



# Economic Impacts and Value of Oregon's Heritage Organizations and Events

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## KLAMATH COUNTY MUSEUM

This project is supported through funding  
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# SUMMARY OF FINDINGS

Local and statewide organizations engaged in protecting, preserving, and sharing Oregon’s heritage contribute to Oregon’s economy in important ways. The first part of this report quantifies some of the economic value Oregon’s heritage activities and resources support, through the employment, income, and tourism spending of heritage organizations and traditions across the state. These estimates capture just a part of the broader economic importance of Oregon’s heritage: the second part of this report provides illustrations of the many different ways heritage enhances the economic well-being of Oregonians.



## Heritage Organizations support Economic Activity throughout Oregon

Our analysis finds that heritage organizations directly supported 1,600 employees and labor income of \$47 million in 2019. Those organizations, in turn, support other businesses in the community through purchases of local goods and services and spending from employees, amounting to 2,147 total jobs in Oregon and \$77.7 million in supported labor income. Altogether, heritage organizations supported \$196.3 million in total economic activity during 2019.

## Heritage Activities support Tourism

During 2019, Heritage organizations drew 2 million visitors to their community from around the state, region, and across the United States. Heritage traditions drew an additional 1 million people to Oregon’s communities to experience and participate in Oregon’s cultural heritage events. All nine regions drew at least 50,000 visitors (to organizations and events), and six drew more than 175,000 each.

## Heritage Tourism is an Important Contributor for Local Economic Development

Tourism supports local economies by supporting local vendors, including shops, restaurants, and hotels. In 2019, visitor spending directly supported 910 jobs in Oregon’s leisure and hospitality sector. After accounting for the additional economic activity supported by hospitality businesses and workers, heritage tourism supported a total of 1,325 jobs and \$55 million in labor income resulting in \$147 million in total economic activity in Oregon.

### Oregon’s Economic Contribution of Heritage Organizations and Traditions, 2019

Impact	Heritage Organizations		Heritage Visitation	
	Direct	Total	Direct	Total
Jobs	1,599	2,147	909	1,325
Labor Income	\$46.7	\$77.7	\$31.9	\$55.2
Value Added	\$58.2	\$114.9	\$45.2	\$83.9
Output	\$97.5	\$196.4	\$77.6	\$147.0

Source: ECONorthwest

## Heritage Activities are Valuable Community Assets

Heritage activities shape the social and cultural landscape of communities around Oregon. They produce a wealth of economic benefits that—while difficult to quantify—contribute to Oregonians’ economic well-being. Oregon’s heritage traditions bring people together in shared purpose and celebration. Heritage organizations collect, preserve, transmit, and interpret Oregon’s rich history and culture: the landmarks, stories, and artifacts that help shape current and future generations’ sense of place and identity. And heritage programs like historic downtowns and certified local governments help institutions leverage financial and other resources that contribute to the betterment of public spaces, more effectively bring people together, and build knowledge and skills that reach beyond heritage alone.



# INTRODUCTION

## THE ECONOMIC VALUE OF OREGON'S HERITAGE

### Heritage and the Economy

Societies and economies are built on foundations of capital: human capital represents population's collective knowledge and talent; natural capital provides amenities and resources; physical capital adds roads, utilities, and buildings; social capital is the institutional and networking glue that binds communities together. Heritage (or cultural) capital extends from the other forms of capital, is woven throughout the foundation, and is passed from generation to generation. It's found in fairs, festivals, and cultural celebrations. It's conveyed in dance, songs, stories, and competitions. It's in parks, cemeteries, on main streets, historic buildings, library collections, and museums. Heritage capital connects people to their past, animates the present, and provides clues about where a community may be headed in the future.

The Oregon Heritage Commission (the Commission) is charged with championing resources, recognition, and funding for preserving and interpreting Oregon's past. From an economic perspective, heritage is a public good and shared broadly. Oregonians ascribe a variety of values to their heritage—economic value, political value, aesthetic value, educational value, cultural value, and spiritual value. If stories are forgotten or historic places and repositories of historic collections are inaccessible, value is lost.

Preserving heritage requires an investment of time and money. The Commission is charged with inspiring public and private investment. To attract investment, the importance of heritage must be clarified. That's the purpose of this report. The Commission hired ECONorthwest to assess one domain of heritage value (economic contribution), and more specifically requested estimates of impacts of Oregon's heritage-related organizations, sites, and activity on local economies. The first section of this report describes the findings of this "economic contributions" analysis.

This second section of this report details the many other ways that Oregon's heritage resources generate economic benefits that are not captured in the monetary transactions of organizations and visitors. Much of this dimension of economic value is difficult to quantify—if quantified, it would likely be many times greater than the economic contribution—but it cannot be ignored.

The intended audience for this report is broad and includes the users of heritage sites and activities, volunteers, elected officials, and business, philanthropic, nonprofit, and other community leaders.



### How this Report measures Economic Value

While the economic impact totals reported here are impressive, they are a subset of the full economic value and do not capture value in other domains (e.g., historic, cultural/symbolic, spiritual, aesthetic) which provide important but difficult to quantify social and economic value to Oregon's communities.

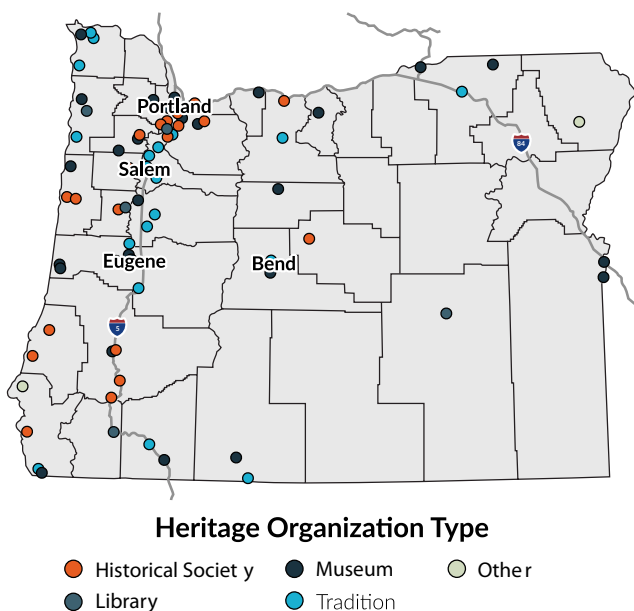
**The first section of this report** quantifies the economic contributions of heritage organizations, heritage traditions, and the effect of visitor spending. **The second section** qualitatively describes the economic benefits of a broader set of heritage resources.

## Oregon's Heritage Landscape

This report evaluated economic activity in heritage collecting organizations (“heritage organizations” e.g., libraries, museums, historical sites) and tradition events (“heritage traditions”) (see Figure 1; page 12 lists the heritage traditions; the Technical Appendix lists the heritage organizations included in the analysis). Oregon Heritage, of Oregon Parks and Recreation Department (OPRD), assists those preserving and sharing the state’s heritage and promotes the goals of the Oregon Heritage Plan. Heritage organizations cover the full geography of the state from Ontario’s Four Rivers Cultural Center and Museum to Astoria’s Barview County Park and Curry County’s Historical Society and Museum to Joseph’s Center for Culture.

Many organizations focus on the heritage of a specific geographic area while others focus on specialized topics including science, technology, art, paleontology,

Figure 1:  
Heritage Organizations and Events (Traditions)  
included in Analysis



Source: ECONorthwest using data from OPRD; Internal Revenue Service.

anthropology, logging, smoke jumping, ranching, shipping, fishing, firefighting, mining, banking, mountaineering, aircraft, spacecraft, railroads, motorsports, and horse drawn transportation. Population focused organizations like the Museum at Warm Springs, Oregon Black Pioneers, the Oregon Jewish Museum, the Polish Library Association, and John Day’s Kam Wah Chung Park broaden the diversity of perspective on the state’s heritage. Organizations range in size from volunteer-run community historic sites in Fossil and Mill City to the Portland Art Museum.

The Commission also fosters and coordinates with 25 longstanding heritage traditions including the Astoria’s Regatta (1894), Portland Rose Festival (1907), the Pendleton Round-Up (1910), Medford’s Pear Blossom Festival (1954), Woodburn’s Fiesta Mexicana (1964), and the Mother’s Day Powwow at the University of Oregon (1969).





## Measuring Economic Value of Oregon's Heritage Organizations & Traditional Activities

### Footprints, Visits, Tourism, and Spillovers

ECONorthwest measured economic impacts associated with Oregon's heritage sites and events during 2019 through two key channels: 1) the economic footprint of 282 heritage organizations for which records were available and 2) the visitation and tourism impacts related to those organizations and the 25 heritage/tradition events (see Figure 2).

Conceptually, measuring organizational economic footprints is straightforward. The entities, mostly private non-profit entities, earn revenue from private donations, philanthropic grants, public appropriations, and entry or admissions charges. The revenue is used to hire staff and purchase materials and supplies. Organizations with any appreciable amount of revenue report their footprints to the U.S. Internal Revenue Service.

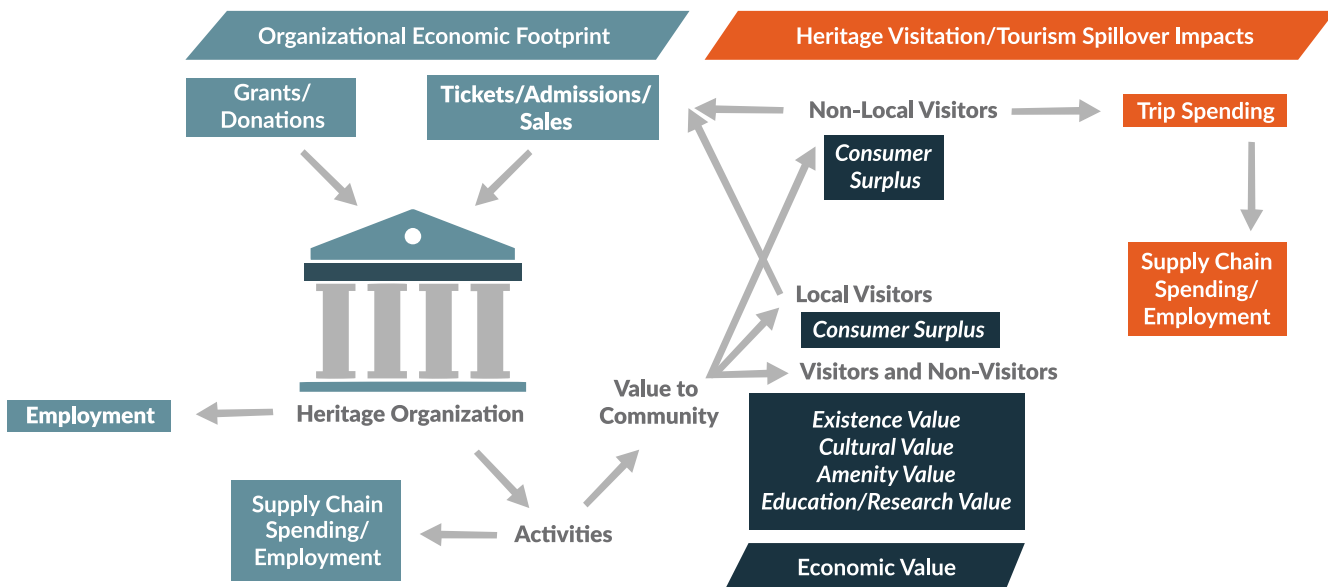
## Economic Contributions in 2020 and 2021 and COVID-19 Closures

The information in this report was evaluated using 2019 data due to anomalies in 2020 from the COVID-19 pandemic. Many heritage organizations and traditions were temporarily closed or postponed during 2020 and 2021.

Due to the closures, reduced capacity, and lower visitation, we anticipate that the economic contributions of Oregon's heritage organizations and traditions followed a similar trend as the broader hospitality and tourism sector.

Recent data for 2022 suggest visitation and expenditures are returning to historical levels, though a tight labor market, inflation, and incomplete data complicate those estimates. Despite that uncertainty, we expect that organizational and visitor spending will return to historical levels in the next few years.

Figure 2: Relationship Between Heritage Organizations and Heritage Visitor/Tourism Impacts



The organization's presence in a community, together with its supported activities or events, set a chain of economic activity into motion—some easily quantified and other less so. When a museum, library, or historical site opens its doors to visitors several things happen. Local community members stop by to learn, reflect, and use resources. In some cases, sites charge admission, but many sites are free. Additionally, most heritage sites will attract visitors from outside the community, and in those cases, they bring new dollars from outside the local economy. Those non-local visitors may also spend money in grocery stores, cafes, restaurants, pubs, and motels. And having served the visitors, those grocery stores, cafes, restaurants, pubs, and motels then re-stock their supplies.

Local and non-local visitors almost always get more than they pay for (e.g., the admission is \$2 and they would have happily paid \$5). The difference between an actual charge and a visitor's willingness to pay is called consumer surplus. Finally, visitors and non-visitors also enjoy other, non-monetized value of heritage sites. One that fits in the economic domain is existence value, or the amount of money someone would be willing to pay to keep a site or event in place even if they never planned on visiting it. For example, some Oregonians would be willing to pay an annual subscription to ensure the continuation of the iconic Pendleton Round Up and Happy Canyon Pageant even if they didn't anticipate a trip to Eastern Oregon.

Many other sociocultural values of heritage site fall outside the economic domain and are harder to quantify, including historic, cultural/symbolic, social, spiritual, and aesthetic values (see Figure 3).

Figure 3:  
Non-Economic, Sociocultural Values of Heritage Sites and Events



**Historical values** convey, embody, or stimulate a relation with or reaction to the past.



**Cultural/symbolic values** build cultural affiliation in the present and can be political, ethnic, or related to other means of living together (e.g., work- or craft-related).



**Social values** enable and facilitate social connections and networks.



**Spiritual values** are intrinsic to some heritage sites associated with organized religion but can also encompass secular experiences of wonder and awe provoked by heritage places.



**Aesthetic value** extends from the visual qualities of heritage places and activities.

Source: de la Torre, Marta. (2002) *Assessing the Values of Cultural Heritage*. The Getty Conservation Trust. Los Angeles, CA.



## Quantifying the Economic Activity Associated with Heritage Sites and Events

ECONorthwest used three key data sources to measure economic activity associated with Oregon's heritage organizations and events:

- **IRS Form 990 submissions from heritage organizations.** The Form 990 submissions, when accessible, provided information on revenues, funding sources, employment counts, and volunteerism at heritage organizations. Usable Form 990 information was available for 106 organizations—or 38 percent of the all the organizations in the Oregon Heritage database. Organizations excluded from the Form 990 analysis were either very small (i.e., less than \$50,000 in annual revenue), had a smaller heritage function embedded in a large organization (e.g., the Knight Library at the University of Oregon), were duplicative (e.g., some organizations file multiple reports under differ names), or could not be identified on the IRS site.
- **Visitor counts from the proprietary Placer.ai software platform.** The Placer.ai data provided visitor counts at museums, libraries, historic sites, and events. The Placer.ai visits data are generated from cellphone activity and use state-of-art technology but are of limited use if a heritage site is co-located with other functions in a multi-story building (i.e., heritage activity within the building cannot be disentangled from other activity). Also, the data set is built from U.S. phone activity and will miss international visitors.
- **Visitor spending estimates from Portland-based Dean Runyan and Associates.** Every year, the firm estimated the economic impact of tourism in Oregon and calculates visitor spending by commodity purchased (e.g., accommodations, food services, retail sales), and average per person night expenditures by accommodation type.

These data help characterize the economic activity directly tied to the heritage organizations/events and the visitor activity they generate. But that direct activity extends or “multiplies” as heritage organizations purchase materials and supplies for their operations, and employees and visitors spend money elsewhere in the local economy and support additional jobs.

## Economic Impact Terminology

Economic impacts are classified by their relationship to the activity in question. For this analysis, the three types of impacts are defined to capture the economic activity of heritage organizations and traditions as follows:



**Direct impacts** are the spending, jobs, and employment directly supported by Oregon's heritage organizations and traditions and can be considered the inputs for the model.



**Indirect impacts** are the economic effects supported by business purchases from heritage organizations and traditions. These indirect effects are sometimes also referred to as supply chain effects.



**Induced impacts** are the changes in regional household spending caused by changes in household income. These are typically referred to as consumption effects.



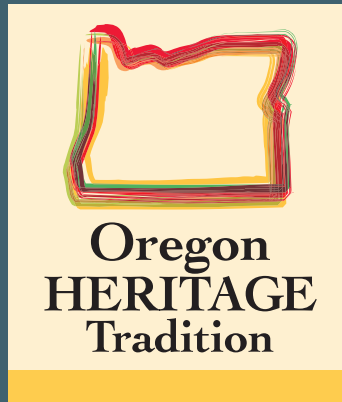
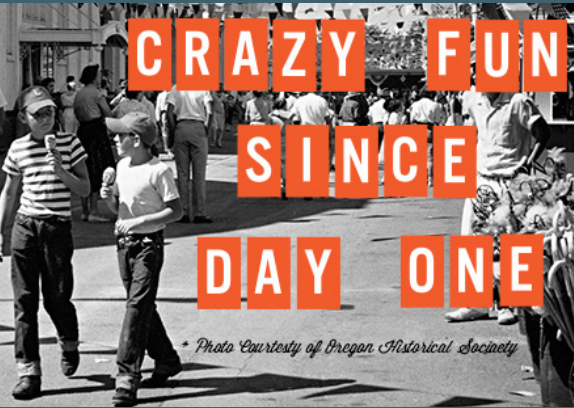
**Output** represents the value of goods and services produced and is the broadest measure of economic activity.



**Labor income** consists of employee compensation and proprietary income and is a subset of output.



**Jobs**, according to IMPLAN's methodology, are measured in terms of full-year-equivalents (FYE). A job can be full-time or part-time, seasonal, or permanent.



## Designated Oregon Heritage Traditions

The Oregon Heritage Tradition designation recognizes events more than 50 years old that represent what it means to be an Oregonian. Designated events are unique locally, regionally, and statewide. In short, these events add to the livability and identity of the state.

- Oregon State Fair, Salem (1858)
- Wasco County Fair and Rodeo, Tygh Valley (1885)
- Linn County Pioneer Picnic, Brownsville (1887)
- Astoria Regatta (1894)
- Clackamas County Fair, Canby (1907)
- Portland Rose Festival (1907)
- Lebanon Strawberry Festival (1909)
- Pendleton Round-Up (1910)
- Happy Canyon Pageant and Wild West Show (1916)
- Portland Midsummer Festival (1928)
- Fourth of July Pet Parade, Bend (1932)
- Klamath Basin Potato Festival, Merrill (1937)
- Brookings Harbor Azalea Festival (1939)
- Portland Greek Festival (1952)
- Pear Blossom Festival, Medford (1954)
- Pacific City Dory Days (1959)
- Bohemia Mining Days, Cottage Grove (1959)
- Scandinavian Festival, Junction City (1961)
- Cannon Beach Sandcastle Contest (1964)
- Woodburn Fiesta Mexicana (1964)
- Astoria Scandinavian Midsummer Festival (1968)
- University of Oregon Mother's Day Powwow (1969)
- Oregon Country Fair (1969)
- Great Oregon Steam-Up, Brooks (1970)
- The Christmas Ships Parade (1954)
- Aumsville Corn Festival (1968)

Source: <https://www.oregon.gov/oprd/OH/Pages/Heritage-Designations.aspx>

# PART 1

## ECONOMIC CONTRIBUTIONS OF OREGON'S HERITAGE ORGANIZATIONS AND TOURISM

We present economic contributions through the two mutually exclusively areas: the economic footprint of heritage organizations and the impacts of the visitor spending that is associated with heritage sites and events.

### Economic Footprint of Heritage Organizations

- Heritage organizations directly supported more than 2,100 jobs and generated nearly \$200 million in economic output.** The Form 990s showed reported about 1,600 employees and labor income of \$47 million directly in heritage organizations in 2019. But the organizations bought materials and supplies, and their employees spent their paychecks in the economy. Take those supply chain and induced consumption impacts into account, and the job and labor income totals rise to 2,147 and \$77.7 million, respectively. That total labor, inside and outside the heritage organizations was associated with \$196.3 million in economic output (Table 1).
- Donations, grants, and in-kind contributions underwrote \$56 million in organizational activity.** During 2019, Oregon's heritage organizations and trusts received \$56 million in revenue from in-kind

contributions, grants, and donations, which accounted for 57 percent of reported revenues that year.

- Volunteers contributed \$8.5 million in-kind labor and 300,000 hours of time to heritage organizations in 2019.** Our analysis found that nearly 6,000 Volunteers who give their time to support Oregon's heritage organizations play a critical role in Oregon's heritage activities and ensuring the organizations remain viable. During 2019, Oregon's heritage organizations reported 6,000 volunteers across the state who donated their time to these organizations. Not all entities track the number of hours donated, but a separate analysis by the Oregon Heritage Commission estimated that volunteers contributed over 300,000 hours of time valued at almost \$8.5 million in in-kind labor support.<sup>1</sup>



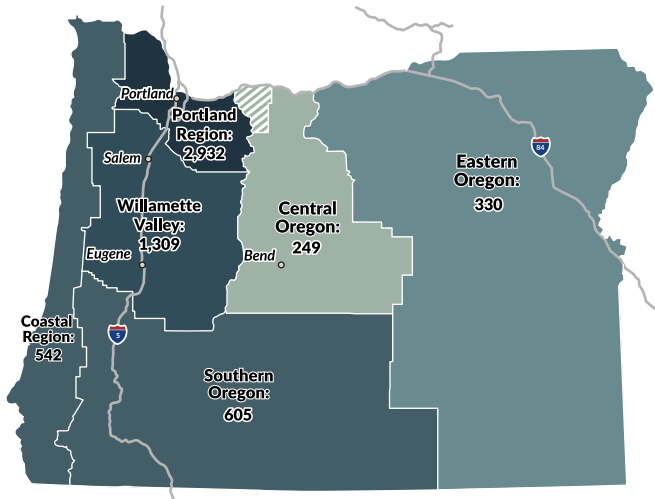
Table 1: Economic Contributions for Heritage Organizations, 2019

Effect	Employment	Labor Income	Value Added	Output
Direct	1,599	\$46,725,869	\$58,211,503	\$97,518,122
Indirect impacts (supply chain effects)	237	\$14,508,906	\$27,368,795	\$48,989,210
Induced impacts (consumption changes)	311	\$16,453,071	\$29,297,317	\$49,843,832
<b>Total</b>	<b>2,147</b>	<b>\$77,687,845</b>	<b>\$114,877,615</b>	<b>\$196,351,164</b>

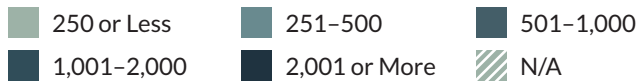
<sup>1</sup> Chikoto-Schultz, G. L., & Christiansen, C. (2020). The Value of Oregon Heritage Organizations' Volunteers: An Oregon Heritage Commission Volunteer Study—A Summary Report. Nonprofit Institute. Portland State University.

# PART 1: ECONOMIC CONTRIBUTIONS OF OREGON'S HERITAGE ORGANIZATIONS AND TOURISM

Figure 4:  
Distribution of Volunteers by Region



Organization Volunteers By Region

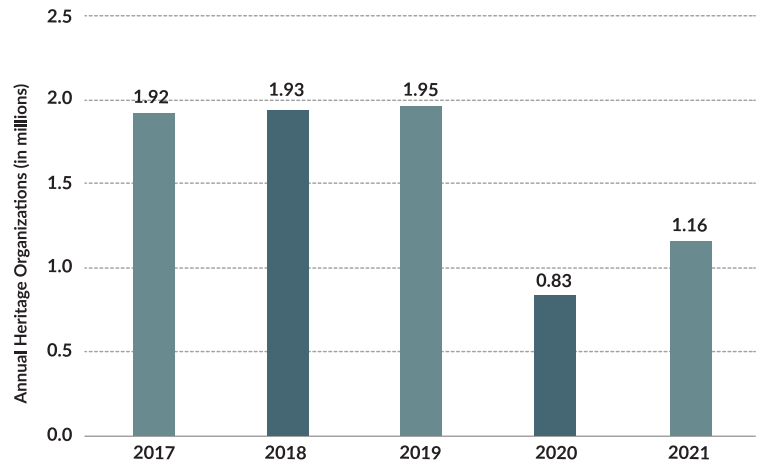


Source: ECONorthwest

## Visitor/Tourism Impacts

- Heritage organizations and events attracted nearly three million visitors in 2019.** Heritage sites and events convey their full range of sociocultural values when people show up to experience, interact, or participate in them. And in the year preceding the global pandemic millions of people did. Heritage organizations hosted almost two million visitors while traditional events added another million. The Portland region—home to OMSI, the Portland Art Museum, the Oregon Historical Society—drew the highest number of organizational visits, but the Willamette Valley led in visits to events with draws like the Oregon State Fair, the Oregon Country Fair, Lebanon’s Strawberry Festival, and Woodburn’s Fiesta Mexicana. All nine regions drew at least 50,000 visitors (to organizations and events), and six drew more than 175,000 each.

Figure 5:  
Annual Heritage Organization Visits (Millions), 2017–2021



Source: ECONorthwest

Unsurprisingly, visits to heritage organizations declined in 2020 and partially rebounded in 2021. If the rest of the economy is a guide, organizations and events should see additional recovery in 2022 and 2023.

- Heritage visitors spent \$137 million in 2019.** The nearly 3 million visitors in 2019 spent about \$26 per visit—or \$77.6 million. The Portland region led in visitor spending but was followed closely by the North Coast. The Placer.ai data suggested a higher share of the visits were overnight, which increased the average per visit expenditure to \$55.

**In all these encounters, visitors supported economic activity but, more importantly, they gained a better understanding of the world they live in, strengthen connections to places they call home, and built a sense a community.**

- Heritage tourism supported more than 1,300 jobs, contributed in \$55 million in labor income.** Spending by tourists supported local economies by eating in local restaurants, purchasing from local shops, and in

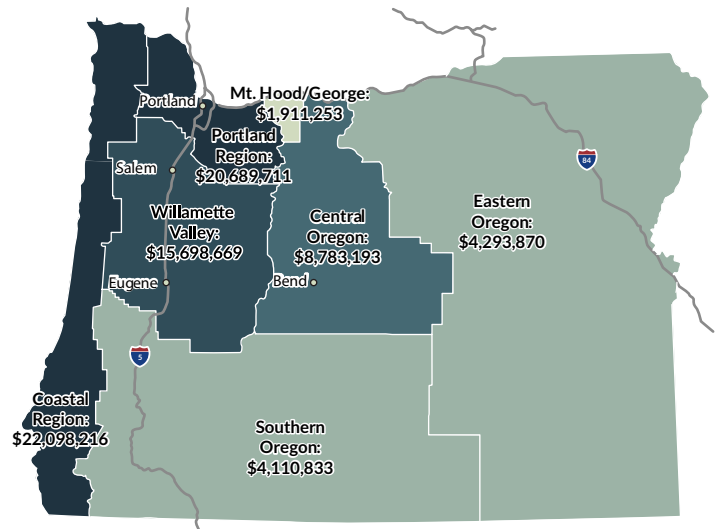
# PART 1: ECONOMIC CONTRIBUTIONS OF OREGON'S HERITAGE ORGANIZATIONS AND TOURISM

some cases spending a night in a local hotel. In 2019, visitor spending directly supported about 910 jobs—concentrated in the leisure and hospitality sector. The induced and indirect effects (supply chains and consumption changes) supported another 193 and 223 jobs, respectively—to bring the total to 1,325. Those jobs were associated with \$55 million in labor income and \$147 million in economic output.

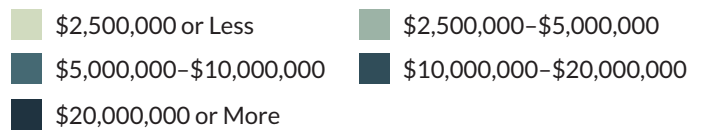
- **Tourism spending generated \$3.2 million in state and local taxes.** Fiscal contributions are not economic contributions, but the analyses often go together. The just described tourism impacts have tax implications.



Figure 6: Visitation-Related Spending by Region, 2019



Direct Spending by Visitors



Source: ECONorthwest

Table 3: Tax Revenue from Tourism Spending

Category	Revenues
Social Insurance Tax	\$74,371
Tax on Production and Imports	\$1,985,449
Corporate Profits Tax	\$171,126
Personal Tax	\$967,552
<b>Total State and Local Tax</b>	<b>\$3,198,498</b>

Source: ECONorthwest

Table 2: Economic Impacts of Heritage Visitation Spending, 2019

Impact Type	Employment	Labor Income	Value Added	Output
Direct spendings by visitors	909	\$31,878,031	\$45,171,352	\$77,585,746
Indirect impacts (supply chain effects)	193	\$11,525,876	\$17,811,573	\$33,806,803
Induced (consumption changes)	223	\$11,767,428	\$20,939,535	\$35,630,682
<b>Total</b>	<b>1.325</b>	<b>\$55,171,335</b>	<b>\$83,922,461</b>	<b>\$147,023,231</b>

Source: ECONorthwest

# PART 2

## ECONOMIC BENEFITS OF OREGON'S HERITAGE

The previous section presents the economic contribution of Oregon's heritage organizations and traditions, through the lens of dollars spent and circulated through the economy. But as noted, Oregon's heritage organizations and traditions produce economic value in so many other ways. Quantifying this value is an exercise that is well beyond the scope of this research effort. But ignoring these many other economic benefits would leave out an important part of the story and reason why Oregonians should continue to invest in protecting and engaging with our heritage endowment.

### Economic Value of Heritage Organizations and Traditions Not Captured by Economic Contributions

We measured the economic footprint of heritage organizations and heritage traditions because when people visit these places they spend money, which is a measurable outcome. But the amount someone spends on heritage activities represents only part of their economic value. Here are some of the other economic benefits that arise from heritage activities:

- When people purchase a ticket for admission for \$2 but would have been willing to spend \$5, the difference reflects **consumer surplus value**. It is not picked up in the transaction itself but is a measure of the full value of the experience to the visitor. Added up across all visitors, this amount is sizeable and could be larger than the actual spending—especially because often admission to heritage museums, libraries, and some traditions is small compared to other types of entertainment or free/by donation.






## PART 2: ECONOMIC BENEFITS OF OREGON'S HERITAGE

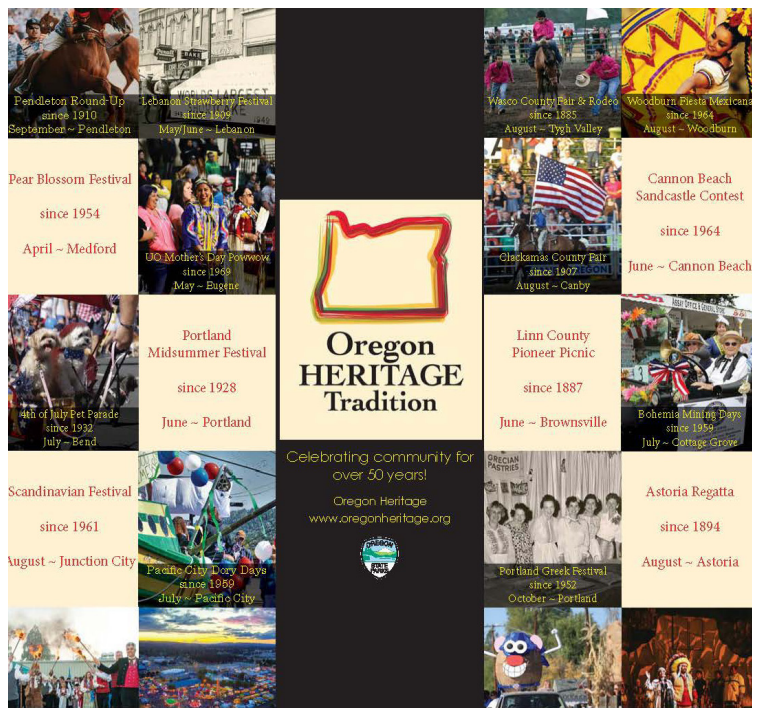
- Heritage organizations and traditions bring people together in shared purpose and identity, serving as institutional and networking “glue” that binds communities together (known as **social capital**). This “glue” is difficult to measure in economic terms, but our communities would not be the same without it.
- Some people may have participated in a tradition or visited an organization once and are willing to pay for future visitors to have a similar experience. Or maybe they read about the tradition and learned something new. Or they’ve never been but wish to participate someday. These sources of value represent **option value, existence value, and bequest value** and are often expressions of **spiritual value, historic value, education value, and social value** that people have (see the box on page 10). Sometimes these values motivate people to spend real money—perhaps as a donation to the organization—or use their time to volunteer. But often this value is uncaptured in monetary terms.
- Sometimes an organization or tradition’s physical asset produces value for the community directly. Historic structures and open spaces that house organizations and traditions—and may not exist but for the stewardship of the organization—produce economic value for the surrounding community. They may elevate nearby **property values**, and generate **aesthetic value** that contribute to sense of place.

While these values are challenging (in some cases impossible or inappropriate—see inset) to measure in economic terms, they are legitimate sources of economic value that likely far outweigh the economic value measured in the economic activity that these organizations and traditions produce.



### Cultural, Spiritual, and Tribal Heritage Values

Traditional monetary measures of economic importance can be inappropriate to describe the value of cultural, spiritual, or tribal values. Monetization implies substitutability (i.e., that monetary compensation at some level can make whole the loss of the service, because equivalent services may be purchased). For example, archaeological values, such as burial grounds and ceremonial sites, are non-renewable and have no substitutes. Given that many, if not all, cultural values for tribes are defined by place, tradition, and continuity of use and practice, no alternative resource could provide a sufficient substitute for the resources in question. Although they are not appropriate to monetize in economic terms, cultural and heritage values of tribes are of significant importance.



**Oregon HERITAGE Tradition**

Celebrating community for over 50 years!  
Oregon Heritage  
[www.oregonheritage.org](http://www.oregonheritage.org)

Events listed in the collage include:  
Pendleton Round-Up (since 1910, September - Pendleton)  
Lebanon Strawberry Festival (since 1959, May/June - Lebanon)  
Wasco County Fair & Rodeo (since 1835, August - Tigh Valley)  
Woodburn Fiesta Mexicana (since 1984, August - Woodburn)  
Pear Blossom Festival (since 1954, April - Medford)  
Cannon Beach Sandcastle Contest (since 1964, June - Cannon Beach)  
UO Mother's Day Parade (since 1969, May - Eugene)  
Clatsop County Fair (since 1907, August - Canby)  
Portland Midsummer Festival (since 1928, June - Portland)  
Linn County Pioneer Picnic (since 1887, June - Brownsville)  
Bohemia Mining Days (since 1959, July - Cottage Grove)  
4th of July Pet Parade (since 1932, July - Bend)  
Scandinavian Festival (since 1961, August - Junction City)  
Pacific City Dory Days (since 1959, July - Pacific City)  
Astoria Regatta (since 1894, August - Astoria)  
Portland Greek Festival (since 1952, October - Portland)

### Heritage Tradition Spotlight: University of Oregon Mother's Day Powwow (1969)



The Powwow came out of the Indian Relocation Act of 1956, when the U.S. Government compelled Native Americans to leave reservations and traditional lands for cities. While many of the promises the U.S. Government made in exchange for relocation (jobs, training, moving expenses) did not materialize, this migration led many Native Americans—displaced from their traditional lands across the country—to seek each other out. This took the form of intercultural exchange through the Powwow, which in turn led to intertribal organizing throughout the 1960s. The Mother's Day Powwow, held at the University of Oregon, is Oregon's oldest documented Powwow. It features connection, dancing, recognition of accomplishments, honoring mothers, and sharing of food through a Salmon Bake.

The nature of the event, which brings tribal members and non-tribal members together from across the country, is associated with visitation and related spending. This economic footprint, however, is a relatively small indication of the economic value the event creates. The Powwow is a perfect example of **social capital** in action: building and reinforcing connections between people, year after year, with tangible outcomes that improve quality of life.

The modern Powwow in the 1950s led to broader organizing among tribes and movement toward greater recognition and justice for Native Americans. The Mother's Day Powwow is open to everyone and showcases the heritage and culture of many Native Americans, including the people who originally inhabited the land we today know as Oregon. The land the Powwow takes place on at the University of Oregon is the traditional indigenous homeland of the Kalapuya people. It also reinforces **cultural value** through intergenerational and intercultural transmission of traditions, which is instrumental in preserving heritage for future generations.



### Collection Organization Spotlight:



Four Rivers Cultural Center (FRCC) located in Ontario (Malheur County) offers a broad range of events and programming that intersects with Oregon's heritage in many ways. The FRCC stewards history by preserving, sharing and celebrating diverse stories, cultural heritage, and artifacts. The museum holds more than a century of history and offers opportunities for free museum admission so all members of the community can experience these artifacts.

With a busy events schedule that includes theater performances, rotating heritage art and museum exhibits, and community education and activity classes, many people visit FRCC each year. Much of their programming has a cost of admission or participation. These measurable economic transactions are reflected in the analysis.

However, these underestimate FRCC's full economic value. The wide range of programming provides **educational value** to many people, who may come for a Zumba class or literacy night and leave with a broader understanding of the history of mining in Eastern Oregon or life in the World War II Relocation Authority's Minidoka Internment Camp. The FRCC also encourages community participation in the creative expression of Oregon heritage, for example by sponsoring a cultural heritage song-writing contest. By serving as an active space that preserves heritage and supports the community through active engagement, it creates **social capital**. This "glue" is difficult to measure but shows up whenever the community comes together in common purpose.



### Collection Organization Spotlight:

# OREGON BLACK PIONEERS

Oregon Black Pioneers (OBP) is dedicated to preserving and presenting the contributions of African Americans to Oregon's heritage. Its work "illuminates the seldom-told history of Black Oregonians who have faced hardship and discrimination to make a life in Oregon over the past 400 years." This organization does not have a physical home open to the public, so its impact is not reflected directly in visitation and heritage spending estimates reported elsewhere in this research. However, it has built a virtual presence with online exhibits and creates and loans physical exhibits to other museums throughout Oregon, which are captured in the economic contribution estimates. For example, its exhibits have been featured at the University of Oregon Museum of Natural and Cultural History Oregon Historical Society, and Pittock Mansion.

In addition to creating its own programming, it works with other museums throughout the Pacific Northwest to incorporate the stories of African Americans into new and existing exhibitions. It collaborated with the City of Salem to place a stone marker at the Pioneer Cemetery



honoring African Americans interned in marked and unmarked graves. OBP also provides historic consultation to government agencies and rural historical societies, including consultancy to other museums like the Linn County Historical Museum and End of the Trail Museum

Through its research, storytelling, and advocacy online and in collaboration with other heritage organizations Oregon Black Pioneers reaches many people and generates economic value well beyond any impacts measured through spending and visitation. With online content delivery, its reach is potentially far greater than through physical exhibits alone. Elevating stories of Oregon's lesser-known heritage expands awareness to inequities still present today. This has **educational value** with the potential for making meaningful impact in the lives of current and future Oregonians.

### Value of Other Heritage Organizations and Heritage Preservation Efforts in Oregon

In addition to heritage organizations and heritage traditions that are the focus of this research effort, the Oregon Heritage supports heritage in other ways, including recognizing and protecting historic cemeteries and historic

Main Streets. It also helps communities enhance and generate value from their heritage resources through programs like the Oregon Heritage All-Star Community and the Certified Local Government Program. The maps below show how widespread these designations are and reflect the significant investment Oregon's communities make in historic preservation and celebrating cultural heritage.

## Historic Cemeteries

There are over a thousand historic cemeteries<sup>2</sup> that preserve the memory and physical legacy of previous generations of Oregonians. Hundreds of these are publicly accessible. These cemeteries are important records of Oregon's heritage and contribute economic value in other ways as well. Cemeteries are protected open spaces that often function like parks: they provide **amenity value**, **recreation value**, and in some cases **valuable habitat for wildlife** that otherwise would not be available.



### Cemetery Spotlight:

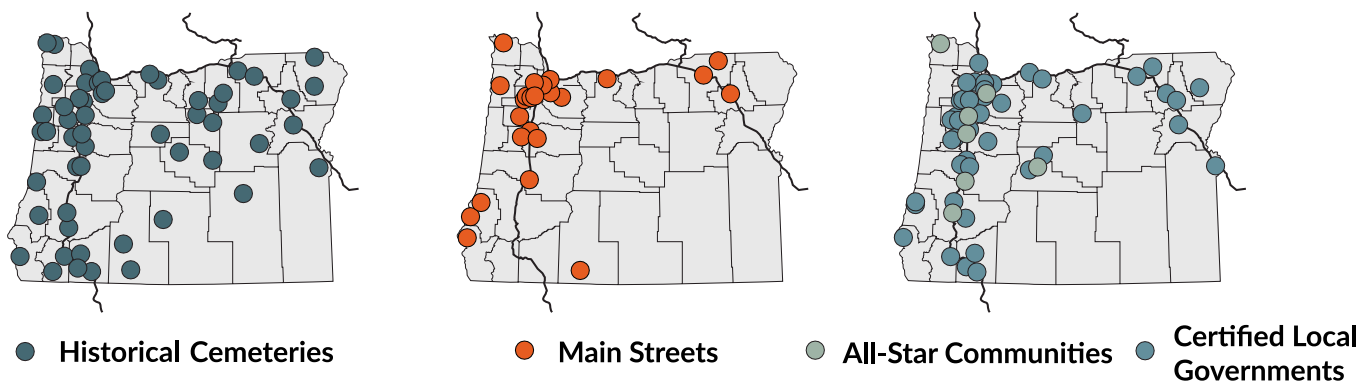
#### LONE FIR PIONEER CEMETERY, PORTLAND

One of Oregon's older historic cemeteries located in the heart of Portland, this site's graves are towered over by a forest canopy and intertwined with trails and paths. It is one of 14 historic cemeteries that Metro manages across Multnomah County. These sites protect the historic and sacred values of the graves within their boundaries, but their full value to the people of Oregon includes the entire landscape: as a trail network, an arboretum, a park, and a curiosity. It is widely accessible to thousands of people in the surrounding neighborhoods alone and visited by thousands more each year for recreation, understanding history, and experiencing a part of Oregon's heritage.

"At the intersection of the past and present, you'll find groves of tall trees, epic views of river valleys, quiet corners amidst a beautiful city. Each cemetery offers its own sense of place and peace."

— Metro Historic Cemeteries

Figure 7. Distribution of Other Heritage Resources in Oregon



<sup>1</sup> Historic cemeteries must include the burial of at least one person who died 75 years before the current date to be eligible for designation.

## Designated Main Streets

The Oregon Main Street program assists Oregon communities with their downtown revitalization and preservation efforts. It is based on a national model and approach (Main Street America) that provides technical assistance, training, and access to grants to fund physical improvements. This organizational infrastructure and investments catalyze economic development in Oregon's communities, which produces a stream of economic benefits for years to come.

A study of Washington's Main Street Program documented its economic impacts across eight categories that demonstrate the potential reach of historic main street investments. Among the larger of the impacts identified were festivals and events and business attraction and retention. The look and feel of historic main streets provide a setting that often attracts people and encourages them to stay longer, ultimately spending more money.

Quantifying the full range of economic impacts of Oregon's Main Street Program was beyond the scope of this research effort, however, at the time of this report a separate analysis is being conducted to quantify the economic impact of Oregon's Main Street program. Many designated heritage traditions quantified here (see the list on page 12) take place within a designated main street downtown and illustrate one of the more substantial ways that Designated Main Streets generate value.

These impacts reflect the quantifiable economic impacts of Main Street investments (both direct financial investment and technical support). Main Streets also contribute to and reinforce **social capital** by creating spaces for people to connect, building community institutions, and protecting **aesthetic and heritage values** that define sense of place and community identity.



### Main Street Spotlight: HISTORIC DOWNTOWN ASTORIA

The **Astoria Downtown Historic District Association (ADHDA)** describes itself as a nonprofit organization with a mission to “preserve and advance historic downtown Astoria’s culture and character through inspired partnerships and community engagement.” The ADHDA hosts several events throughout the year within the main street area, which generate economic activity for local businesses. For example, the monthly 2nd Saturday Art Walk is an event in which people can discover local art as they follow along with a map provided by ADHDA, which outlines a path to participating local art galleries and boutiques in the area. There is also a weekly Sunday Market that includes local produce, arts & crafts, food, music, and more.

The ADHDA also hosts seasonal and annual events. In the fall, their Oktoberfest event helps bring the community together downtown and draw attention to local brewing companies. Near Halloween, the Downtown Trick-or Treating event allows families

to discover local shops, as participating businesses pass out candy to children in costume. In the winter, there are several holiday events focused on local shopping, holiday lighting, and business window decoration contests. In addition to recurring events, the ADHDA also hosts fundraising events, such as the Jane Barnes Revue, which draws on and celebrates Astoria’s colorful history in an evening party and fashion show. The ADHDA invests proceeds from fundraisers in the betterment of downtown. Past investments include signs that highlight the National Register Historic District and make downtown more pedestrian and tourist friendly.

The **Astoria Regatta** is a designated heritage tradition that takes place within and is enhanced by the Astoria Historic Downtown main street area. Through parades, festivals, sailboat races, fun runs, picnics, and more, the Astoria Regatta fulfills its goal of celebrating Northwest maritime history and future. Astoria’s historic downtown is an example of historic preservation, cultural heritage activities, and heritage tourism creating synergies that attract economic activity and increase the value of people’s experience Oregon’s heritage.

### All-Star Communities and Certified Local Governments

Finally, so many of the economic contributions and benefits described in this report would not happen without collaborations and partnerships that leverage heritage preservation as a community.

The Oregon Heritage All-Star Community designation is available to communities that engage in a wide spectrum of

cultural heritage activities. The program goals are to educate communities about the many different ways they can invest in cultural heritage, from preservation of historic buildings to compilation of oral histories; encourage participation and local coordination in cultural heritage; and recognize and incentivize efforts through official designation.

The Certified Local Government program is a federal program administered by the Oregon State Historic Preservation Office that supports local governments in historic preservation. CLGs have implemented ordinances

to address historic preservation, established a historic preservation commission, agreed to enforce state historic preservation laws, and participate in the listing process for National Register of Historic Places. Once certified, local governments have access to financial and technical support to actively facilitate local participation in historic preservation.

These programs help local governments and organizations build **social capital** and invest in **human capital** resources that broadly support cultural heritage and historic preservation activities. Building local government capacity can help leverage private and non-profit heritage efforts, ultimately **expanding the stream of economic activity and economic benefits** that come from preserving Oregon's heritage for current and future generations.

### Salem:



The Oregon Heritage All-Star Community program helps communities make the most of their historic resources through education about the spectrum of cultural heritage activities available to their community, encouragement to participate in and coordinate cultural heritage activities, and recognition of communities that reach an exemplary level of participation in cultural heritage events. From an economic perspective, communities supported through the Heritage All-Star program

leverage their historic resources to drive economic activity to local businesses and create experiences that people value in a variety of ways.

The Heritage All-Star program designated Salem, Oregon as an All-Star Community in 2013, recognizing the city's past and the work of individuals and organizations within the city who preserved Salem's history and culture. Salem does the work of historical preservation through its Heritage Days, which take place during a week in the summer. Salem collaborates with several local businesses, organizations, social service agencies, and public agencies to host events throughout the week and to provide musical entertainment. Salem also has Ancestry Days, in which residents can participate in lectures, tours, research opportunities, and other informational programs to learn more about their ancestral and immigrant connections to Salem.

Other events focused more on local businesses include the Salem Food Truck and Craft Beer festival and the seasonal Salem Haunted Happenings event that takes place around Halloween. These events help promote local food truck vendors, breweries, restaurants, gift shops, and services in the area and also help facilitate community connections.



# TECHNICAL APPENDIX

This technical appendix serves as a thorough, but not exhaustive, summary of the data sources and methods we used to generate the gross economic contributions estimates presented in the body of this report. The appendix is segmented into two sections. The first section details the data sources used and the methodology employed to estimate the economic footprint of heritage organizations.

## Economic Footprint of Heritage Organizations: Data Sources and Methodology

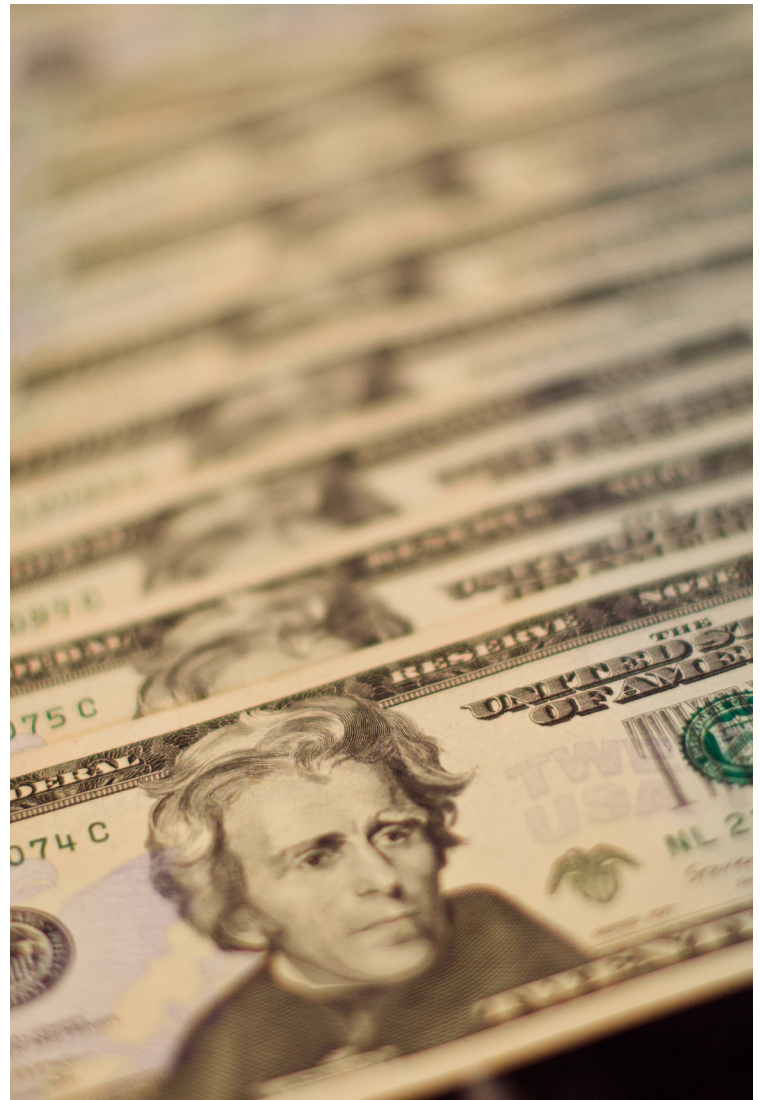
This section details the data source underlying our economic footprint of heritage organizations analysis, and how we used it to formulate our model inputs.

### Data Source

The **Internal Revenue Service (IRS)** provides easy access to filings for tax-exempt organizations via the IRS's tax-exempt organization search tool.<sup>3</sup> Non-profit organizations must file one of four 990 form types with the IRS annually. The standard 990 form is filed by organizations who had at least \$200,000 in gross receipts, or at least \$500,000 in total assets in a given filing year. The 990-EZ is filed by organizations who earned less than \$200,000 in gross receipts and held less than \$500,000 in total assets in a given filing year.<sup>4</sup>

Only the standard 990 and the 990-EZ provided us the financial data needed for modeling. However, there are two other 990 form types a tax-exempt organization can

file, the 990-PF and the 990-N. Both form types were excluded from our analysis for different reasons. The 990-PF form only pertains to private foundations. The 990-N is only filed if an organization earned at most \$50,000 in gross receipts in a given filing year. Unfortunately, no financial information is immediately available for organizations that file a 990-N; as a result, they were excluded from our analysis.



<sup>3</sup> The IRS tax exempt organization search tool can be accessed at the following address:

<https://www.irs.gov/charities-non-profits/tax-exempt-organization-search>

<sup>4</sup> IRS, Form 990 Series Which Forms Do Exempt Organizations File Filing Phase In. Information accessed on June 21, 2022:

<https://www.irs.gov/charities-non-profits/form-990-series-which-forms-do-exempt-organizations-file-filing-phase-in>

## Methodology

This section provides a thorough methodology of how we arrived at the final economic contributions estimates for heritage organizations in Oregon in 2019.

### Researching the 990 Forms of Heritage Organizations

To estimate the gross economic footprint of heritage sites across Oregon, ECONorthwest extracted several financial and employment data points from the standard 990 and 990-EZ forms. No Employee Identification Numbers (EINs) were provided with the heritage organization dataset we received, so the first analytical step consisted of researching and collecting the EIN for each of the 282 total heritage organizations, where available. Through the EIN and 990 collection process, we made several findings:

- Of the entire dataset, 106 organizations (or, 38 percent) had 990 form data for modeling.
- Approximately 28 percent of heritage organizations earned less than \$50,000 in 2019 (i.e., the organization filed a 990-N). As a result, we could not extract financial data to include these organizations in our analysis.
- Fifteen percent of heritage organizations were a part of a larger institution and thus, had no individual 990 forms available. Examples of this include university and public libraries (e.g., Knight Library at University of Oregon), museums operated by state or federal agencies (e.g., the Thomas Condon Paleontology Center, operated by the National Park Service), and many museums that were operated by local agencies or universities (e.g., Fort Klamath operated by Klamath County).
- About seven percent of organizations in the dataset were duplicative. For example, the Baker Heritage Museum and the Oregon Trail Regional Museum are

the same entity, but they each have their own row in the dataset. Where duplication occurred, we only included 990 data once, assuming the information was available.

Figure 8 provides a summary of the 990 research conducted for the full list of heritage organizations.

Figure 8:  
Summary Findings of 990 Form Data for Heritage Organizations, 2022

990 Form Research Finding	Count	% Share of Total
<b>Useable Data</b>	<b>106</b>	<b>38%</b>
Standard 990	63	22%
990-EZ	43	15%
<b>Un-useable Data</b>	<b>176</b>	<b>62%</b>
990-N	79	28%
990-PF	1	0%
Auto-Revocation List	9	3%
Duplicative	19	7%
Unable to Locate EIN	26	9%
Cannot untangle from other institution	42	15%
<b>Total State and Local Tax</b>	<b>282</b>	<b>100%</b>

Source: ECONorthwest research; IRS.



## Extracting Economic Model Inputs from the 990s

The standard 990 form asks filing organizations for detailed financial data, like spending, investments, and revenues. It also includes information about an organization’s directors, the number of persons who worked either for pay or as volunteers at any time during the filing period, and a detailed accounting of the organization’s balance sheet. The 990-EZ form, on the other hand, asks filers for similar financial data like the standard 990; however, it does not ask about an organization’s employees nor its volunteers, and it provides an abbreviated balance sheet section.

Data from 63 standard 990 forms and 43 990-EZ forms formed the basis of our model inputs. Of particular importance were the operating expenditures and net capital expenditures of these organizations, as these inputs directly affect the calculations IMPLAN uses to ascertain the overall economic impact on Oregon’s economy.

Net capital expenditures were estimated, as purchases of depreciable assets are not uniformly reported on the 990 forms. The estimates were computed by subtracting from

year-end capital assets the beginning of year capital assets and depreciation taken during the filing year. The result is an approximation because it is possible that some non-profits may have disposed of capital assets during the year. In the case of some museums, additions to their exhibits may appear as capital assets, possible appreciating capital assets, which also may distort the estimate. From our research and review, these exceptions appear uncommon.

Employment estimates created challenges for the analysis. The standard 990 forms reveal that 13 of the 57 non-profits with annual revenue exceeding \$50,000 had no paid employees. They operated using volunteers and work done through paid service providers, such as accountants. It is likely that nearly all 990-EZ non-profits were entirely run by volunteers. Since volunteers are not paid, from the standpoint of an economic impact analysis, these unpaid workers have no economic impacts on the rest of the economy that arises from labor income. When reviewing the IRS data, one should consider the amount of work time put into the non-profits that cannot be captured by an economic impact model.

Figure 9 shows a summary of the financial data retrieved from the organizations that filed a 990 or 990-EZ in 2019.

Figure 9: Summary of 990 and 990-EZ Inputs for Economic Footprint Analysis, 2019

Income/Expense Category	Standard 990	990-EZ	Output
Revenue	\$94,853,000	\$2,666,000	\$97,519,000
Payroll Costs	\$46,211,000	\$514,000	\$46,725,000
Non-Payroll Expenses	\$48,569,000	\$1,591,000	\$50,160,000
Net Revenue	\$73,000	\$560,000	\$633,000
Employment *	1,580	20	1,600

Source: IRS, 2019 tax-exempt organization filings; ECONorthwest calculations.

Note: Employment estimates for 990-EZ filers are estimated based on employment numbers reported by heritage organizations that filed a standard 990.

## Heritage Tourism: Data Sources and Methodology

Like the section prior, this section details the data source underlying our heritage tourism analysis, and how we used it to formulate our model inputs.

### Data Sources

The estimates for our economic contributions of heritage tourism analysis relied primarily upon two data sources: travel impact estimates from Dean Runyan Associates and visit estimates from Placer.ai.

- **Dean Runyan Associates** is a Portland-based research firm that specializes in quantifying the economic impacts of travel and tourism. Every year, they publish a report that analyzes and articulates the economic impact of tourism in Oregon. For this analysis, we relied upon Dean Runyan’s 2019 report for several data elements at the tourism region level.<sup>5</sup> The data elements include overnight visitor volume by accommodation type (hotel, motel, STVR; private homes; and other overnight), visitor spending by commodity purchased (e.g., accommodations, food services, retail sales), and average per person night expenditures by accommodation type.

The methodology section below details the assumptions we used from Dean Runyan’s report to produce our heritage tourism estimates.

- **Placer.ai** is a proprietary artificial intelligence software platform that estimates foot traffic trends via anonymized cellular location data. To generate their visit estimates, Placer.ai relies upon a panel dataset of over 30 million unique monthly users. These panel visits

are normalized and then extrapolated via a proprietary extrapolation algorithm to generate skew-corrected visit estimates at a specified location in the U.S.

A visit is triggered when a panel cellphone scans for a Bluetooth or WiFi signal two consecutive times in a five- to fifteen-minute period. The period between scans depends on the user phone’s Operating System (OS). For example, an Android OS will scan for a WiFi signal every three to seven minutes. Several salient caveats to be mindful of when interpreting Placer.ai’s visit estimates are as follows:

- Placer.ai counts only one visit per person per day to a “Place of Interest” (POI). If a visitor happens to make multiple visits to the same POI, Placer.ai groups them into one daily visit.
  - A POI can be any physical location, like a retail business, a park, or a city’s downtown area, for example. For purposes of our analysis, each POI is an individual heritage site.
  - Placer.ai cannot account for verticality in its estimates, nor can it attribute visits to a single entity if the space is being shared with another (e.g., a two-story building with retail on the ground floor and offices above would return a single visit value in Placer.ai, with no data disaggregation by floor or business).
  - Placer.ai attributes a single visit to a POI when the dwell time at that POI exceeds seven minutes. This excludes short visits, or visits with dwell times that are at least one minute long and shorter than seven minutes.
  - If a POI has fewer than 50 individuals represented from its panel dataset in a specified time frame (e.g., in the full year of 2019), then Placer.ai will not report any POI

<sup>5</sup> Dean Runyan Associates. (April 2020). *Oregon Travel Impacts, 1992-2019p*. Portland, OR. Retrieved from: <https://industry.traveloregon.com/wp-content/uploads/2020/04/ORImp19.pdf>

visit estimates to the user. This is to ensure the privacy of individuals in less populated areas.

- Placer.ai, by default, filters out employee counts from visit estimates. They determine a visit to be an employee based on the following criteria: 1) long visits (at least four hours are spent at a POI), 2) daytime visits (the visits take place between 5 AM to 10 PM), and 3) multiple visits (visit repetition, either daily or weekly).
- Placer.ai’s mobile device panel is created exclusively from U.S.-based phone applications. It is unlikely that their panel dataset represents international tourists.



Figure 10: Visits to Heritage Sites and Traditions, by Oregon Tourism Region, 2019

Dean Runyan Tourism Region	Primary Heritage Site Visits			Heritage Tradition Visits			All Heritage Visits		
	Day Visits	Overnight Visits	All Visits	Day Visits	Overnight Visits	All Visits	Day Visits	Overnight Visits	All Visits
Central	8,960	93,287	162,914	1,200	5,544	19,214	10,160	98,831	182,128
Central Coast	5,773	6,666	47,340	6,507	30,824	63,792	12,280	37,490	111,132
Eastern	3,715	19,557	100,018	9,301	40,249	89,263	13,016	59,806	189,281
Mt. Hood/Gorge	9,171	18,405	52,413	0	0	0	9,171	18,405	52,413
North Coast	67,342	144,866	273,027	6,085	10,246	22,866	73,427	155,113	295,893
Portland Region	17,024	124,617	686,646	5,491	23,145	172,681	22,515	147,762	859,327
South Coast	5,735	20,473	56,461	0	0	0	5,735	20,473	56,461
Southern	8,749	51,457	207,926	1,001	1,759	18,342	9,750	53,216	226,268
Willamette Valley	19,391	109,075	365,790	50,625	60,856	638,181	70,016	169,931	1,003,971
<b>Statewide Total</b>	<b>145,860</b>	<b>588,404</b>	<b>1,952,535</b>	<b>80,209</b>	<b>172,624</b>	<b>1,024,339</b>	<b>226,069</b>	<b>761,028</b>	<b>2,976,874</b>

Source: ECONorthwest calculations; Placer.ai; Dean Runyan Associates (2020).

## Methodology

This section provides a thorough methodology of how we arrived at the final economic contributions estimates for heritage tourism in Oregon in 2019.

## Estimating Visits

First, we segmented the total number of visits at each primary heritage site and heritage tradition into day trips and overnight trips. We assumed that visits from persons who traveled between 50 and 99 miles constitute a day trip. Visitors who traveled more than 100 miles to a site were assumed to be an overnight trip.

Using Placer.ai, we calculated that there were 1.95 million primary heritage site visits in 2019, and an additional 1.02 million heritage tradition visits. In total, this amounts to nearly 2.98 million heritage visits in 2019. Figure 10 shows the primary heritage site and heritage tradition visits aggregated by Dean Runyan tourism region.

## Deriving regional commodity spending patterns

The trip type assumptions (day and overnight) then allowed us to use Dean Runyan’s 2019 expenditure estimates to produce many of our model inputs. Dean Runyan only publishes per person day trip expenditures at the state-level. Thus, we used their statewide estimates for all day trip visits to heritage sites. For overnight trips, we used three key data elements from their region-level travel impact summaries,<sup>6</sup> which include:

- Overnight visitor volume by accommodation type (hotel, motel, STVR; private homes; and other overnight),
- Visitor spending by commodity purchased (e.g., accommodations, food services, retail sales), and
- Average per person night expenditures by accommodation type.

Figure 11 shows the originally reported Dean Runyan expenditure values we used as the basis to generate our IMPLAN model inputs for overnight visits.

For day travel expenditures, we used two of Dean Runyan’s reported values, which we converted from a per party estimate to a per person estimate. We used their “outdoor activity” for primary heritage site day travel estimates, and their “cultural” activity for heritage tradition day travel estimates. In nominal terms, our assumptions were about \$49.90 per person for primary heritage site visits and about \$79.40 for heritage tradition visits.

Figure 11:  
Per Person Overnight Expenditures by Overnight Accommodation Type and Tourism Region, 2019

Dean Runyan Tourism Region	Per Person Overnight Expenditure (Original Values Reported by Dean Runyan)			All Overnight (Average)
	Hotel, Motel, STVR	Private Home	Other Overnight	
Central	\$165.0	\$46.0	\$34.0	\$84.0
Central Coast	\$145.0	\$35.0	\$40.0	\$89.0
Eastern	\$104.0	\$29.0	\$36.0	\$57.0
Mt. Hood/Gorge	\$140.0	\$34.0	\$37.0	\$79.0
North Coast	\$130.0	\$29.0	\$36.0	\$81.0
Portland Region	\$244.0	\$64.0	\$41.0	\$132.0
South Coast	\$114.0	\$36.0	\$42.0	\$68.0
Southern	\$130.0	\$42.0	\$36.0	\$67.0
Willamette Valley	\$140.0	\$38.0	\$40.0	\$63.0

Source: Dean Runyan Associates (2020); ECONorthwest calculations.

<sup>6</sup> Regions are comprised of Oregon counties. Please refer to page 16 of Dean Runyan Associates’ 2019 Travel Impacts Report for a map of their regions. <https://industry.traveloregon.com/wp-content/uploads/2020/04/ORImp19.pdf>

## Mapping heritage visits to regional visitor spending commodity patterns

With the regional-level commodity patterns generated, the following calculations were undertaken for overnight visits:

1. Multiply total overnight visits by the distribution of visitor volume by accommodation type. This resulted in primary heritage site visit counts by accommodation type and region.
2. Multiply the accommodation type per person overnight expenditure value by the overnight visitors by accommodation type. This resulted in an aggregate spend amount by accommodation type.
3. The aggregate expenditures (by accommodation type) were then distributed along the 2019 visitor spending by commodity purchased. This resulted in expenditures by NAICS industry, which were then cross walked to IMPLAN industry codes to generate



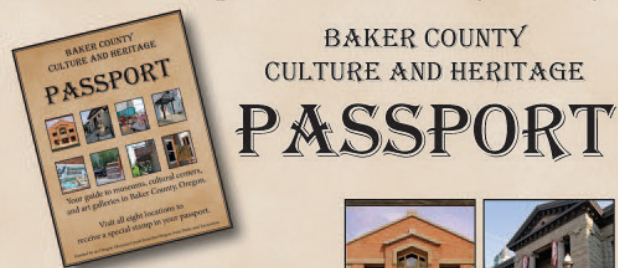
industry-level model inputs.

The day visit computations followed a similar framework to overnight visits for each region, albeit with fewer steps:

1. Multiply the total day visits by the 2019 statewide per person day visit expenditure for outdoor activities (primary heritage site visits) and cultural activities (heritage tradition visits).
2. The total expenditures were then distributed along the 2019 visitor spending by commodity purchased. Like overnight visits, this step resulted in expenditures by industry for day visits, which we subsequently cross walked to IMPLAN industry codes to generate model inputs. The key difference here is that we assumed zero dollars were spent on accommodations and visitor air transportation for day visits.

After expenditure estimates were calculated for both day and overnight visits, we summed both values together by region to create an array of industry-level IMPLAN inputs. Figure 12 details, at a high-level, the statewide inputs used in IMPLAN to generate the results. In

### Your road map to Baker County history!



Collect special stamps at our special places!

Passports available at:

- Baker Heritage Museum
- Crossroads Carnegie Art Center
- National Historic Oregon Trail Interpretive Center
- Eastern Oregon Museum
- Sumpter Municipal Museum
- Sumpter Valley Railroad
- Pine Valley Museum
- Huntington Museum

This project is supported by a grant from the Oregon Heritage Commission and the Oregon Parks and Recreation Department.



# TECHNICAL APPENDIX

Figure 12: Commodity Group Summary of Heritage Tourism Model Inputs (in thousands of dollars), by Dean Runyan Tourism Region, 2019

Commodity Group	Central Oregon	Eastern Oregon	Mt. Hood/Gorge	Portland Region	Southern Oregon	Willamette Valley	North Coast	Central Coast	South Coast	Statewide
Accommodations	\$2,384	\$790	\$356	\$4,618	\$684	\$1,792	\$3,055	\$850	\$297	\$14,826
Food Services	\$2,415	\$1,197	\$566	\$4,901	\$1,148	\$4,466	\$4,977	\$1,212	\$486	\$21,368
Food Stores	\$670	\$452	\$146	\$784	\$373	\$1,464	\$1,384	\$383	\$170	\$5,827
Local Transportation & Gas	\$942	\$535	\$248	\$2,958	\$608	\$2,151	\$1,892	\$423	\$218	\$9,975
Arts, Entertainment & Recreation	\$989	\$761	\$271	\$1,393	\$575	\$3,164	\$2,468	\$644	\$271	\$10,537
Retail Sales	\$979	\$549	\$324	\$2,252	\$541	\$2,314	\$2,535	\$611	\$213	\$10,318
Visitor Air Transportation	\$404	\$10	\$0	\$3,782	\$182	\$347	\$0	\$0	\$11	\$4,735
<b>Total</b>	<b>\$8,783</b>	<b>\$4,294</b>	<b>\$1,911</b>	<b>\$20,688</b>	<b>\$4,111</b>	<b>\$15,698</b>	<b>\$16,311</b>	<b>\$4,123</b>	<b>\$1,666</b>	<b>\$77,586</b>

Source: ECONorthwest calculations; Placer.ai; Dean Runyan Associates (2020).

Figure 13: Commodity Spend Detail Summary of Heritage Tourism Model Inputs (in thousands of dollars), by Dean Runyan. Tourism Region, 2019

Commodity Group	IMPLAN Commodity Code	IMPLAN Industry Code	Central Oregon	Eastern Oregon	Mt. Hood/Gorge	Portland Region	Southern Oregon	Willamette Valley	North Coast	Central Coast	South Coast	Statewide
Accommodations	3507	507	\$2,258	\$737	\$271	\$3,830	\$613	\$1,605	\$2,736	\$792	\$277	\$13,119
Accommodations	3508	508	\$126	\$53	\$85	\$788	\$71	\$187	\$318	\$57	\$20	\$1,707
Food Service	3509	509	\$1,089	\$734	\$246	\$1,753	\$722	\$2,811	\$3,133	\$743	\$212	\$11,444
Food Service	3510	510	\$937	\$295	\$197	\$2,311	\$239	\$929	\$1,036	\$298	\$205	\$6,449
Food Service	3511	511	\$390	\$168	\$123	\$836	\$186	\$726	\$809	\$170	\$68	\$3,476
Arts, Entertainment & Rec	3496	496	\$32	\$61	\$2	\$141	\$38	\$212	\$165	\$52	\$3	\$706
Arts, Entertainment & Rec	3497	497	\$17	\$0	\$8	\$1	\$0	\$0	\$0	\$0	\$0	\$27
Arts, Entertainment & Rec	3498	498	\$5	\$1	\$0	\$23	\$0	\$1	\$1	\$0	\$16	\$47
Arts, Entertainment & Rec	3499	499	\$50	\$18	\$33	\$131	\$40	\$218	\$170	\$15	\$33	\$707
Arts, Entertainment & Rec	3500	500	\$132	\$55	\$33	\$112	\$23	\$126	\$98	\$46	\$0	\$625
Arts, Entertainment & Rec	3501	501	\$27	\$121	\$3	\$52	\$29	\$157	\$123	\$102	\$9	\$622
Arts, Entertainment & Rec	3502	502	\$6	\$16	\$1	\$3	\$30	\$168	\$131	\$14	\$0	\$370
Arts, Entertainment & Rec	3503	503	\$230	\$347	\$32	\$318	\$278	\$1,531	\$1,194	\$294	\$117	\$4,341
Arts, Entertainment & Rec	3504	504	\$283	\$47	\$111	\$224	\$53	\$291	\$227	\$40	\$26	\$1,301
Arts, Entertainment & Rec	3505	505	\$79	\$27	\$28	\$98	\$12	\$68	\$53	\$23	\$12	\$402
Arts, Entertainment & Rec	3505	506	\$38	\$24	\$8	\$35	\$25	\$135	\$105	\$21	\$4	\$394
Arts, Entertainment & Rec	3506	420	\$89	\$44	\$11	\$258	\$47	\$257	\$200	\$37	\$51	\$994
Food Stores	3406	406	\$670	\$452	\$146	\$784	\$373	\$1,464	\$1,384	\$383	\$170	\$5,827
Retail Sales	3409	409	\$167	\$208	\$44	\$260	\$105	\$449	\$492	\$231	\$20	\$1,976
Retail Sales	3410	410	\$172	\$33	\$41	\$201	\$50	\$214	\$234	\$36	\$15	\$997
Retail Sales	3411	411	\$425	\$181	\$183	\$1,361	\$272	\$1,162	\$1,273	\$201	\$133	\$5,190
Retail Sales	3412	412	\$215	\$128	\$56	\$430	\$114	\$489	\$535	\$142	\$45	\$2,154
Local Transportation & Gas	3408	408	\$279	\$115	\$64	\$1,733	\$276	\$977	\$859	\$91	\$55	\$4,449
Local Transportation & Gas	3418	418	\$112	\$104	\$90	\$648	\$59	\$210	\$185	\$82	\$51	\$1,544
Local Transportation & Gas	3450	450	\$230	\$47	\$47	\$95	\$51	\$180	\$158	\$37	\$24	\$869
Local Transportation & Gas	3520	520	\$182	\$36	\$27	\$178	\$75	\$264	\$232	\$29	\$51	\$1,074
Local Transportation & Gas	3474	474	\$39	\$192	\$4	\$85	\$35	\$124	\$109	\$152	\$4	\$744
Local Transportation & Gas	3478	478	\$99	\$40	\$16	\$217	\$112	\$397	\$349	\$32	\$34	\$1,295
Visitor Air Transportation	3414	414	\$191	\$2	\$0	\$579	\$76	\$144	\$0	\$0	\$7	\$998
Visitor Air Transportation	3420	420	\$155	\$1	\$0	\$369	\$44	\$83	\$0	\$0	\$3	\$656
Visitor Air Transportation	3474	474	\$57	\$6	\$0	\$2,835	\$63	\$120	\$0	\$0	\$0	\$2,081
<b>Total</b>			<b>\$8,783</b>	<b>\$4,294</b>	<b>\$1,911</b>	<b>\$20,690</b>	<b>\$4,111</b>	<b>\$15,699</b>	<b>\$16,310</b>	<b>\$4,122</b>	<b>\$1,665</b>	<b>\$77,586</b>

Source: ECONorthwest calculations; Placer.ai; Dean Runyan Associates (2020).



# ECONorthwest

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