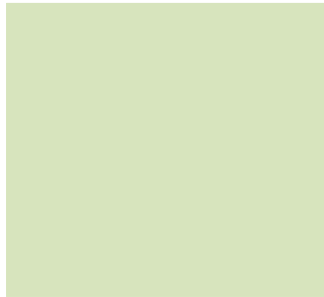


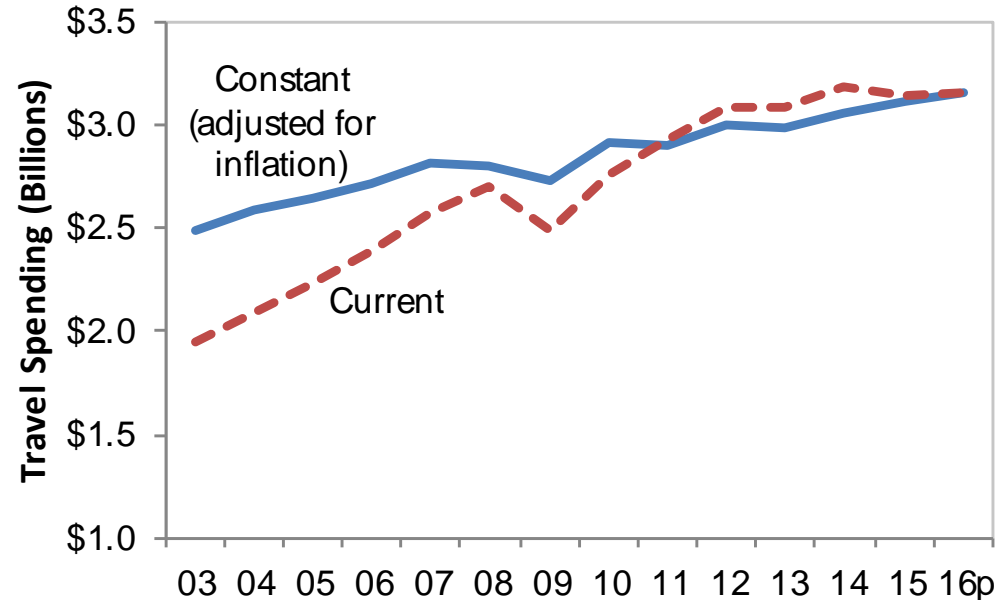
Use Economic and Travel Research to Advance Your Community

2017



Total Direct Travel Spending

Travel Spending for Nebraska, 2003-2016p



Note: Travel spending was deflated by a composite of items from the Midwest Urban CPI.

Primary Measures of Travel-Generated Economic Impacts

- ☐ Direct Travel Spending *
 - ☐ Destination or Visitor Spending
 - ☐ Spending by type of accommodation and commodity purchased
 - ☐ Industry Earnings Generated by Travel Spending
 - ☐ Industry Employment Generated by Travel Spending
 - ☐ Travel-Generated Tax Receipts (State and Local)
-
-

* For local areas, includes resident ground transportation and air travel spending for travel to other visitor destinations.

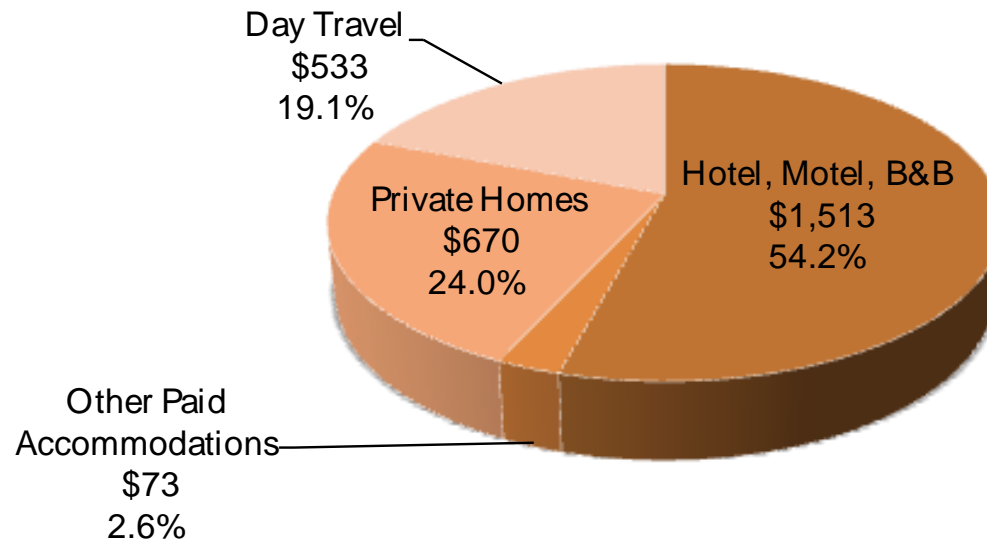
Nebraska Travel Impacts

Nebraska Travel Trends, 2003-2016p

	Spending	Earnings	Employment	Tax Receipts (\$Million)		
	(\$Million)	(\$Million)	(Thousand)	Local	State	Total
2003	1,957	465	33.9	27	103	130
2004	2,089	470	33.9	29	110	139
2005	2,230	484	34.1	31	116	147
2006	2,392	507	34.9	35	123	158
2007	2,571	541	36.5	39	132	171
2008	2,711	560	36.6	42	136	177
2009	2,485	539	35.0	40	133	173
2010	2,759	555	34.8	43	144	187
2011	2,931	571	35.1	44	147	191
2012	3,094	597	35.8	48	154	202
2013	3,095	616	36.5	52	154	206
2014	3,187	642	37.5	55	160	215
2015	3,146	665	38.2	58	162	220
2016p	3,159	690	38.8	60	162	223
<i>Annual Percentage Change</i>						
15-16p	0.4	3.8	1.7	4.4	0.0	1.1
03-16p	3.8	3.1	1.0	6.4	3.5	4.2

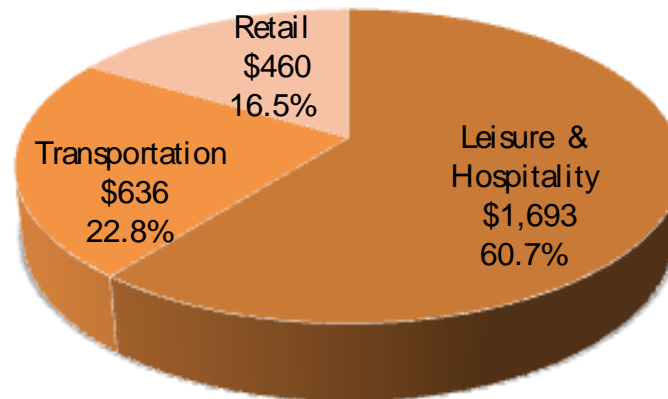
Type of Accommodation

**Nebraska Visitor Spending by Type of Accommodation, 2016p
(\$Million)**



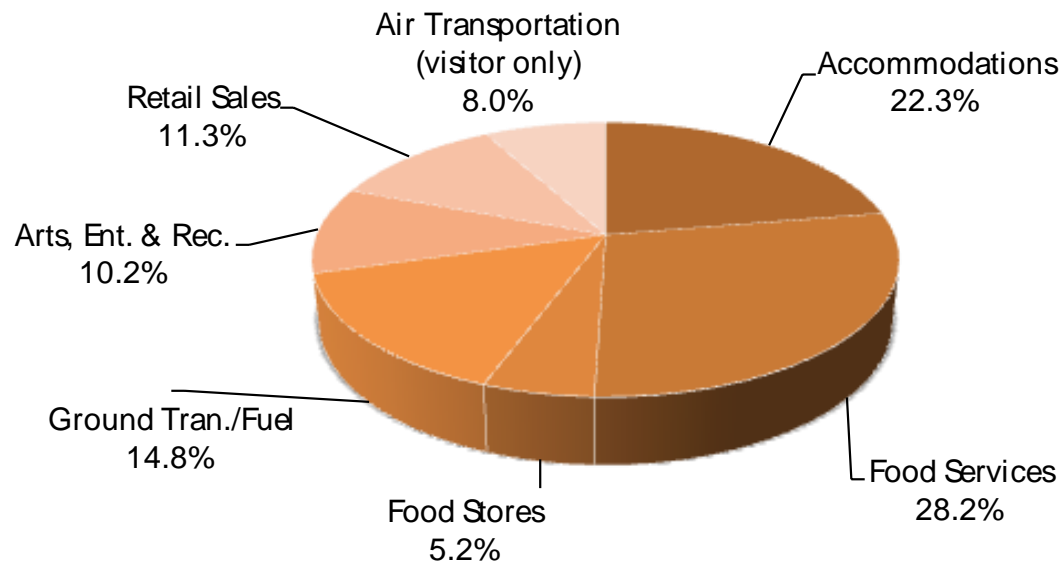
Type of Commodity or Visitor Purchase

**Nebraska Visitor Spending by Type of Commodity, 2016p
(\$Million)**



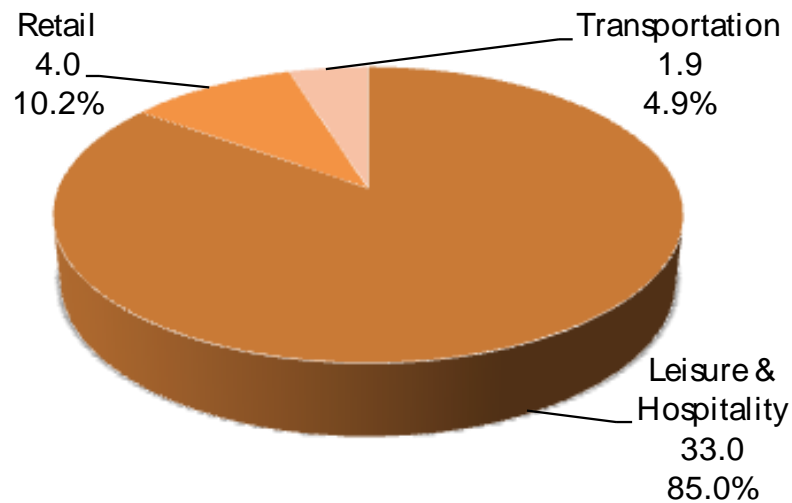
Type of Commodity or Visitor Purchase

**Nebraska Visitor Spending by Type of Commodity, 2016p
(\$Million)**



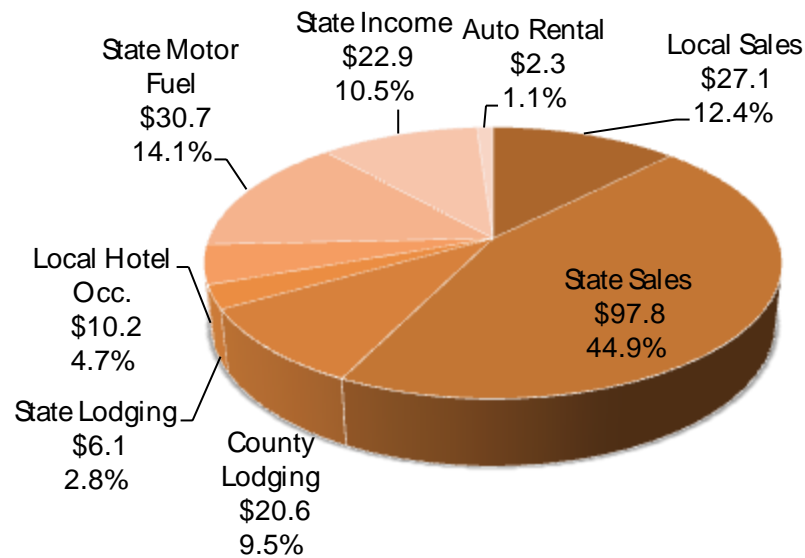
Travel-Generated Employment

**Nebraska Travel-Generated Employment by Industry, 2016p
(Thousand Jobs)**



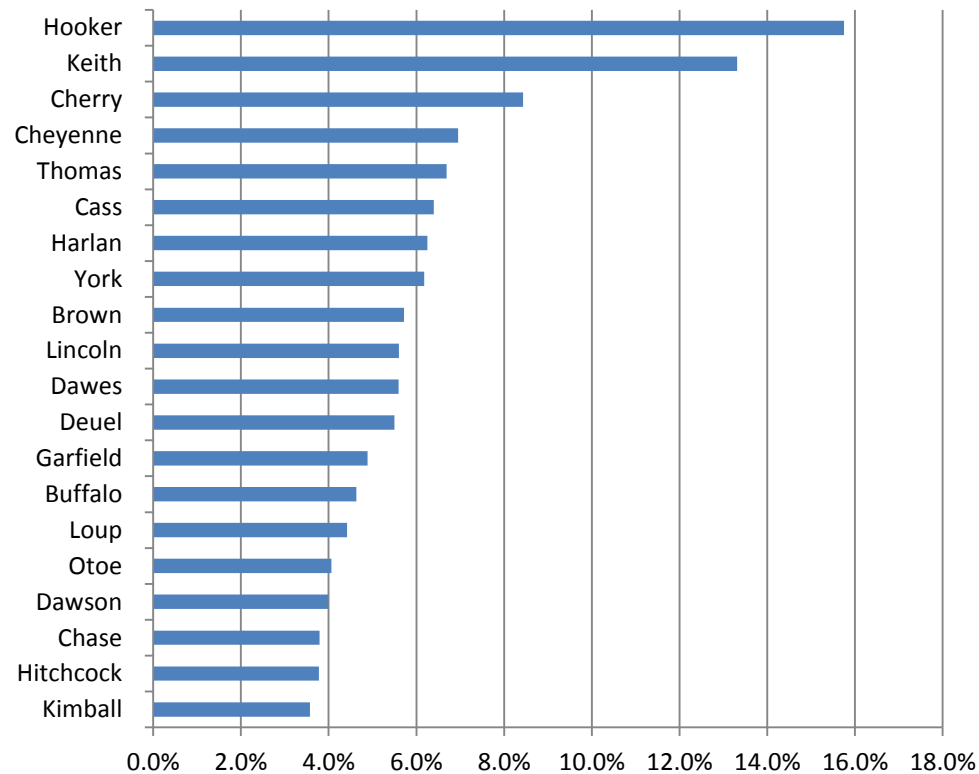
Travel-Generated Tax Revenue

Nebraska Travel-Generated Tax Revenue, 2016p (State and Local)



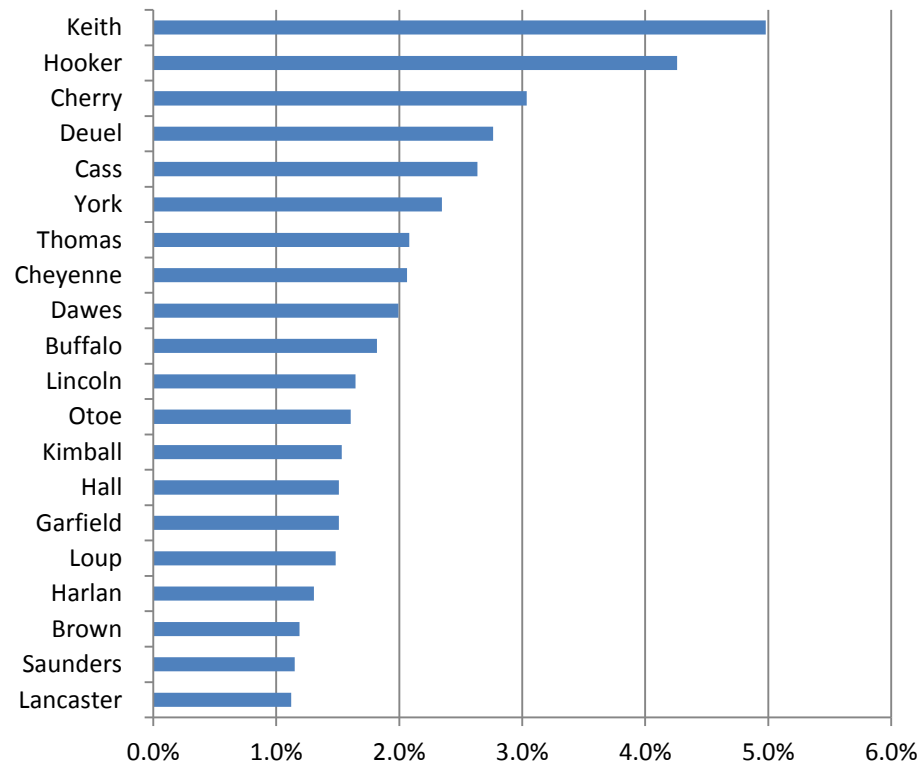
Nebraska Counties, Travel-Generated Employment as a Percentage of Total

Travel-Generated Employment as a Percent, Top 20

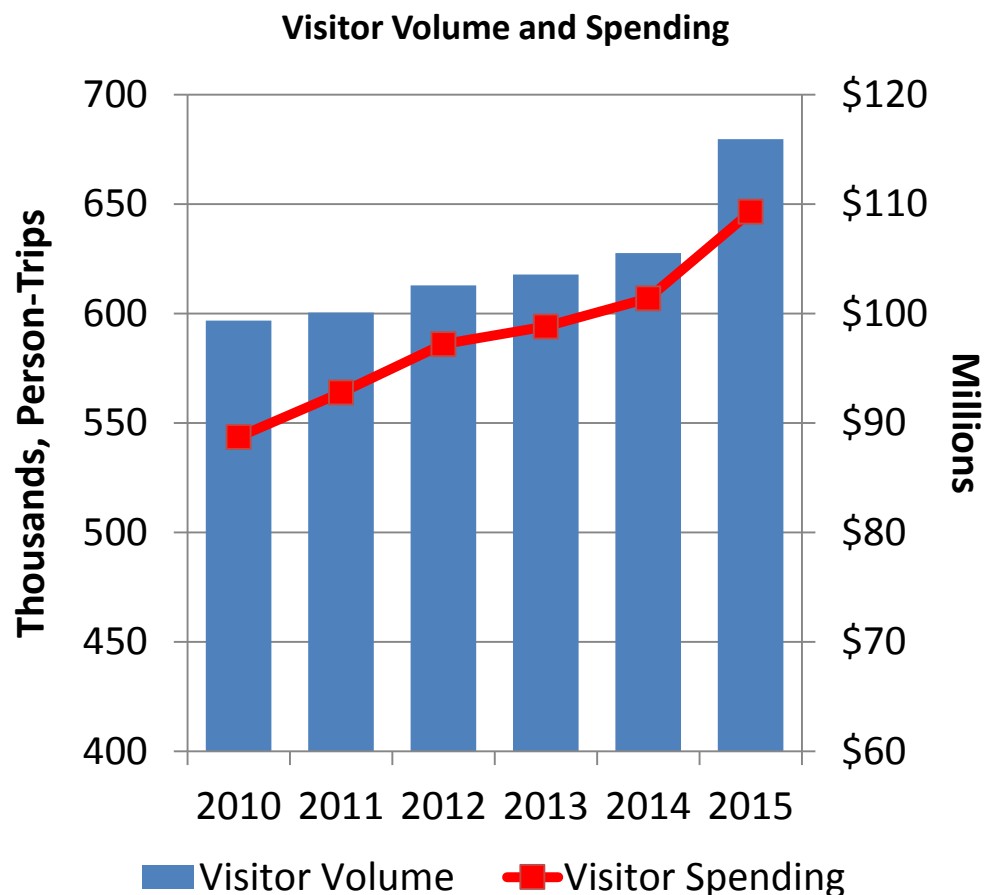


Nebraska Counties, Travel-Generated Earnings as a Percentage of Total

Travel-Generated Earnings as a Percent, Top 20



Travel and Tourism-Generated Visitor Volume and Spending

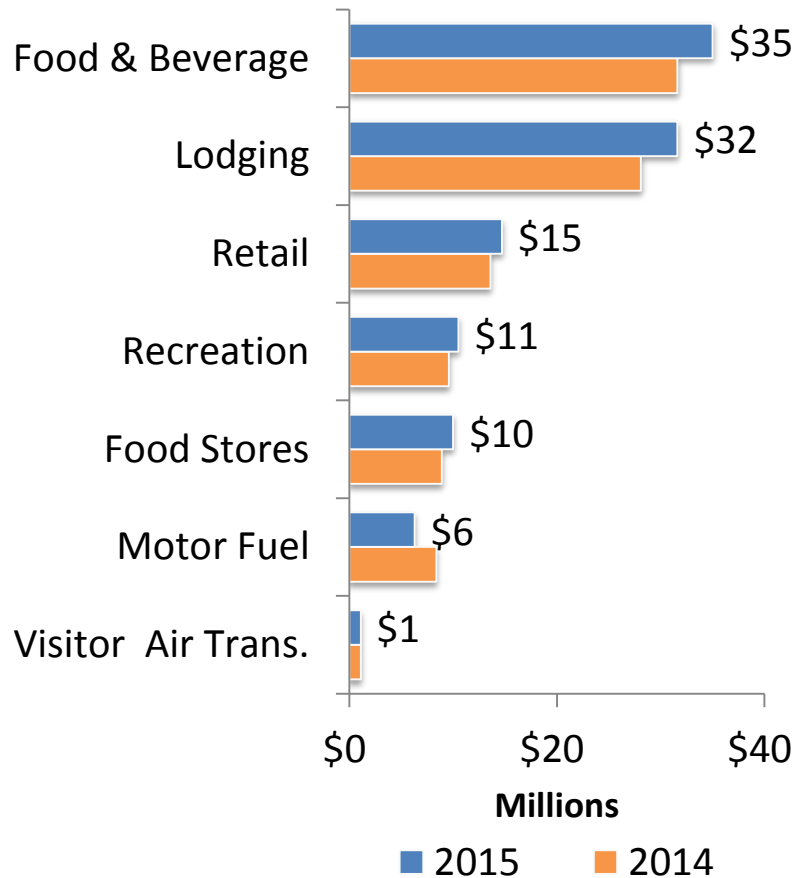


Source: Dean Runyan Associates

- During 2015, approximately 680,000 visitors (person-trips) traveled to Lincoln County; and these visitors spent a total of \$109.3 million, increases of 8.3% and 7.9% over past year, respectively.

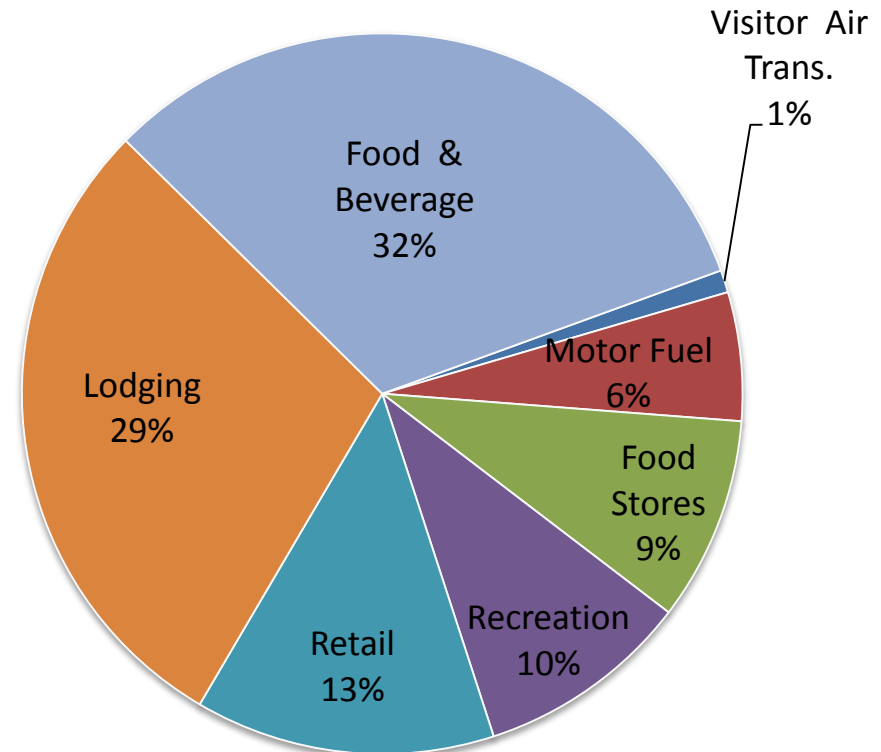
Visitor Spending by Type of Purchase

Visitor Spending by Type (\$M)



Visitor Spending Profile, 2015

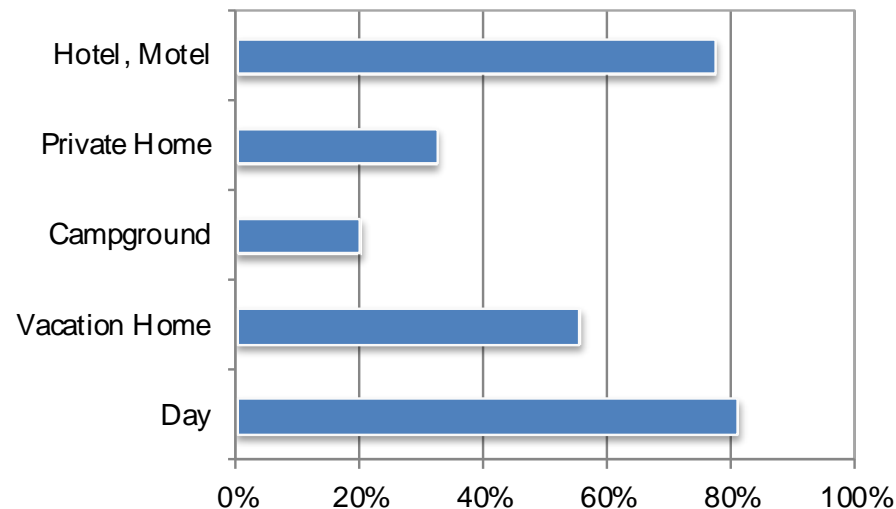
Total: \$109.3 Million



Source: Dean Runyan Associates

Spending by Type of Accommodation

City of Hood River Share of County Visitor Spending by Type of Accommodation, 2015p



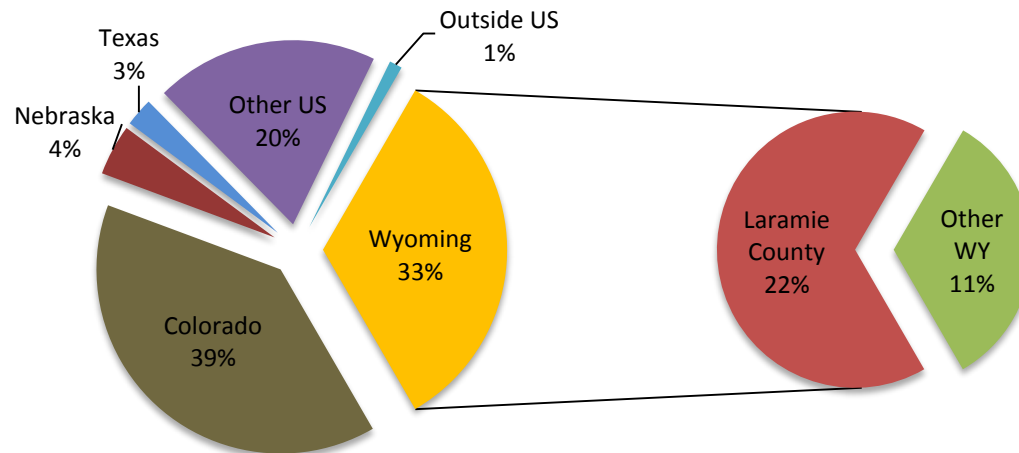
Festivals and Special Events

- ☐ Attendance count and share of attendees who are residents
 - ☐ Overnight Visitors (and length of stay) vs. Day Travelers
 - ☐ Origin and Previous Visitation
 - ☐ Motivation for Travel (primary reason, casual activity, etc.)
 - ☐ Accommodation Type and Travel Party Companions
 - ☐ Visits to attractions, other communities, and places
 - ☐ Participation in other activities
 - ☐ Trip planning and demographics (education, age, and range of income)
-
-

Origin of Attendees

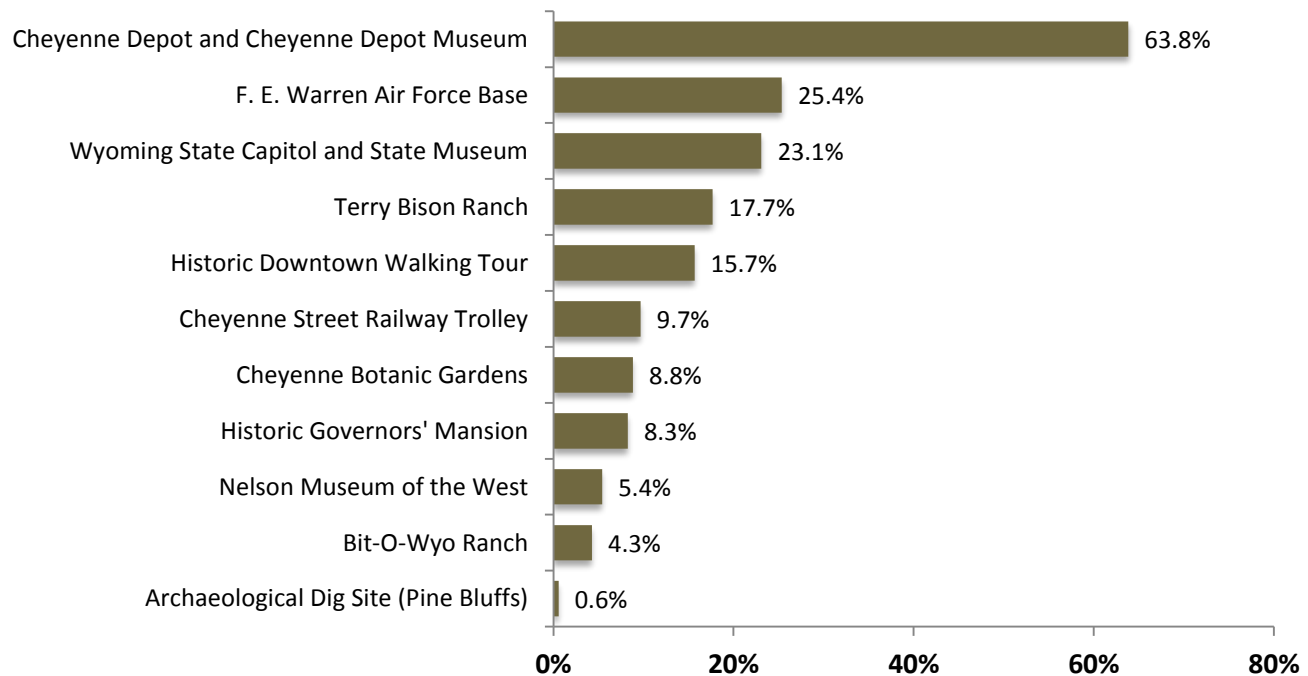
More than one-third of event attendees came from Colorado. Two-thirds of Wyoming attendees came from Laramie County.

Origin of Attendees, Cheyenne Frontier Days

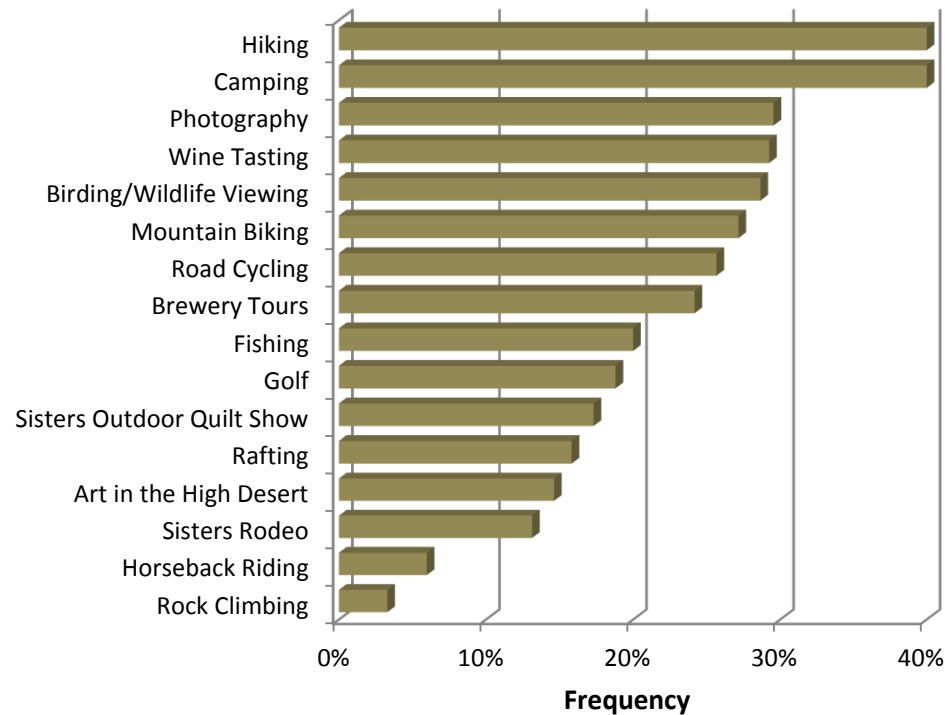


Visits to Other Local Attractions and Places

Visits to Attractions and Places in or near Cheyenne, July 2015



Participation in Outdoor Recreation and Other Activities



Base: Sisters Folk Festival Survey (n = 335)

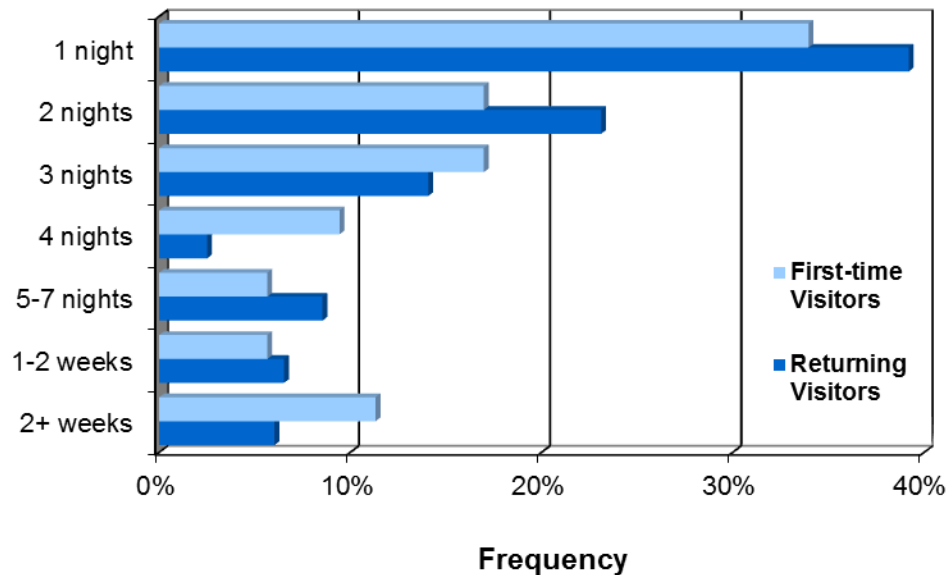
Source: Dean Runyan Associates

Visitor Profile Characteristics

- ☐ Visitor Origin, First Time and Returning Visitors
 - ☐ Overnight and Day Visitors
 - ☐ Length of Stay
 - ☐ Type of Accommodation (for overnight stays)
 - ☐ Mode of Transportation
 - ☐ Purpose of Trip, Places Visited, Activities
 - ☐ Party Size, Traveling with Children
-
-

Length of Stay

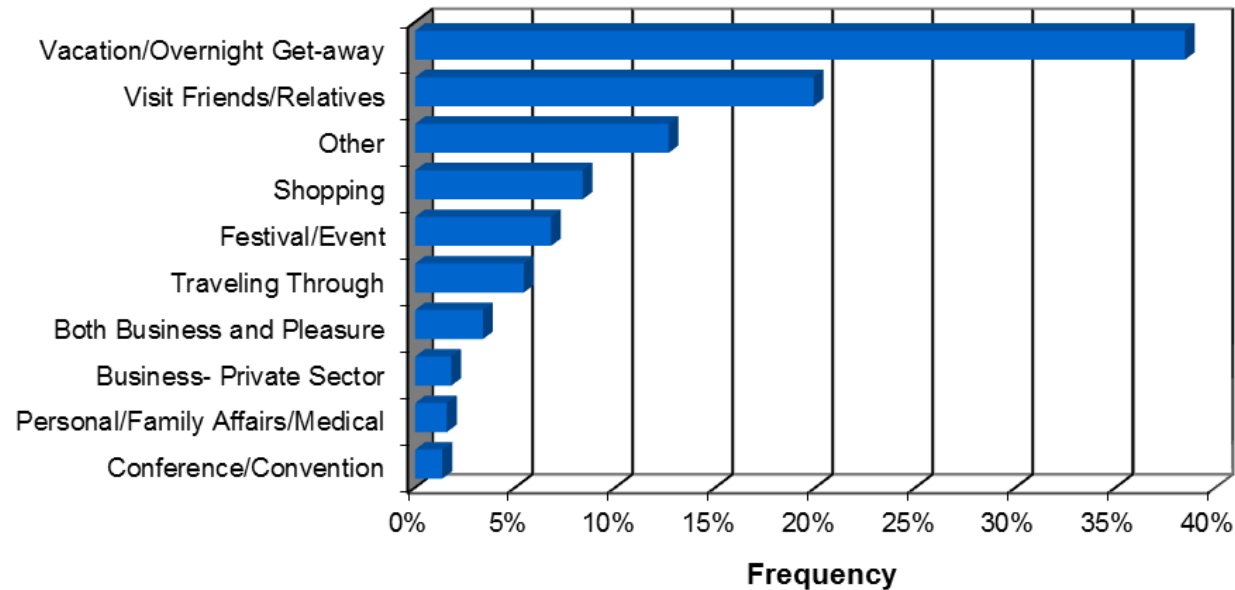
Length of Stay in Bellingham, First-time vs. Returning Visitors



Source: Dean Runyan Associates

Purpose of Trip

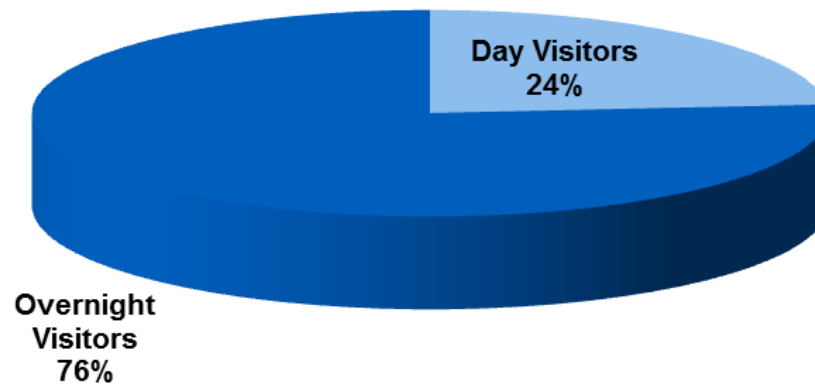
Primary Purpose for Visiting Whatcom County



Source: Dean Runyan Associates

Day and Overnight

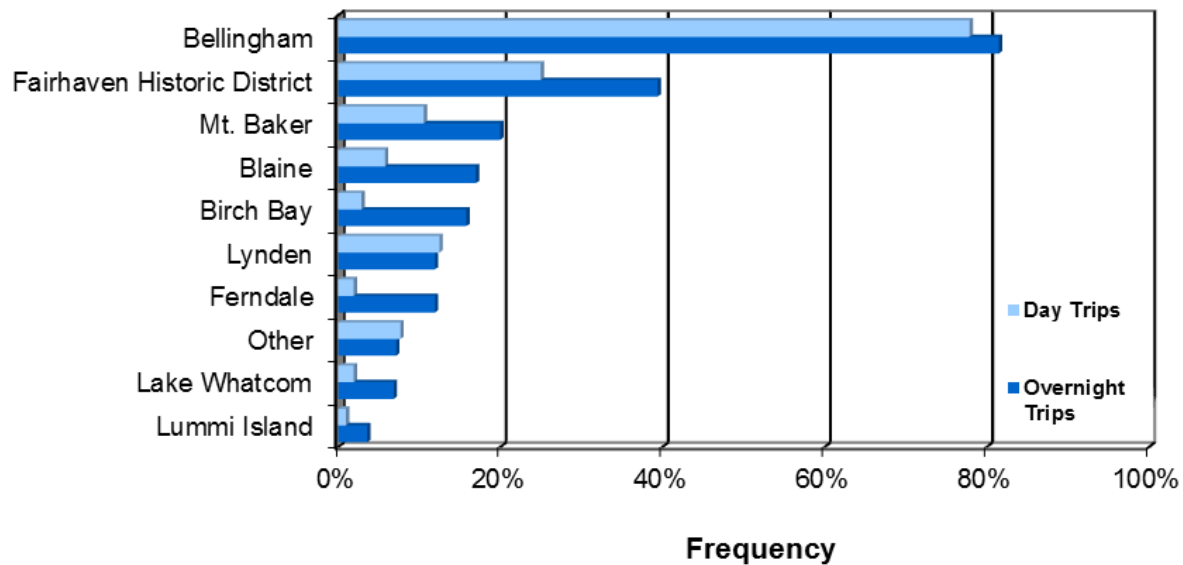
Percentage of Day and Overnight Visitors



Source: Dean Runyan Associates

Places and Locations Visited

Locations Visited in Whatcom County



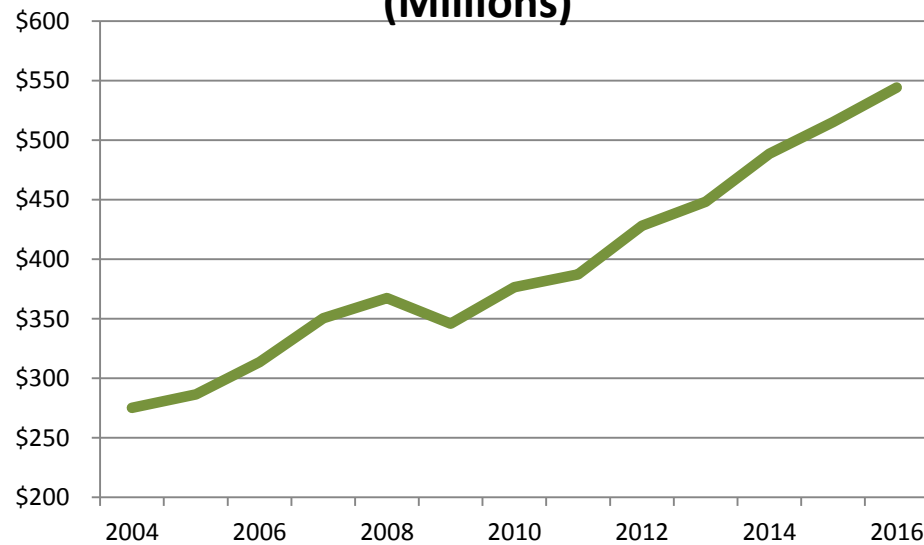
Source: Dean Runyan Associates

Paid Accommodations

- ☐ Census or list of participating lodging properties and number of rooms
 - ☐ Occupancy Rate by Month and YOY percent change
 - ☐ Average Daily Rate (ADR, Room Revenue/Rooms Sold)
 - ☐ Rooms available (Supply) and room nights sold (Demand)
 - ☐ Room Revenue (Demand x ADR)
 - ☐ Lodging Tax Receipts and room sales (compare with revenue)
 - ☐ List of Campgrounds (and number of sites)
-
-

Statewide Lodging Sales

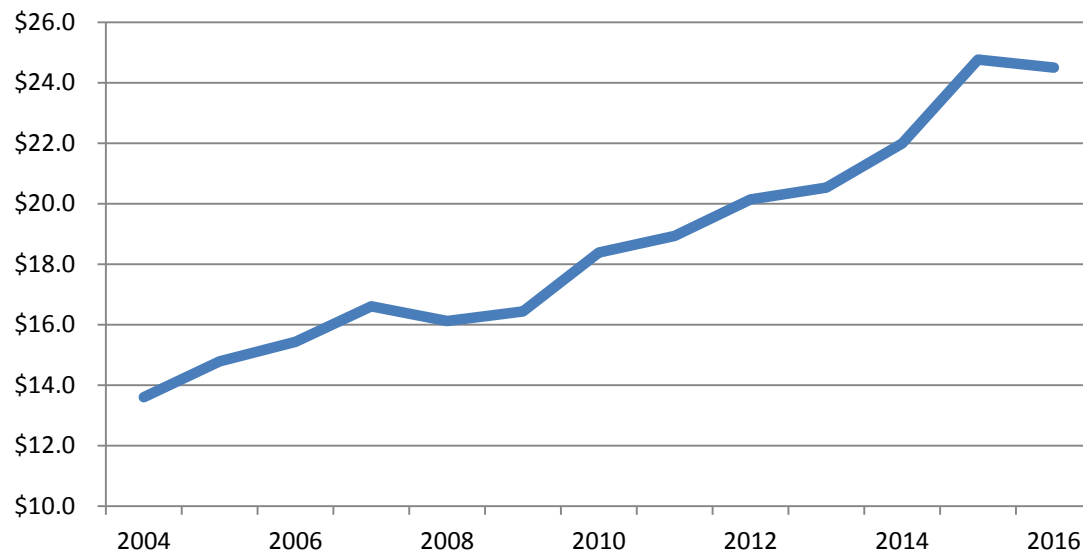
**Nebraska Lodging Sales
(Millions)**



Sources: Dean Runyan Associates, Nebraska Department of Revenue

County Lodging Sales

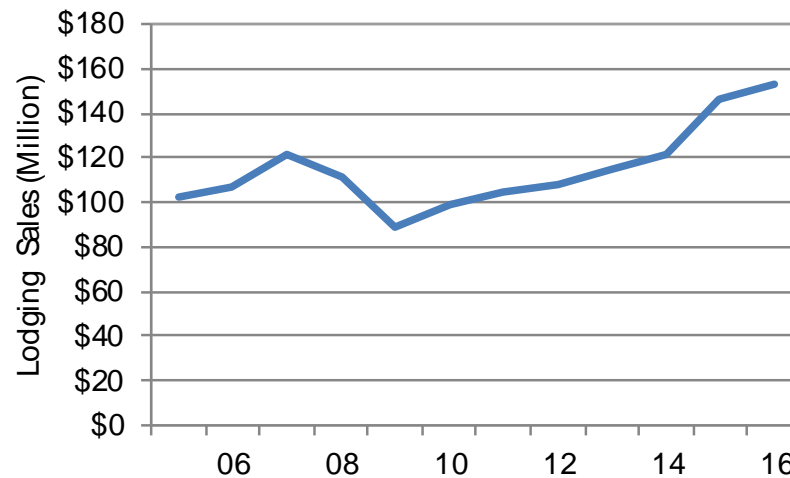
Lincoln County Lodging Sales



Sources: Dean Runyan Associates, City of North Platte

City Lodging Sales Trend

Lodging Sales, 2005 to 2016



Source: Irvine City Clerk's Office of Records and Information. Lodging sales were derived from tax receipts divided by the 8 percent tax rate.

Visitor Volume Estimates

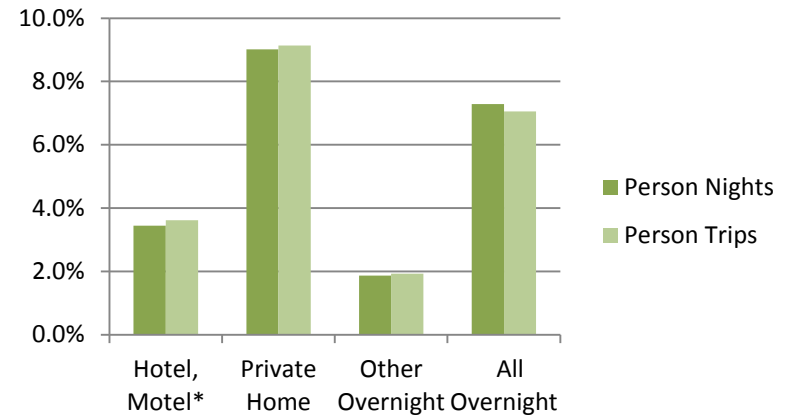
- ☐ Room Demand
 - ☐ Visitor Survey
 - ☐ Population (U.S. Census Bureau)
 - ☐ Inventory/Use of Campsites & Second Homes
 - ☐ Visitor air arrivals
-
-

Overnight Visitor Volume, 2014-2016p

	Person-Nights (000)			Party-Nights (000)		
	2014	2015	2016	2014	2015	2016
Hotel, Motel*	33	47	52	15	22	24
Private Home	462	469	475	199	204	209
Other Overnight	11	12	12	3	4	3
All Overnight	505	528	539	217	229	236

	Person-Trips (000)			Party-Trips (000)		
	2014	2015	2016	2014	2015	2016
Hotel, Motel*	17	25	27	8	11	12
Private Home	152	154	156	62	64	65
Other Overnight	3	4	4	1	1	1
All Overnight	173	183	187	71	76	78

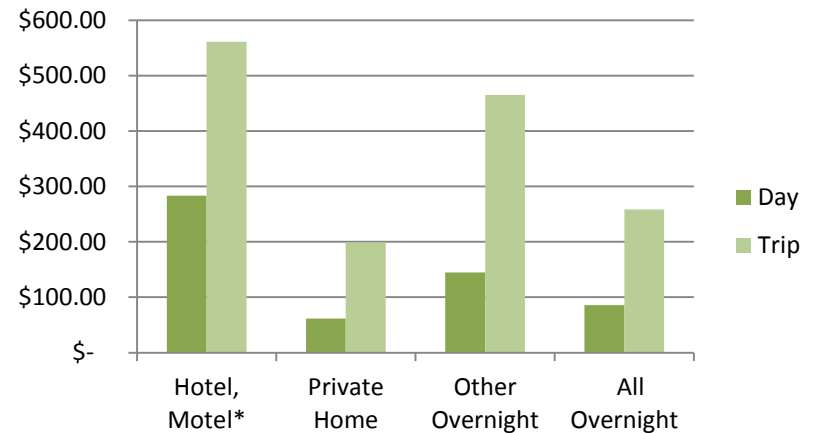
Overnight Volume Pct. of County



Average Expenditures for Overnight Visitors, 2016p

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel*	\$283	\$561	\$132	\$250	2.1	2.0
Private Home	\$62	\$199	\$27	\$83	2.3	3.2
Other Overnight	\$144	\$465	\$42	\$135	3.4	3.2
All Overnight	\$85	\$259	\$38	\$108	2.3	3.0

Travel Party Average Expenditure



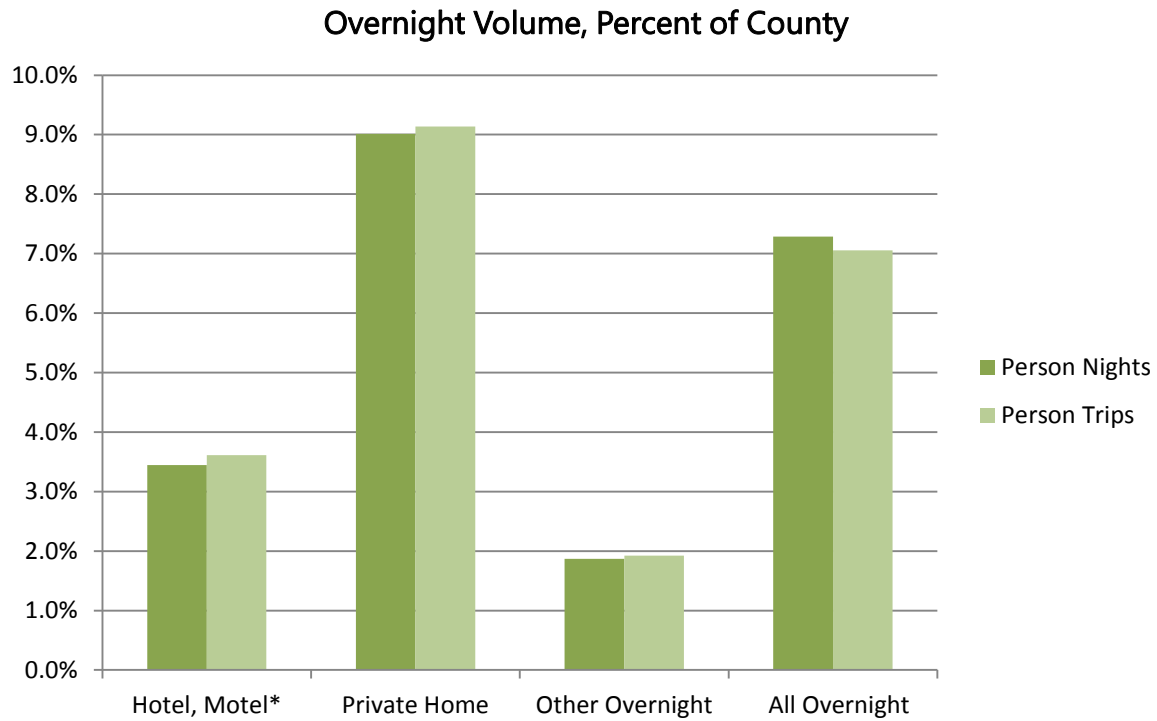
Overnight Visitor Volume

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Overnight Visitor Volume

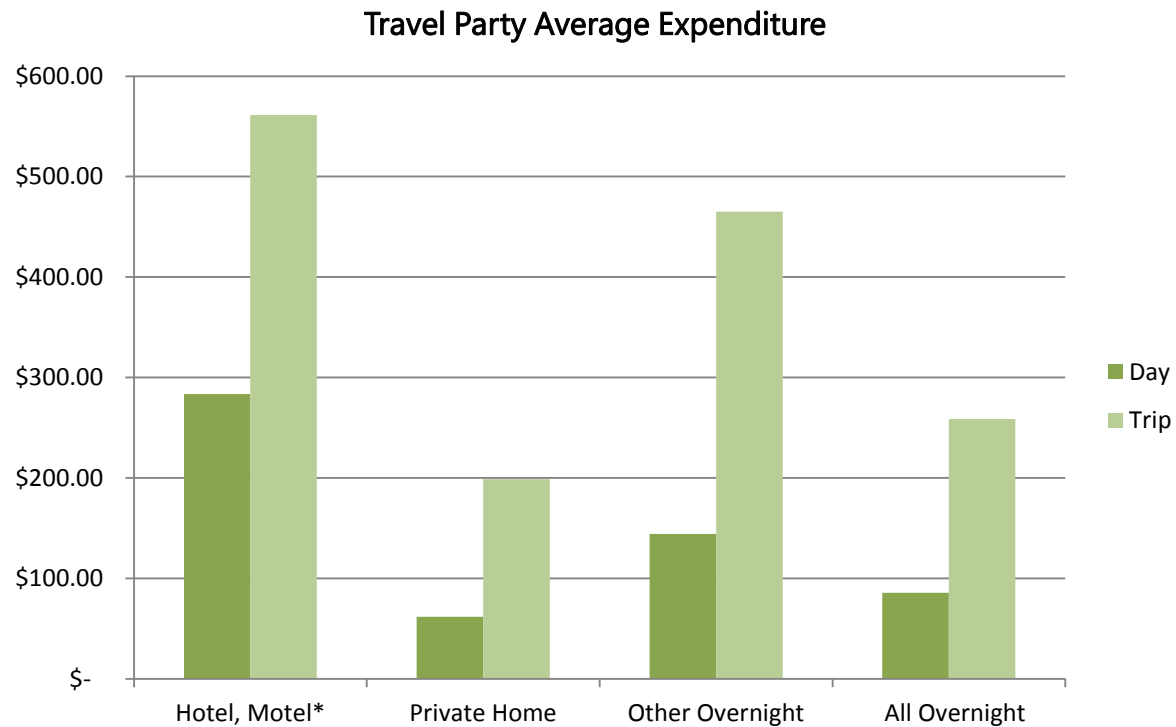


Average Daily Expenditures

Average Expenditures for Overnight Visitors, 2016p

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Average Daily Expenditures



Economic Impacts for Conference and Convention Centers

SEASIDE CIVIC AND CONVENTION CENTER ECONOMIC IMPACT CALCULATOR

Select Year: 2017

Attendance by Type of Events, 2017

Conference/Convention	15000
Trade Show	500
Civic Event	1500
Fundraiser	2500
State of Oregon Affiliation	900
Total Attendees	20400

Calculate Impacts

The SCCC event attendee impact estimates are calculated using the Regional Travel Impact Model (RTIM), a proprietary computer model for analyzing travel economic impacts at the state level, developed by Dean Runyan Associates.

IMPLAN Group LLC modeling system was used to estimate the secondary impacts of direct spending.

The Model is intended to be updated annually as soon as SCCC event attendee data becomes available for the new calendar year.


Category	2017
▼ Direct Impacts	
▼ 1. Spending by SCCC Event Attendee (\$)	
Overnight	11,655,030
Day Travel	141,516
Local Resident	38,790
Total Spending in Seaside	11,835,336
▼ 2. Spending by Commodity Purchased (\$)	
Accommodations	5,903,635
Restaurants	3,143,726
Groceries	911,772
Transportation	553,409
Recreation and Entertainment	459,011
All other retail	863,782
Total Spending in Seaside	11,835,336
▼ 3. Earnings Generated by SCCC Spending (\$)	
Leisure & Hospitality	2,189,940
Arts, Entertainment & Recreation	112,599
Retail (includes groceries, and motor fuel)	222,258
Total Direct Earnings	2,524,798
▼ 4. Employment Generated by SCCC Spending (Jobs)	
Leisure & Hospitality	106
Retail & other	13
Total Direct Employment	119
▼ 5. Tax Receipts Generated by SCCC Spending (\$)	
Local Tax Receipts	411,630

Economic Impacts for Conference and Convention Centers

Select Year: ▼

Attendance by Type of Events, 2017

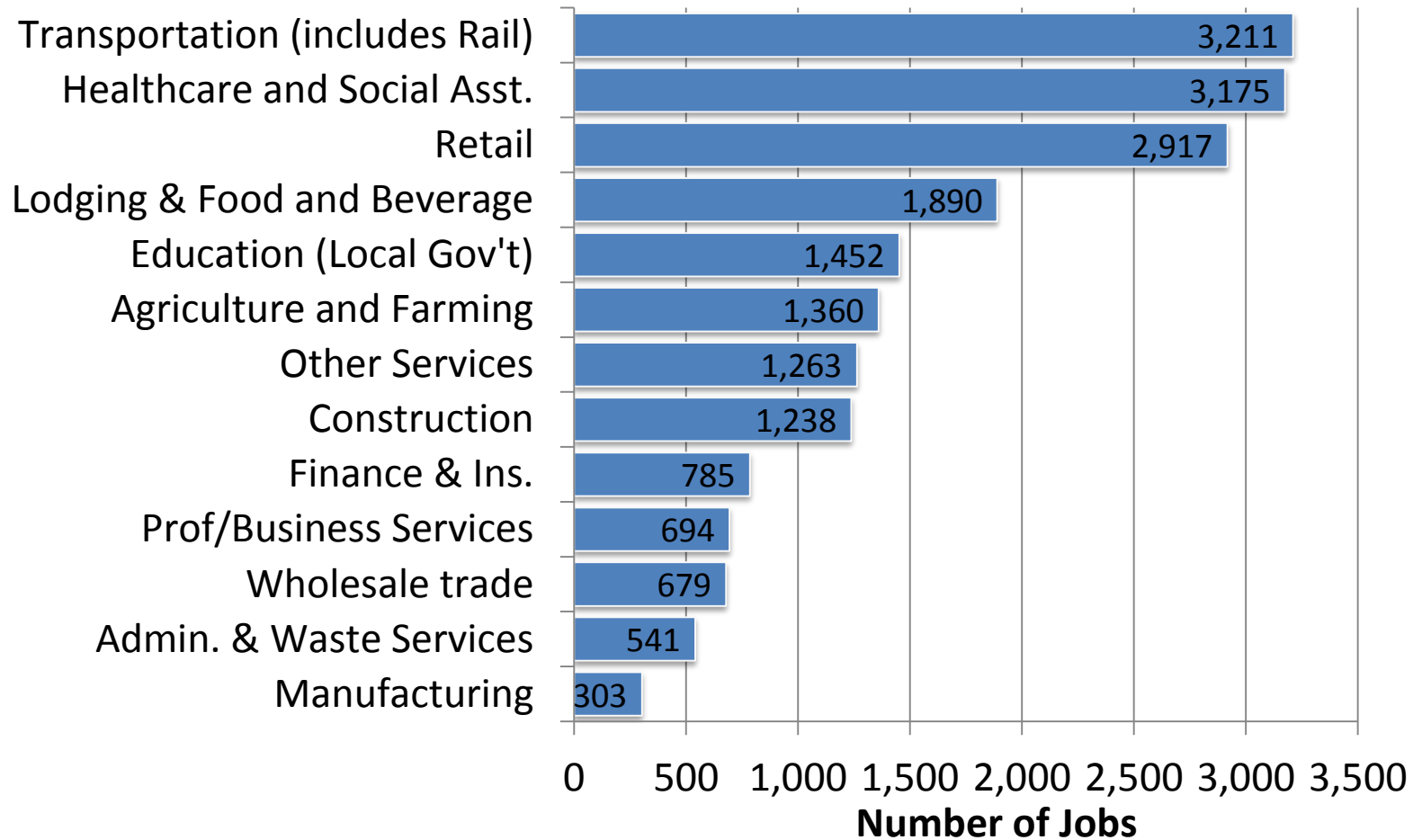
Conference/Convention	<input type="text" value="15000"/>
Trade Show	<input type="text" value="500"/>
Civic Event	<input type="text" value="1500"/>
Fundraiser	<input type="text" value="2500"/>
State of Oregon Affiliation	<input type="text" value="900"/>
Total Attendees	<input type="text" value="20400"/>



Economic Impacts for Conference and Convention Centers

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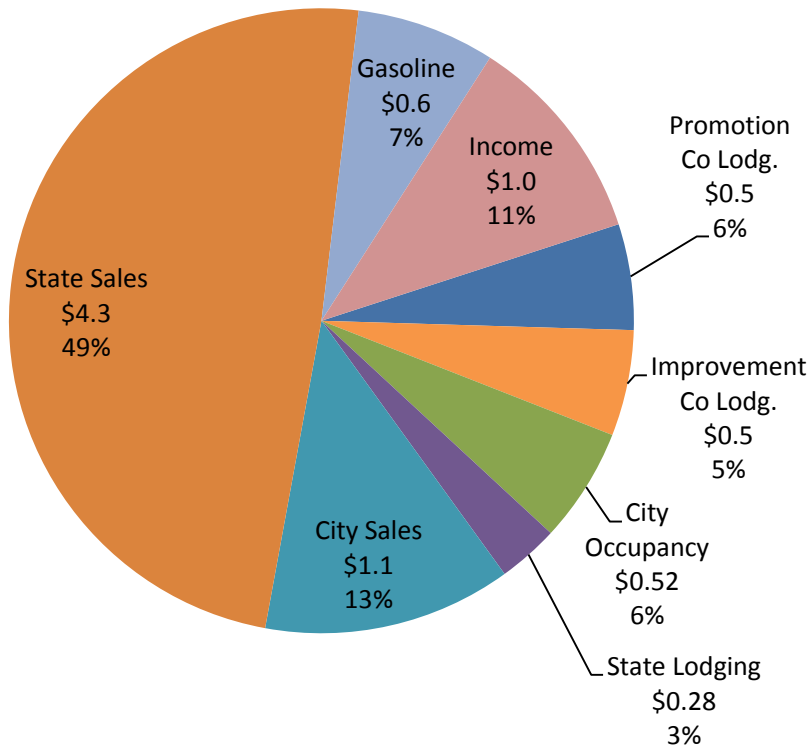
Lincoln County Total Employment by Industry, 2015



Sources: Bureau of Economic Analysis and IMPLAN

Travel and Tourism-Generated Tax Receipts in Lincoln County, 2015

**Travel and Tourism-Generated Tax
By Category, 2015
(Millions)**



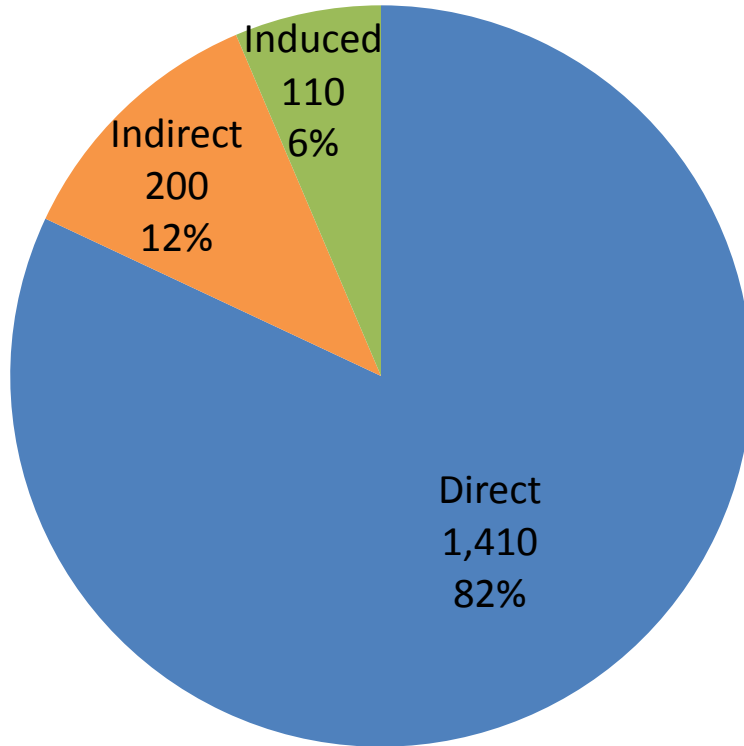
Tax Category	Amount
State Travel-Generated Tax	\$6,164,142
State Lodging	\$275,841
State Sales	\$4,300,585
Income	\$958,622
Gasoline	\$629,094
Local Travel-Generated Tax	\$2,609,169
County Lodging (Improvement)	\$480,589
County Lodging (Promotional)	\$480,589
City Occupancy	\$520,373
City Sales	\$1,127,617
TOTAL	\$8,773,311

Sources: Dean Runyan Associates, City of North Platte

Share of General Fund Budget

- Travel-generated sales tax revenue is a primary source for funding for the City of North Platte General Fund, which represents about 4% of the General Fund budget, contributing to the following public services:
 - Police (\$237,000)
 - Fire (\$200,000)
 - Library (\$52,000)
 - Park and Rec. Facilities (\$58,000)

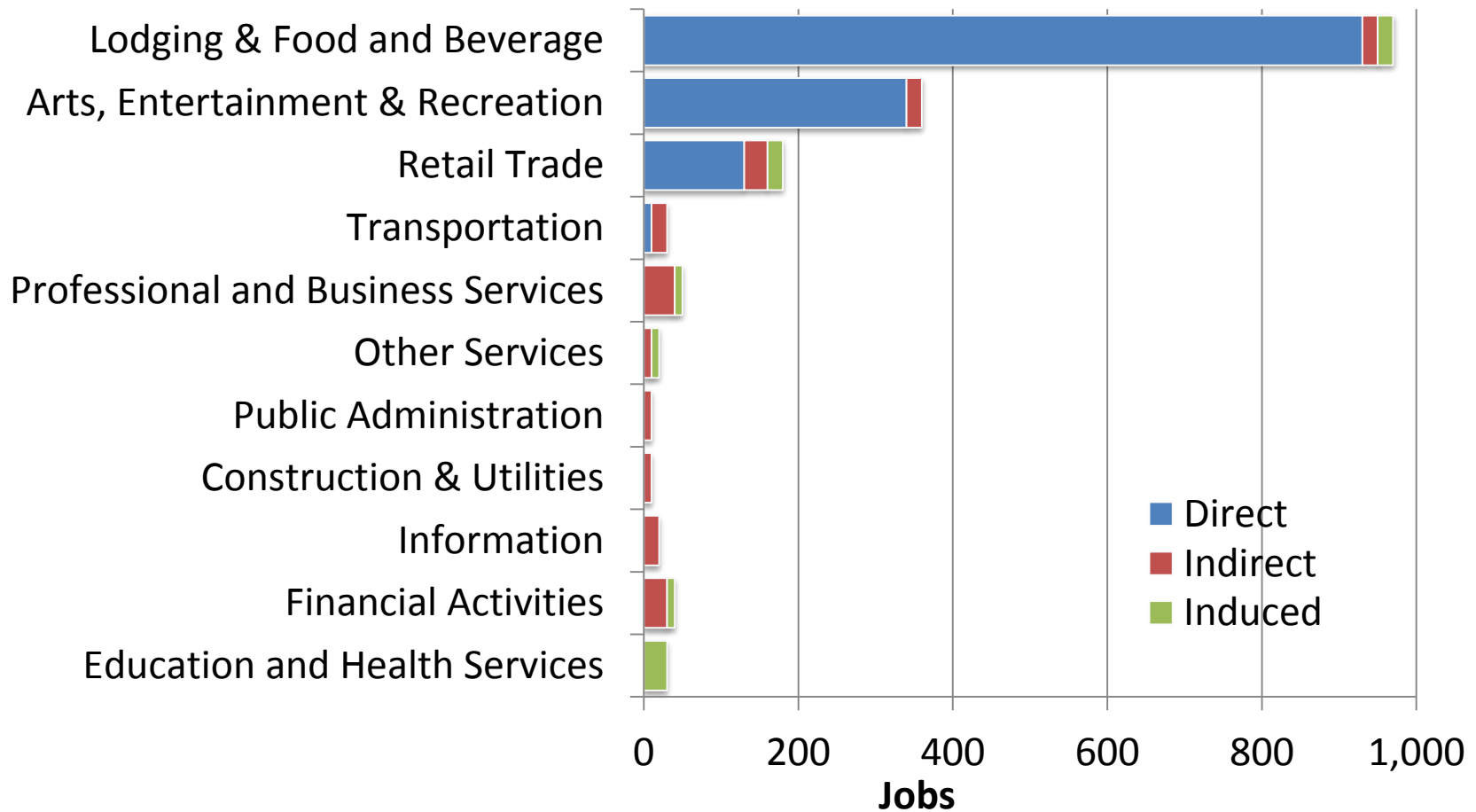
Secondary Travel and Tourism-Generated Employment, 2015



- Travel and tourism spending in Lincoln County generated 1,720 jobs, including additional jobs created by indirect and induced impacts.
- Direct travel and tourism generated employment (1,410 jobs) represents a significant share of employment in lodging & food and beverage (1,890 jobs) for Lincoln County in 2015.
- Travel and tourism-generated employment represented 7.5% of total employment (nearly 1-in-13 jobs) in Lincoln County in 2015.

Sources: IMPLAN, Dean Runyan Associates

Travel and Tourism-Generated Employment by Industry, 2015



Source: IMPLAN, Dean Runyan Associates

2017 Eclipse Economic Impact Study

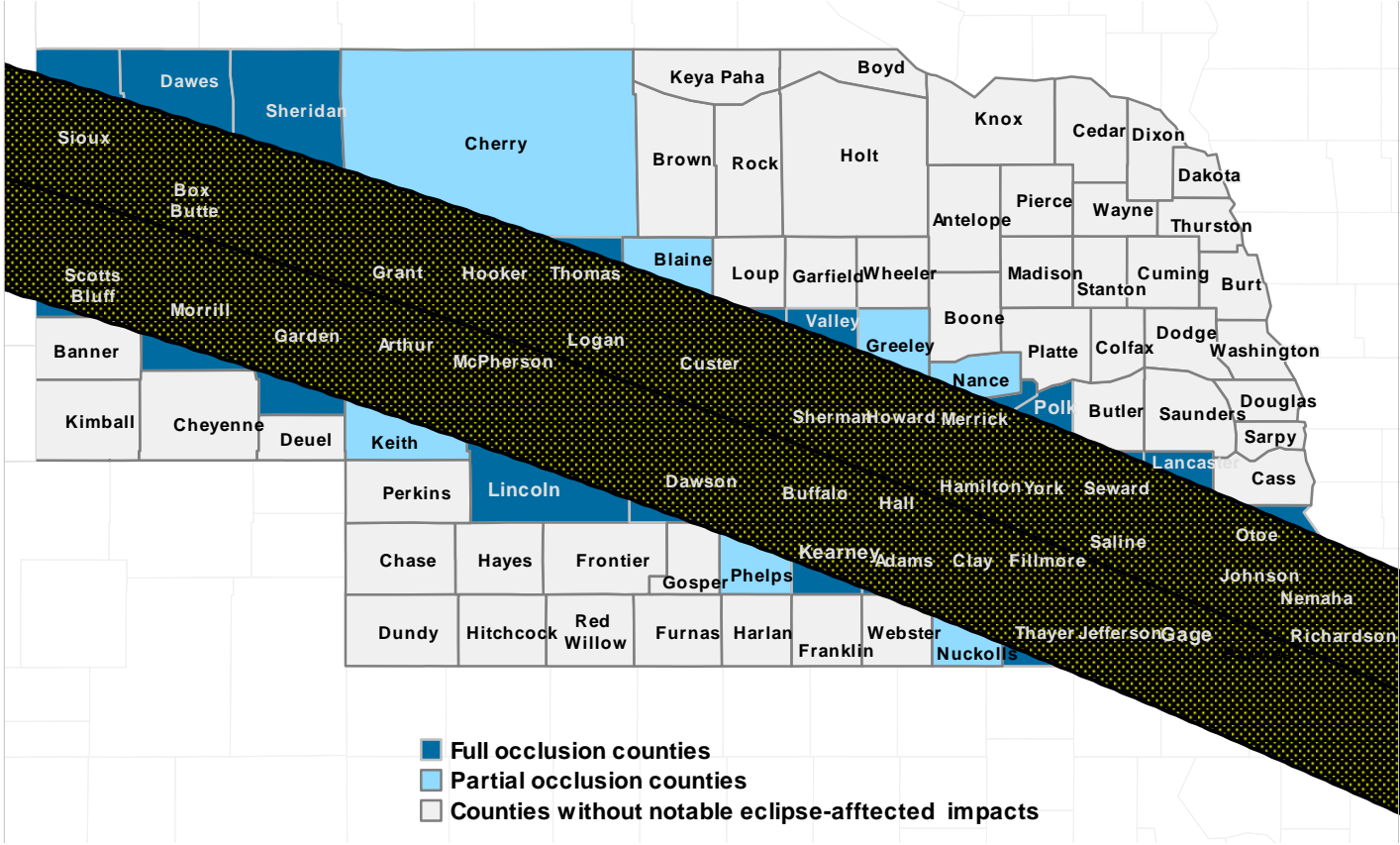
Visitor Volume. It is estimated that a total of 708,000 visitors were in Nebraska for the 2017 Solar Eclipse. Approximately 87 percent of these visitors were out-of-state residents.

Visitor Days. Visitation associated with the eclipse represented approximately 1.7 million visitor days.

Spending impact: A total of about \$127 million in travel spending in the state of Nebraska can be attributed to the 2017 Solar Eclipse.

Tax impact: State and local tax revenue amounted to \$10 million for all eclipse-affected counties.

2017 Eclipse Economic Impact Study



End Slide

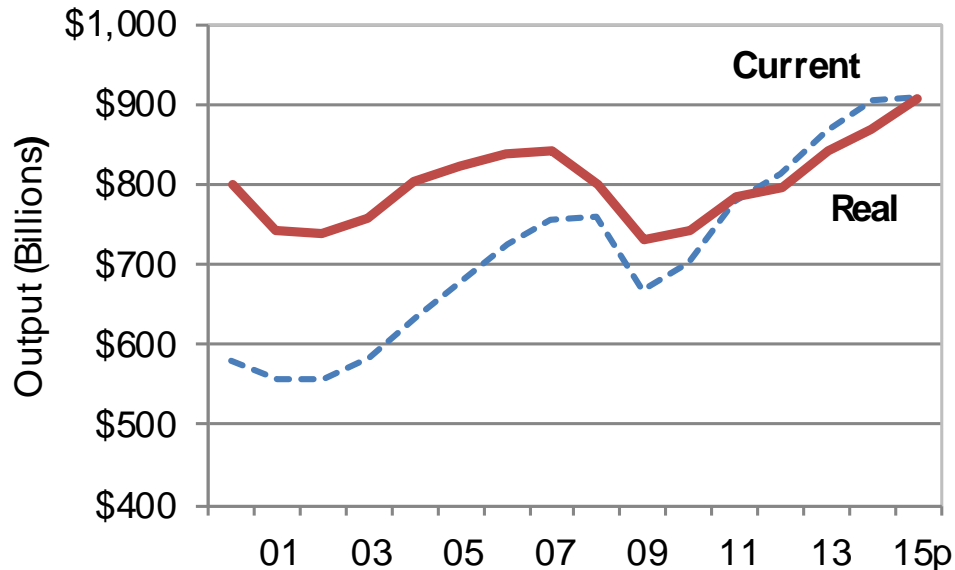
Special thanks are due to John Ricks, Executive Director for the Nebraska Tourism Division, for his support and assistance.

Dean Runyan Associates appreciates the opportunity to present at the Nebraska Tourism Conference.

Appendices

U.S. Travel Trends: Direct Travel Spending

Annual Direct Travel Spending in U.S., 2000-15p



Spending by resident and foreign visitors was \$909 billion in 2015 in current dollars. This reflects virtually no increase over 2014, largely due to lower prices for motor fuel.

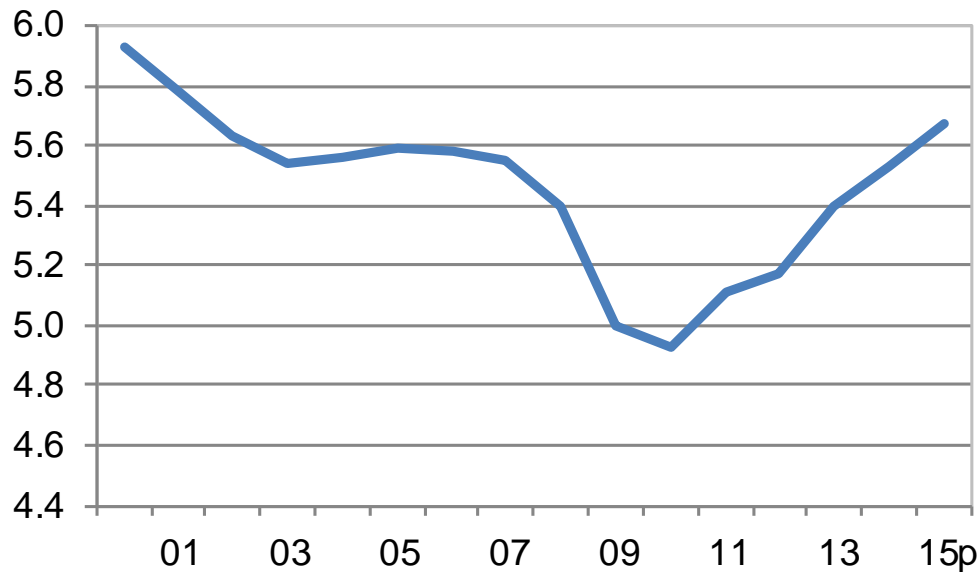
From 2010 to 2015, direct travel spending increased by 4.4% per year.

This compares to a 4.2% average annual increase in travel and tourism spending in Lincoln County, NE over 2010-2015.

Sources: : Bureau of Economic Analysis Travel & Tourism Satellite Accounts, Dean Runyan Associates

U.S. Travel Industry Employment

U.S. Travel Industry Employment



Travel-generated employment has increased at a steady rate since 2010.

Travel industry employment has now recovered to the level immediately preceding the 2008-09 recession, although it is still below its peak earlier in that decade.

Sources: : Bureau of Economic Analysis Travel & Tourism Satellite Accounts, Dean Runyan Associates

Travel and Tourism Impact Categories

Impact Category	Description
Travel Spending	Purchases by travelers during their trip, including lodging taxes and other applicable local and state taxes, paid by the traveler at the point of sale.
Total Earnings	The earnings (wage and salary disbursements, earned benefits and proprietor income) of employees and owners of businesses that receive travel expenditures. Only the earnings attributable to travel expenditures are included; this typically is only a portion of all business receipts.
Employment	Employment associated with the above earnings; this includes both full- and part-time positions of wage and salary workers and proprietors.
Local Tax Receipts	Tax receipts collected by the City of North Platte and Lincoln County, as levied on applicable travel-related purchases (e.g., lodging, occupancy, and sales taxes).
State Tax Receipts	State motor fuel taxes, sales taxes, lodging taxes and business and personal income taxes attributable to travel expenditures.