

Attribution and Tourism Impacts – A Visitor Center Study PNREC 2019





***Based on the: Economic Linkages and Impact Analysis for
the Oregon Sea Grant Programmed and Operated Hatfield
Marine Science Center Visitor Center 2018***

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Today

- Any questions you have
- Oregon Sea Grant vision and mission
- Visitor Center and coastal communities economic future
- Study approach
- Economic impacts
- Tourism as business retention and recruitment
- Other opportunities to increase impacts
- Please ask questions during the presentation



Oregon Sea Grant



Vision: Thriving coastal communities and ecosystems in Oregon

Mission: Oregon Sea Grant is a catalyst that promotes discovery, understanding, and resilience for Oregon coastal communities and ecosystems

Visitor Center's and Coastal Communities' Economic Future

- Income inequality continues to grow
- Discretionary spending declines
- Leisure time increases as automation causes less than one-third of jobs to be full year full time –Baxter
- Retirees move at an increasing rate away from Coastal and other amenity rich communities to metro areas
- Government spending on programs other than entitlements declines



Study Approach

- Two types of economic impacts – Visitor Center operating expenditure and spending by visitors
- 2015 budget for operating expenditures
- Surveyed visitors and used their responses along with Dean Runyan Inc./Oregon Tourism spending estimates
- 139K visitors divided between school year (44%) and school vacations (56%)
- Applied the operating expenditures and visitor spending to the Lincoln County and Oregon economies using an input/output model - IMPLAN

Terms

- Full and Part-time Jobs
- Output or sales
- Value-added or income portion of sales
- Direct effects
- Indirect effects
- Induced effects
- Total effects
- Multiplier
- Economic linkages and economic footprint
- Export
- Economic Impacts
- Total Economic Effects

Lincoln County Economy

10-15% Direct tourism related: Accommodations, food services, retail, and arts and entertainment

10-15% Indirect tourism related: Government, manufacturing – breweries, distilleries, second home construction

30-40% Marine related: Commercial fishing and processing, research and support services for those people (government and health care)

30-50% All other: Resident related services – government, health care, retail, etc. and other manufacturing – wood products, and services

Operating Expenditure Effects – Lincoln County

Type of Effect	Employment Full & Part-time Jobs	Total Value Added (\$)	Output (\$)
Direct	9	317,549	460,000
Indirect	1	52,855	96,474
Induced	2	97,876	177,194
Total	12	468,280	733,668
Multiplier	1.4	1.5	1.6

Operating Expenditure Effects – Oregon

Type of Effect	Employment Full & Part-time Jobs	Total Value Added (\$)	Output (\$)
Direct	9	317,549	460,000
Indirect	2	84,705	139,969
Induced	3	164,441	288,261
Total	14	566,695	888,230
Multiplier	1.6	1.8	1.9

Visitor Profile

Answer	Percentage
Lincoln County resident	5%
Oregon resident from outside Lincoln County	67%
Outside Oregon	28%
Day visitors	30%
Overnight visitors	70%
Hotel, motel or rented home	64%
Private home	14%
Campground or other	22%
Portion of reason for travelling to Lincoln County attributable to the Visitor Center	39%
People who visit the Visitor Center once or more per year	40%

Visitor Spending Effects – Lincoln County

Type of Effect	Employment Full & Part-time Jobs	Value Added (\$)	Output (\$)
Direct	95	3,360,313	6,066,909
Indirect	12	738,293	1,388,741
Induced	14	853,367	1,518,804
Total	121	4,951,972	8,974,454
Multiplier	1.3	1.5	1.5

Visitor Spending Effects – Oregon

Type of Effect	Employment Full & Part-time Jobs	Value Added (\$)	Output (\$)
Direct	101	3,691,274	6,530,090
Indirect	17	1,594,109	2,766,241
Induced	24	1,783,492	3,048,538
Total	142	7,068,875	12,344,870
Multiplier	1.4	1.9	1.9

What does all this mean?

Very few investments for economic development initiatives can produce a return of more than ten times the investment. The Visitor Center exceeds that return and its primary purpose is educational with economic development as an indirect benefit.

These impact estimates are conservative.

- Extent to which the Visitor Center helps make Lincoln County and Oregon unique/more competitive
- Volunteer contributions
- Long term learning effects – students and workers

Tourism as business retention & recruitment

- One third of high tech entrepreneurs with whom I have visited located where they are based on positive recreational experiences
- Tourism's primary goal needs to be mailing lists and recruitment with less emphasis on harvesting seasonal income (tourism – attribution error)
- Retention efforts without recruitment is only marginally successful

Quite an opportunity!

If the facilities, scientists, staff, students and volunteers of the Visitor Center were expanded to accommodate as many visitors and regain its position from 30 years ago as the third most visited no admittance fee facility in Oregon. The impacts may increase by a factor of three or more

An even greater opportunity!

Create North and South Coast branch
visitor centers.

Questions and thank you!

What did I not discuss that you expected me to discuss?

What concerns do you have about the economic future of Lincoln County and the other coastal counties – maybe Sea Grant and the Visitor Center can help?