

Economic Impacts of Travel, 2006

Portland, Oregon

January 2007

Prepared for the

Portland Oregon Visitors Association
Portland, Oregon

**ECONOMIC IMPACTS OF TRAVEL, 2006
PORTLAND, OREGON**

Prepared for the

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INTRODUCTION

This study, prepared for the Portland Oregon Visitors Association (POVA), documents the economic significance of the travel industry in the Portland Metro area from 1991 through 2006. The principal aim of this study was to prepare preliminary estimates of travel spending during 2006 as well as to provide estimates of the earnings, employment and tax revenues generated by these expenditures. For purposes of this analysis, the Portland Metro area is defined as Clackamas, Multnomah and Washington counties.

MEASUREMENT OF TRAVEL IMPACTS

The impact estimates associated with traveler spending to the Portland Metro area were measured using the Regional Travel Impact Model (RTIM) developed by Dean Runyan Associates. The RTIM was calibrated specifically to represent the unique characteristics of the travel industry in the Portland Metro area.

TRANSPORTATION IMPACTS

The focus of this analysis is on the destination-specific impacts of visitors. This is straightforward with respect to the spending on commodities such as accommodations, food services, recreation and retail purchases. It is less obvious with respect to ground and air transportation services, in that transportation provides a link between an origin and destination. In this report, the impacts related to spending on transportation are allocated to the location (i.e., county) in which those spending impacts occur, regardless of whether that location is the ultimate destination of the visitor. For this reason, urban counties, such as Multnomah, will tend to have relatively greater transportation impacts because some of the spending on transportation will be related to visits at other destinations.

IMPACT ESTIMATES FOR 2005 AND 2006

The 2005 estimates contained in this report are *preliminary*. The preliminary estimates are based on the 2005 economic impact analysis prepared for the Oregon Tourism Commission and updated with the most current information collected for Clackamas, Multnomah and Washington counties. This approach is consistent with the methodology used to produce travel economic impact figures for the state of Oregon.

INTERPRETATION OF IMPACT ESTIMATES

Users of this report should be aware of other issues regarding the interpretation of reported impact estimates

- All estimates contained in this report supersede those previously published.
- The estimates in this report are expressed in *current* dollars. There is no adjustment for inflation (with the exception of the graph on page 3).
- Economic impact measurements reported herein represent only direct economic impacts. Direct economic impacts include only the spending by travelers and the employment generated by that spending. Secondary effects related to the additional spending of businesses and employees are not included.

- The employment estimates in this report are estimates of the total number of full and part-time number of jobs directly generated by travel spending, rather than the number of individuals employed. Both payroll employees and proprietors are included in these estimates. Caution should therefore be used in comparing these estimates with other employment data series.

RECENT TRAVEL SPENDING TRENDS

Total travel spending in the Portland Metro area in 2006 was \$3.4 billion. This represents a 7.2 percent increase over the preceding year. This is the third straight year of strong growth following the 2001-2003 slump. This spending also generated 28,300 jobs with earnings of \$737 million and \$136 million in state and local tax receipts.

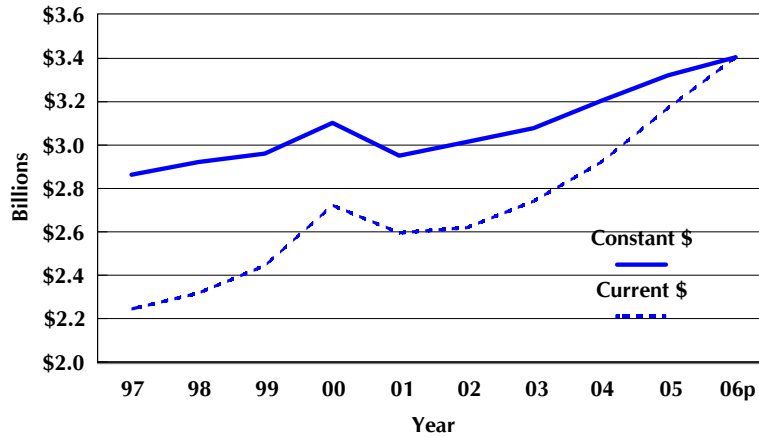
Portland Metro Travel Trends, 1991-2006p

	Spending	Earnings	Employment	Tax Receipts (\$Million)		
	(\$Million)	(\$Million)	(Thousand)	Local	State	Total
1991	1,386	358	19.9	13	43	56
1992	1,529	396	20.6	14	47	62
1993	1,651	424	21.4	20	50	70
1994	1,741	453	22.1	23	53	76
1995	1,874	491	23.5	26	56	82
1996	2,057	531	24.7	29	59	88
1997	2,245	568	25.7	32	61	92
1998	2,318	597	26.5	32	63	95
1999	2,445	632	26.7	34	66	99
2000	2,723	676	27.6	39	72	111
2001	2,594	674	27.3	39	71	110
2002	2,622	670	27.3	40	70	109
2003	2,740	661	27.0	40	71	111
2004	2,924	686	27.6	43	77	120
2005	3,172	714	28.0	47	80	128
2006p	3,401	737	28.3	52	83	136
<i>Annual Percentage Change</i>						
05-06p	7.2	3.1	1.1	11.2	3.9	6.6
91-06p	6.2	4.9	2.4	9.6	4.5	6.1

Note: Employment includes payroll employees and proprietors. Earnings include payroll, other earned benefits and proprietor income. Tax receipts include room taxes, gasoline taxes, auto rental taxes, and personal and corporate income taxes. Property taxes are not included. All estimates for 2006 are preliminary.

In constant (inflation adjusted) dollars, travel spending increased by 2.5 percent in 2006 over 2005. Higher room rates and transportation costs accounted for a substantial portion of the difference between the constant and current dollar increases. Nonetheless, this rate of increase exceeds the average annual rate of change in constant dollar travel spending since 1997 (1.9 percent).

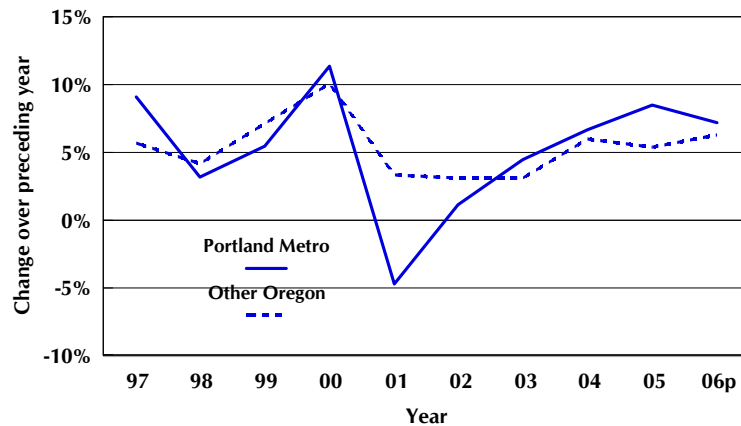
Portland Metro Direct Travel Spending, 1997-2006p Constant & Current Dollars



Note: Constant Dollars deflated by a composite of price indices for the West Urban CPI-U.

As the graph below indicates, increases in travel spending in the Portland Metro area have exceeded the growth rates in the remainder of the state for the past four years. Preliminary data suggests that the narrowing of the gap in 2006 was due, in part, to strong growth in the Willamette Valley, and a flattening rate of growth of visitor air travel to Portland (see graph next page).

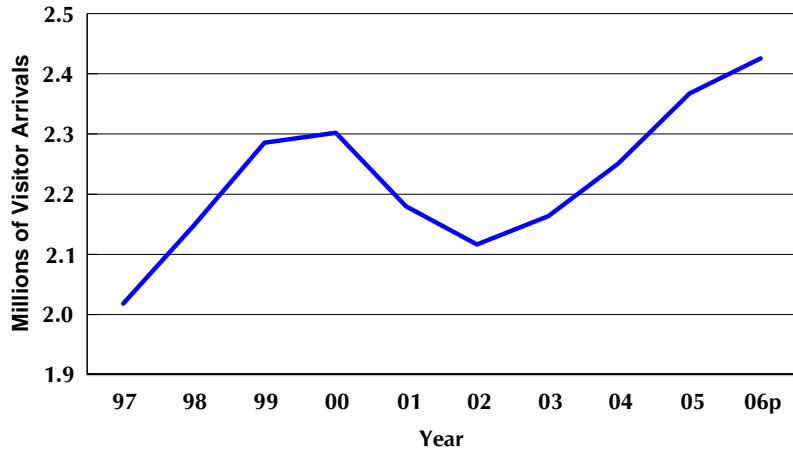
Annual Percent Change in Travel Spending Current Dollars



Source: Dean Runyan Associates. Estimates for 2006 are preliminary.

There were an estimated 2.43 million domestic air passenger visitor arrivals to PDX in 2006. This represents a 2.5 percent increase over 2005 (identical to the growth in constant dollar travel spending). This rate of growth is less than the preceding two years for Portland, but exceeds that overall national rate of change in passenger air traffic for 2005 to 2006.¹

Domestic Air Passenger Visitor Arrivals to Portland 1997-2006p



Source: Dean Runyan Associates, Bureau of Transportation Statistics (U.S. Department of Transportation) and Portland International Airport. These estimates are for domestic visitor arrivals only. They do not include return travel of Portland area residents or arrivals with connecting flights normally reported in air passenger statistics. International travel is not included. Preliminary estimates for 2006 are based on partial year data.

¹ The rate of growth for domestic air passenger visitor arrivals to PDX was 4.1 percent for 2004 to 2005 and 5.2 for 2005 to 2006. Nationally, domestic air passenger traffic was essentially unchanged from 2005 to 2006. (Estimates for 2006 are based on January to September data.)

TRAVEL IMPACTS WITHIN THE PORTLAND METRO AREA

Multnomah County receives the majority of travel impacts in the Portland Metro area. This is due to the location of the airport and the volume of business and convention travel in the county. However, it is more useful to consider the Portland Metro area as a whole with respect to travel and tourism. The appeal of the Portland Metro area as a visitor destination is based on attractions throughout the region. With respect to employment impacts, residents of all three counties commute to work at locations throughout the metro area. For example, many of the Multnomah County travel-generated jobs are staffed by residents of Clackamas and Washington counties.

Portland Metro Travel Impacts by County, 2005

	Total			Tax Receipts	
	Spending (\$M)	Earnings (\$M)	Employment (000)	Local (\$M)	State (\$M)
Portland Metro	3,172	714	28.0	47	80
Clackamas County	388	90	4.6	4	10
Multnomah County	2,357	524	18.9	40	57
Washington County	426	100	4.6	4	13

Note: Employment includes payroll employees and proprietors. Earnings include payroll, other earned benefits and proprietor income. Tax receipts include room taxes, gasoline taxes, auto rental taxes, and personal and corporate income taxes. Property taxes are not included. Preliminary 2006 estimates are not available at the county level.

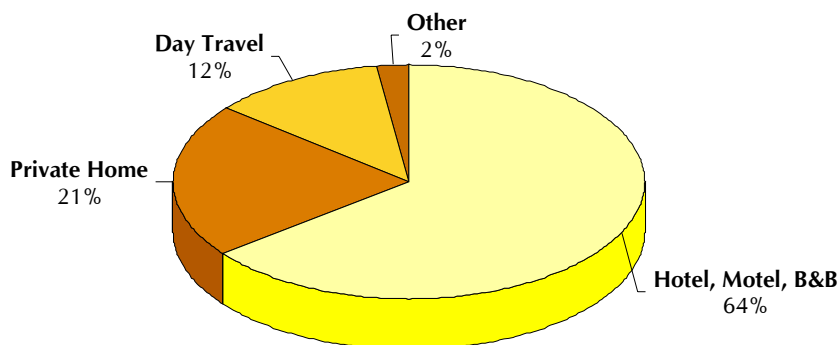
SUMMARY OF PORTLAND METRO TRAVEL IMPACTS

Detailed economic impacts for 1991 through 2006p can be found on pages 9 and 10. Highlights of the travel impacts in the Portland Metro area in 2006 include:

- **Visitor Spending by Type of Traveler Accommodation**

Commercial lodging is important to the Portland visitor industry, as it is with other metropolitan areas that attract convention and business travel. Sixty-four percent of all visitor spending (\$1.8 billion) in the Portland Metro area in 2006 was attributable to visitors who stayed in hotels, motels and B&Bs. Visitors staying in the private homes of friends and relatives spent \$590 million. Travelers visiting Portland for the day spent \$330 million. (These estimates include one-way airfares to Portland.)

**Portland Metro Travel Spending
by Type of Accommodation, 2006p**



Note: Travel spending by type of accommodation includes one-way airfares to Portland. Other accommodations include campgrounds and vacation homes.

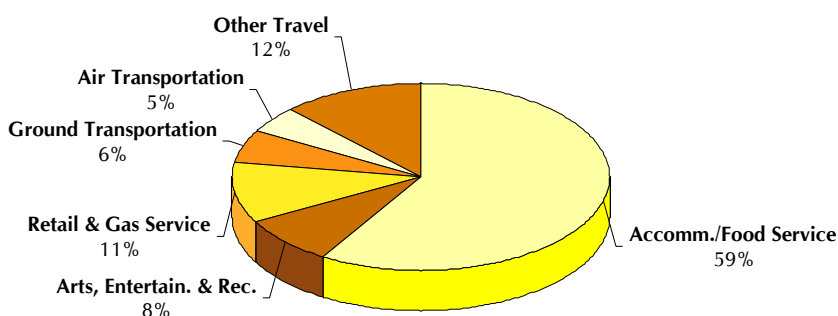
- **Visitor Spending by Commodity Purchased**

Spending by visitors to the Portland Metro area in restaurants and other eating and drinking establishments totaled \$542 million in 2006. Spending on accommodations totaled \$465 million. Visitors in the Portland Metro area also spent \$382 million on retail goods (excluding gasoline) shopping and \$182 million on arts, entertainment and recreation.

- **Employment and Earnings Generated by Travel Spending**

Travel spending generated 28,300 jobs in the Portland Metro area in 2006 with total earnings of \$737 million. Most of these jobs were service-oriented, relating to accommodations, food services, entertainment and recreation. Another major category of travel-generated employment and earnings was air transportation – which serves the larger Portland metro area as well as surrounding regions in Oregon and Washington.

Portland Metro Travel-Generated Employment, 2006p



Note: Employment includes all full-time and part-time payroll employees and proprietors. Other travel includes resident air travel and travel arrangement services.

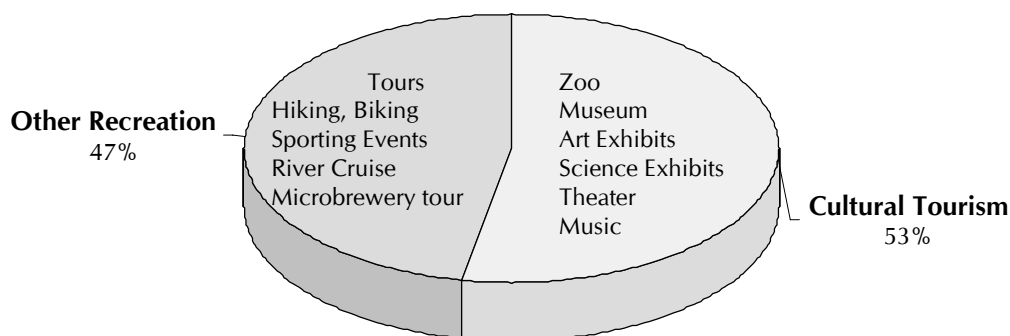
- **Tax Revenues Generated by Travel Spending**

Travel spending in the Portland Metro area generated \$52 million in local taxes. Local taxes include county and city room taxes and the county auto-rental tax. Property taxes are not included. State tax receipts generated by travel spending (\$83 million) include gasoline taxes, income taxes applied to individuals and businesses, and the statewide one-percent lodging tax.

- **Visitor Impacts related to Arts, Entertainment and Recreation**

Visitor spending on arts, entertainment and recreation amounted to \$182 million in 2006, generating \$51 million in earnings and 2,300 jobs. These impacts, in turn, can be distinguished between those related to “cultural tourism” and other recreational activities. Spending on cultural tourism amounted to \$96 million (53 percent of all spending on arts, entertainment and recreation); spending on other recreation amounted to \$86 million.

Visitor Impacts Related to Arts, Entertainment & Recreation



Source: Dean Runyan Associates and Longwoods International Visitor Survey. See Appendix D for complete listing of activities.

Portland Metro Travel Impacts, 1991-1998

	1991	1992	1993	1994	1995	1996	1997	1998
Total Direct Travel Spending (\$Million)								
Visitor Spending at Destination	1,073	1,177	1,265	1,347	1,468	1,606	1,715	1,758
Other Travel*	313	352	387	394	407	451	530	560
Total Direct Spending	1,386	1,529	1,651	1,741	1,874	2,057	2,245	2,318
Visitor Spending by Type of Traveler Accommodation (\$Million)								
Hotel, Motel	614	681	736	795	890	986	1,062	1,078
Private Campground	17	17	18	19	19	19	20	20
Public Campground	3	3	3	3	4	4	4	4
Private Home	291	315	338	348	359	385	403	425
Vacation Home	10	11	12	13	14	16	17	18
Day Travel	138	149	158	168	182	197	209	213
Spending at Destination	1,073	1,177	1,265	1,347	1,468	1,606	1,715	1,758
Visitor Spending by Commodity Purchased (\$Million)								
Accommodations	178	197	211	230	262	289	314	325
Food & Beverage Services	203	221	235	252	278	301	325	339
Food Stores	39	42	44	47	52	56	60	62
Ground Tran. & Motor Fuel	259	279	300	323	348	382	399	367
Arts, Entertainment & Recreation	77	83	89	95	104	112	120	125
Retail Sales	171	186	198	211	231	250	267	277
Air Transportation (visitor only)	146	169	187	189	192	216	230	264
Spending at Destination	1,073	1,177	1,265	1,347	1,468	1,606	1,715	1,758
Industry Earnings Generated by Travel Spending (\$Million)								
Accommodations & Food Service	141	155	165	178	199	217	235	244
Arts, Entertainment & Recreation	22	24	25	27	30	32	34	35
Retail**	33	35	37	39	42	46	48	51
Auto Rental & other ground tran.	14	16	18	21	24	25	27	28
Air Transportation (visitor only)	42	49	53	55	57	62	61	68
Other Travel*	106	117	125	132	139	150	163	171
Total Direct Earnings	358	396	424	453	491	531	568	597
Industry Employment Generated by Travel Spending (Thousand Jobs)								
Accommodations & Food Service	10.7	11.0	11.4	11.5	12.5	13.3	13.8	14.0
Arts, Entertainment & Recreation	1.5	1.5	1.5	1.7	1.7	1.7	1.7	2.0
Retail**	2.0	2.2	2.2	2.2	2.3	2.4	2.5	2.5
Auto Rental & other ground tran.	1.0	1.0	1.2	1.3	1.4	1.4	1.5	1.5
Air Transportation (visitor only)	1.1	1.3	1.3	1.4	1.5	1.5	1.5	1.7
Other Travel*	3.5	3.7	3.8	4.0	4.2	4.3	4.7	4.8
Total Direct Employment	19.9	20.6	21.4	22.1	23.5	24.7	25.7	26.5
Tax Receipts Generated by Travel Spending (\$Million)								
Local Tax Receipts	13	14	20	23	26	29	32	32
State Tax Receipts	43	47	50	53	56	59	61	63
Total Direct Tax Receipts	56	62	70	76	82	88	92	95

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and travel agency services. **Retail includes gasoline.

**Portland Metro
Travel Impacts, 1999-2006p**

	1999	2000	2001	2002	2003	2004	2005	2006p
Total Direct Travel Spending (\$Million)								
Visitor Spending at Destination	1,862	2,102	2,049	2,103	2,204	2,361	2,559	2,761
Other Travel*	583	621	545	519	536	563	613	641
Total Direct Spending	2,445	2,723	2,594	2,622	2,740	2,924	3,172	3,401
Visitor Spending by Type of Traveler Accommodation (\$Million)								
Hotel, Motel	1,140	1,314	1,261	1,304	1,371	1,486	1,629	1,781
Private Campground	21	22	22	22	24	25	25	26
Public Campground	4	4	4	4	4	5	4	4
Private Home	453	487	481	478	501	523	559	590
Vacation Home	20	24	25	25	26	27	29	30
Day Travel	224	252	256	268	278	295	312	330
Spending at Destination	1,862	2,102	2,049	2,103	2,204	2,361	2,559	2,761
Visitor Spending by Commodity Purchased (\$Million)								
Accommodations	338	366	342	347	351	375	413	465
Food & Beverage Services	352	395	396	429	446	480	512	542
Food Stores	64	71	73	77	81	87	90	94
Ground Tran. & Motor Fuel	409	497	497	486	547	609	693	774
Arts, Entertainment & Recreation	130	146	147	157	162	170	175	182
Retail Sales	288	324	327	350	348	357	369	382
Air Transportation (visitor only)	281	303	267	258	270	282	306	321
Spending at Destination	1,862	2,102	2,049	2,103	2,204	2,361	2,559	2,761
Industry Earnings Generated by Travel Spending (\$Million)								
Accommodations & Food Service	253	279	272	287	296	316	340	364
Arts, Entertainment & Recreation	37	41	42	45	46	47	49	51
Retail**	53	59	58	59	63	66	69	72
Auto Rental & other ground tran.	30	33	34	36	37	39	40	42
Air Transportation (visitor only)	75	77	81	74	66	64	64	60
Other Travel*	183	186	188	170	154	153	153	148
Total Direct Earnings	632	676	674	670	661	686	714	737
Industry Employment Generated by Travel Spending (Thousand Jobs)								
Accommodations & Food Service	14.0	14.7	14.4	14.9	14.9	15.5	16.0	16.6
Arts, Entertainment & Recreation	1.9	2.0	2.0	2.1	2.2	2.3	2.3	2.3
Retail**	2.5	2.6	2.5	2.5	2.7	2.8	3.0	3.0
Auto Rental & other ground tran.	1.5	1.5	1.6	1.6	1.6	1.6	1.6	1.6
Air Transportation (visitor only)	1.8	1.9	1.9	1.8	1.6	1.6	1.5	1.3
Other Travel*	4.9	4.9	4.8	4.4	3.9	3.8	3.7	3.4
Total Direct Employment	26.7	27.6	27.3	27.3	27.0	27.6	28.0	28.3
Tax Receipts Generated by Travel Spending (\$Million)								
Local Tax Receipts	34	39	39	40	40	43	47	52
State Tax Receipts	66	72	71	70	71	77	80	83
Total Direct Tax Receipts	99	111	110	109	111	120	128	136

Details may not add to totals due to rounding.

*Other Travel includes resident air travel and travel agency services. **Retail includes gasoline.

APPENDICES

Appendix A. RTIM Methodology

Appendix B. Definition of Terms

Appendix C: Travel Impact Industries Matched to 1997 NAICS

Appendix D. Recreation Activities in Portland Metro Area

**REGIONAL TRAVEL IMPACT MODEL (RTIM)
TRAVEL IMPACT ESTIMATION PROCEDURES**

TRAVEL SPENDING

Hotel, Motel, B&B. Spending on commercial accommodations by hotel and motel guests is estimated from transient lodging tax collections at the city/county jurisdictional level. Spending by hotel and motel guests in other business categories, such as food and transportation, is estimated using spending distributions reported in the visitor survey data. The spending distribution shows how travelers divide their spending between lodging and other purchases.

Private Campground. Spending by campers using commercial campgrounds is estimated from the number of commercial campsites, the average occupancy of these campsites and the average daily expenditures of visitor camp parties reported in survey data. Spending in other business categories is estimated in the same way as for hotel guests.

Public Campground. Spending by campers using public campgrounds is estimated from visitor counts at national and state parks, national forests, and state and federally managed recreation areas and then multiplying the visitation by daily spending estimates from the visitor survey.

Private Home. Spending by private home guests is determined from visitor survey data estimating the number of visitors staying as guests of friends and relatives and applying these rates to the household population base in individual counties.

Vacation Home. Estimated spending by vacation home renters and owners is based on a ratio derived between the number of visitors staying in commercial accommodations and those staying in vacation homes and the relative expenditure levels for each type of visitor. The state total is distributed among the counties using housing data from the U.S. Bureau of the Census.

Day Travel. The share of day visits as a percentage of total travel is estimated from visitor survey data and applied to average daily spending estimates to produce day visitor spending.

Note: Longwoods International, under contract to the Oregon Tourism Commission, provided the survey data.

Air Transportation. Visitor spending estimates for air transportation are derived from the Origin-Destination survey conducted for the Bureau of Transportation Statistics.

Employment and earnings estimates are derived from industry receipts, payroll, and employment data for passenger traffic. The impacts of air cargo operations on scheduled passenger flights are not included in these estimates.

Travel Arrangement Services. This category consists of travel agents, tour operators, and other travel arrangement and reservation services. Employment and earnings are estimated from covered employment and wage data.

RELATED TRAVEL IMPACTS

Spending by travelers generates jobs, payroll, and state and local tax revenue.

Earnings generated directly from traveler expenditures are estimated from a payroll-to-receipts ratio obtained from the 1997 Economic Census and earnings estimates from the Bureau of Economic Analysis.

Employment in each business category is calculated from wage data supplied by the Oregon Employment Department and earnings estimates from the Bureau of Economic Analysis.

Local Taxes consist of local room taxes, or transient lodging taxes as well as local taxes applicable to traveler purchases in eating and drinking establishments and on automobile rentals.

State Taxes consist of corporate income taxes and gasoline taxes attributable to travel expenditures, personal income taxes based on the associated travel-generated employment, and the state one percent lodging tax (effective January 2004).

Personal income taxes are estimated by applying the average state personal income tax rate to payrolls resulting from traveler spending. Corporate income taxes are estimated by applying the applicable corporate tax rate to the business receipts, or sales, generated from traveler spending.

State sales taxes are not applicable in the state of Oregon and are not included in the state tax revenue attributable to traveler spending.

DEFINITION OF TERMS

Accommodation: Spending for lodging by hotel and motel guests, campers and vacation home users.

Air Transportation: One-way airfares and related impacts for visitors traveling to the Portland area. Outbound and resident air travel is included in “other travel” category.

Campers: Travelers staying at RV parks and commercial campgrounds or at public campgrounds such as those in National Parks and National Forests.

Day Travel: Day travel is defined as a trip of 50 miles or more (one way) that does not include an overnight stay away from home. Day travel does not include routine commutes for business or school.

Earnings: Total earnings include wage and salary disbursements, other earned benefits and proprietor income. Only the earnings attributable to travel expenditures are included.

Employment: Industry employment (jobs) associated with the travel-generated payroll and proprietors. This includes both full- and part-time positions.

Expenditures: 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.

Food and Beverage Services: Businesses serving food and beverages for immediate consumption. In addition to table-service restaurants, this category includes fast-food outlets and refreshment stands.

Food Stores: Grocery stores, food markets, liquor and wine stores, and other businesses selling food or beverages for consumption off the premises.

Ground Transportation: Spending on car rentals, gasoline and other vehicle operating expenses and on local transportation such as taxi, bus and train.

Hotel and Motel Guests: Travelers staying in hotels, motels, resorts, bed & breakfast establishments, condominiums and other lodging places where the Transient Lodging Tax is collected.

Local Tax Receipts: Tax revenue collected by counties and municipalities, as levied on applicable travel-related businesses. Consists of transient lodging taxes and local use taxes.

Private Home Guests: Travelers staying as guests with friends or relatives.

Receipts: Travel expenditures less the sales and excise taxes imposed on those expenditures. Also referred to as business receipts.

Recreation: Spending on amusement and recreation, such as admissions to tourist attractions.

Retail Sales: Spending for gifts, souvenirs, and other items. Excludes spending listed separately, such as food stores or recreation.

Spending Distributions: Information from visitor surveys showing how spending by each type of visitor is divided among various business categories.

State Tax Receipts: Personal income taxes based on the associated travel-generated employment; state corporate income taxes and motor fuel taxes attributable to travel expenditures; and, one percent state lodging tax (beginning January 2005).

Transient Lodging Tax: A tax charged on lodging. Also referred to as room tax, transient occupancy tax, hotel tax or lodging tax.

Travel: A day or overnight trip that is not of a local or commuting nature. Travel may be for business or pleasure purposes.

Travel Arrangement: Fees paid to travel agents and tour operators and related impacts are included in "other travel" category.

Traveler: A person traveling in the Portland Metro area. A traveler may be an Oregon resident or a resident of another state. The terms traveler and visitor have the same meaning in this report.

Vacation Home User: Travelers using their own vacation home or timeshare and those renting a vacation home or privately owned cabin where transient lodging tax is not collected.

Visitor Spending. Spending by travelers at or near their destinations. This excludes outbound airfares spending on travel arrangement services. All automobile operating expenses are included in the ground transportation component of destination spending.

TRAVEL IMPACT INDUSTRIES MATCHED TO 1997 NAICS

TRAVEL IMPACT INDUSTRY	NAICS INDUSTRIES* (code)
Accommodation & Food Services	Accommodation (721) Food Services and Drinking Places (722) Residential Property Managers (531311)
Arts, Entertainment & Recreation	Performing Arts, Spectator Sports (711) Museums (712) Amusement, Gambling (713) Scenic and Sightseeing Transportation (487) Miscellaneous Industries (see note**)
Retail	Food & Beverage Stores (445) Gasoline Stations (447) Clothing and Clothing Accessories Stores (448) Sporting Goods, Hobby, Book, and Music Stores (451) General Merchandise Stores (452) Miscellaneous Store Retailers (453)
Ground Transportation	Interurban and rural bus transportation (4852) Taxi and Limousine Service (4853) Charter Bus Industry (4855) Passenger Car Rental (532111) Parking Lots and Garages (812930)
Air Transportation	Scheduled Air Passenger Transportation (481111) Support Activities for Air Transportation (4881)
Travel Arrangement	Travel Agencies (56151) Tour Operators (56152)

Notes: *Government enterprizes (e.g., park systems) are included in this classification.

**Includes parts of industries in other sectors (e.g., accommodation, charter bus).

RECREATIONAL ACTIVITIES IN PORTLAND METRO AREA

Cultural Tourism activities

Museums
Zoo
Art Gallery
Fair/exhibition/festival
Historic sites
Science exhibit
Theater/dance/symphony/opera
Bar/disco/nightclub (part)

Other recreational activities

Day cruise
Short guided tour
Power boating/sailing
Winery/vineyard
Microbrewery tour
Viewing wildlife/birds
Professional/college sports
Bicycling
Golf
Photography
Other
National/state park
Hiking/backpacking
Snow skiing
Fishing
Bar/disco/nightclub (part)

Source: Longwoods International Visitor Survey conducted for the Oregon Tourism Commission, 1997.