TLT), food & beverage tax (where applicable), auto rental tax (where applicable), airport facility charges (where applicable).

State taxes include lodging tax (TLT), personal & business income tax, and motor fuel excise taxes.

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

Lane County / Detail Trend

Direct Travel Impacts, 2003-2022p

	2003	2014	2015	2016	2017	2018	2019	2020	2021	2022	Annual % Chg.	
											2021-22	2019-22
Direct Travel Spending (\$Millions)												
Destination Spending	445.7	648.2	673.2	717.2	724.8	765.8	782.9	414.3	859.3	1,102.9	28.4%	40.9%
Other Travel*	74.8	194.5	195.4	211.5	225.9	258.3	258.2	151.6	205.5	290.7	41.4%	12.6%
TOTAL	520.5	842.7	868.6	928.7	950.8	1,024.1	1,041.1	566.0	1,064.8	1,393.6	30.9%	33.9%
Visitor Spending by Type of Traveler Accommodation (\$Millions)												
Hotel, Motel, STVR	157.7	267.2	285.2	313.6	315.4	332.5	338.9	189.1	393.6	532.6	35.3%	57.2%
Hotel, Motel**									316.7	404.4	27.7%	
STVR**									76.9	128.2	66.8%	
Private Home	126.8	181.2	183.7	190.1	194.5	206.9	210.9	107.6	233.6	265.5	13.6%	25.9%
Campground	29.0	35.4	36.0	37.0	37.2	38.7	40.3	32.4	36.0	40.2	11.5%	-0.5%
Second Home	5.1	9.4	9.5	9.5	9.8	10.2	10.5	8.6	9.8	11.5	16.6%	9.6%
Day Travel	127.1	155.0	158.8	167.0	167.9	177.5	182.4	76.7	186.3	253.3	36.0%	38.9%
TOTAL	445.7	648.2	673.2	717.2	724.8	765.8	782.9	414.3	859.3	1,102.9	28.4%	40.9%
Visitor Spending by Commodity Purchased (\$Millions)												
Accommodations	63.3	112.2	124.8	139.9	142.1	141.3	142.5	99.8	196.9	269.9	37.1%	89.4%
Food Service	116.9	179.0	190.2	206.0	209.1	224.0	233.6	111.9	232.8	284.8	22.3%	21.9%
Food Stores	46.4	65.0	67.7	69.2	68.2	70.6	72.2	43.6	84.4	102.6	21.5%	42.0%
Local Tran. & Gas	42.9	75.8	66.8	66.9	68.5	81.3	81.6	34.9	82.6	109.1	32.1%	33.7%
Arts, Ent. & Rec.	70.0	83.0	85.8	90.9	90.3	94.3	95.8	48.7	94.8	110.4	16.4%	15.2%
Retail Sales	83.6	93.3	95.6	99.1	97.6	101.0	102.1	52.4	114.1	137.9	20.9%	35.1%
Visitor Air Tran.	22.5	39.8	42.4	45.1	49.0	53.3	55.0	22.9	53.6	88.2	64.3%	60.2%
TOTAL	445.7	648.2	673.2	717.2	724.8	765.8	782.9	414.3	859.3	1,102.9	28.4%	40.9%

House Bill 2267 established Travel Oregon in 2003, we include this year to track the long-term growth of the industry.

Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

*Other Travel spending includes resident air travel, travel arrangement & convention services, and transportation of visitors traveling to other Oregon destinations.

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

Lane County / Detail Trend

Direct Travel Impacts, 2003-2022p

	2003	2014	2015	2016	2017	2018	2019	2020	2021	2022	Annual % Chg.	
											2021-22	2019-22
Travel Industry Earnings (\$Millions)												
Accom. & Food Serv.	77.8	127.1	138.1	149.6	158.2	169.2	178.4	143.3	164.5	213.7	29.9%	19.7%
Arts, Ent. & Rec.	20.5	30.0	31.4	34.2	34.8	37.6	39.6	31.0	34.7	44.4	28.1%	12.2%
Retail**	15.8	20.2	21.2	22.6	23.1	24.2	24.7	24.5	26.4	29.9	13.3%	21.2%
Ground Tran.	3.1	3.8	4.1	4.4	4.3	4.9	5.2	4.2	6.4	7.7	20.2%	47.2%
Other Travel*	9.0	38.9	43.8	51.0	53.3	61.8	60.4	49.8	46.2	56.5	22.2%	-6.4%
TOTAL	126.2	220.0	238.6	261.8	273.7	297.6	308.4	252.9	278.2	352.2	26.6%	10.0%
Travel Industry Employment (Jobs)												
Accom. & Food Serv.	4,300	5,300	5,540	5,780	5,920	6,030	6,150	4,720	5,200	6,210	19.3%	0.9%
Arts, Ent. & Rec.	1,940	2,420	2,400	2,540	2,580	2,620	2,630	1,870	2,000	2,670	33.9%	1.5%
Retail**	780	840	860	880	880	890	890	800	840	880	4.7%	-0.2%
Ground Tran.	140	120	120	130	120	130	130	120	170	170	-1.3%	25.9%
Other Travel*	350	1,100	1,240	1,310	1,310	1,450	1,340	1,020	840	820	-2.9%	-38.9%
TOTAL	7,510	9,770	10,160	10,630	10,800	11,110	11,140	8,530	9,060	10,750	18.7%	6.2%
Tax Receipts Generated by Travel Spending (\$Millions)												
Local Tax Receipts	5.8	10.5	11.9	12.9	13.0	13.6	13.6	9.2	15.8	20.7	30.9%	52.7%
State Tax Receipts	12.4	20.7	21.8	23.7	26.2	27.9	28.5	19.9	26.5	33.1	25.2%	16.1%
TOTAL	18.2	31.1	33.7	36.6	39.2	41.5	42.1	29.1	42.3	53.9	27.3%	45.5%

House Bill 2267 established Travel Oregon in 2003, we include this year to track the long-term growth of the industry. Details may not add to totals due to rounding. Percent change calculated on unrounded figures.

*Other Travel includes resident air travel, travel arrangement and convention/trade shows.

**Retail includes gasoline station employment and earnings.

Lane County / Visitor Details

Visitor Details, 2022p

Overnight visitor volume for Lane County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates, therefore, will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric than visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day-travel estimates are not included because of data limitations.

Additional years available at www.travelstats.com/oregon

Average Expenditure for Overnight Visitors, 2022

	Person		Party		Party Size	Length of Stay
	Day	Trip	Day	Trip		
Hotel, Motel, STVR	\$221	\$456	\$561	\$1,167	2.5	2.1
Private Home	\$55	\$182	\$126	\$431	2.3	3.4
Other Overnight	\$64	\$198	\$193	\$593	3.0	3.1
All Overnight	\$113	\$307	\$275	\$770	2.4	2.8

Overnight Visitor Volume, 2020-2022

	Person-Nights			Party-Nights		
	2020	2021	2022	2020	2021	2022
Hotel, Motel, STVR	1,316,490	2,737,550	3,117,460	513,320	1,020,920	1,225,860
Private Home	2,561,550	4,899,810	4,839,110	1,088,230	2,184,500	2,125,610
Other Overnight	932,280	992,030	1,169,880	352,800	375,450	390,480
All Overnight	4,810,320	8,629,390	9,126,450	1,954,350	3,580,870	3,741,950

	Person-Trips			Party-Trips		
	2020	2021	2022	2020	2021	2022
Hotel, Motel, STVR	695,060	1,350,340	1,508,800	263,220	498,940	588,970
Private Home	724,330	1,381,880	1,472,160	305,290	599,510	622,080
Other Overnight	306,570	326,230	380,610	116,100	123,560	127,190
All Overnight	1,725,960	3,058,460	3,361,570	684,610	1,222,010	1,338,240