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**Oregon Travel News**

**March 2003**

Nationally, the travel and tourism industry has faced some of its most challenging times over the past several years, with the nation's economic downturn, the events of 9-11 and the threat of continued terrorism – and now war. Consumer confidence, as measured by the Travel Industry Association of America (TIA), continues to decline, falling 4.5 percent in the fourth quarter of 2002; gas prices are soaring; and business travel continues to decrease. One bright spot on the national radar screen is leisure travel, which TIA predicts will increase slightly (2 percent) over 2001 levels.

In 2001, international arrivals to the United States declined 11 percent, and arrivals in 2002 are predicted to remain flat (down .1 percent). TIA predicts that international travel will pick up in 2004 when arrivals are forecast to surpass 2000 levels and climb to 52.6 million visitors.

All areas tracked by TIA show softness for 2002: Domestic enplanements were down 5.2 percent; rail passenger traffic was down 4.6 percent; hotel occupancy rates and receipts were down .9 and .7, respectively; and gasoline service station receipts were down 2.1 percent. On the positive side, restaurant receipts were up 5.6 percent.

In Oregon, 2002 was mixed, although there were definite bright spots throughout the state:

- Statewide lodging occupancy was up (between 1.5 and 2.6 percent); however average daily room rates were down (between 1.7 and 3.6 percent).
- State Parks had “a banner year” with record-setting camper nights that surpassed 1992 records.
- Lufthansa German Airlines announced a new non-stop passenger service to connect Portland with Frankfurt, Germany, starting on March 31, 2003.
- New attractions and improvements were completed, including multi-million-dollar renovations at the Hilton Hotel and Hotel Lucia in Portland, the Columbia River Maritime Museum in Astoria, PGE Park in Portland, Willamette Pass and Hoodoo Ski Areas, The High Desert Museum in Bend, and Eugene's Hult Center for the Performing Arts.
- Crater Lake National Park commemorated its Centennial, and the Oregon Coast Aquarium in Newport and the National Historic Oregon Trail Interpretive Center near Baker City celebrated their 10<sup>th</sup> anniversaries.
- The Frank Lloyd Wright House opened at The Oregon Garden, and the Oregon Shakespeare Festival opened its New Theater.

According to the Oregon Tourism Commission's annual *Travel Impacts Report*, total travel spending in 2002 was \$6.2 billion, a modest 1.6 percent increase over 2001. Room sales showed little growth in 2002, although sales have grown 5.8 percent per year since 1991. Local taxes, primarily lodging taxes, were also flat in 2002 (\$73 million statewide). Overall, when adjusted for inflation, travel spending has grown in Oregon approximately 2.5 percent per year since the early 1990s. The complete report and county-by-county data is available on the Commission's website: [www.traveloregon.com/research.cfm](http://www.traveloregon.com/research.cfm).

### **Regional highlights for 2002 include:**

The **Portland Metro** area reports a stable 2002, with convention bookings and hotel occupancies up over 2001. The average daily hotel room rate was down, however, between 2 and 4 percent. Attractions such as the recently relocated Children's Museum and renovated PGE Park, along with the Hilton's new Executive Tower expansion and new Hotel Lucia, add to the city's visitor amenities. In addition, transportation upgrades, including an expansion of the free ride "Fareless Square" zone; the Portland Streetcar Project linking PSU and the Cultural District with the Pearl District and Nob Hill areas; the new Max light rail expansion to the airport; and the Eastbank Esplanade pedestrian and bike trail along the Willamette River, truly make Portland a transportation innovator. The Oregon Zoo broke all previous attendance records in 2002, with 1,330,838 visitors – 2,077 more visitors than the record set in 2000. Slated for opening in 2003 are the 500,000-square-foot expansion of the Oregon Convention Center in April, and a major renovation of the Oregon Historical Society museum facility in July. Visitor counts at the downtown State Welcome Center were up by a third, with more than half a million visitors, and counts at the center at Jubitz on I-5 in north Portland were up 14 percent. The Clackamas County Regional Information Center, also designated a State Welcome Center, opened in June 2002 at the End of the Oregon Trail Center in Oregon City. In rural Clackamas County, a new bed and breakfast opened in Mulino, between Oregon City and Molalla, and the community of Estacada added a new outdoor mural to their collection which now features 10 murals and a walking tour brochure.

*Sources: Portland, Oregon Visitors Association; Clackamas County Tourism Development Council*

Note: the following report is primarily for the summer season only; calendar year 2002 information is limited.

The **Oregon Coast** reports a generally positive summer season, with lodging demand being up compared to summer 2001 and overall visitor activity being strong. In Astoria, the Lewis & Clark commemoration is already drawing increased numbers of visitors to the area, and camping at Fort Stevens State Park was up significantly. Attendance at Fort Clatsop National Memorial was up 2.5 percent in 2002. Major renovations at the Columbia River Maritime Museum and Flavel House, as well as continued work to restore historic properties, are helping Astoria define itself as a visitor destination. Seaside reports a healthy summer season, with strong convention activity; fully booked lodging properties at peak times; and solid attendance at major events. The Central Coast reports that visitor expenditures were flat or down, walk-in counts at the Newport chamber were flat, and counts at the Oregon Coast Aquarium were down 26 percent. With the confusion over the "Florence Fire" (being renamed the "Biscuit Fire"), the Florence

area suffered during mid-summer. The Coos Bay-North Bend area reports solid visitor activity in summer 2001, with visitor center counts being very strong in September and lodging properties staying full. Visitor counts at the Brookings State Welcome Center were flat at year-end, and jet boat activity was up overall on the southern coast.

*Source: Oregon Coast Visitors Association*

Visitor activity in the **Willamette Valley** appears to be basically flat in 2002 compared to 2001. In the **Eugene-Springfield** area, while hotel occupancy was flat, visitor spending was up 2 percent over 2001. Walk-in visitation numbers at the visitor center in Eugene were equal to last year's counts (7,257 in 2002 compared to 7,275 in 2001). There are several new developments in the area worth noting: a new high-speed, six-passenger ski lift at Willamette Pass Ski Area; a large-scale expansion at the UO's Autzen Stadium, adding more than 12,000 seats; a new 38,000-square-foot meeting facility at Lane Community College; and major renovations at the Valley River Inn, Doubletree Hotel and Village Green in Cottage Grove. **Corvallis** reports a flat year for lodging occupancy and a slight decrease in lodging tax receipts in 2002. Counts at their visitor center were up significantly (7,000 more than in 2001 for a total of 14,977), but reflect primarily day-trip visitors. Attendance numbers at Corvallis-area festivals and events were mixed in 2002, with some being up and others flat. **Albany** reports a healthy year, with lodging taxes up 10 percent and attendance at major events up. The community also saw several new restaurants open, as well as downtown specialty shops. On the horizon is the building and installation of a hand-carved carousel, to be located in the downtown area. In **Salem**, visitation remained flat in 2002, with attractions reporting increases as well as decreases, and convention activity being down slightly compared to 2001. Counts at the Salem visitor center were up slightly (27,966 in 2002 compared to 27,318 in 2001), and attendance at Mission Mill Museum increased nearly 50 percent, going from 79,319 in 2001 to 117,088 in 2002. The Oregon Garden reports a 23 percent decrease in visitation, and Silver Falls State Park saw a 10 percent decline in 2002. Salem is scheduled to open a new downtown convention center in fall of 2004, with a grand opening planned for January 2005.

*Sources: Visitor bureaus in the Willamette Valley*

In the **Mt. Hood/Columbia Gorge** region, **Hood River** reports "a great summer season that far exceeded expectations" according to the chamber of commerce. A steady May and increased visitor activity in June, as well as the Mt. Hood Railroad featuring Thomas the Tank Engine for 10 days in June and July, significantly boosted visitation in the region. In July, the Ford Gorge Games were the best attended Gorge Games ever, and were broadcast on NBC Sports and the Outdoor Life Network. From August through fall 2002, the Hood River area continued to have a very strong tourism season. The Columbia Gorge Discovery Center and Museum in **The Dalles** was down 7 percent, but its 'Cargo' exhibit, slated for opening in 2004 as part of the Lewis & Clark Bicentennial, should increase traffic to the facility and area. In **Troutdale**, counts at the visitor center were comparable to 2001, but group business at the Columbia Gorge Premium Outlets was down 27 percent, with sales down only slightly. Ski areas on Mount Hood were all up in the 2001-02 season; the area's summer season also was solid. A lack of snow in December 2002 and January 2003 slowed ski business in the Mount Hood area this season, but business is expected to pick up February through April if snow levels continue to increase.

*Sources: Hood River and Troutdale Chambers of Commerce; Clackamas County TDC*

**Central Oregon** reports a flat 2002, with average daily room rates at resorts up, but occupancy down. Lodging properties in Bend finished the year down 5-10 percent; however, nearly 200 rooms were added to the city's inventory in 2002, and approximately 400 more are slated to open this year. Visitation at the Welcome Center in Bend was down 21 percent; Lava Lands down 9 percent; The High Desert Museum down 14 percent; and the Museum at Warm Springs down 7 percent. Skier visits at Mount Bachelor, however, increased in the 2001-02 season, and the area's golf courses continue to thrive and expand, with the region's annual hosting of significant golf events. A new resort and residential golf development, Pronghorn, is scheduled to open in 2003, which will be the only place in the world where both Jack Nicklaus and Tom Fazio have designed adjacent 18-hole golf courses within the same development. While retail sales were relatively flat or down, spa business in the region boomed in 2002.

*Source: Central Oregon Visitors Association*

Tourism activity in **Eastern Oregon** appears to be flat in 2002 compared to the previous year. Room tax revenues were down slightly in **La Grande-Union County** and **Pendleton**. Both areas are optimistic about 2003, with a potential excursion train between Elgin and Joseph; the opening of the Northeast Oregon Regional Fire Museum in La Grande in May; and an increase in conventions booked in 2003 in Pendleton. State parks report that while the region as a whole is up, some parks were down, including the Sumpter Dredge near **Baker City**, which reported a decrease in visitation for the first time since its opening in 1998. Parks in the **Ontario** area, however, saw increases overall, and the State Welcome Center in Ontario was up 2 percent. Counts at the Umatilla Welcome Center were down 9 percent. The National Historic Oregon Trail Interpretive Center in Baker City was down slightly in 2002, with counts hovering around 70,000 for the year. Many communities and facilities in the eastern Oregon region are launching programs and marketing for the Lewis & Clark Bicentennial, including major exhibits at the Oregon Trail center and Tamastlikt Cultural Institute, and special events along the trail from now through 2006.

*Sources: Visitor bureaus and chambers in Eastern Oregon*

Despite summer wildfires in many areas, **Southern Oregon** reports a solid visitor year for 2002. **Roseburg's** lodging tax revenues were strong throughout the summer and counts at the visitor center were comparable to 2001. As in many other communities, the fires actually helped fill local lodging establishments with personnel related to fire control. **Grants Pass** had an increase in room tax revenues throughout 2002, with the conference segment of the hotel business experiencing a healthy spring and summer before a very strong fall for groups. Multi-day rafting trips on the "permit only" section of the Rogue River were very strong; one-day trips were lighter due to smoky summer skies. **Medford** ended the year with a 2 percent increase in room tax revenues, and the visitor center at Harry & David's reports an 8 percent increase in counts. Small meetings and events increased in 2002 as well – up a whopping 41 percent, with a 32 percent increase in out-of-town delegates. **Ashland's** larger lodging properties report a 5-10 percent increase in occupancy in 2002, with bed and breakfast establishments reporting mixed results. Looking forward to 2003, advanced bookings appear to be slow, necessitating more strategic thinking on the part of marketing organizations and departments. The Siskiyou Welcome Center in Ashland was down 28 percent, but opened in late July after relocating to an office-style trailer in the parking lot of its former facility at the Ashland Ranger District office. The Klamath and Lakeview Welcome Centers were down 6 percent and 4 percent, respectively. The Oregon Shakespeare Festival was up 8 percent; Crater Lake National Park was flat in 2002,

its 100<sup>th</sup> anniversary year; Wildlife Safari was flat; Oregon Caves National Monument was only down 3 percent, despite very smoky skies in August; and Seven Feathers Resort and Casino was up a healthy 20 percent in 2002.

Source: Southern Oregon Visitors Association

## 2001 & 2002 Visitor Data

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	<u>2001</u>	<u>2002</u>	<u>% Change</u>
<b>Visitor Centers:</b>	678,658	860,980	+27%*

*Includes all State Welcome Centers (Astoria, Brookings, Ashland, Klamath Falls, Lakeview, Ontario, Umatilla and three in the Portland area), plus local visitor centers in Newport, Bend and Eugene.*

\*The recently relocated Portland center in Pioneer Courthouse Square had a 35 percent increase in 2002.

<b>Attractions:</b>	23,183,766	22,983,235	-1%
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*Includes counts at most major attractions throughout Oregon (see complete list of attractions, attached).*

<b>National Park Sites:</b>	920,466	938,633	+2%
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*Includes Crater Lake National Park, Oregon Caves National Monument, Fort Clatsop National Memorial and John Day Fossil Beds.*

### **State Parks:**

Day-Use Areas:	6,453,628	6,165,870	-4%
Campgrounds:	2,225,965	2,373,869	+7%

*Includes 12 day-use sites in high visitor traffic areas, and all 51 state parks with overnight camping facilities.*

<b>Skier Visits:</b>	1,404,330 (2000-01)	1,656,358 (2001-02)	+18%
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*The 2001-02 numbers include Oregon's 13 ski areas; the 2000-01 numbers do not include Warner Canyon in Lake County.*

<b>Airport Activity:</b>	7,327,845	7,034,139	-4%
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*Includes enplanements at Portland International, Eugene, Medford and Redmond airports.*

<b>Passenger Rail Counts:</b>	120,957	121,804	+7%
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*Includes Amtrak Cascades Train and Thruway Motorcoach ridership counts provided by ODOT Rail Division.*

<b>Traffic Counts:</b>	903,547	921,995	+2%
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*Includes average daily traffic counts at ten sites monitored throughout Oregon by the Oregon Department of Transportation.*

<b>Local Tax Revenues:</b>	\$73 million	\$73 million	0
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*Includes all local lodging taxes throughout Oregon, a meals tax in Ashland, and car rental taxes in Multnomah and Lane Counties. Data from 2002 'Oregon Travel Impacts' report prepared for the Oregon Tourism Commission by Dean Runyan Associates.*

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<b>Attractions</b>	<b>2001</b>	<b>2002</b>	<b>Difference</b>	<b>% chng</b>
A.C. Gilbert's Discovery Village	83,615	78,675	-4,940	-6%
Applegate Trail Interp Ctr	8,000	10,000	2,000*	25%
Cape Perpetua	29,422	35,891	6,469	22%
Children's Museum	135,313	213,627	78,314	58%
Columbia Gorge Discovery Center	39,180	36,500	-2,680	-7%
Columbia River Maritime Museum	68,306	97,737	29,431	43%
Crater Lake National Park	506,973	506,219	-754	0%
D River State Recreational Site	1,219,676	1,160,844	-58,832	-5%
Enchanted Forest	134,705	133,348	-1,357	-1%
End of the Oregon Trail Interp Center	57,128	48,813	-8,315	-15%
Fort Clatsop National Memorial and Salt Works	226,469	232,142	5,673	3%
Forest Discovery Center	31,000	38,092	7,092	23%
Four Rivers Cultural Center	4,812	7,469	2,657	55%
Grotto (The)	191,262	200,000	8,738	5%
Hatfield Marine Science Center	161,185	125,673	-35,512	-22%
Hellgate Jetboat Excursions	60,846	69,146	8,300	14%
High Desert Museum (the)	160,026	137,650	-22,376	-14%
Indian Head Casino	420,585	343,200	-77,385	-18%
Japanese Garden	123,460	165,504	42,044	34%
Jerry's Rogue Jets	25,000	25,801	801	3%
John Day Fossil Beds National Monument	99,329	115,233	15,904	16%
Malheur Wildlife Refuge (Visitor Ctr & Museum)	65,000	62,000	-3,000	-5%
Mill Resort & Casino	1,208,973	1,264,753	55,780	5%
Mission Mill Museum	79,319	117,088	37,769	48%
Multnomah Falls	2,500,000	2,500,000*	N/A	N/A
Museum at Warm Springs	18,956	17,650	-1,306	-7%
Old Camp Casino	65,885	71,809	5,924	9%
Oregon Air and Space Museum		2,305	N/A	
Oregon Caves National Monument	87,695	85,039	-2,656	-3%
Oregon Coast Aquarium	683,680	506,142	-177,538	-26%
Oregon Garden (The)	234,648	181,833	-52,815	-23%
Oregon History Center	37,316	26,791	-10,525	-28%
Oregon Museum of Science & Industry	998,024	778,457	-219,567	-22%
Oregon Shakespeare Festival	368,776	399,609	30,833	8%
Oregon State Capitol	170,393	190,128	19,735	12%
Oregon Trail Ctr at Flagstaff – "NHOTC"	73,500	69,852	-3,648	-5%
Oregon Zoo	1,313,972	1,330,838	16,866	1%
Portland Art Museum	420,292	444,699	24,407	6%
Portland Classical Chinese Garden	298,332	153,748	-144,584	-48%
Salem Carousel	214,000	223,000	9,000	4%

<b>ATTRACTIONS</b>	<b>2001</b>	<b>2002</b>	<b>Difference</b>	<b>% chng</b>
Sea Lion Caves	N/A	6%	N/A	6%
Seven Feathers Resort & Casino	1,026,000	1,231,196	205,196	20%
Shore Acres State Park	263,488	258,952	-4,536	-2%
Silver Falls State Park	957,896	869,062	-88,834	-9%
Spirit Mountain Casino	3,100,000*	3,300,000*	200,000*	6%
Tamastlikt Cultural Institute	40,000	49,995	9,995	25%
Tillamook Air Museum	77,000	76,000	-1,000	-1%
Tillamook Cheese Factory	1,021,633	969,587	-52,046	-5%
Umpqua Discovery Center	21,266	18,103	-3,163	-15%
Wild Horse Gaming Resort & Casino	610,068	558,025	-52,043	-9%
Wildlife Safari	156,000*	156,000*	0*	0%
Woodburn Company Stores	3,045,402	3,048,236	2,834	0%
Yaquina Head Interpretive Center	84,059	82,109	-1,950	-2%
Yaquina Head Lighthouse	82,401	88,813	6,412	8%
<b>GRAND TOTAL</b>	<b>23,110,266</b>	<b>22,913,383</b>	<b>-199,188</b>	<b>-1%</b>

*Difference only reflects attractions  
Reporting visitors for both 2001 and 2002*

**\*Estimate**