

**John Day River Territory Rural Tourism Studio
Baseline Assessment
October 2010**



RURAL TOURISM STUDIO

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I. Introduction

This report includes qualitative and quantitative baseline information for the John Day River Territory (Gilliam, Sherman and Wheeler Counties) at the start of its work with Travel Oregon on the Rural Tourism Studio (RTS) Project in September 2010.

The Rural Tourism Studio program aims to stimulate new tourism development activities that generate business revenue, jobs, entrepreneurial opportunities, and revenue for public services over time. The RTS workshops are designed to help the community learn about and organize around key sustainable tourism products, services and markets; connect with new partners and resources for implementation; and generate local momentum for action.

The data will be combined with business surveys, workshop participant surveys, and ongoing key stakeholder interviews data to assess the value of the RTS program approach for increasing beneficial tourism in Oregon's rural communities.

II. General community profile and context

The three-county John Day River Territory is located in the north-central part of Oregon. Sherman and Gilliam Counties abut the Columbia River just south of the state of Washington. Wheeler County is directly south of Gilliam County. Other rivers also define the region. The Lower John Day River passes through all three counties, forming the border between Sherman and Gilliam Counties. The Deschutes River forms the western boundary of Sherman County. The John Day and Deschutes Rivers in the region are nationally designated wild and scenic rivers.

The Eastern Oregon Visitors Association (EOVA) includes the John Day River Territory in its role as the official regional destination marketing organization (RDMO) partner for Travel Oregon.

A. History and Geography

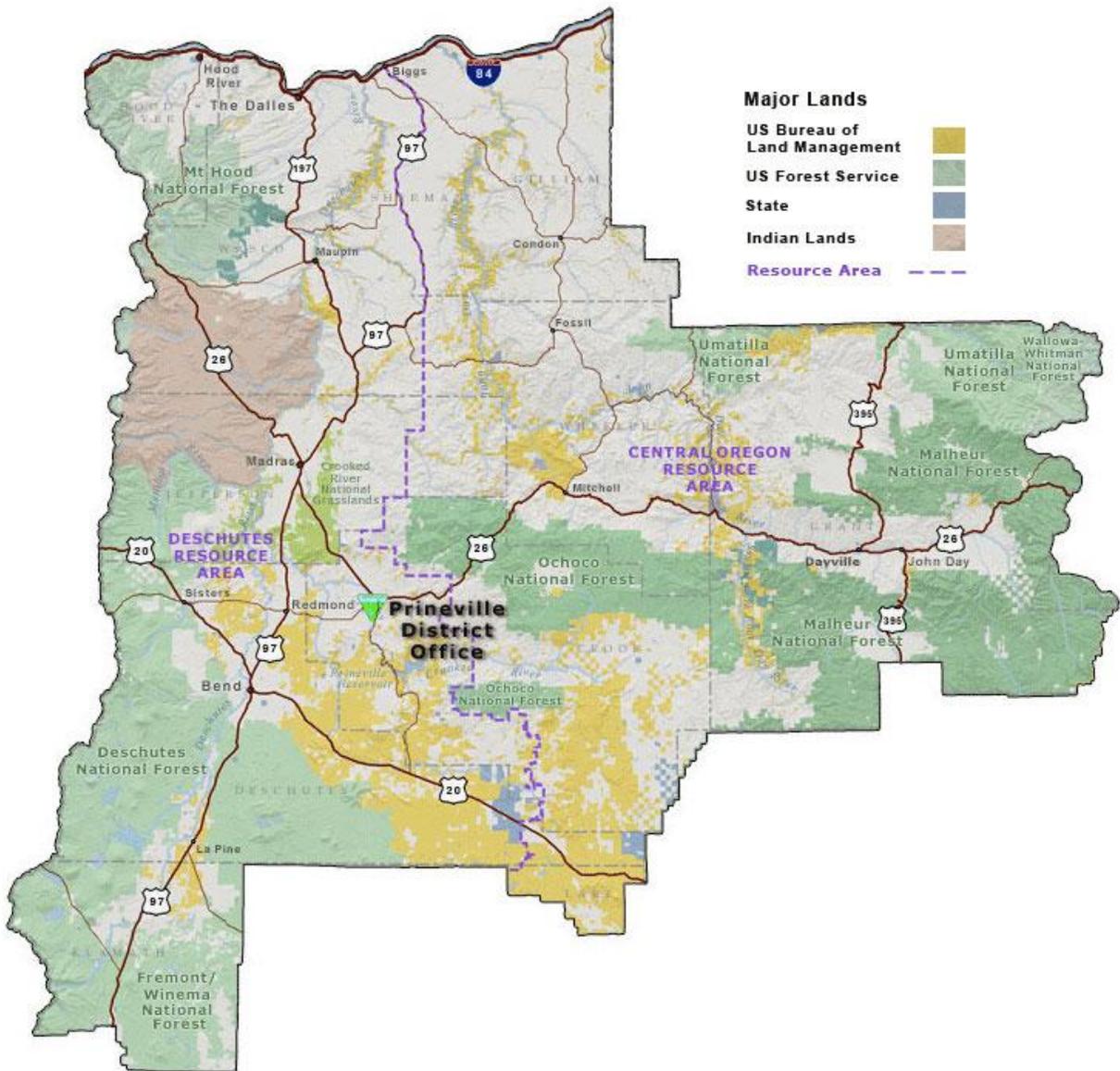
Like many areas along the Columbia River, it is located in the ancestral territory of many tribes, including the Columbia River Tenino and Wyam, Nez Perce, Confederated Tribes of the Umatilla Reservations, Confederated Tribes of the Umatilla Reservation, and Confederated Tribes and Bands of the Yakima Indians. The Oregon Trail passes through Gilliam and Sherman Counties. This part of the region was first settled by non-Indian pioneers starting in 1858 as a transportation and ranching hub. Spurred by a desire to gain land patents, subsequent homesteaders transformed the landscape to primarily agricultural uses. To the south, Wheeler County's early pioneer settlement was driven by gold mining. The county's first postmaster is credited with discovering its even richer fossil deposits in 1876.

While the region shares many characteristics in terms of architecture, history and population density, the topography is varied. Gilliam and Sherman County are primarily open rolling terrain cut through by steep river canyons. Sherman County has the greatest percentage of any county statewide of land under agricultural cultivation. Wheeler County's terrain is more varied and rugged, including parts of two national forests (Ochoco and Umatilla) and internationally known geological features such as fossil beds, and the Painted Hills.

The northern part of the region is located along I-84, a major east-west highway. State Highway 26 is the primary east-west route for the southern part of the region. Federal Highway 97 carries north south traffic in the western part of the region. Other north-south routes are secondary, often very winding highways.

The closest major airport is in Portland, OR, 2.5 to 3 hours away depending on starting location. Limited commercial air service is available from Pendleton OR and Pasco WA, each of which is only nominally closer than Portland. There are also three small airports within the region (Wasco, Condon and Arlington) for private planes.

The land area of the region is 3,742 square miles: unlike many of Oregon’s rural counties, only a small amount is publicly owned. The map below shows all publicly owned land in the Prineville District of the federal Bureau of Land Management. The John Day River Territory (Sherman, Gilliam and Wheeler Counties) is located in the upper right hand section of the left side of the map. Across these three counties, public lands are concentrated in Wheeler County, where the largest sections of the John Day National Fossil Beds Monument are located.



Source: U.S. Department of the Interior, Bureau of Public Lands website

B. Demographics

This is sparsely populated country. The total population of this rural region is 4,719, and according the US Census, the population is declining. The three counties are the three smallest statewide in terms of population. The total population of all three counties together is still far short of the next smallest county.

Two thirds of the region's residents live in incorporated areas. There are ten incorporated cities in the region: Moro, Wasco, Rufus and Grass Valley in Sherman County; Arlington, Condon and Lone Rock in Gilliam County; Fossil, Mitchell and Spray in Wheeler County. Condon, with an estimated* population of 785 people, is the largest. The population density varies from .9 people per square mile in Wheeler County to 2.3 people per square mile in Sherman County.

Population Change, John Day River Territory, 1990-2009

	1990	2000	2009*	% change 2000-2009
John Day River Territory	5028	5396	4719	-12.5%
<i>Gilliam County</i>	<i>1717</i>	<i>1915</i>	<i>1645</i>	<i>-14.1%</i>
<i>Sherman County</i>	<i>1915</i>	<i>1934</i>	<i>1711</i>	<i>-11.5%</i>
<i>Wheeler County</i>	<i>1396</i>	<i>1547</i>	<i>1363</i>	<i>-11.9%</i>
Oregon	2,842,321	3,421,437	3,825,657	+11.8%

Source: U.S. Census

** Portland State University's Population Research Center estimates the 2009 combined population of the three county John Day River Territory to be 5300, or roughly the same population as estimated by the US Census in 2000. The PSU methodology yields a "certified population estimate" used for allocation of certain state resources. PSU is also the only source of up-to-date population estimates for small municipalities outside of metropolitan areas.*

C. Economy

The area's economy has long been dependent on natural resource-based activities and it is subject to swings in agricultural commodity prices, especially for wheat and barley. In recent years, wind farms have become a major source of income, especially in Sherman and Gilliam Counties. Gilliam County has also diversified its economy through development of two regional waste-disposal facilities. Wheeler County is a major gateway to the region's most well-known tourism product in the John Day Fossil Beds National Monument and the related Oregon Paleo Lands Institute.

Throughout the region, there has been a concerted effort to expand marketing and develop new tourism products that highlight cultural/heritage resources, outdoor recreational opportunities, and agri-tourism. Tourism is still a small part of the regional economy. Since the early 1990's, tourism-related employment has slightly contracted.

**Tourism Sector Jobs, John Day River Territory
1990-2009**

Year	1991	2001	2003	2005	2007	2009
Tourism Jobs	170	170	170	170	150	150

Source: Oregon Travel Impacts- 1991-2009p, Dean Runyan Associates for Travel Oregon

D. Why this region has been selected for Rural Tourism Studio

Travel Oregon selected the John Day River Territory through a competitive application process. The application parameters reflect lessons learned about community readiness factors during the RTS pilot program phase in 2009. Key readiness factors for this region include:

- Long history of collaborating on regional initiatives. As per the community application: “Recent examples include the Lower John Day Conservation Workgroup which led to land purchases that made Cottonwood Canyon State Park possible and the Lower John Day Development Partnership which developed a Strategic Plan for economic improvement in the region. The three county governments collaborate on shared services such as veterans and emergency services, share membership in Eastern Oregon Visitors Association and meet quarterly. Gilliam and Wheeler Counties collaborated on the Housing Rehabilitation Program through the Community Development Block Grant and the development of a Gilliam/Wheeler Food & Farm Guide.”
- Interest and potential for synergy with state tourism niche market development around agri-tourism
- Unique cultural and natural assets, including the John Day River, John Day Fossil Beds National Monument, the Paleo Lands Institute, and the pending development of a new state park, Cottonwood Canyon, that will be the state’s second largest park when complete. The North American Salmon Stronghold Partnership has recently adopted the John Day River for special public sector focus and additional resources.
- Broad community capacity: All three counties have participated in the Ford Institute Leadership Program
- Other resources to be leveraged: As per the application, “The John Day River Territory is a new destination marketing effort that would greatly benefit from the training offered through the Rural Tourism Studio. We recently received a USDA grant for development of marketing materials. The Studio would fit in well with that grant and help us determine how best to position the region for tourism.”
- Isolation and economic need is also a factor in its selection. The large geography and low population density create organizing challenges that, if solved, hold lessons for other similar rural areas.

At the start of the Rural Tourism Studio initiative, there is a nine person steering committee representing diverse stakeholders in place. It includes the following members:

Kara Wilson Anglin	Formerly with Condon Chamber of Commerce
Jessica Bates	Gilliam County Economic Development Officer
Nancy Wilson	Wilson Ranches Retreat Bed & Breakfast
Will Boettner	Paleo Adventures
Melva Thomas	Sherman County Court
Anne Mitchell	Oregon Paleo Lands Institute
Jessica Metta	Mid-Columbia Economic Development District
Marta Mikkalo	Arlington Chamber of Commerce
Sherry Kaseberg	Sherman County Historical Society

The first workshop of the RTS program will be held on October 12, 2010 and the program is expected to be complete by January 12, 2011.

III. Qualitative assessment of “starting point” for RTS

The region has existing and emerging attractions that could serve as the basis for new tourism development, especially related to cultural and natural history. The region also has a strong track record of successful collaboration for shared goals. There is a relatively new and informal coordinating committee for cooperative tourism marketing and product development in the three county John Day River Territory region. There is room for further development of organizational infrastructure and visitor support services to tap tourism’s potential as a contributor to the regional economy.

A. Planning

Tourism is a priority in regional economic development plans. There are two current economic development plans in place for the region:

- The Lower John Day Development Partnership Strategic Plan for the years 2007-2013 was developed by the Mid-Columbia Economic Development District (MCCED), which is responsible for regional economic development planning in a six county region as an affiliate of the U.S. Economic Development Administration. MCCED coordinates access to some economic development project funding. This plan covers the three John Day River territories only.
- The Strategic Action Plan for Economic Development in Gilliam County for 2010-2015, developed through the Gilliam County Economic Development Office).

Additionally, there is a regional *marketing* plan for the 11 county Eastern Oregon tourism region, which includes the John Day River Territory. Developed by the Eastern Oregon Visitors Association, the regional marketing plan branding, targets and budget are included in section B below.

The Lower John Day Plan guides economic development investment in the region. It notes the following priorities:

1. Workforce housing- given the expected temporary and expected permanent employment growth driven by wind farms and recreation, an existing affordable housing shortage is expected to worsen. This priority area includes infrastructure to support such housing, such as water and wastewater treatment systems.
2. Industrial land for spin-off and support activities, as well as for business attraction
3. Support for existing business expansion. Plan language related to tourism and agri-tourism includes:
 - Investing in value added businesses who will utilize local crops and livestock and process, package and market to capture more of the crop value and keep it in the region. Examples include the (new) specialty bakery and could include specialized marketing techniques such as the “salmon safe” label.
 - “Value added” can apply to the recreation and tourism industry . . . support guide services, interpreters, lodging, hospitality and related businesses that enhance a visitor’s experience and encourage a larger share of revenue be kept within the region”
4. Workforce development- training for unemployed and underemployed residents to take advantage of new job opportunities in new sectors. This priority includes telecommunications infrastructure for distance learning, child care and transportation initiatives.

This plan is unusual for regional economic investment plans in Oregon in that it does include specific provisions for “special use of funds” targeted at tourism and industrial marketing: “Investments may also be made to explore business clusters in renewable energy, value added agriculture, and tourism recreation.”

The Gilliam County Plan includes three tiers of primary focus for economic development activities. The Tier 1 focus areas are business development, infrastructure and housing. “Recreation and Tourism” is one of four Tier 2 focus areas. Within tourism, these are the goals:

- Develop and implement tourism marketing plan to support current tourism products
- Develop additional and sustain existing recreational opportunities for local residents
- Develop additional tourism offerings
 - Research current trends in tourism; chose two appropriate tourism product development projects to pursue

The region’s assets and focus on tourism *development* are very consistent with the target market priorities of Travel Oregon’s 2009-2011 Strategic Plan.

- Culinary/Agri-tourism
- Cultural/Heritage Tourism
- Outdoor Adventure and Recreation

One of the first action steps for the Gilliam County plan, completed in Spring 2010, was to organize a county-wide tourism committee under the auspices of the Condon Chamber of Commerce. Since that time, local stakeholders have been working to implement this idea at a regional level, where they envision one coordinating committee for the three county John Day River Territory(JRDT). The planning committee for the RTS application reflects this regional focus for future tourism planning, marketing and implementation. Very recently, this regional coordinating committee spun off from the Condon Chamber of Commerce. JDRT activities are now coordinated by the Mid-Columbia Economic Development District (MCEDD), though they are still primarily driven by volunteer energy. This committee has not yet incorporated itself as a separate non-profit.

B. State of tourism and implementation activities

This is a region with underdeveloped potential for tourism as a contributor to regional vitality. Tourism is currently a highly seasonal activity concentrated between May and October. Several tourist attractions, including the Oregon Paleo Lands Institute and the Sherman County Historical Museum, are only open seasonally as a result.

Currently, tourism is most visible (via signage and business mix) as a segment of the local economy in Wheeler County. Gilliam and Sherman County still appear from the road to be primarily agricultural regions, with the notable exception of large clusters of wind power turbines rising from farms closest to winds coming down the Columbia River Gorge.

The highest volume tourism attraction in the region is the Deschutes River State Recreational Area. Located at the mouth of the Deschutes and Columbia Rivers on the Sherman County/Gilliam County border, it draws over 250,000 day visitors and over 30,000 overnight campers annually. Its location along Interstate 84 is favorable to drawing pass-through visitors taking a break, as well as destination visitors.

Wheeler County is one of three gateways to the John Day Fossil Beds National Monument, a unique attraction that draws over 100,000 visitors annually. With a far more remote location than the Deschutes Recreational Area, most of its visitors are likely visiting the region with this specific destination in mind.

The National Monument is renowned as one of the world's richest paleontological sites, with fossils spanning an era of 40 million years across three non-contiguous sites, or "units". The Clarno Unit west of Fossil is the only point of entry that is actually in the John Day River Territory. The Fossil-based nonprofit Oregon Paleo Lands Institute was opened in the summer of 2009, and offers additional interpretative services and program activities related to the Fossil Beds.

The John Day River is another recreational attraction for both water and land based activities. The John Day River is a nationally designated Wild and Scenic River, and a state designated Scenic Waterway for its ecological and scenic significance. As a national wild and scenic river, the river is actively managed by the federal government. A new "John Day River Management Plan" is in the public input stage. Focused on the river's peak boating use season which extends from May 20 through July 10, its stated goal is to "reduce crowding (on two sections of the river) by spreading the number of daily launches more evenly throughout this time period." The prospect of further limiting boat launch permits concerns some local stakeholders who rely on river based tourism, and this topic will likely come up during Rural Tourism Studio project development.

A new state park, Cottonwood Canyon, is under development along the lower John Day River: <http://cottonwoodcanyon.files.wordpress.com/2010/04/cottonwood-vision-webrez.pdf>. When it opens in 2013, it will be the second largest park in the Oregon state park system. This new project can serve as the anchor for additional tourism development.

There are other smaller scale attractions, both historical and land-based in particular, within the region. These include the national award winning Sherman County Historical Society, as well as fee hunting on private ranchland. There is some curiosity locally about whether the massive scale of the region's wind power "farms" can be positioned as a tourism asset in the future!

Earlier in 2010, the Eastern Visitors Association (EOVA), in its role as the regional destination marketing organization, commissioned a branding strategy by the Portland based Wieden+Kennedy public relations firm. EOVA is now applying the results to regional marketing. The target markets for the (whole) Eastern Oregon Region include "empty nesters, soft adventurers, motorcyclists, cultural and international travelers" and the brand includes the following attributes:

- Everyday history and the Oregon Trail
- Vacationer's sampler platter
- Slow and steady pace
- Affecting beauty

Within the Eastern Oregon region, EOVA is developing specialized strategies for a five county sub-region under the tag "Rugged Country".

The organizational infrastructure for tourism development within the John Day River Territory is new and in flux, as described in the next section. It is built upon many other successful intra-regional collaborative projects.

Lodging and dining facilities, especially the latter, are limited within the region. Besides camping, lodging options are primarily single level modest drive up motels and bed and breakfasts. Two exceptions to this rule are Wilson Ranches Retreat outside Fossil and the Historic Hotel Condon in downtown Condon. Wilson Ranches is a destination facility that has a substantial international clientele (*In six month report, insert additional data from this business*). The Hotel Condon was acquired and renovated through a

community based partnership in 2001, and now is operated privately. Last year, it closed for the winter months for economic reasons, and its restaurant has remained closed.

C. Organizations and partnerships

For this sparsely populated rural region, distance is a familiar challenge for regional collaboration. Fortunately, the region has a number of regional collaboration success stories, and strong relationships built through that success. The all-volunteer John Day River Territory steering committee, with limited staff support from the Mid-Columbia Economic Development Office and the Gilliam County Economic Development Office, is the current vehicle for tourism development and joint marketing.

Several of the nonprofit partners within this steering committee have their own product development and marketing capability, including the Oregon Paleo Lands Institute and the Sherman County Historical Museum. Business partners such as Wilson Ranches Retreat also bring marketing and product development capacity.

The federal Bureau of Land Management is actively involved in tourism through its presence at the John Day Fossil Beds National Monument, and its role in developing the John Day River Management Plan. The general BLM district office serving this region is located in Prineville, one county to the east of Wheeler. The Oregon Department of State Parks and Recreation is actively involved with new tourism product development through the Cottonwood Canyon State Park project.

As noted above, EOVA is the regional destination marketing organization, and its director is an active partner for the project. Chambers of Commerce in the region are not heavily focused on tourism. There are three Chambers in the region: two in Gilliam County (Arlington and Condon) and one in Wheeler County (Fossil). Only the Condon Chamber has any staffing, and it is a part time position. Sherman County does not have a Chamber of Commerce, but its Historical Museum serves as a seasonal point of contact, and the city maintains visitor information on its website.

It is expected that one outcome of the Rural Tourism Studio will be the creation of a more formal organizational structure (perhaps a 501(c)(3)) to sponsor future tourism development and marketing for the three-county region.

IV. Quantitative assessment of “starting point” for RTS

There are many types of data that can measure progress in developing a more robust, sustainable tourism sector. The types of information most of interest include:

- A. Volume of visitors
- B. Seasonality of visitors
- C. Visitor profile
 - Average spending/duration of visit
 - Key draws
 - Quality of experience
 - Where they have travelled from, and how they learned about the community
- D. Businesses related to tourism markets
 - Number of business establishments, and those within that relate to tourism
 - Mix of products and services offered to tourists
 - Diversity of business customer base
 - Growth/profitability of businesses

- Jobs growth related to tourism markets
- E. New investments by public or private sector in tourism products
- F. Other improvements in community well-being due to sustainable tourism development

Because the Rural Tourism Studio here is launching during a recession, and the region has a small existing infrastructure of tourism business, *short term* trend data may be unreliable as indicators of project impact. In the longer term, however, this baseline data should prove useful as a benchmark for progress.

A. Visitor volume

There are several sources of potential visitor volume data:

- Local transient lodging taxes can be used as a proxy for comparing visitor volume from year to year. This is especially useful for areas are smaller than a single county
- Visitor expenditures by county as captured by Travel Oregon research
- Local visitor counts by key organizations and destinations

In Oregon, 83 cities and 15 counties levied locally administered transient lodging taxes. Within the John Day River Territory, only one city, Condon, administers such taxes, at a rate of 5%. Total revenue is divided among the Condon Chamber of Commerce (60%), the City of Condon for tourism related activities (30%) and tourism facility development/improvement (10%).

Lodging Tax for Condon, 2008 to 2010

Year	Total transient tax revenue
2008	\$16,500
2009	\$14,100
2010	\$ 9,900 *

Source: City of Condon

* Note that 2010 income does not include the final quarter: it is also depressed by the seasonal closure (December 2009-April 2010) of the Hotel Condon, which had not occurred in prior years.

Tourism spending grew faster in the John Day River Territory between 2005 and 2008 than in the Eastern Oregon region as a whole: it also, however, decreased faster between 2008 and 2009 in the John Day area than in the wider region. The spike in visitor spending in Gilliam and Sherman Counties may be in part due to a shortage of housing for the new employees of wind farms and related companies. According to (*track back source for six month report*), some workers had no option but to take up long term residence in local hotels because they could not secure more standard housing .

Visitor Spending at Destination, John Day River Territory, 2005-2009**

	2005	2007	2008	2009	% change 2005-2008	%change 2008-2009
Eastern Oregon region	311.7	347.1	355.0	321.2	13.9%	-9.5%
John Day River Territory	14.5	16.2	17.9	15.4	23.4%	-14%
<i>Gilliam County</i>	2.6	2.8	3.8	3.3	46.2%	-13.2%
<i>Sherman County</i>	8.8	10.3	10.9	9.3	23.9%	-14.7%
<i>Wheeler County</i>	3.1	3.1	3.2	2.8	3.2%	-12.5%

Source: Oregon Travel Impacts, 1991-2009p, Dean Runyan Associates for Travel Oregon:

** Visitor spending counted in millions of dollars

Several organizations within the region collect visitor counts. Here are trend summaries:

Visitor Counts, Key John Day River Territory Attractions, 2007-2010

Attraction	2007	2008	2009	2010
Deschutes River State Park Area- day visitors	259,538	242,556	272,290	Not yet available
<i>Overnight campers</i>	<i>29,627</i>	<i>31,930</i>	<i>33,584</i>	Not yet available
John Day Fossil Beds National Monument- total visitors		113,180	133,028	Not yet available
<i>Sheep Rock Unit</i>		<i>31,815</i>	<i>36,261</i>	Not yet available
<i>Clarno Unit</i>		<i>14,182</i>	<i>23,053</i>	Not yet available
<i>Painted Hills Unit</i>		<i>23,212</i>	<i>28,616</i>	Not yet available
Oregon Paleo Lands Institute	Not open yet	Not open yet	1,915 (July 1 open)	2,630
Sherman County Historical Society		1,974	1,800	Not yet available

Sources: State Parks and Recreation, National Park Service, Oregon Paleo Lands Inst, Sherman County Hist Society

B. Seasonality

Currently, formal data on the seasonal distribution of visitors is only available from one organization, the Oregon Paleo Lands Institute, and only for the period starting in July 2009, which was its opening month.

Both years, the highest visitation month for the Paleo Institute was July, which coincides with an annual Bluegrass Festival. May through August were the peak months for visitation in 2010. In both 2009 and 2010, visitation dropped off sharply in September.

Seasonal Distribution of Visitors, Oregon Paleo Lands Institute 2009 and 2010

	2009	2010
Jan	n/a	25
Feb	n/a	55
Mar	n/a	242
Apr	n/a	107
May	n/a	467
Jun	n/a	450
Jul	1115	680
Aug	179	325
Sep	375	150
Oct	141	129
Nov	71	n/a
Dec	34	n/a

Other data, such as the peak boat launch period cited in the new John Day River Management Plan, and seasonal hours of operation for other tourism related attractions, reinforce that summer is the peak season. For the six month report, data on seasonal distribution of boat launch permits is expected to be available.

C. Visitor profile

Two relatively small attractions in terms of visitor volume, the Oregon Paleo Lands Institute and Sherman County Historical Museum, both compile information on where visitors' place of origin. Such data is available for 2009 for Sherman County, and 2010 for the Paleo Institute. In addition, visitor profile information for the larger Eastern Oregon region included in the Appendix.

Where visitors come from*

	Sherman County Historical Museum		Oregon Paleo Lands Institute
	2008	2009	2010
Local county	22.5%	16.8%	11.7%
Other Oregon Counties	39.1%	35.5%	53%
<i>Eastern Oregon</i>			15.1%
<i>Western Oregon</i>			37.9%
Other States	33.4%	41.6%	20.4%
<i>Eastern Washington</i>			3.3%
<i>Western Washington</i>			10.3%
<i>California</i>			1.3%
<i>Other US</i>			5.4%
International	5.0%	6.1%	1.7%

* Numbers cannot be compared over time from 2009 to 2010, since these are two different destinations. Presented together to conserve space.

Anecdotally, Michelle Ordway of the John Day Fossil Beds National Monument reports that “We have many visitors from Germany and the Netherlands, in addition to visitors from the Pacific Northwest. We also have significant Middle Eastern and Asian visitors from the Northwest’s major metropolitan areas. “

Tracy Hubschmitt of the Oregon Paleo Lands Institute reports additional anecdotal visitor profile information

- Average size of group- 2 or 4-5 people
- Length of stay- Either passing through on staying 1-2 nights

- Draws for their visit- fossils, ghost towns, John Day Fossil Beds National Monument, seeing family and friends
- How they hear of the Paleo Institute: its website, Wilson Ranches Retreat website or referral, John Day Fossil Beds National Monument website, television news report (Portland area), word of mouth

Sherry Kaseberg of the Sherman County Historical Museum reports that “signs”, information at the Moro City Park, and special events are the most important ways that visitors learn about this attraction. In contrast to the Paleo Institute, and even though the Museum has a fine web site, the internet is not a major tool for attracting visitors here.

Home zip code data is available at the regional level for the Eastern Oregon Tourism Region that includes the John Day River Territory. This data was last updated in 2006, and is included in the appendix of this report.

Finally, average daily expenditures by visitors are an important measure of economic impact. However, data is only available at the statewide level. For 2008, the average expenditure for overnight visitors was \$124 per day and \$331 per trip (source: Dean Runyan Associates for Travel Oregon). While average expenditure data gathered locally as part of future visitor surveys may not be scientifically rigorous, it will provide important insights regarding trends.

D. Businesses

Information about the number of tourism related businesses in the region is not available (*although the Condon Chamber may have a sub-regional sample available for the six month report*).

The distribution of tourism spending by category of expenditure, however, indicates which *types* of businesses are currently generating revenue from tourism activities in the region. The largest category of visitor spending is ground transportation/motor fuel. This is consistent with the region’s location on a major interstate corridor. The fastest growing category is accommodations, which is consistent with anecdotal evidence about the impact of a worker housing shortage as noted above.

Total Tourism Spending in the John Day River Territory 2005-2009

Category	2005	2007	2008	2009	% change 2005-2008	% change 2008-2009
Accommodations	1.8	2.1	2.5	3.1	38.9%	24/0%
Food and beverage	2.4	2.6	2.9	2.7	20.8%	-6.9%
Food stores	1.4	1.5	1.6	1.6	14.3%	0
Ground transport/motor fuel	6	7.4	8.1	5.9	35.0%	-27.2%
Arts/entertainment/recreation	.9	.9	.9	.9	0	0
Retail sales	1.9	1.9	1.9	1.9	0	0
Air transportation	0	0	0	0	0	0

Source: Oregon Travel Impacts, 1991-2009p, Dean Runyan Associates for Travel Oregon

*** Visitor spending counted in millions of dollars*

The remaining business information noted in the introduction to Section IV will be gathered through periodic surveys of a sample set of local businesses. The survey will track market, product, employment and revenue trends. The first such survey will be conducted in late Spring 2011.

E. Other Data

This will be gathered from open-ended survey questions with key stakeholders, businesses and partners over time.

V. Appendix: Additional Regional Level Data

Between 2004 and 2006, 10% of Oregon visitors spent time in the Eastern Oregon region. Of these 2.1 million Eastern Oregon visitors, 86% spent at least one night in the region. The remaining 14% were pass-through visitors.

Top five urban zip codes for Eastern Oregon Region visitors, 2004-2006

City	% of E.O. visitors from urban areas
Portland, OR	41%
Eugene, OR	13%
Spokane WA/ID	11%
Seattle-Tacoma, WA	9%
Yakima WA	5%

Source: Longwoods International for Travel Oregon

Top 5 home states for Eastern Oregon visitors, 2006

State	% of E.O. Visitors from state
Oregon	47%
Washington	31%
California	5%
Idaho	3%
Oklahoma	3%

Source: Longwoods International for Travel Oregon