



THE PEOPLE'S COAST

Oregon Coast Visitors Association (OCVA)





THE PEOPLE'S COAST

Regional Visitor Report (The Coast) Oregon 2009 & 2011 Comparisons - Longwoods International



THE PEOPLE'S COAST

WHY ARE THEY COMING?

↑ 7% Marketable Trips, now 68% (leisure: Resorts, Outdoors, touring, Special Events, Casinos)

↓ 5% Visiting Friends and Relatives, now 29%
(43% Oregon avg steady!)

↓ 3% Business Travel, now 3%

Longwoods International Oregon 2009 - 2011



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WHAT ARE THE SPENDING ON?

↑ 3% Lodging (39%)

↓ 3% Retail (16%)

0% Restaurant, Food & Beverage (24%)

0% Recreation (10%)

0% Transportation (11%)



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ORIGIN OF OVERNIGHT TRIPS

↓ 2% Oregon (↓1% Eugene, ↓3% Medford-Klamath Falls,
Greater Portland steady)

↑ 3% Washington (↑ 4% from Seattle-Tacoma)

↑ 1% California

↑ 1% Idaho

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PROFILE OF COASTAL TRAVELERS

More planning & booking via internet (42% to 43%)



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Traveling slightly less with children (19%)

Longwoods International Oregon 2009 - 2011



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Slightly larger groups

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THE PEOPLE'S COAST

PROFILE OF COASTAL TRAVELERS

More planning & booking via internet (42% to 43%)

Traveling slightly less with children (19%)

Slightly larger groups

Slightly younger

Longwoods International Oregon 2009 - 2011



THE PEOPLE'S COAST

PROFILE OF COASTAL TRAVELERS

More planning & booking via internet (42% to 43%)

Traveling slightly less with children (19%)

Slightly larger groups

Slightly younger

Slightly less affluent

Longwoods International Oregon 2009 - 2011



THE PEOPLE'S COAST

PROFILE OF COASTAL TRAVELERS

More planning & booking via internet (42% to 43%)

Traveling slightly less with children (19%)

Slightly larger groups

Slightly younger

Slightly less affluent

Still very homogeneous

Longwoods International Oregon 2009 - 2011



THE PEOPLE'S COAST

PROFILE OF COASTAL TRAVELERS

More planning & booking via internet (42% to 43%)

Traveling slightly less with children (19%)

Slightly larger groups Slightly more Women (57%)

Slightly younger

Slightly less affluent

Still very homogeneous

Longwoods International Oregon 2009 - 2011



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PROFILE OF COASTAL TRAVELERS

More planning & booking via internet (42% to 43%)

Traveling slightly less with children (19%)

Slightly larger groups

Slightly more Women (57%)

Slightly younger

Slightly more single

Slightly less affluent

Still very homogeneous

Longwoods International Oregon 2009 - 2011



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PROFILE OF COASTAL TRAVELERS

More planning & booking via internet (42% to 43%)

Traveling slightly less with children (19%)

Slightly larger groups

Slightly more Women (57%)

Slightly younger

Slightly more single

Slightly less affluent

Slightly more educated

Still very homogeneous

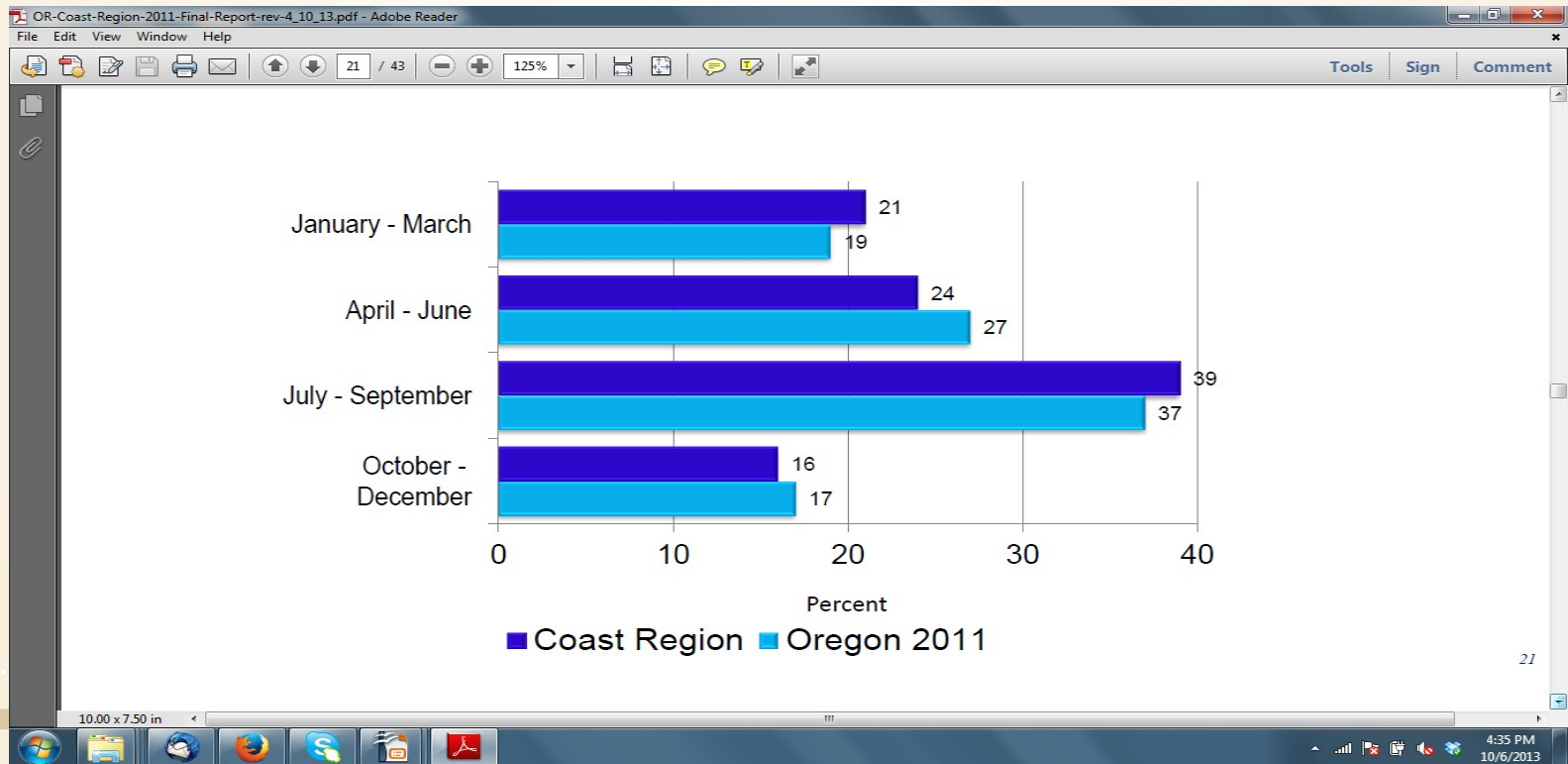
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WHEN ARE PEOPLE TRAVELING

↑ 2% April - June Travel (Summer / Shoulders same)





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HOW LONG ARE THEY STAYING

All over the board:

↓ 2% 1 night (29%)

↓ 2% 3-4 nights (23%)

↑ 4% 2 nights (35%)

↑ 1% 5-6 nights (6%)

↑ 1% 7+ nights (7%)

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WHERE ARE THEY STAYING?

Losers: ↓ 3% Motels (23%)

 ↓ 3% Hotels (16%)

Winners: ↑ 1% Camping/RV/Trailer (20%)

 ↑ 3% Resorts (16%)

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WHAT ARE THEY DOING?

Losers:

- ↓ 3% Beach/Waterfront (64%)
- ↓ 7% Shopping (37%)
- ↓ 2% Casino (24%)
- ↓ 5% National / State Parks (26%)
- ↓ 2% Eco-tourism (6%)

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WHAT ARE THEY DOING?

Winners:

- ↑ 2% Camping (21%)
- ↑ 3% Art Galleries (10%)
- ↑ 2% Brewery (10%)
- ↑ 3% Historic Sites (20%)
- ↑ 2% Exceptional Culinary Experiences (11%)



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Oregon Travel Impacts **1991 to 2012p** - Dean Runyan



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2012 Coos County

Employment Lowest in past 10yrs / Lowest in past 20yrs
(exp 1999)

Spending Highest in past 20yrs!

Earnings Highest in past 20yrs!

Tax Receipts Highest in past 20yrs!



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2012 Curry County

Employment Higher than 6 of past 11yrs / 16 of past 20yrs

Spending Highest ever in past 20yrs!

Earnings Higher than 7 of 10 past years.

Tax Receipts Highest ever in past 20yrs!



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OR Travel Impacts 2012.pdf - Adobe Reader

File Edit View Window Help

101 / 252 90%

Tools Sign Comment

Curry County Travel Trends, 1991-2012p

	Spending	Earnings	Employment	Tax Receipts (\$Thousands)		
	(\$Millions)	(\$Millions)		Local	State	Total
1991	76.7	25.3	2,100	394	1,908	2,302
1992	75.9	24.8	2,040	355	1,938	2,292
1993	74.6	24.3	1,930	337	1,925	2,262
1994	77.0	25.1	1,930	350	1,995	2,345
1995	78.2	25.5	1,870	358	2,001	2,360
1996	78.3	25.4	1,810	358	1,956	2,314
1997	78.1	25.3	1,730	350	1,919	2,269
1998	78.4	25.8	1,710	359	1,918	2,277
1999	82.3	26.9	1,670	382	1,984	2,366
2000	86.3	27.8	1,740	398	2,062	2,460
2001	92.7	30.0	1,790	433	2,187	2,620
2002	100.4	32.8	2,000	460	2,321	2,781
2003	102.0	33.1	1,980	463	2,366	2,829
2004	106.5	34.2	1,940	549	2,608	3,157
2005	105.3	33.4	1,880	538	2,562	3,100
2006	109.9	34.8	1,850	569	2,661	3,229
2007	114.1	37.3	1,910	605	2,796	3,401
2008	116.1	37.6	1,880	552	2,811	3,363
2009	113.0	38.1	1,840	559	2,783	3,342
2010	111.3	35.9	1,750	528	2,674	3,202
2011	114.6	35.1	1,710	522	3,062	3,584
2012p	118.1	36.7	1,680	520	3,123	3,644
Annual Percentage Change						
11-12p	3.1%	4.5%	-1.8%	-0.4%	2.0%	1.7%
91-12p	2.1%	1.8%	-1.0%	1.3%	2.4%	2.2%

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Wild Rivers Coast
– Rural Tourism Studio –
Baseline Assessment
August 2013



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State Of Tourism Economy

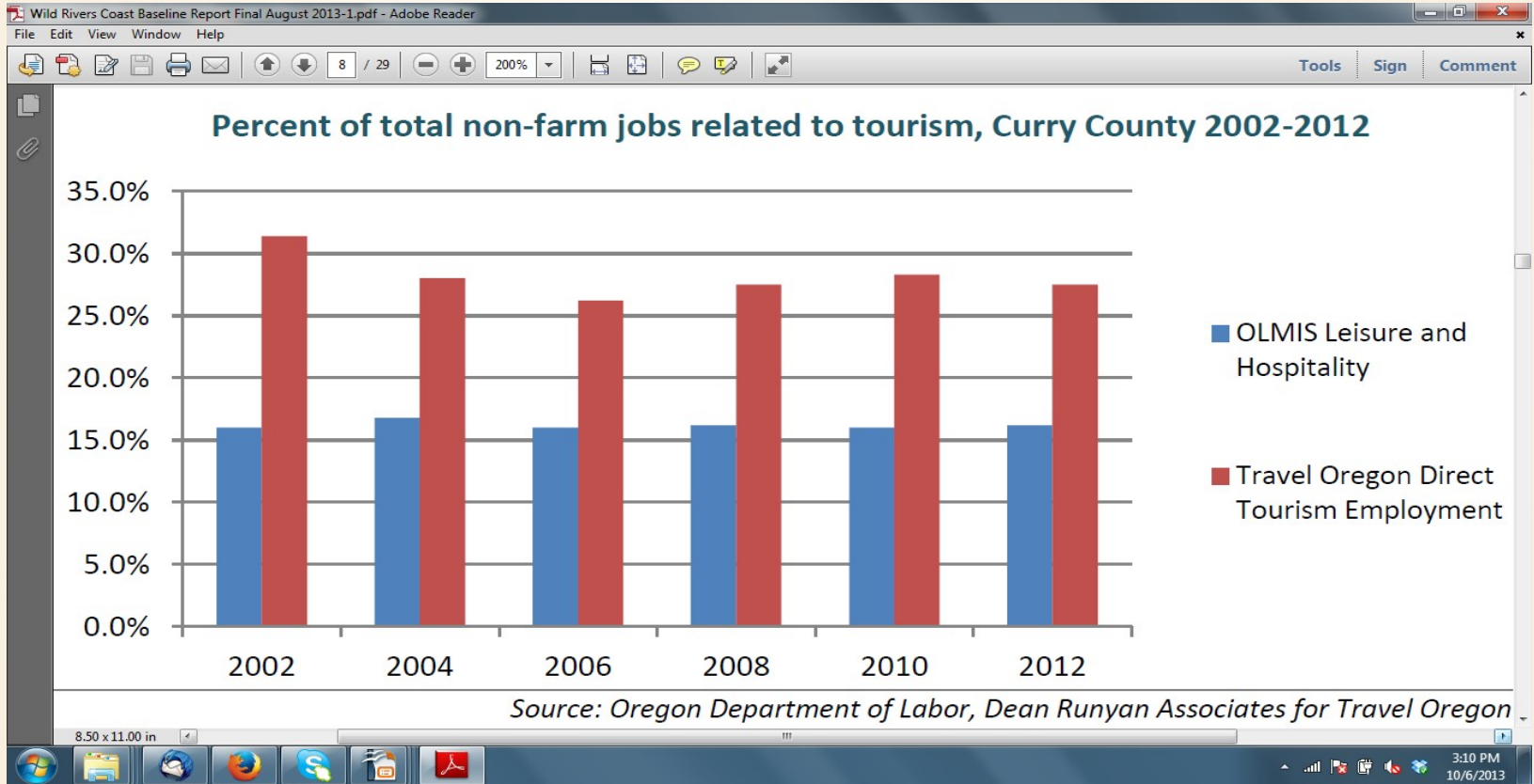
2012 Tourism Sector Jobs lowest in past 10 years.

16% Total non-farm jobs (OLMIS)

25% Jobs are dependent on tourism (Travel Oregon)



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WRC Baseline Assessment August 2013



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Spending of Overnight Visitors, Per Day

\$167/day - Oregon Average

\$131/day - Oregon Coast Avg

\$105/day - South Coast Avg

\$ 99/day - Curry County Avg (60% of avg overnight
visitors in Oregon)



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Notable Economic Factor!

Visitor spending (per resident) very high, compared to state average.

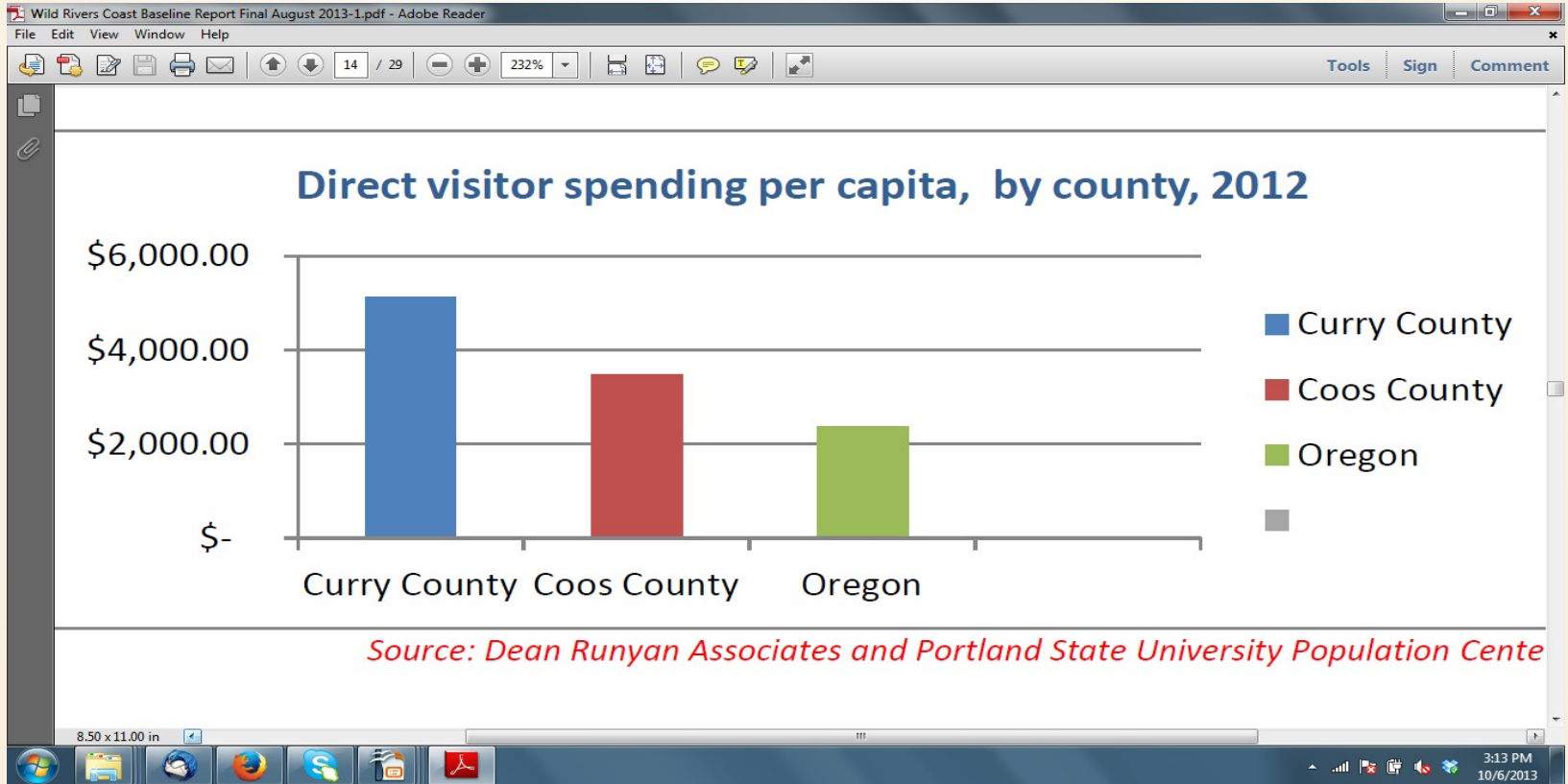
\$5,000/per Curry

\$3,500/per Coos

\$2,250/per Oregon Average



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WRC Baseline Assessment August 2013



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TRENDS:

Visitor expenditures beginning to recover in all categories
(at or above 2012 levels)

Food & Beverage largest increase

8.3 % Coos County

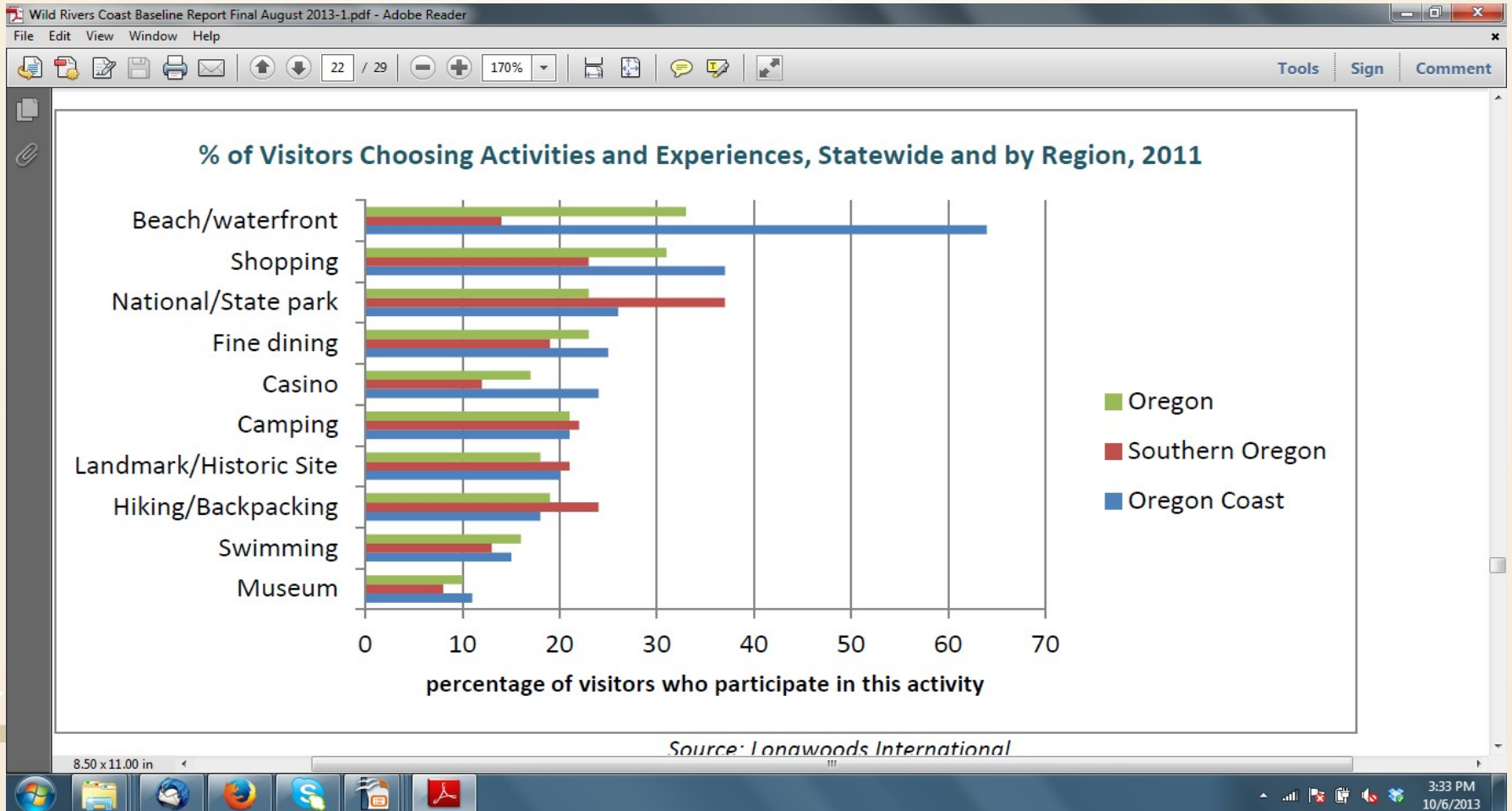
7.7% Curry

Retail 2nd largest increase



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TRENDS:





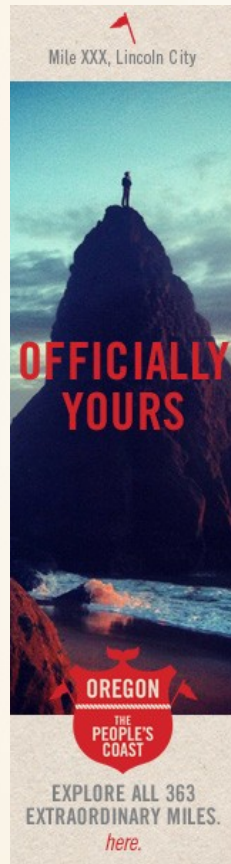
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Baseline Measurements:

- A. Volume of Visitors - TRT taxes, visitor expenditures, visitor counts
- B. Seasonality of Visits -
- C. Visitor Profiles - origin of travel, quality of experience, key draws, avg spending, avg duration of visit
- D. Business Profiles - number, diversity of products/services, diversity of customers, revenue, employment
- E. New Investments -
- F. Other Improvements/Misc. -



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BY OFFICIAL DECREE:

UNLIMITED FETCHING.

OREGON STATUTE 390.610

"...it is the public policy of the State of Oregon to forever preserve and maintain...the ocean shore...so that the public may have the free and uninterrupted use thereof."

visittheoregoncoast.com

