

South Lincoln County Rural Tourism Studio Baseline Assessment February 2012

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RURAL TOURISM STUDIO

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South Lincoln County Rural Tourism Studio Baseline Assessment Contents

I. Introduction	2
II. General community profile and context	2
A. History and geography	3
B. Demographics	4
C. Economy	5
D. Why this region was selected for Rural Tourism Studio	5
III. Qualitative assessment of starting point for RTS	6
A. Planning	7
B. State of tourism and implementation activities	7
C. Organizations and partnerships	8
IV. Quantitative assessment of starting point for RTS	9
A. Visitor volume	10
B. Seasonality	12
C. Visitor profile	13
D. Businesses	13
V. Appendix: Additional regional and county level data	15

I. Introduction

This report includes qualitative and quantitative baseline information for the South Lincoln County region at the start of its work with Travel Oregon on the Rural Tourism Studio (RTS) Project in February 2012.

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, and to provide useful information to local participants with which they can gauge their progress.

II. General community profile and context

South Lincoln County is located between the Coast Range and the Pacific Ocean along the central coast of Oregon. Lincoln County as a whole is 60 miles long from north to south, and 15-25 miles wide from east to west: the southern part of the county comprises approximately the a third of the county's total land. South Lincoln County includes two incorporated cities: Waldport and Yachats, and well as two unincorporated communities, Seal Rock on the coast, and Tidewater inland.

Tourism is a major driver of the regional economy in Lincoln County, and particularly in South County's smallest incorporated community, Yachats (population 690), where 87% of the municipal budget depends on revenue from local lodging tax. In larger Waldport (population 2033), tourism supports just a half of a percent of the municipal budget, primarily because its tax base is more diverse and there are relatively few places to stay overnight in the community. Historically and today, the two communities have different relationships with the tourism sector as a result.

Yachats in particular has received international acclaim as a visitor destination (including recent inclusion as one of Arthur Frommer's Top Ten Favorite Travel Destinations worldwide), while Waldport holds to its blue collar roots and visitor activity is dominated by fishing and boating. Both communities share a desire to develop only tourism that will enhance the authentic experience of a low-key, rural, natural environment for tourists while preserving quality of life for residents" (excerpted from RTS application).

South Lincoln County benefits from an active corps of volunteers working on tourism and community improvement projects. The culture of the area seems to place more focus on active project development (largely with volunteers) and less emphasis on planning processes, as compared with other RTS sites. The South Lincoln County RTS application specifically cites the need to develop an overall plan of action for the future to coordinate projects and increase the capacity to undertake more.

The Oregon Coast Visitors Association (OCVA), the official regional destination marketing organization (RDMO) partner for Travel Oregon, is based in the Lincoln County seat, Newport. It markets the whole Oregon coast under the brand of "The People's Coast" in reference to the status of all Oregon

oceanfront property as public land. Lincoln County lies at the mid-point of the Oregon's 363 mile stretch of US Highway 101, which is also known as the Pacific Coast Highway. The entire Oregon segment is a National Scenic Byway.

The Central Oregon Coast Association, which shares the OCVA executive director and office, is a local destination marketing organization for Lincoln County as a whole. As noted in Part III of this report, there are many other organizations working on tourism marketing and product development in South Lincoln County.

A. History and Geography

South Lincoln County includes approximately 300 square miles of diverse landscape, from the steep 800 foot high Cape Perpetua headlands on its southern coast to wide flat beaches, estuaries and off-shore haystack rock formations to the north. The Alsea and Yachats Rivers create bays in Waldport and Yachats. Inland, the land rises swiftly into the Coast Range. While most known for its extraordinary coastline, the most dominant feature of the landscape may in fact be its forested nature. The vast majority of land in all of Lincoln County is forested, and in South Lincoln County, the vast majority of land is part of the Siuslaw National Forest (SNF), as shown in blue on the SNF graphic to the right. South Lincoln County is circled.

Given regular coastal storms and steep topography, landslides and prolonged road closures have left South Lincoln County especially isolated at times. This has in turn depressed the economy. The region lost commercial air service late in 2011, when daily flights to Portland from the Lincoln County seat of Newport were suspended.

The main north south transportation link is Highway 101 (also known as the Pacific Coast Highway), which runs the entire length of the Pacific Coast from Canada to Mexico. In Oregon, it is primarily a two lane highway. In terms of east-west travel, winding State Highway 34 connects Waldport and the populous Willamette Valley, via Corvallis and then Interstate 5 corridor 1.5 hours away. Another east-west route, OR 126, connects with Highway 101 in the next county south. It goes to Eugene where the nearest commercial airport is located, 2 hours away. The closest international airport is in Portland, the state's largest metropolitan area. Portland is approximately three hours away and accessible from the north end of the county via Lincoln City and OR 18.

South Lincoln County is rich in history and historians. The Waldport Heritage Museum, Little Log Church in Yachats, Cape Perpetua Visitors Center and Alsea Bay Interpretive Center all offer parts of its story.

According to the community's RTS application, there has been renewed interest in recognizing and honoring tribal history in the area despite a painful past. The region is located in the ancestral territory



of the Alsea Indians, hunter gatherers who moved between the coast and inland depending on the season. By 1860, however, the native population had been wiped out by disease. From 1860-1875, the Yachats area was again home to a significant tribal population. Members of the Coos and Lower Umpqua tribes had been forcibly relocated there, where a sub-agency of the Siletz Indian Reservation had been established, in order to free land to the south for homesteaders. In 1895, the newer tribal population was compelled to move again, this time to coastal reservations, to make additional land available for homesteaders.

Amanda's Trail, which rises 1000 steep feet up and then 800 steep feet down Cape Perpetua, marks the path of the relocation marches. The trail was completed and dedicated in 2009 in memory of a blind Coos woman who was one of those forcibly marched, and whose bloody footprints left a visible trace. Volunteers from the local and tribal communities gave their time to build the last section of the trail.

In terms of European settlement, explorers had been visiting the coast of south Lincoln County since the 16th century. They included Bartolome Ferrelo in 1543, Sir Francis Drake in 1575, Martin D'Aguilar in 1605 and Captain James Cook in 1778. Captain Cook gave the Cape its English name.

Waldport was the first area formally settled by pioneers. The first white settlers arrived there during the 1870's, and logging was the draw. The City of Waldport was chartered in 1890, and its school opened in 1907. Waldport incorporated in 1911, and celebrated its centennial last year.

The first post office in Yachats was established in 1892, when the settlement was called "Oceanview", but the city didn't incorporate until 1967. Tourism first emerged in 1905, when a bark warehouse was converted into a hotel. Tourism has since been a key part of the local economy, although during WWII, the community also sported foxholes and gun stations to guard against enemy attack: military personnel were housed in a local skating rink.

B. Demographics

According to the 2010 Census, the four zip codes covering South Lincoln County (Waldport, Yachats, Seal Rock and Tidewater) have a total population of 8,313 people. This is 18% of Lincoln County's population as a whole. Approximately one third of the area's residents live within the city limits of the two incorporated communities, Waldport and Yachats.

More detailed population trend information is available for the incorporated cities. Although Yachats is less than one square mile in size, it grew much faster than neighboring Waldport or Lincoln County as a whole over the past decade.

Population Change, South Lincoln County cities compared with Lincoln County

<i>Year</i>	Waldport	Yachats	Lincoln County
<i>1990</i>	1,595	533	38,889
<i>2000</i>	2,050	617	44,479
<i>2010</i>	2,033	690	46,034
<i>Estimated 2011</i>	2,040	710	46,155
<i>% change 1990-2000</i>	28.5%	15.8%	14.4%
<i>% change 2000-2010</i>	-0.8%	11.8%	3.5%

Source: U.S. Census and Portland State University

As is common in rural Oregon, the share of population that is school-age (under 18) is shrinking for both communities and the county as a whole. Only 5% of Yachats population is in this age group (down by 58% since 2000): though 15.8% of Waldport's population is under the age of 18, it's also down, by 34% since 2000). This is a reflection of both reduced economic opportunity for young families, and the attractiveness of the area for retirees.

Half of the housing stock in Yachats as of 2010 is either vacant or seasonal, as compared with less than 20% of Waldport's housing stock. This means that the population of Yachats in particular swells during summer and early fall, the high tourist season.

C. Economy

Although detailed employment data for South Lincoln County is not available due to the small size of all its communities, the RTS application is thorough in qualitatively describing the local economic base. Most economic activity is concentrated along the Highway 101 corridor where residents and visitors are concentrated. As is the case in many rural areas, the public sector is a major employer, through the Lincoln County School District, Forest Service, and municipal services.

Waldport has the more diversified economy, with service businesses for the local market and tourists (e.g. health clinic, banks, grocers). Yachats is almost entirely dependent on tourists. Tourism is extremely seasonal in the area, making it difficult for small businesses to survive during the off season months solely from local sales.

While timber is a big part of the region's history, there are no remaining sawmills. Traditional natural resource based economic activity in general, including logging, dairy and fishing, is in decline. However, local and organic agricultural products are growing, and there is interest in expanding growth opportunities associated with this sector into the inland valleys.

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

Travel Oregon selected South Lincoln County 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:

- Interest and potential for synergy with Travel Oregon's statewide priority market niche of nature-based tourism:
- Strong sense of identity as a distinct and underserved area with shared market opportunities and challenges
- Experience with collaboration through emergency planning, fire protection, and Ford Community Leadership Program projects
- Unique cultural and natural assets, including a National Scenic Byway, Oregon Coast Trail, diverse topography and natural resource based recreation assets, concentration of cultural and authentic community events, and a cadre of skilled and active volunteers, many of whom are drawn from the large population of retirees.
- Strong local champions as partners, including local political leadership actively in support of RTS goals as a high community priority
- Economically challenged and off the beaten path, yet located on the Oregon Coast, which has international market prominence as a destination. This will be the most well-known (across a diverse market) region in which RTS has taken place.

At the time of the Rural Tourism Studio application, the steering committee included eleven people as listed below. Another eleven people have been actively involved in planning and advisory roles.

Andrea Scharf	Marketing Director, City of Yachats (Go Yachats)
Maggie Rivers	Manager, Port of Alsea
Lou Piette	Vice President, Waldport Chamber of Commerce and Manager of the Waldport Farmers Market
Nas Ali	Marketing Director, Soul Vacation Resorts
Mark Campbell	Owner, Crestview Golf Course and Waldport City Council President
Susan Woodruff	Mayor, City of Waldport
Sue McEneny	Co-owner, Brian McEneny Woodworking Gallery
Joe Smolen	Commissioner, Port of Alsea
Ron Brean	Mayor, City of Yachats
Barbara Shepherd	Owner, The Village Bean, Yachats, and graphic designer
Caroline Bauman	Director, Economic Development Alliance of Lincoln County

The first workshop of the RTS program will be held on February 28-29, 2012. The program is expected to be complete in May 2012.

III. Qualitative assessment of “starting point” for RTS

This area shares many characteristics with past Oregon RTS communities: economic struggles, isolation, and a strong desire to shape tourism to be compatible in scale and scope with the character of the local community. However, there are also a couple of key differences.

Unlike in past communities, where significant prior tourism planning and assessment work preceded Rural Tourism Studio, the RTS workshops here are providing the first real opportunity for developing any sort of shared strategy for tourism development. This starting condition should yield useful insights about community readiness and culture, program design, sequencing, and follow up assistance needed for similar RTS communities in the future. The second major difference is that the level of formal political support for tourism seems much higher here than in any past RTS community: Waldport’s Mayor is a key project champion, and the City of Yachats already funds a tourism marketing program out of its municipal budget.

Despite the lack of much shared formal planning, there are *many* tourism development projects underway with skilled community volunteers in leadership roles. These projects are aimed at broadening the season and the geography of tourism related activity to preserve the area’s distinct character while expanding local economic opportunities.

In terms of organizations and partnerships, there are many county-wide partnerships but leaders in South Lincoln County express a sense of their area being underserved due to its low population and isolation. Thus, there’s strong interest in organizing locally to address shared priorities yet to be refined. There is some experience, but not deep experience, in collaborative projects involving multiple communities in South Lincoln County. The two incorporated communities have different visions for the future based on their history, and RTS offers a forum for surfacing common elements of their visions.

A. Planning

There has been surprisingly little *specific planning focused on tourism development* in Lincoln County, and limited joint planning of any kind undertaken by South Lincoln County's two incorporated communities together. Nevertheless, as noted in the part B of this section, the communities have individually undertaken many tourism development projects, generally with an explicit focus on building livability for community residents as well. The South Lincoln County RTS will represent the first opportunity for developing a shared strategy and multi-project action plan focused on tourism.

The RTS application references a number of plans that indicate community support for tourism as a priority strategy. They include the following (not an exhaustive list):

County wide or regional plans	South County specific plans
Lincoln County Economic Development Strategies (2010-2011) (Economic Development Alliance of Lincoln County): <ul style="list-style-type: none">• Goal 6-Arts and Culture• Goal 7- Natural Resource Economy• Goal 8- Tourism, primarily workforce dev and marketing	City of Waldport Parks Master Plan (2005)
Oregon Coastal Management Association: Demographic and Economic Description of the Oregon Coast, 2006	Port of Alsea Interpretive Plan (year?)
<i>Lincoln County Bicycle Plan (1992!)</i>	Yachats Comprehensive Plan (2011)
	South Lincoln County Economic Development Strategies (2003)

Wider scale regional planning is coordinated through the Albany, OR-based Cascades West Economic Development District, which covers Lane, Linn, Lincoln and Benton Counties. CWEDD is responsible for regional economic development planning as an affiliate of the U.S. Economic Development Administration, and it coordinates access to some economic development project funding. Tourism is one of many goals identified in its current "Comprehensive Economic Development Strategy."

The Port of Alsea is in the process of updating its strategic plan, with a strong focus on visitor services. The Siuslaw National Forest, which covers much of the land mass in South Lincoln County, does not appear to have any Recreation Management Plans targeted here.

B. State of tourism and implementation activities

Tourism is highly seasonal in South Lincoln County, with nearly half of its business concentrated in the three summer months, as is detailed in Part IV of this report. There are recent signs that the South Lincoln County tourism industry is *beginning* to emerge from the depths of recession in the second half of 2011. The challenge for the area is to attract more visitors during the other nine months of the year, and particularly from October through May.

Most overnight lodging is located in Yachats, although the former Bayshore Hotel in Waldport just reopened as the Soul Vacation Resort, adding 80+ rooms to the community supply. Rental houses are popular options throughout the county. There are also a number of state campgrounds and recreation sites.

Currently, most tourist activity is concentrated on the narrow strip of coast. Crabbing and fishing are the main draws for Waldport and Alsea Bay, whereas Yachats is more arts oriented. Waldport's Port of Alsea has created an Alsea River Trail guide, and there is interest in creating a similar river route along

the Yachats River in Yachats. In terms of history, both communities have exhibition space in the form of the Waldport Heritage Museum and the Little Log Church in Yachats, and both have interpretive centers for their main topographic features: The Alsea Bay Bridge Interpretive Center in Waldport, and the Cape Perpetua Scenic Area and Visitors Center just south of Yachats. Finally, both communities host many events, some “high culture” and some very grass roots. These include Waldport Beachcomber Days, the Yachats Mushroom and Agate Days, crab feeds, and an annual classical music festival.

Both along the coast and inland, there are many trails, especially for hikers. Volunteer groups in both Yachats and Waldport have been developing loop trail systems to connect various discrete segments of Forest Service trails through easements on private land. Rotating crews of volunteers (whose youngest member is reportedly 61 years young!) each work one Saturday a month building and maintaining trails.

There is interest in and opportunity for more collaborative projects around expanding visitor activity options related to biking, hiking, watersports and trails. There is also interest in developing more guided experiences related to both outdoor and cultural touring. In the past, for example, Waldport High School students operated a kayak rental business as a social enterprise. While that enterprise did not survive the recession, there are perceived opportunities for more guiding and outfitting type endeavors.

Several RTS steering committee members are working with an organization called “Dark 30 Sports” to bring an extreme bicycling event to the area in June 2013. The Yachats Chamber is starting up a “We Speak” hospitality training program, inspired by the Oakridge Rural Tourism Studio presentation at last year’s Oregon Governor’s Conference on Tourism. The Port of Alsea is gearing up for a bond measure to improve its crab floats and boat ramp and address seasonal capacity constraints. All of these new projects have a strong community outreach/engagement component.

As noted in the introduction, Yachats has received much recent national press, including (between 2007 and 2009) features in *Sunset*, *Coastal Living*, *National Geographic Adventure Travel*; designation by *Budget Travel* as one of the “Ten Coolest Small Towns in America”; and, just recently inclusion on *Arthur Frommer’s Top Ten Favorite Travel Destinations* worldwide.

A perceived drag on the area’s potential for tourism is the high rate of retail vacancy in both city downtowns, which was exacerbated by the recession. With the goal of downtown revitalization, Waldport sponsored a downtown revitalization program in the early 2000’s, and is now exploring participation in the Oregon Main Street program. Yachats is applying to do the same.

C. Organizations and partnerships

As the area is small in population and isolated, many important functions in the communities depend on volunteers. Recent projects such a wetlands restoration in Yachats, a building size mural in Waldport, the trail system building referenced above, and the many events and festivals are testament to active and effective volunteers.

There is some experience but, according to local steering committee members, not deep experience with collaborative projects spanning multiple communities in South Lincoln County. Past efforts include:

- South Lincoln County emergency planning task force
- Area wide study of current and future water needs
- South County Livability issues forum (in past)
- Past shared public works departments and current close collaboration between fire districts

- The Ford Institute Leadership Program, which has been a foundational source of participation for the Rural Tourism Studio in several past communities, has also taken place here, although the local Ford alumni network doesn't seem to be as closely connected with the initial RTS network as in other places.
- The school district is a county-wide school district that fully encompasses all of South Lincoln County and more, and a recent bond measure passed to build a new high school in Waldport.
- This is NOT an exhaustive list

In terms of tourism-related organizations and partnerships, Yachats and Waldport are involved with the Central Oregon Coast Association, which coordinates county-wide marketing. At the local level, both Yachats and Waldport have Chambers of Commerce that are engaged in tourism promotion, albeit with very limited staff (one part timer in Yachats, all volunteer in Waldport). In addition, the City of Yachats has a full time marketing director, under the name Go Yachats. These marketing relationships are cooperative, but could bear clarification and strengthening as part of the RTS process.

Both cities, the Port of Alsea, both chambers, the regional destination marketing organization (Oregon Coast Visitors Association/Central Oregon Coast Association), Oregon State Parks and Recreation Department, and several businesses are already involved with Rural Tourism Studio Planning. Cultural/heritage tourism is not as well represented. One other key partner not represented at the table is the Siuslaw National Forest, but that is likely because there is currently an interim supervisor in place. A new supervisor is expected to be on board soon.

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

In an area as small as South Lincoln County, data is especially limited. There is virtually no local data beyond anecdotal information about where visitors come from, how long they stay, and how they learn of the area. Furthermore, because the Rural Tourism Studio here is launching during a recession, *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

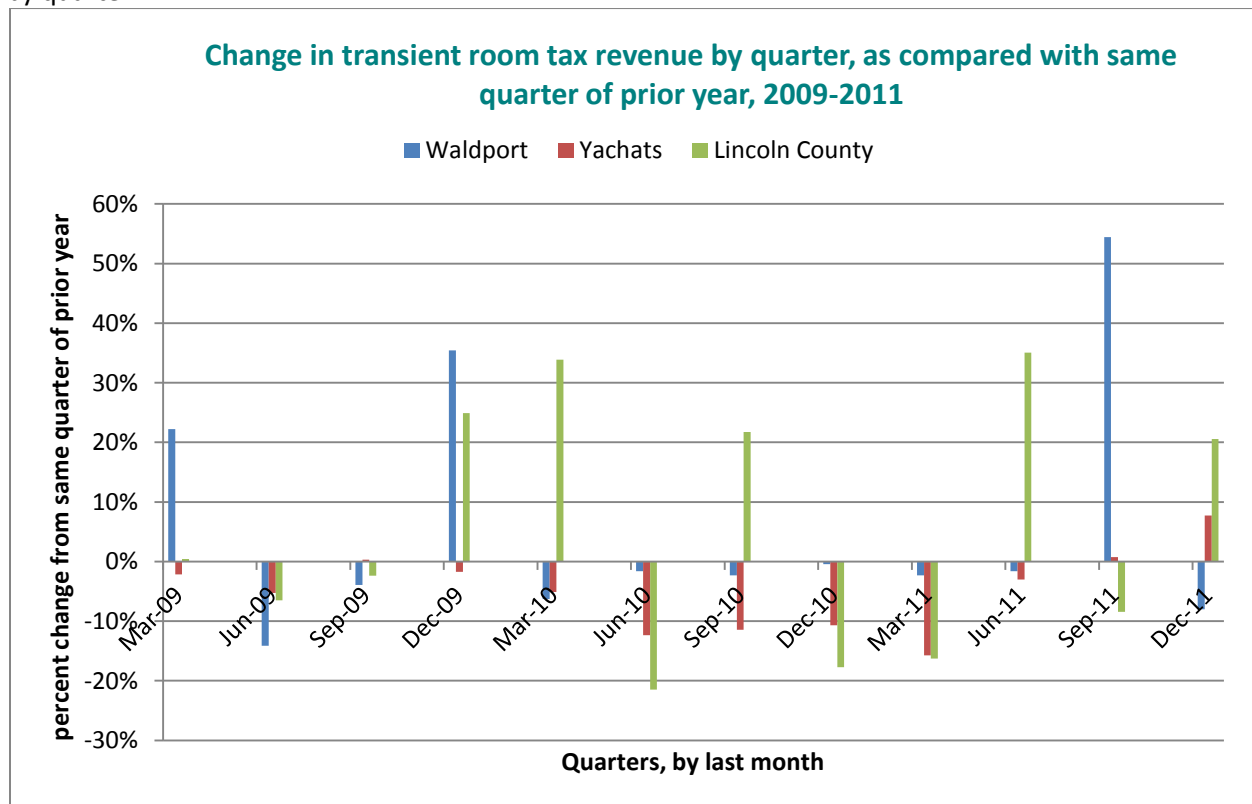
There are several sources of potential visitor volume data:

- 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

Transient room tax revenue is a far more significant economic resource in Yachats than in Waldport. Last year (2011), the city collected \$435,521 in room tax receipts, which funded 87% of the municipal budget. By contrast, the city of Waldport collected \$28,302, which funds approximately .5% of the municipal budget.

In terms of how trends in South Lincoln County compare with the whole county and the state, data is available through the end of *fiscal* year 2010 (June 30, 2010) from research conducted by Dean Runyan Associates for Travel Oregon. Between FY2008 and FY2010, the state and South Lincoln County (Waldport and Yachats together) both experienced 4.7% annual decreases in room tax revenue. Over the same period, the rest of Lincoln County (unincorporated areas and cities) registered a 10% net increase in room tax revenue.

At the local level, more recent quarterly tax receipt data is available through December 2011, which reveals most recent trends; particularly important as the region tries to climb out of recession. At this level, there are some fragile signs of recovery. The chart below shows the change in room tax revenue by quarter.



Source: City of Waldport, City of Yachats, Central Oregon Coast Association. For Lincoln County, on this chart only, percentages are based on room tax for unincorporated parts of the county.

The data shows, for example, that after seven straight quarters of declining room tax revenue (as compared with the same quarter of the prior year), the City of Yachats registered an increase for the last quarter of the year. In Waldport, there was a spike in revenue when the Soul Vacation Resort opened for its first summer, but in fall, revenues were lower than the fall of 2010. In unincorporated Lincoln County, there was wild variation in room tax revenue generation from one year to the next, but 2011 finished strong.

Visitor expenditures by category are only available at the county level. Since South Lincoln County accounts for just 5.5% of Lincoln County's transient room tax revenue, and the pattern of spending (percentage of overnight visitors, party size, etc) may be different in South County, the county data may not be reflective of the local patterns of visitor expenditures. As a reference, however, the county data is included in the Appendix.

Visitor counts for local attractions within the Siuslaw National Forest represent a cross-section of outdoor recreation enthusiasts who are an important part of this area's visitor base. Between 2008 and 2009, use of most areas increased significantly over 2008. Between 2009 and 2010, usage was generally down. Information is not yet available for 2011.

Siuslaw National Forest, South Lincoln County: Visitor Use Data, 2008-2010

	Visitors 2008	Visitors 2009	Visitors 2010	Change 08-09	Change 09-10
Riveredge Campground	910	1,085	1,050	19%	-3%
Blackberry Campground	4,968	6,240	5,860	26%	-6%
Canal Creek Campground	1,804	2,696	1,248	49%	-54%
Tillicum Beach Campground	20,668	31,016	23,916	50%	-23%
Cape Perpetua Campground**	7,832	10,268	6,200	31%	-40%
Mike Bauer Day Use	6,352	6,980	7,432	10%	6%
Ermie Walters Boat Launch	1,345	1,230	1,423	-9%	16%
Cape Perpetua Visitor Center***	52,816	56,422	66,800	7%	18%
Devils Churn***	12,320	17,370	19,660	41%	13%
Cape Perpetua Overlook***	9,825	12,425	11,400	26%	-8%
Total	118,840	145,732	144,989	23%	-1%
	Passes Sold	Passes Sold	Passes Sold		
NW Forest DayPasses	1,844	2,022	1,480	10%	-27%
NW Forest Annual Passes	391	400	300	2%	-25%
Oregon Coast 5-day passes	1,227	1,411	1,139	15%	-19%
Oregon Coast Annual Passes	373	418	386	12%	-8%
Total	3,835	4,251	3,305	11%	-22%

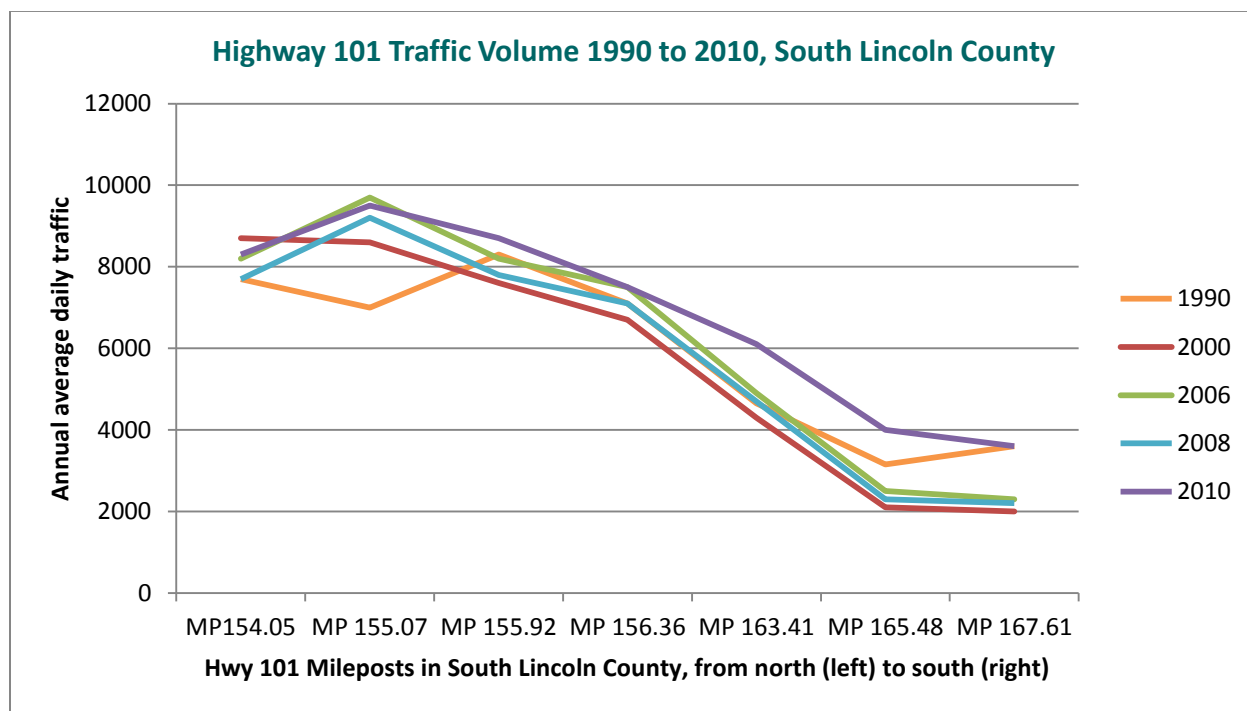
Source: Siuslaw National Forest

*Information based on pass sales, concessionaire reports, fee envelopes, NRRS reports, and special use permits. Some use counts are missing.

** This campground closed for part of summer season in 2010 due to major construction

***Potential double-counting of some visitors to Cape Perpetua Visitor Center, Overlook, and Devils Churn

Traffic counts along US Highway 101 provide an indicator of *potential* visitor volume, given that the coast region is a popular visitor destination. Traveling from north to south, traffic volumes drop off significantly in Waldport at the junction of US Highway 101 and OR Highway 34, which is the only connection from South Lincoln County to the populous Willamette Valley. South of Waldport, traffic counts were at or below 1990 levels until 2010, the most recent year for which data is available.



Source: Oregon Department of Transportation

B. Seasonality

The transient room tax data as noted above shows a consistent pattern of seasonal variation across the county and in South Lincoln County in particular. Close to half of the total transient room tax is collected during the summer season (July 1-September 30). The spring season is a distant second in terms of transient room tax volume. Waldport's pattern of summer volume may be distorted by the opening of a sizable new hotel, the Soul Vacation Resort in the spring of 2011.

Seasonal distribution of Room Tax Revenue by Quarter, 2008 to 2011*

Season	Waldport	Yachats	Unincorporated Lincoln County
Jan-Mar	12%	16%	15%
Apr-Jun	19%	23%	21%
Jul-Sep	53%	44%	46%
Oct-Dec	16%	17%	18%

Source: City of Waldport, City of Yachats, Central Oregon Coast Association.

The Oregon Department of Transportation does not maintain monthly traffic count measuring points in South Lincoln County, to document seasonal changes in traffic in the area. However, as stated in the RTS application and in various stakeholder interviews, summer is clearly the peak traffic season.

C. Visitor profile

The Central Oregon Coast Association and the local tourism marketing organizations, base their promotions on visitor profile information for the overall Oregon Coast region, as conducted by Longwoods International for Travel Oregon.

In summary, the typical visitor is from a household who spend at least \$1000 annually on travel, have some college education and are seeking nature based, cultural and heritage rich travel experiences. Approximately one third of visiting parties have at least one child under the age of 17, and approximately a third of visitors include a visit with friends or relatives while on the coast.

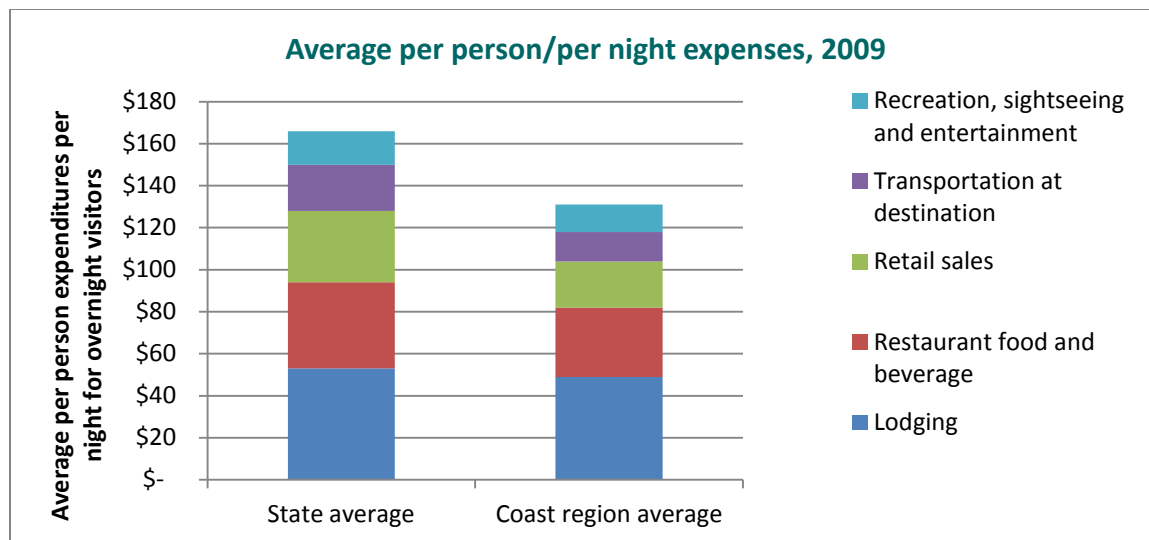
For the multi-county Oregon Coast region, Oregon tops the list of visitors' home states, followed by Washington, California, and Idaho. Home zip code data is available at the regional level for the Oregon Coast region. This data was last updated in 2009, and is included in the appendix of this report.

The Yachats Chamber hand tallies the "home state" of its visitors, and its information is consistent with the above. In the winter, almost all visitors are from Oregon. In the summer, all 50 states and several countries are represented, but the majority of visitors are from nearby states.

For Waldport, Port Commissioner Joe Smolen has informally gathered visitor origin data as part of preparation for the Port's strategic plan update. From a sample of 57 visitors and non-local (South Lincoln County) boat launch pass holders he interviewed in the summer of 2010, 63% were from Oregon. The Corvallis-Albany area was the metropolitan area with the highest number of visitors. A total of eleven states were represented.

There is no other visitor *profile* information gathered locally.

Finally, average daily expenditures by visitors are an important measure of economic impact. According to the Longwood research (based on 2009 data), overnight visitors to the Coast region spent \$126 per day. This is 24% less per day than the average overnight visitor in Oregon, as shown on the next page. Lodging expenditures are similar between the region and the state, but restaurant, retail and transportation expenditures are lower for Coast visitors. Data is only available for expenditures by day trippers at the state level, and according to that data, they spend less than a third as much as overnight visitors.



Source: Longwoods International for Travel Oregon

As part of the RTS program services, Travel Oregon will provide an optional visitor profile tracking template to participating communities interested in gathering supplemental information.

D. Businesses

There is not a consolidated inventory of tourism related businesses in South Lincoln County: each Chamber maintains an on-line directory of its members, and the City of Yachats marketing program, Go Yachats, has a larger directory on its website. Consolidating an inventory of tourism businesses, especially the small businesses that offer experiential tours and guiding, would be a useful short term project. One year after the completion of the RTS workshops (in Spring 2013), Travel Oregon will survey a sample set of local businesses about market, product, employment and revenue trends.

E. Other Data

As part of the RTS evaluation process, this information will be gathered from open-ended survey questions with key stakeholders, businesses and partners over time.

V. Appendix: Additional Regional and County Level Data

Top five urban zip codes for Oregon Coast visitors, 2009

City	% of O.C. visitors from urban areas
Portland	54%
Eugene	9%
Medford/K'Falls OR/CA	6%
Seattle	6%
Bend	3%
Chico/Redding CA	3%

Source: Longwoods International for Travel Oregon

Top four home states for Oregon Coast visitors, 2009

State	% of Coast Visitors from state
Oregon	66%
Washington	15%
California	9%
Idaho	3%

Source: Longwoods International for Travel Oregon

Tourism Sector Jobs (Direct Employment), Lincoln County: 2008-2010

2008 jobs	2009 jobs	2010 jobs (prelim est)	% change 2008-2010
6,010	5,650	5,650	-6.0%

Source: Dean Runyan Associates for Travel Oregon

Visitor spending by Category for Tourism Related Businesses, Lincoln County 2008-2010

Category	2008	2009	2010 (prelim)	% change 2008-010
Accommodations	\$131.9 million	\$126.4 million	\$128.8 million	- 2.4%
Food and beverage	\$102.8 million	\$104.3 million	\$104.4 million	+1.6%
Food stores	\$41 million	\$40.7 million	\$40.2million	-2.0%
Ground transport/motor fuel	\$55.5 million	\$42.6 million	\$48.5 million	-12.6%
Arts/entertainment/recreation	\$57.9 million	\$57.0 million	\$55.9 million	-3.5%
Retail sales	\$55.3 million	\$55 million	\$55.0 million	-0.5%
Total	\$444.4 million	\$426.0. million	\$432.9 million	-2.6%

Source: Dean Runyan Associates for Travel Oregon

Average Daily Visitor Expenses, Oregon and Oregon Coast, 2009

	Oregon day trip	Oregon overnight	OR Coast, overnight
Lodging	n/a	\$53	\$49
Restaurant	\$19	\$41	\$33
Retail	\$15	\$34	\$22
Transportation	\$8	\$22	\$14
Recreation/Entertainment	\$7	\$16	\$13

Source: Longwoods International for Travel Oregon