

OCEANSIDE TRAVEL IMPACTS 2010-2017P

May 2018

Prepared for the

Visit Oceanside Conference and Visitors Bureau

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TRAVEL IMPACTS, 2010-2017P**

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Prepared by

Dean Runyan Associates
833 S.W. Eleventh Avenue, Suite 920
Portland, Oregon 97205
(503) 226-2973
www.deanrunyan.com

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INTRODUCTION

This study, prepared for the Visit Oceanside Conference and Visitors Bureau, documents the economic significance of the travel industry for the City of Oceanside from 2010 through 2017. This report provides preliminary 2017 estimates for Oceanside, and estimates overnight visitor volume and average spending.

MEASUREMENT OF TRAVEL IMPACTS

The impact estimates associated with traveler spending in Oceanside 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 Oceanside. The impact estimates in this report are comparable to those found in the report prepared for the California Travel and Tourism Commission.¹ The estimates for 2017p are designated as preliminary due to some incomplete source data for the calendar year. Any future revisions will be minor.

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.
- 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 jobs directly generated by travel spending, rather than the number of individuals employed. Both payroll and self-employment are included in these estimates. Caution should therefore be used in comparing these estimates with other employment data series.

¹ See *California Travel Impacts, 2000-2017p*, prepared for the California Travel and Tourism Commission.

RECENT TRAVEL TRENDS IN OCEANSIDE

Travel spending in Oceanside in 2017p was \$351 million. This represents a 10.1 percent increase from 2016. Employment increased for the seventh consecutive year following the recession, an average annual increase of 5.1 percent since 2010. Travel-generated earnings totaled approximately \$105 million, an increase of 5.7 percent from the previous year. Local and state travel-generated tax receipts increased from 2016 as well, by 12.3 percent and 6.3 percent, respectively.

Oceanside Direct Travel Impacts, 2010-2016p

	Spending	Earnings	Employment	Tax Receipts (\$Million)		
	(\$Million)	(\$Million)		Local	State	Total
2010	201	59	2,350	5.2	8.2	13.3
2011	208	61	2,380	5.6	7.9	13.5
2012	231	69	2,590	6.5	8.2	14.6
2013	234	71	2,680	6.7	8.5	15.2
2014	287	82	2,850	7.9	10.0	17.2
2015	315	94	3,200	9.1	10.8	19.9
2016	319	99	3,260	9.6	10.6	20.2
2017p	351	105	3,330	10.8	11.3	22.1
<i>Annual Percentage Change</i>						
16-17p	10.1	5.7	2.1	12.3	6.3	9.2
10-17p	8.3	8.5	5.1	11.1	4.7	7.5

Estimates for 2017 are preliminary. These estimates supersede all previous reports.

VISITOR VOLUME AND AVERAGE SPENDING

The following table provides average spending estimates for overnight travelers to Oceanside.

Oceanside Average Spending, 2017p Overnight Visitors

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel, STVR	\$558	\$2,232	\$199	\$797	2.8	4.0
Other Overnight	\$107	\$371	\$46	\$161	2.3	3.5
All Overnight	\$264	\$964	\$107	\$388	2.5	3.6

Notes: *Size refers to the average number of persons in the travel party. **Length of Stay refers to the average number of nights in Oceanside. Destination spending refers to visitor spending within Oceanside. STVR (short term vacation rental).

Visitor volume estimates for Oceanside are shown below. These estimates are derived from the visitor spending estimates, visitor surveys and lodging data.

Oceanside Overnight Visitor Volume, 2015-2017p

	Person-Nights (000)			Party-Nights (000)		
	2015	2016	2017	2015	2016	2017
Hotel, Motel, STVR	1,020	1,092	1,204	364	390	430
Other Overnight	1,815	1,832	1,851	786	793	800
All Overnight	2,835	2,924	3,055	1,150	1,182	1,230

	Person-Trips (000)			Party-Trips (000)		
	2015	2016	2017	2015	2016	2017
Hotel, Motel, STVR	255	273	301	91	97	108
Other Overnight	522	527	532	226	228	230
All Overnight	777	800	833	317	325	338

Detailed travel impacts for 2010 through 2017p follow.

**Oceanside
Travel Impacts, 2010-2017p**

	2010	2012	2013	2014	2015	2016	2017
Visitor Spending by Type of Traveler Accommodation (\$Million)							
Hotel, Motel, STVR	124.3	152.3	157.0	181.3	209.8	212.9	240.0
Private Home	47.7	51.7	50.3	50.7	50.3	49.9	52.2
Campground	8.8	9.3	9.6	9.8	9.8	10.2	10.8
Vacation Home	20.8	21.5	21.2	21.4	21.5	21.7	22.4
Day Travel	20.4	22.5	22.2	23.4	23.3	24.0	25.6
Destination Spending	222	257	260	287	315	319	351
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	45.4	54.2	56.9	68.6	78.1	83.7	93.5
Food Service	67.4	76.4	76.9	83.4	92.2	94.0	103.8
Food Stores	9.0	9.8	9.9	10.6	11.0	10.9	11.3
Local Tran. & Gas	31.7	38.3	37.5	37.8	39.0	36.3	40.8
Arts, Ent. & Rec.	40.2	46.0	46.4	50.4	55.3	55.3	60.1
Retail Sales	28.3	32.4	32.7	35.7	39.3	38.5	41.5
Destination Spending	222	257	260	287	315	319	351
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	39.2	45.8	47.9	54.8	62.1	67.5	72.8
Arts, Ent. & Rec.	16.6	19.0	19.6	20.8	24.9	24.4	24.1
Retail*	5.0	5.7	5.8	6.3	7.1	7.1	7.8
Total Direct Earnings	60.7	70.4	73.3	81.9	94.1	99.1	104.7
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,460	1,620	1,700	1,830	1,960	2,010	2,040
Arts, Ent. & Rec.	840	900	910	930	1,020	1,030	1,060
Retail*	170	190	190	210	220	220	230
Total Direct Employment	2,350	2,590	2,680	2,850	3,200	3,260	3,330
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	5.0	6.3	6.6	7.9	9.1	9.6	10.8
State Tax Receipts	8.8	9.1	9.4	10.0	10.8	10.6	11.3
Total Local & State	13.3	14.6	15.2	17.2	19.9	20.2	22.1

Details may not add to totals due to rounding. Retail* includes motor fuel.

APPENDICES

APPENDIX A. REGIONAL TRAVEL IMPACT MODEL (RTIM) METHODOLOGY

APPENDIX B: TRAVEL IMPACT INDUSTRIES MATCHED TO 2007 NAICS

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

TRAVEL SPENDING

Hotel, Motel, STVR. Spending on commercial accommodations by hotel and motel guests is estimated from transient lodging tax collections at the city/county jurisdictional level. STVR is an acronym for short term vacation rentals.

Campgrounds. Spending by campers using commercial campgrounds is estimated from the number of commercial campsites, the average occupancy of these campsites. Spending by campers using public campgrounds is estimated from visitor counts at federal, state, and locally managed campsites and recreation areas, and the average daily expenditures of visitor camp parties reported in survey data.

Private Home. Spending by private home guests is determined from census data and visitor survey data. The average number of days per year visitors hosted by residents and the average daily spending of these visitors are estimated from visitor survey data.

Vacation Home. The estimated spending by vacation home renters and owners is also based on census data and visitor survey data.

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.

Spending by visitors in other business categories, such as food and transportation, is estimated using spending distributions reported in the visitor survey 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 2012 Economic Census and earnings estimates from the Bureau of Economic Analysis.

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

Local Taxes consist of local room taxes and sales taxes attributable to visitor spending and property and sales taxes attributable to travel industry employees and businesses.

State Taxes consist of sales taxes and motor fuel taxes attributable to visitors and income and sales taxes attributable to travel industry employees.

TRAVEL IMPACT INDUSTRIES MATCHED TO 2007 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)

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

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

A more detailed description of these industries can be found at <http://www.ntis.gov/naics>.