

OCEANSIDE TRAVEL IMPACTS 2010-2018P

April 2019

Prepared for the

Visit Oceanside Conference and Visitors Bureau

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TRAVEL IMPACTS, 2010-2018P**

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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 2018. This report provides preliminary 2018 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 2018p 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 2018p was \$382 million. This represents a 6.0 percent increase from 2017. Employment increased for the eighth consecutive year following the recession, an average annual increase of 3.9 percent since 2010. Travel-generated earnings totaled approximately \$117 million, an increase of 5.5 percent from the previous year. Local and state travel-generated tax receipts increased from 2017 as well, by 6.4 percent and 7.4 percent, respectively.

Oceanside Direct Travel Impacts, 2010-2018p

	Spending (\$Million)	Earnings (\$Million)	Employment	Tax Receipts (\$Million)		
				Local	State	Total
2010	232	64	2,580	6.4	9.5	15.9
2011	242	66	2,610	6.9	9.4	16.3
2012	267	75	2,840	8.0	9.7	17.7
2013	270	78	2,930	8.4	10.0	18.4
2014	296	87	3,100	10.2	10.6	20.8
2015	324	100	3,340	11.7	11.4	23.1
2016	329	105	3,400	12.4	11.2	23.6
2017	361	111	3,470	13.9	11.8	25.7
2018p	382	117	3,500	14.8	12.7	27.5
<i>Annual Percentage Change</i>						
17-18p	6.0	5.5	0.9	6.4	7.4	6.9
10-18p	6.5	7.7	3.9	11.0	3.7	7.1

Estimates for 2018 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, 2018p Overnight Visitors

	Travel Party		Person		Party Size	Length of Stay (nights)
	Day	Trip	Day	Trip		
Hotel, Motel, STVR	\$565	\$2,261	\$202	\$808	2.8	4.0
Other Overnight	\$263	\$948	\$95	\$338	2.8	3.6
All Overnight	\$276	\$1,003	\$115	\$423	2.4	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, 2016-2018p

	Person-Nights (000)			Party-Nights (000)		
	2016	2017	2018	2016	2017	2018
Hotel, Motel, STVR	1,092	1,204	1,247	390	430	445
Other Overnight	1,832	1,851	1,832	793	800	841
All Overnight	2,924	3,055	3,079	1,182	1,230	1,287

	Person-Trips (000)			Party-Trips (000)		
	2016	2017	2018	2016	2017	2018
Hotel, Motel, STVR	273	301	312	97	108	111
Other Overnight	527	532	527	228	230	242
All Overnight	800	833	839	325	338	353

Detailed travel impacts for 2010 through 2018p follow.

**Oceanside
Travel Impacts, 2010-2018p**

	2010	2012	2014	2015	2016	2017	2018p
Visitor Spending by Type of Traveler Accommodation (\$Million)							
Hotel, Motel, STVR	124.3	152.3	181.3	209.8	212.9	240.0	251.8
Private Home	56.2	60.4	59.4	58.8	58.5	61.0	67.5
Campground	8.8	9.3	9.8	9.8	10.2	10.7	11.2
Vacation Home	22.1	22.7	22.5	22.7	22.9	23.4	24.2
Day Travel	20.4	22.5	23.4	23.3	24.0	25.5	27.6
Destination Spending	231.8	267.2	296.4	324.5	328.5	360.6	382.2
Visitor Spending by Commodity Purchased (\$Million)							
Accommodations	45.4	54.2	68.6	78.1	83.7	93.4	99.2
Food Service	67.4	76.4	83.4	92.2	94.0	103.7	110.0
Food Stores	9.0	9.8	10.6	11.0	10.9	11.4	11.6
Local Tran. & Gas	31.7	38.3	37.8	39.0	36.3	40.9	46.2
Arts, Ent. & Rec.	40.2	46.0	50.4	55.3	55.3	59.9	62.3
Retail Sales	38.1	42.3	45.6	49.0	48.3	51.4	52.8
Destination Spending	231.8	267.2	296.4	324.5	328.5	360.6	382.2
Industry Earnings Generated by Travel Spending (\$Million)							
Accom. & Food Serv.	38.7	45.3	54.2	61.4	66.7	71.8	76.2
Arts, Ent. & Rec.	16.6	19.0	20.8	24.9	24.4	24.1	25.0
Retail*	6.1	6.9	7.5	8.3	8.4	9.1	9.5
Ground Tran.	3.1	3.8	4.4	5.0	5.3	5.8	6.1
Total Direct Earnings	64.4	74.9	86.8	99.5	104.8	110.7	116.9
Industry Employment Generated by Travel Spending (Jobs)							
Accom. & Food Serv.	1,450	1,610	1,810	1,950	1,990	2,020	2,090
Arts, Ent. & Rec.	840	900	930	1,020	1,030	1,060	1,030
Retail*	210	230	250	260	260	270	270
Ground Tran.	10	10	10	10	10	10	10
Total Direct Employment	2,580	2,840	3,100	3,340	3,400	3,470	3,500
Government Revenue Generated by Travel Spending (\$Million)							
Local Tax Receipts	6.4	8.0	10.2	11.7	12.4	13.9	14.8
State Tax Receipts	9.5	9.7	10.6	11.4	11.2	11.8	12.7
Total Local & State	15.9	17.7	20.8	23.1	23.6	25.7	27.5

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>.