

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



RURAL TOURISM STUDIO

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I. Introduction

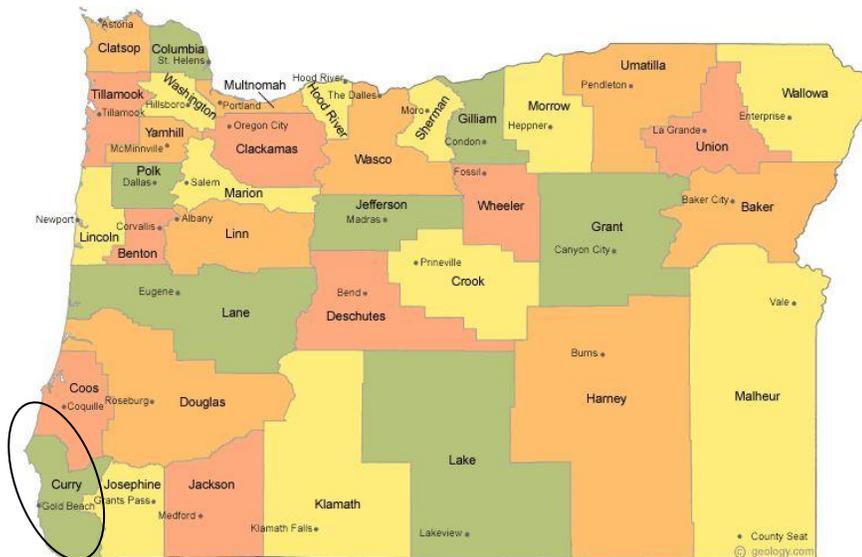
This report includes qualitative and quantitative baseline information for the Wild Rivers Coast region at the start of its work with Travel Oregon on the Rural Tourism Studio (RTS) Project in October 2013. The region includes Curry County and a portion of Coos County from Bandon south to the Curry County border.

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.

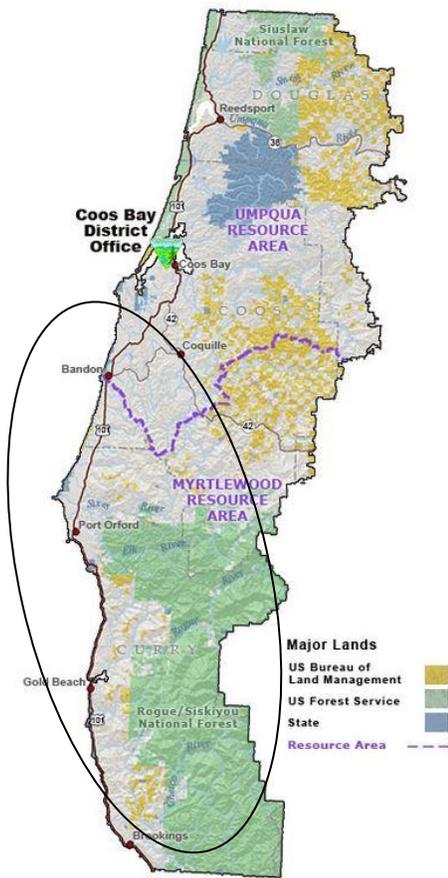
This data will be combined with workshop participant surveys, ongoing key stakeholder interviews and project implementation updates to assess the value of the RTS program approach for increasing beneficial tourism in Oregon's rural communities, and to provide useful information to local participants with which they can gauge their progress.

II. General community profile and context

The Wild Rivers Coast region is located on the southern coast of Oregon. This region, which has begun collaborating in new ways through a new philanthropic initiative called the Wild Rivers Coast Alliance, includes Curry County and the southern part of Coos County, starting at Bandon and extending south to the California border. The core of the Wild Rivers Coast Rural Tourism Studio area is the coastal sections, which are linked by Highway 101 (also known as the Pacific Coast National Scenic Byway), their dramatic topography and their location as the most isolated of Oregon's coastal communities with respect to major population centers. As traditional natural resource sectors of fishing and timber have declined, tourism has gained in importance as a current source of employment and a driver of future growth in the region's economy.



In Travel Oregon's Regional Destination Marketing Organization (RDMO) network, this region is affiliated with the Oregon Coast Region, currently administered by the Greater Newport Chamber of Commerce. It has also had historic affiliations with the Oregon Coast Visitors Alliance and the Southern Oregon e Visitors Association. As



noted in Part III of this report, there are many other organizations working on tourism marketing and product development in the area.

In most cases, area profile data is provided for Curry County, since Bandon is only a small piece of Coos County and Coos County data would otherwise obscure the WRC trends. Where available, Bandon-specific data is included.

A. History and Geography

Curry County covers 1648 square miles, and the area of Coos County from Bandon south is another approximately 100 square miles. Population is clustered along the coast along Highway 101, with the Rogue River-Siskiyou National Forest blanketing the inland land. Tourism is a major part of each community’s economy noted in section I-C. From Port Orford South, this region is also known as Oregon’s Banana Belt due to its unusually mild micro-climate.

The Wild Rivers Coast region is uniquely located between diverse coastal landscapes and true wilderness. Sea stacks punctuate the entire shoreline from Face Rocks at Bandon Beach to the Samuel S. Boardman State Scenic Corridor between Gold Beach and Brookings. On shore, the terrain varies from long flat beaches to sheltered harbors to dramatic promontories including Cape Sebastian (712 feet above sea level, the highest) and Cape Blanco. Cape Ferrolo near

Brookings is the first point of Oregon land named by European explorers: Spain’s Juan Rodriguez and Bartolome Ferrolo in 1543.

The Wild Rivers Coast region naturally includes rivers. In Curry County, there are five nationally designated Wild and Scenic Rivers: the Chetco, Elk and Rogue, meet the sea at Brookings, Port Orford and Gold Beach respectively, while the North Fork of the Smith River and the Illinois Rivers flow into the Rogue inland. Other notable rivers are the Pistol River north of Brookings, famous for ocean windsurfing, and the meandering Coquille River which flows into Bandon Harbor.

Agriculture (cranberries in the north, lilies in the south, and ranching and diversified crops in the middle), has a visible presence in the lowland valleys, but as one travels inland the terrain grows extremely rugged and mountainous. As shown in the U.S. Bureau of Land Management map above, most of the inland part of the region is public lands, primarily the Rogue River-Siskiyou National Forest which covers 59% of Curry County. Within the National Forest is the Kalmiopsis Wilderness- one of the most diverse concentrations of rare endemic plants (unique to the area) in North America. Also in the National Forest is Brandy Peak, the region’s highest peak at 5,298 feet above sea level.

History:

The coastal lands of Curry County were originally home to many interrelated tribes collectively known as the Rogue River Indians: the Chetco, Tututni and Tolowa. They shared dialects with the Coquille tribe to the north near Bandon.

When gold and other precious metals were discovered in the mid-19th century by white prospectors, white settlement grew rapidly, as did tensions with the area's native populations. After failed treaty negotiations, the Rogue River Indian wars of 1855-1856 decimated the native population, and those who survived were forcibly resettled to the Coastal, Siletz and Grand Ronde reservations on the north coast of the state. When the temporary Coastal Reservation was shut down in 1875, natives who returned found extensive white settlement. For this reason, there are few visible remnants of tribal history in Curry County today. In contrast, the Coquille Tribe was able to establish a new foothold in southwest Coos County is a strong presence in the Coos County economy.

Port Orford was established as Curry County's first permanent coastal settlement in 1851, and was the initial county seat when Curry County was created in 1955. Port Orford contains three sites registered on the National Registry of Historic Places, related to its maritime history, including a unique Coast Guard lifeboat rescue station necessitated by the frequency of shipwrecks off its rough shore.

Bandon (originally named Averill) was became Coos County's first permanent white settlement in 1853. The community received its new name from George Bennett, an early Irish settler who hailed from Bandon, Ireland. Bandon was at one point the most significant shipping port between San Francisco and Portland. Its downtown commercial district was completely destroyed by fire in 1936, and then rebuilt.

Gold Beach was settled in 1856 as Ellensburg, established as the permanent county seat in 1859 and given its present name in 1890. By the early 20th century, Bandon and Gold Beach were established tourism destinations, with Gold Beach and the Rogue River a premier fishing destination. Until the 1930s, however, when the Roosevelt Highway (that became Highway 101) was completed, the southern half of the Wild Rivers Coast region (Gold Beach and Brookings) were only accessible by boat.

Brookings was the last of the region's current incorporated cities to be settled, starting in 1913 as a purpose-built redwood logging town according to a master plan by Bernard Maybeck, a prominent California architect. The Brookings area has strong connections with Japanese history: in 1942, it was the site of the first enemy bombardment of the U.S. mainland (thankfully, the bomb fizzled in the damp coastal conditions). It is also the dominant global producer of Easter lilies, which are native to southern islands of Japan. Brookings became the Easter lily hub gradually. After WWI, a local American soldier brought bulbs back to Curry County as gifts for his friends and neighbors. During WWII when exports from Japan were banned, west coast cultivation expanded, with the most productive area being a small stretch of coast centered on Brookings.

Access:

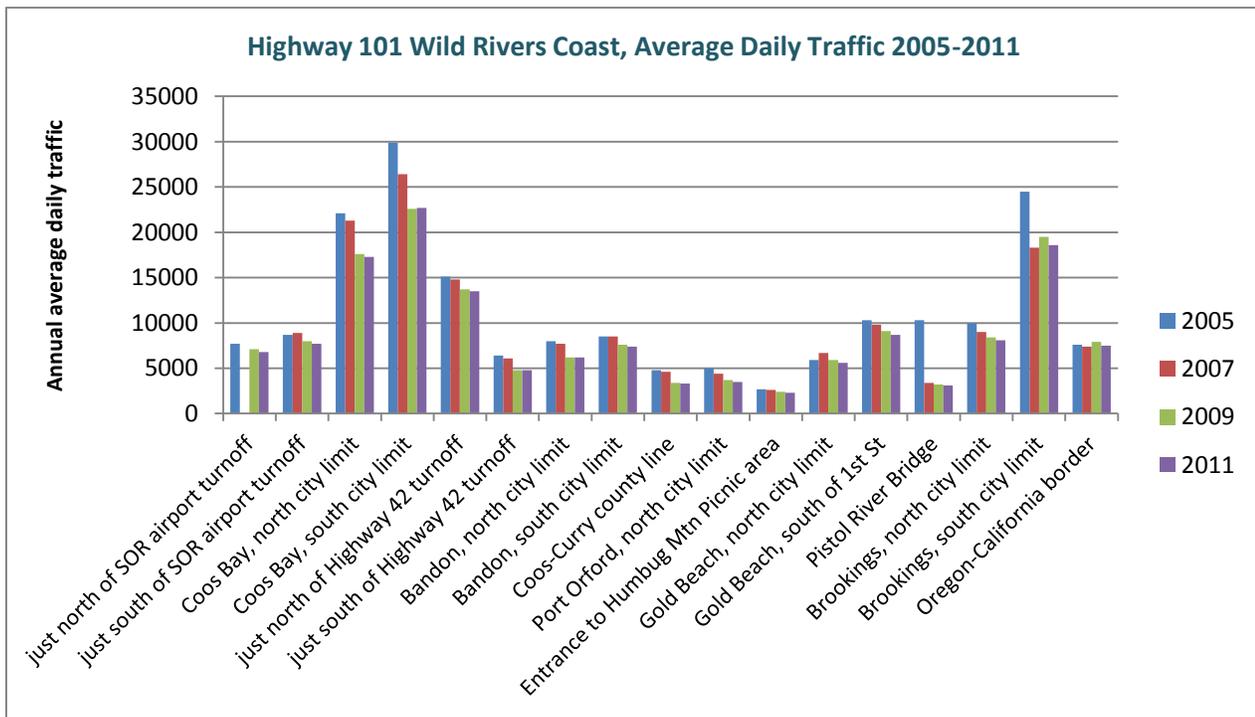
The main north south transportation link is U.S. Highway 101, which runs the entire length of the Pacific Coast from Canada to Mexico. In Oregon, it stretches for 363 miles, primarily as a two lane highway. **The Wild Rivers Coast region encompasses approximately 120 miles, or one third of the highways' total length in the whole state.**

In terms of east-west travel, winding State Highway 42 connects Bandon to the southern part of the populous Willamette Valley and the Interstate 5 corridor 1.5 hours away. As the crow flies, the region is also close to the Medford, Oregon metropolitan area via U.S. 199, but due to the rugged terrain of the Kalmiopsis Wilderness, a traveler must go south to California and back up Highway 101 to reach Curry County. From Medford to Gold Beach, travel time is approximately 3 hours.

The nearest commercial airports are in North Bend, Oregon, 27 miles north of Bandon, and Crescent City, California, 26 miles south of Brookings. The North Bend airport, recently renamed the Southwest Oregon Regional Airport, is the busier of the two regional airports, with 18,283 passengers boarding in 2012. By comparison, 12,547 passengers boarded at the Del Norte County airport in Crescent City. Passenger traffic for both airports was down sharply from 2011-2012, in contrast to the growth experienced at the closest larger airports (in Eugene and Medford Oregon). Comparative data is included in the appendix.

The closest international airport is technically in Medford (@ 3 hours from Gold Beach), but the closest airport with current international service is Portland, the state’s largest metropolitan area. Portland is approximately 4.5-5.5 hours away, depending on exact point of trip origin.

The table below shows average daily traffic counts on Highway 101 between the airport in North Bend and the California border. The trend of declining highway traffic since 2005 is also the pattern for the other major routes leading into the Wild Rivers Coast region. More information about traffic to and within the region is included in the Appendix.



Source: Oregon Department of Transportation

B. Demographics

The WRC region includes four incorporated cities: Bandon, Brookings, Gold Beach and Port Orford. The largest of these is Brookings, with an estimated population of 6,316 people in 2012 and over 10,000 if the contiguous, unincorporated community of Harbor is included. Gold Beach is the Curry County seat. Langlois in north Curry County is the region’s other unincorporated community of any size.

Settlement is concentrated along the coast. The area population as estimated for 2012 is slightly over 25,000 people: 22,248 in Curry County and another 3,066 in Bandon. This represents 1.7% of the state’s land area and

.6% of its population. While Bandon is a small part of the region’s square miles and its population, it is a significant part of the region’s tourism economy as noted in the sections that follow.

A defining feature of this region’s population is its high proportion of retired residents, much higher than other coastal areas in Oregon. In 2012, nearly 30% of Curry County’s population was at least 65 years old. This is double the state rate of 14.9%. Only Central Oregon’s Wheeler County has a higher proportion of senior citizens. The mild “banana belt” climate and the proximity to California retirees as a more affordable area for retirement are factors in attracting new residents in this age group.

There is little racial or ethnic diversity in the area’s population even by Oregon standards: 93.2% of Curry County’s total population is white as compared with 88.3% statewide: the largest minority group is people of Hispanic/Latino descent: they comprise 6% of the population. In terms of the tourism implications of this demographic mix, local attractions may need to reach out intentionally and pro-actively to diverse visitors so that they feel welcomed.

C. Economy

In terms of overall economic vibrancy, **this region has greatly felt the recession, with unemployment rates in both counties well above the state average.** Adding to the economic problems are severe constraints on public sector budgets. Curry County has the second lowest property tax rate in the state, and it is constrained by state law limiting property tax increases. The combination of recession and low property tax revenue has brought Curry County to the point where it may soon be unable to fund its core, mandated operations and may turn over some functions to other units of government. As of August 2012, County Commissioners were still pursuing a local levy to fill budget gaps.

Between 2008 and 2012, Curry County lost 8.3% of its jobs: by comparison, Coos County lost 2.4% of its jobs and the state of Oregon lost 1.9% of its employment base. Job loss affected all sectors, but particularly the public sector.

Unemployment Rate, Wild River Coast Counties as Compared with State Average

	Curry	Coos	Oregon
June 2013	10.4%	10.2%%	8.1%
June 2012	11.4%	10.8%	8.8%
June 2011	11.9%	11.5%	9.8%
June 2010	12.4%	12.5%	10.6%
June 2009	13.0%	13.0%	11.6%

Source: OLMIS Region 7

Over the same period, job loss in the tourism sector was substantial. Between 2008 and 2012, tourism related employment dropped by 21.2%.

Tourism Sector Jobs, South Coast Region 2002-2012

Year	2002	2004	2006	2008	2010	2012*
Tourism Jobs, South Coast region (Coos and Curry Counties)	5000	4950	4980	5170	4670	4730
Tourism Employment, Curry County only	2000	1940	1850	1880	1750	1680

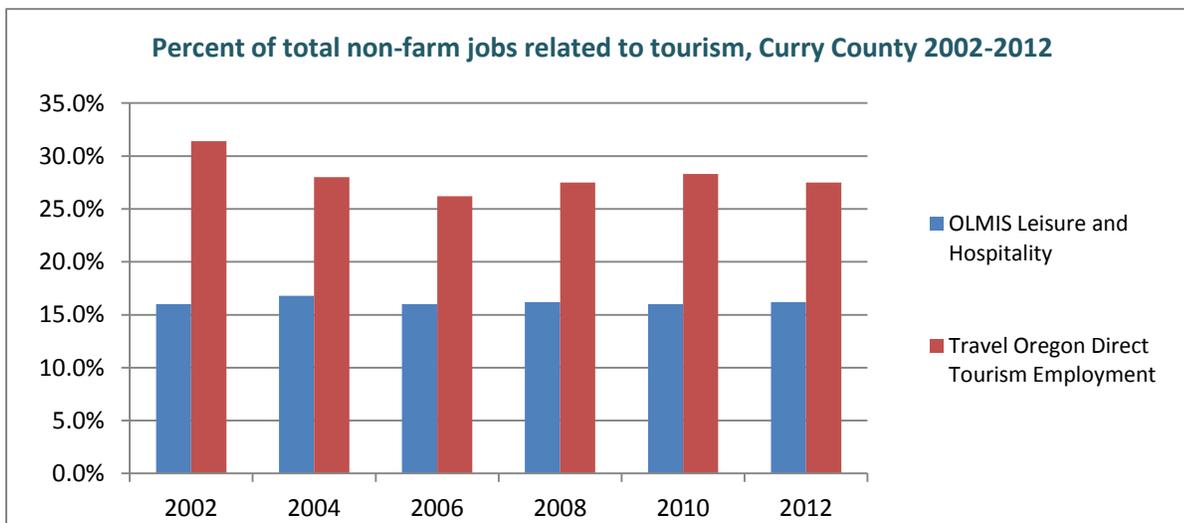
* = preliminary estimate

Source: Oregon Travel Impacts- 2002-2012p, Dean Runyan Associates for Travel Oregon

The chart below shows two different estimates of the role of tourism in the region’s economy. According to the Oregon Labor Market Information Service (OLMIS), tourism has been a relatively steady part of the Curry County economy since 2002, accounting for approximately 16% of total non-farm jobs. In 2012, this meant that the “leisure and hospitality” sector accounted for 990 of the county’s 6,110 total jobs.

The Travel Oregon estimates of tourism’s role, and also its decline during the recession, are much more dramatic. This is because Travel Oregon considers not only direct employment in tourism businesses (e.g hotels, resorts) but also the multiplier impact of visitor expenditures on retail and other services not counted as “leisure and hospitality” businesses. By this accounting, **more than one in four Curry County jobs in the county depend on tourism.**

The percentage of Bandon jobs related to tourism is likely higher than in Curry County, though municipal level statistics are not available.



Source: Oregon Department of Labor, Dean Runyan Associates for Travel Oregon

Additional detailed information about tourism’s role in the region’s economy is illustrated in Section IV of this report.

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

Travel Oregon selected the Wild Rivers Coast through a competitive application process. The successful application was originally submitted for Curry County alone in 2012, under the sponsorship of the America’s Wild Rivers Coast branding initiative. As Travel Oregon worked with the community to refine the scope of work, the geographic boundaries and associated stakeholders were expanded to include the southern coast of Coos County.

The RTS selection criteria reflect lessons learned about community readiness factors during the RTS pilot program phase in 2009. Key readiness factors for this region include:

- Each community has invested in sustained leadership training/development, and has a strong core group interested in tourism development.

- The WRC region has unique, high quality nature based tourism assets, including one of the highest concentrations of nationally designated wild and scenic rivers in the lower 48 states.
- The communities have been working together to establish an Oregon Scenic Bikeway. Each community is aware of the increase in regional bicycle tourism, and is interested in strengthening their bicycle tourism components.
- The region has a new philanthropic stakeholder in the form of the Wild Rivers Coast Alliance, established by Bandon Dunes Golf Resort owner Michael Keiser. As such, there are potential local sources of philanthropic and investment capital for projects that emerge from RTS.
- This region is also one selected recently by The Ford Family Foundation to pilot the second phase of its intensive leadership development investments. The new funding and capacity building initiative, called Pathways, focuses on implementation of regional projects, with a particular focus on economic development.
- This is an area with economic need. The government of Curry County is in financial crisis, which has negative ripple effects on the region's economic stability. Tourism is an important sector in the transition of this region's struggling economy.

The steering committee includes the following people as of June 1, 2013.

Karen Auburn	Port Orford
Leesa Cobb	WRCA Steering Committee, Executive Director of Port Orford Ocean Resource Team
Jack Cook	A Wild Bird Store; Brookings-Harbor Chamber of Commerce
Ron Crook	Curry County Fairgrounds Manager, Gold Beach
Jodi Fritts-Matthey	Gold Beach - Steering Committee Admin Lead
Ken Hall	<i>Completed the RTS application</i>
Jan Hayes	Curry County Board of Commissioners
Hank Hickox	WRCA Steering Committee, General Manager Bandon Dunes, Travel Oregon Commissioner
Carolyn Hill	Southern Oregon Visitors Association
Marcus Hinz	Oregon Coast Visitors Association
Harry Hoogesteger	WRCA Executive Committee Chairman, South Coast Watersheds Coordinator
Kim Hunter	Rogue River - Siskiyou National Forest Gold Beach Ranger District
Annette Klinefelter	Curry County Economic Development
Julie Miller	Bandon Chamber of Commerce; Southern Oregon Visitors Association
Gary Milliman	City of Brookings
Tyson Razor	Port Orford Ocean Resource Team
Nancy Schwieger	Gold Beach Ranger District, Rogue River-Siskiyou National Forest
Jim Seeley	Wild Rivers Coast Alliance
Harv Shubothe	Greater Bandon Association
Marie Simonds	Wild Rivers Coast Alliance
David Smith	Curry County Commissioner
Sandy Viera	Gold Beach Chamber of Commerce; Wild Rivers Coast Alliance Steering Committee

The first workshop of the RTS program will be held on October 8-9, 2013. The program is expected to be complete by January 28, 2014.

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. The RTS Steering Committee, together and independently, has been extremely active in the months leading up to the RTS workshops, building working relationships, exploring new projects and branding ideas.



In May, as groundwork for the RTS, Travel Oregon collaborated with local organizations to host a series of networking conversations about the future of tourism in the area and its fit into the region’s larger vision for itself. This is the **first time in the RTS program where such intensive community outreach, visioning and asset identification preceded the start up of the core workshops**. Based on community input, Travel Oregon is creating an interactive Google map with icons representing specific assets upon which to build. A sample of that map is shown here.

A. Planning

The RTS application did not include references to current local or regional plans related to tourism, and a scan of current documents shows little mention. The CCD Business Development Corporation, the region’s Economic Development District and its Regional Investment Board, did not not prioritize public sector tourism investments in its 2007-2013 Comprehensive Economic Development Strategy (CEDS) for

the Coos-Curry-Douglas County region. The CEDS plan does not that “the region’s moderate climate, the recreation and isolation opportunities, and the proximity to California markets were identified as valuable assets for the region’s visitor industry.” Specific resources identified are: “diverse unspoiled tourism product, especially eco-tourism and heritage tourism products, fishing, hunting and off-road vehicles.”

Local chambers have marketing plans for tourism, and the plan is especially robust for Gold Beach. The State Parks Master Plan for Curry County was last updated in 2003.

In past decades, there has been significant investment in tourism planning, and one plan in particular from 1995 bears note: the Nature-based Tourism Development Project for Curry County by Egret Communications. The intent was to expand and deepen the area’s visitor draws to supplement jet-boat trips, sport fishing and scenic-driving activities. Activities included eco-tourism oriented small business development and a \$700,000 canopy walk attraction known as the Canopy Project. Smaller aspects of this project were implemented, but the larger visitor infrastructure investments were not. It proved controversial as yet another lightning rod for the Pacific Northwest’s ongoing conflicts between conservation and timber uses. Local stakeholders note that such a project may not face the same negative reception today.

The Wild Rivers Coast Alliance, a relatively new Bandon based philanthropic venture, does not have a regional plan per se, but has prioritized investments around four objectives, including one to “**drive economic development and ecological enhancement through sustainable tourism**”. Tourism is, in this vision, one part of a vibrant sustainable economy.

B. Implementation activities

As tourism activity is creeping back to pre-recession levels, the Wild Rivers Coast region is abuzz with new tourism development activity. Section IV includes detailed tourism trend data. Current implementation activities fall into several **niche markets, and it's worth noting that these markets lend themselves to cross-promotion in terms of geography and activities.** For example, hiking trails lead to significant historical resources at Cape Blanco, the Port Orford Heads, and Brookings.

Bicycle tourism product development

- Around bicycle tourism, there is a pending application from the region for development of an Oregon Scenic Bikeway from Battle Rock Park in Port Orford to Paradise Point, up Elk River Road and on to Cape Blanco State Park. It links to nature tourism in that it creates a “land to sea connectivity” experience along the ocean and between two rivers, the Elk and the Sixes.
- Bicycle kiosks have been installed in Bandon, unincorporated Langlois, Port Orford and Gold Beach as a class project of the Ford Institute Leadership Program.

Golf tourism product development

- The Oregon State Parks and Recreation Commission is considering a land exchange with the owners of the Bandon Dunes Golf Resort. The swap would transfer ownership of part of the 902 acre Bandon State Natural Area just south of Bandon to the Resort, in exchange for a local land swap back to State Parks, an agreement to spend \$300,000 fighting noxious invasive gorse plants locally, and a cash payment of nearly \$3 million to allow the state to acquire new park lands in Eastern Oregon. This will enable construction of a new, 27 hole walking course.
- While golfers at other Bandon Dunes courses do not venture outside the resort to partake of other recreational activities, there are efforts to promote return trips to the region with friends or family for other activities besides golf. As international visitation increases, especially from Japan, there's also potential to promote longer stays on the first visit, since many international travelers will be coming for longer and perhaps already bringing family.

Heritage/cultural tourism product development

- The Main Street Association in Port Orford is working to make its art galleries a more prominent asset
- The region is participating in a West Coast initiative by the non-profit Washed Ashore Art to create art out of plastic debris that washes into shore. This art, some of which is made from tsunami debris, is on display in Bandon the summer of 2013.
- The region has several museums reflecting its diverse history: hours are currently seasonal and web based information about heritage attractions is scattered across many different web sites.

Nature tourism product development:

- A new visitors center under development at Battle Rock Park in Port Orford will also include a Marine Education Center. Among others, the Wild Rivers Coast Alliance and the nonprofit Port Orford Ocean Resource Team (which engages in environmental education and sustainable fisheries is a partner with this project). The new Red Fish Rocks marine reserve will be one featured asset.
- State Parks has a newly completed interpretive plan that will expand interpretive signage along trails to historic and natural sites from the Port Orford Headlands to Cape Blanco.
- The Rogue River-Siskiyou National Forest has many outdoor recreation opportunities including white water rafting, wilderness camping, lake and river fishing, special forest products such as mushrooms to harvest, wildlife viewing and trails: as well as visitor infrastructure such as camping facilities, boat ramps and more. With federal budget constraints, no new product development initiatives are currently underway.

- Whale watching and sport fishing are already established attractions

Culinary tourism product development

- Bandon singled out by Budget Travel as one of “Ten Coolest Small Towns in America” in 2010, characterized as “Farm to Table hub on Oregon’s rugged coast.” The community aspires to be a center of excellence for several trades including creamery/cheese making and chocolate making, with Face Rock Creamery as an anchor attraction.

C. Organizations and partnerships

The organizational structure for tourism marketing and development varies across the region, and while significant strides have been made around regional collaboration, some of the working relationships are still fragile.

The four incorporated communities have Chambers of Commerce that appear to work closely together, especially Port Orford with Bandon and Gold Beach, and Gold Beach with Bandon. In addition to the Chamber of Commerce in Bandon, an organization called the Greater Bandon Association is active in both community development and tourism. Port Orford has a Chamber of Commerce and an active Main Street Association which also focuses on tourism. In Gold Beach, the city owns and operates the visitor center, while also contracting for services with an independent Chamber. In Brookings, the city has recently established its own tourism committee and suspended payments of lodging tax revenue to the Chamber of Commerce. While the communities work well together, there are some intermittent tensions *within* each community around tourism, with Brookings being the most obvious example.

Many key stakeholders are already involved with the Rural Tourism Studio as a result of extensive outreach and existing collaborative relationships as noted in the implementation activities above. Efforts are underway to better coordinate tourism marketing activities within the Wild Rivers Coast region. Under the auspices of the Wild Rivers Coast Alliance, an intern has worked over the summer to develop a master calendar of events for all the communities. An additional coordination activity suggested by stakeholders is to integrate the web-based information about the region that is now scattered across many different websites and diverse branding. Another potential coordination activity is to improve signage for key attractions.

State Parks and the Forest Service already collaborate on visitor information and interpretive trails/signage. There are also three larger regional organizations based outside the region that work with businesses along the Wild Rivers Coast on marketing and product development initiatives.

- Oregon Coast Visitors Association/Peoples Coast
 - Creating a brand for retail products from the Oregon Coast
 - Brand to include high end art, not just natural landscape
 - Developing a coastal public art trail
- Southern Oregon Visitors Association
 - Tie marketing of Klamath birding to coastal whale watching opportunities
 - Coordinate marketing to National Parks (Redwoods, Crater Lake)
- Newport Area Chamber of Commerce
 - Receives state lodging tax revenue to spend on regional marketing of the Oregon Coast

While some stakeholders feel an advantage to having several organizations work on their behalf, just as many feel frustrated that their region is not being represented in a cohesive way. The current situation is also not financially sustainable for the regional marketing organizations.

IV. Quantitative assessment of “starting point” for RTS

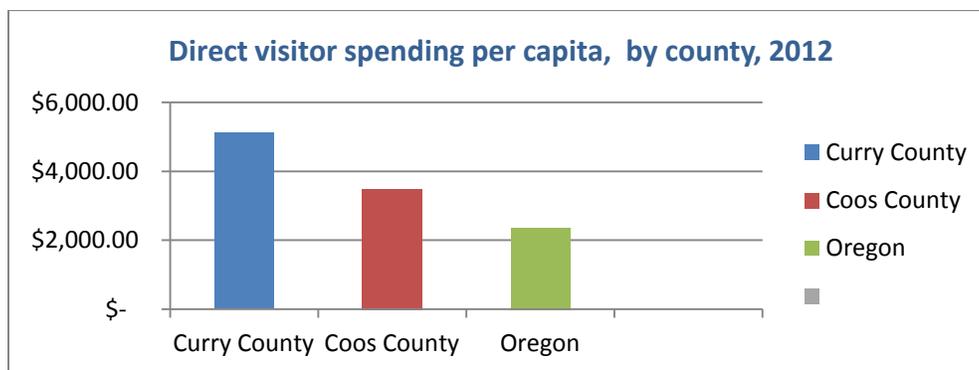
As noted in Section II.C, tourism is a significant part of the region’s economy. Travel Oregon’s “Tourism Impacts” annual reports by Dean Runyan Associates include county by county breakouts of the economic impact of tourism, and a sense of the scale of effort needed to increase its economic impact. As shown in the table below, tourism contributes significantly to the local economy and public sector budgets through the transient room tax. More detail on tax receipts is included in the following section.

Travel Impact Indicators for South Coast Counties, 2012

	Coos County	Curry County
Amount of visitor spending that supports one job	\$73,480	\$68,170
<i>Additional visitor spending if each resident household encouraged one overnight visitor per year</i>	<i>\$4,003,000</i>	<i>\$1,434,000</i>
Employee earnings generated by \$100 in visitor spending	\$27	\$32
Local and state tax revenues generated by \$100 in visitor spending	\$3.50	\$3.20
<i>Additional employment if each resident household encouraged one additional overnight visitor per year</i>	<i>54</i>	<i>21</i>

Source: Dean Runyan Associates for Travel Oregon

The chart below shows total visitor spending *per capita* for Curry and Coos counties as compared with the state. Visitor spending *per resident* is much higher in this region than in the state as a whole, and much higher than many other rural areas. This illustrates the **relatively high economic contribution of visitors to the local economy**. While tourism’s economic impacts are not its only benefits for host communities, perceived economic returns affect the level of local support for tourism development initiatives. Thus, this information is important to communicate as projects are planned.



Source: Dean Runyan Associates and Portland State University Population Center

There are many other 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

The following section summarizes the data of this nature that is available at the start of the Wild Rivers Coast Tourism Studio program in River Canyon Country.

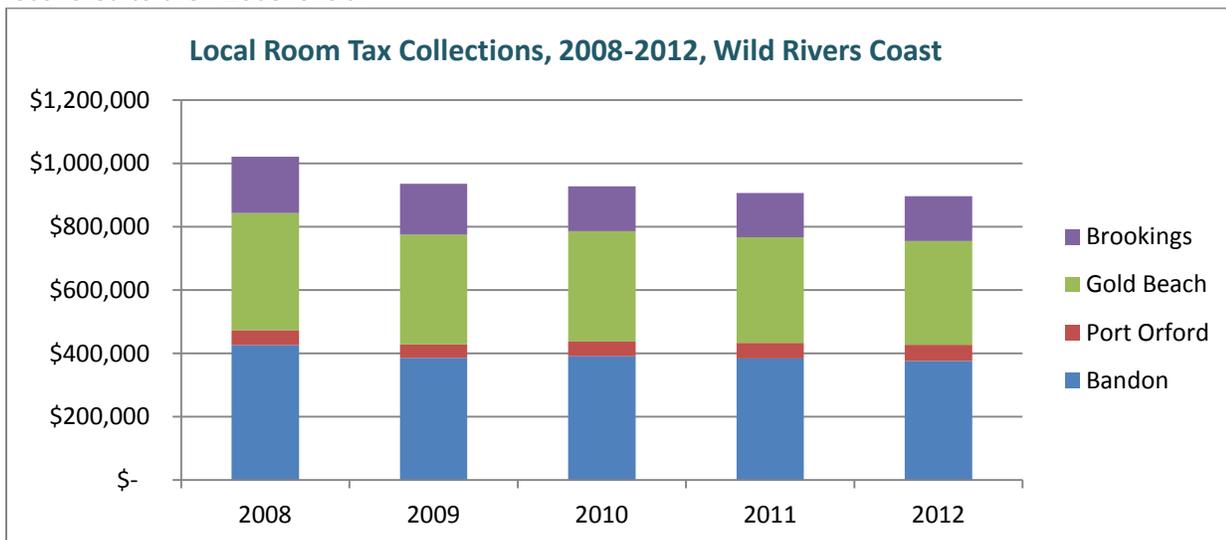
A. Visitor volume

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.
- Visitor expenditures by county as captured by Travel Oregon research
- Local visitor counts by key organizations and destinations

Overall, visitor volume data shows promising though uneven signs of recovery in tourism activity post-recession.

All four incorporated cities in the region have a **local room tax**. The tax rate in Bandon, Brookings and Gold Beach is 6%, and in Port Orford, 7%. **Bandon and Gold Beach account for the majority of room tax receipts: each take in over \$350,000 annually.** Port Orford is the only city in which 2012 room tax receipts have recovered to their 2008 levels.



Source: Dean Runyan Associates

Detailed visitor expenditures are only available through 2012, and only at the whole-county geographic level. **Visitor expenditures are beginning to recover from the depths of the recession.** Across all categories of spending 2012 visitor expenditures are at or above 2010 levels. Spending on “Food and beverage” (restaurant

and food service) is the single largest area of visitor spending for both counties. This is the category with the greatest increase in visitor spending since 2008.

Visitor spending by Category for Tourism Related Businesses, Coos County, 2008-2012

Category	2008 (millions)	2010 (millions)	2012 prelim (millions)	% change 2008-2012
Accommodations	44.7	40.6	45.0	0.7%
Food and beverage	55.6	53.9	60.2	8.3%
Food stores	21.3	19.9	21.8	2.3%
Ground transport/motor fuel	29.6	23.5	29.2	-1.4%
Arts/entertainment/recreation	35.9	33.1	35.2	-1.9%
Retail sales	26.0	24.8	26.5	1.9%
Visitor air transport	4.0	3.0	3.0	-25.0%
Total	217.1	198.8	220.9	1.8%

Source: Dean Runyan Associates for Travel Oregon

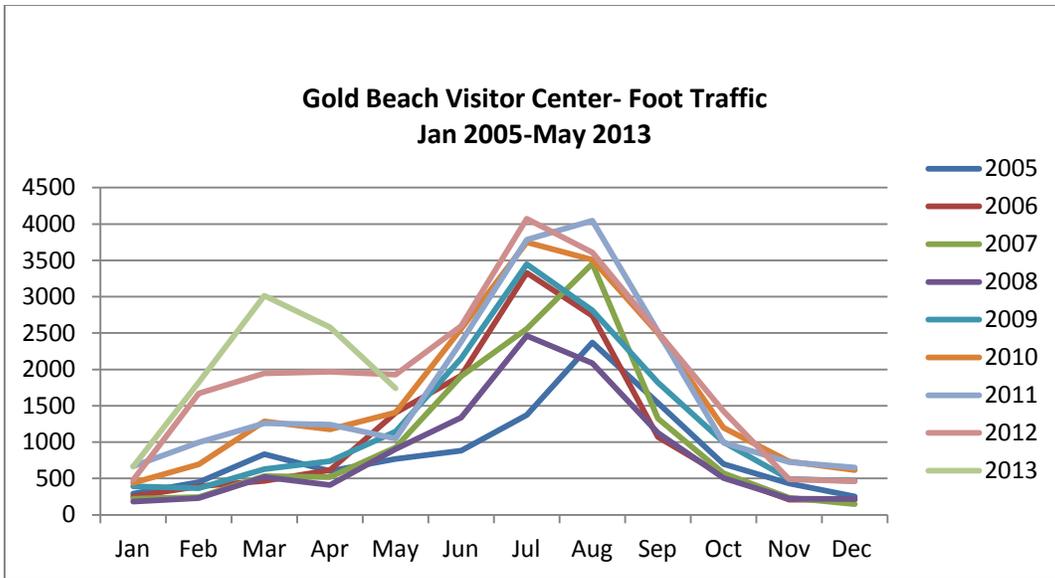
Visitor spending by Category for Tourism Related Businesses, Curry County 2008-2012

Category	2008 (millions)	2010 (millions)	2012 prelim (millions)	% change 2008-2012
Accommodations	22.8	22.4	22.4	-1.75%
Food and beverage	28.7	29.1	30.9	7.7%
Food stores	15.5	14.9	15.9	2.6%
Ground transport/motor fuel	14.4	12.0	14.0	-2.8%
Arts/entertainment/recreation	15.3	14.6	14.9	-2.6%
Retail sales	15.5	15.3	15.9	2.6%
Total	112.2	118.3	114.0	1.6%

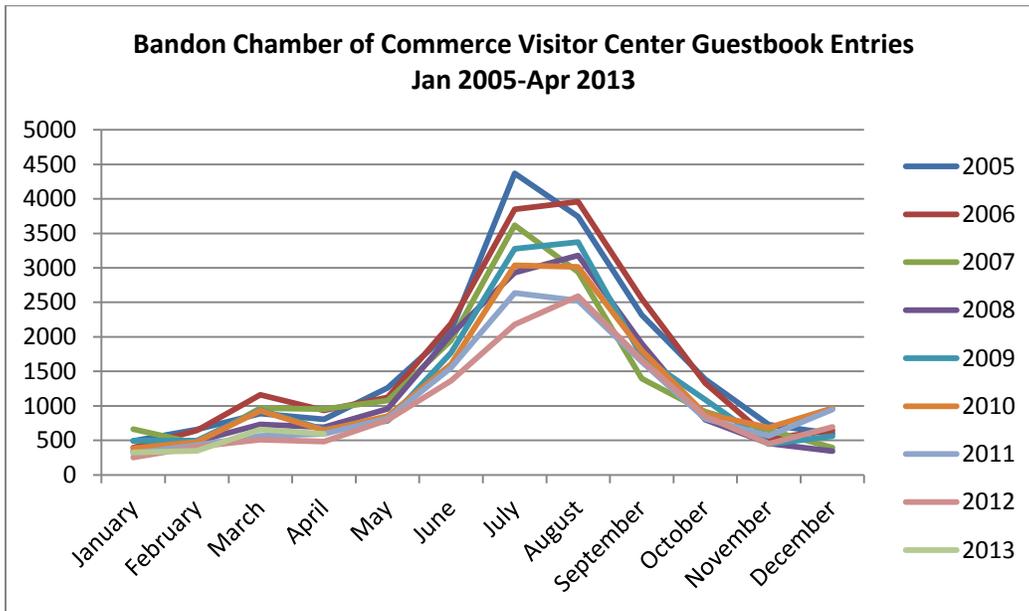
Source: Dean Runyan Associates for Travel Oregon

Trends in the number of visitors “on the ground” in the area can be estimated by the volume of **foot traffic at visitor centers**. Using Gold Beach and Bandon as representative samples because they account for the bulk of visitors, the story is a tale of two cities with different trends.

In Gold Beach, foot traffic is higher than in past years, with a sharp uptick in the first months of 2013. In Bandon, on the other hand, foot traffic has generally been declining since 2005, although starting in 2010, visitation in the month of December has exceeded prior years.



Source: City of Gold Beach



Source: Bandon Chamber of Commerce

Data about visitation to state parks is another source of information about visitor volume. In fiscal year 2013 (July 1, 2012-June 30, 2013), the South Coast accounted for 18% of the whole Oregon Coast’s day users and 18.9% of its overnight users. State park user statistics show the beginning of a recovery from recession levels. **In FY2013, there were over 4 million day users (4,200,448) and over a quarter of a million (273,069) overnight users of the region’s five state parks open to camping.**

For day visitors, Harris Beach State Recreation Area is the most popular destination of the region’s 18 day use areas for which statistics are gathered. It attracting 1,222,800 visitors in FY13, representing 29% of all day users. Samuel Boardman State Scenic Corridor was the second most popular, with 695,118 visitors, and Bullard Beach State Park rounded out the top three with 404,484 visitors in FY13. While day use for Harris Beach and Bullard

Beach has been growing, the day use numbers for Samuel Boardman S.C.C have been steadily decreasing since 2002.

For overnight campers, Bullard Beach State Park is the top destination, with 100,132 campers in fiscal year 2013. Harris Beach State Recreation Area is not far behind, with 87,215 campers in the same time period.

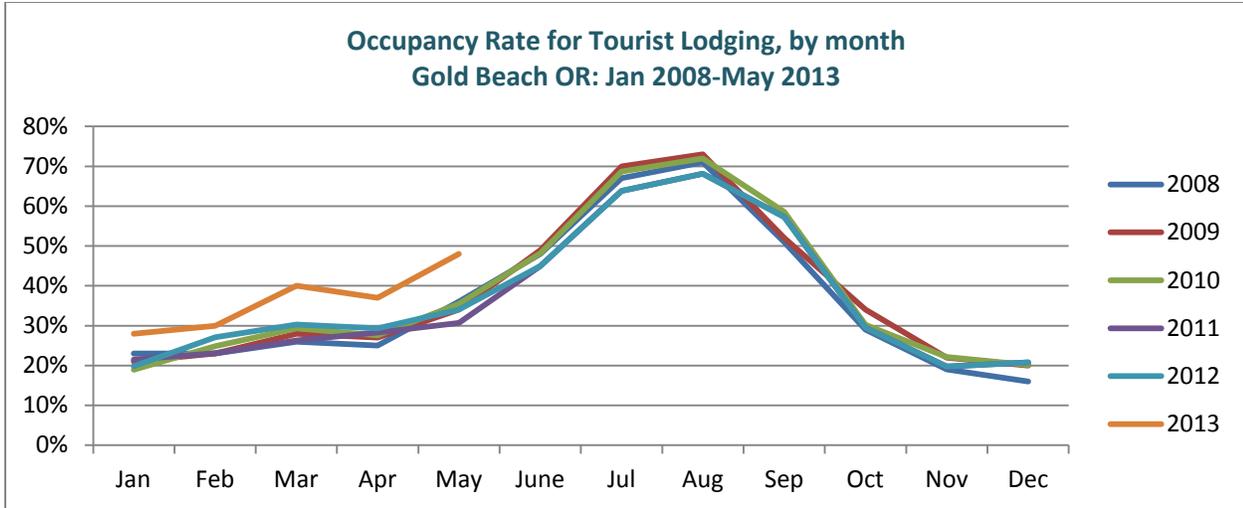
Visitor data for the Gold Beach Ranger District of the Rogue River-Siskiyou National Forest is based solely on information collected from fee-based recreation site. Since fees are not collected from day use areas, trails and dispersed camping sites, the data does not reflect the *total* number of annual visitors. Furthermore, seasonal operating schedule changes, facility or road repairs, weather and nearby logging project activity may influence access to recreation sites and resulting visitor numbers. **Nearly across the board, however, National Forest campground rentals were down significantly between 2009 and 2012.**

**Rogue River-Siskiyou National Forest, Gold Beach Ranger District
Documented Visitation, 2009-2012**

Campground rentals	2009	2010	2011	2012
Lobster	1091	669	700	688
Quosatana	4057	4760	4189	3176
Foster Bar	957	1099	1188	965
Ludlum	515	534	588	481
Miller	1002	2149	1970	1079
Nook	856	1143	1767	1150
Redwood	2274	2782	3995	2275
S Fork Camps	663	603	790	469
Lobster Day use	Estimated 77,000 vehicle/yr visit the cg's, inclusive of day use			
Quosatana day use				
Foster Bar day use				
Cabins rentals				
Packer's Cabin RR (holds 12)	n/a	131	83	92
Ludlum House (holds up to 60)	n/a	191	195	174
Snow Camp RR (holds 3-4)	n/a	101	95	97
LOW LO RR (holds 3-4)	n/a	110	131	122

Source: Rogue River-Siskiyou National Forest

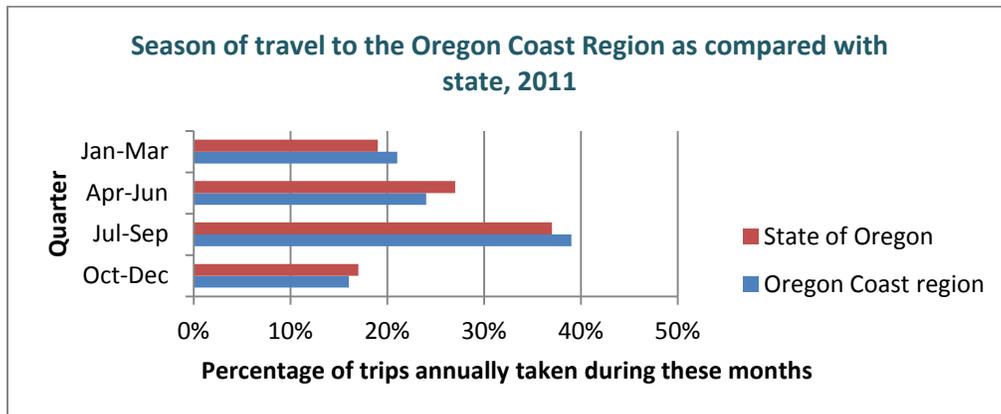
Local observers across the region, including the Forest Service, note **evidence of an upswing in tourism in 2013**, and this is borne out by detailed occupancy rates that are available for Gold Beach, the region's tourism services center. The chart below shows that occupancy rates are up sharply for the first five months of 2013 as compared with the previous 5 years, and in fact, these occupancy rates have not been seen for at least ten years.



Source: City of Gold Beach

B. Seasonality

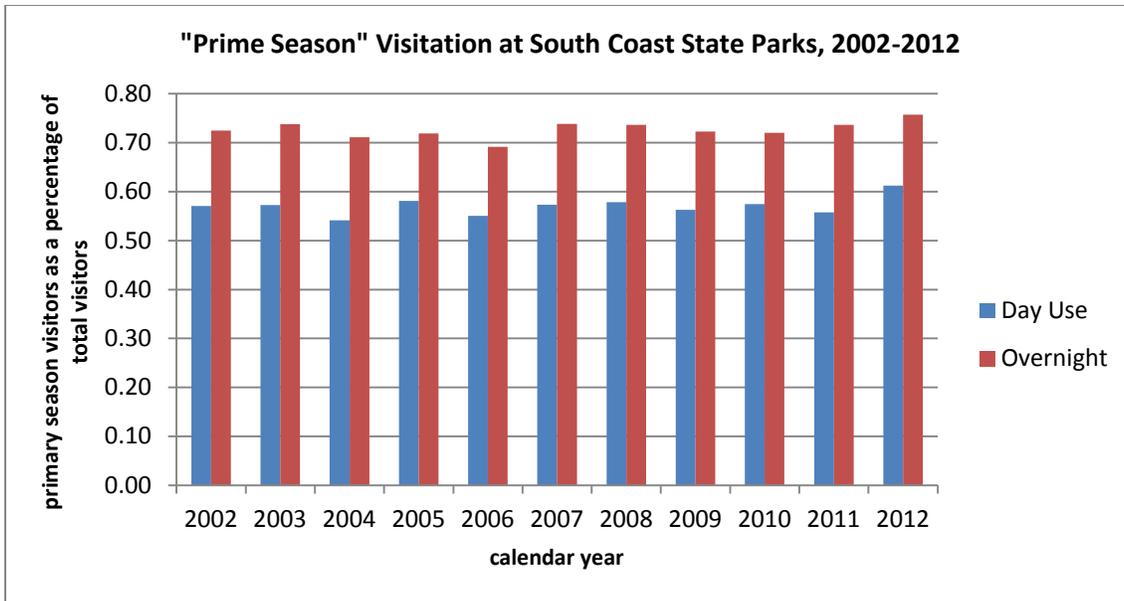
The seasonal pattern of visitors to the coast is similar to that of the state, except that the coast receives slightly more of its visitors in the spring and fall than the state. Summer is by far the busiest season.



Source: Longwoods Research

Section II-A of this report above also illustrates the seasonal distribution of visitors in terms of foot traffic at visitor centers.

The majority of state park users are also concentrated during state parks “primary season” from May 1 through Sept 30. The trend is that an increasing proportion of state park users are visiting the South Coast during prime time. This suggests **opportunities to expand visitation in the off-season.**



Source: Oregon Department of Parks and Recreation

C. Visitor profile

As in other regions of the state, tourism promoters rely on visitor profile information developed semi-annually for Travel Oregon by Longwoods International for Travel Oregon. The most recent regional visitor profile was completed in 2011. But, sensing differences in the profile of visitors to the isolated and lightly developed South Coast as compared with other parts of the coast, both Bandon and Gold Beach are participating in a detailed visitor profile study sponsored through the Southern Oregon Visitors Association and conducted by DCG Research. The year-long study wrapped up in June 2013, but final quarter results are not yet available.

Based on visitor center and web surveys so far, below are some interesting preliminary results that help show both the commonalities and differences between the northern and southern parts of the Wilder Rivers Coast region as represented by Bandon and Gold Beach.

One significant difference between the two communities is the planned length of stay. While this particular data sample is not large enough to draw definitive conclusions, it is notable that the % of visitors who intend to stay in the area at least 7 nights is 59% higher in Gold Beach than in Bandon.

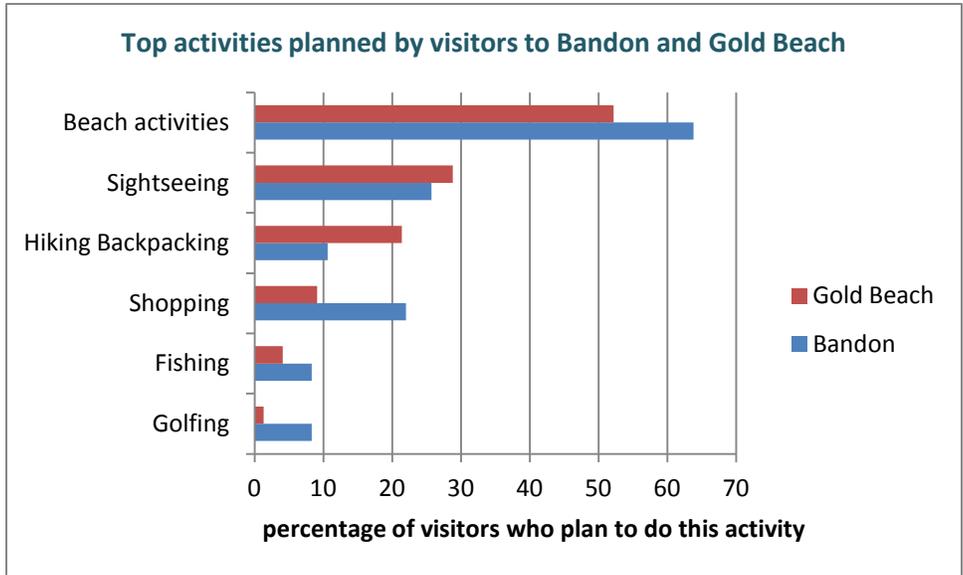
Visitor Profile Data, Gold Beach and Bandon 2013	Bandon	Gold Beach
Repeat visitor?	64.9%	50.0%
Most common party size = 2 people	66.7%	63.6%
Expected length of stay- 2-3 nights	44.0%	63.6%
Expected length of stay- 7 nights or more	18.1%	26.8%

DCG Research

Six Southern Oregon communities, including Gold Beach and Brookings, participated in this study. For the six communities in total, another interesting finding is that most visitors have modest household incomes (under \$75,000 per year for an average party size of two). People who use the website have slightly lower incomes than people who come into the visitors center for information.

Visitor activities

According to the DCG research, the top three reasons cited for visiting both communities are “beach activities”, “sightseeing” and “hiking/backpacking.” More specifically, the top five activities for Bandon and Gold Beach break out as follows:



Source: DCG Research

Hiking/Backpacking is far more popular in Gold Beach, as well as fishing. In Bandon, shopping and golf are more popular than in Gold Beach.

Together the two communities represent a blend of what attracts visitors to the Oregon Coast region, as well as visitors to the adjacent Southern Oregon region. This correlates with local stakeholder perceptions that the Wild Rivers Coast communities don't neatly fit the profile of either region (or the associated regional marketing/brands). For example, casinos are a significant draw for Coast visitors in general, but not likely to be for the Wild Rivers Coast. Wineries are a sizable draw for Southern Oregon, but similarly not likely to be for the Wild Rivers Coast.



Source: Longwoods International

It is worth noting that in both regions, historic attractions are more popular than for the state as a whole. Additionally, it is worth noting that eco-tourism slightly lags the statewide average (7%) in terms of its popularity on the Coast (6%) and in Southern Oregon (6%). Bicycling also lags behind the statewide average, with just 1.5% of visitors to the Coast and .5% of visitors to Southern Oregon exercising their pedal power.

Where visitors come from:

For the entire Oregon Coast region, Oregon tops the list of visitors’ home states, followed by Washington and California. The most common home urban areas for coast visitors are Portland, Eugene and Seattle, in that order. More information is included in the appendix of this report.

Through the Visitor Center survey in Gold Beach and Bandon, there is more recent and specific information about where visitors to the South Coast call home. As was expressed in interviews with local stakeholders, the visitor profile is quite different between the northern part of the Wild Rivers Coast region (Bandon) and the central/south (Gold Beach). Gold Beach has more visitors from the state of California, and Bandon from Oregon.

Home States of Visitors: Bandon and Gold Beach compared with official Travel Oregon regions

	Bandon, visitor center 2012-2013		Gold Beach visitor center 2012-2013		Oregon Coast region, 2011	Southern Oregon region, 2011
Local	6.7%	43.9%	3.6%	32.9%	64%	42%
Oregon	37.2%		29.3%			
Northern CA	10.3%	15.2%	18.3%	24.3%	8%	26%
Southern CA	4.9%		6.0%			
Washington	9.9%		6.1%		18%	12%
Idaho	2.7%		2.0%		2%	4%
Other	28.3%		34.7%		8%	14%

Source: DCG Research and Longwoods International

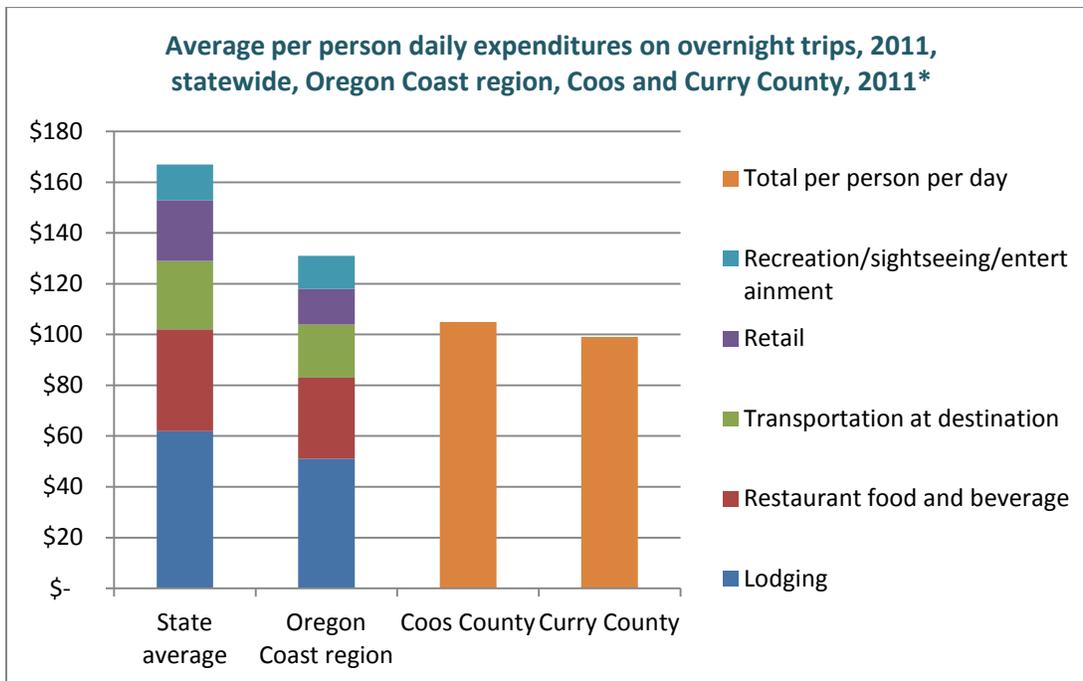
Anecdotal evidence supports an increase in international visitors. According to Travel Oregon’s International Travel Division, Oregon is continuing to see increases in the size and diversity of its international market. Statewide, the largest international markets for Oregon tourism are:

- Canada
- Japan
- United Kingdom
- Korea
- Germany

China is growing as a source of visitors, and Brazil and India are emerging as well, both nationally and here in Oregon.

What visitors spend:

Finally, average daily expenditures by visitors are an important measure of economic impact. According to the Longwoods research (based on 2011 data), overnight visitors to the Oregon Coast Region spent \$131 per person per day. This is just 78% of what the average overnight visitor to Oregon spends per day (\$167), as shown below. And the South Coast (Coos and Curry Counties) appears to draw much lower than the average spending by overnight visitors to the Oregon Coast in general. According to Dean Runyan research for Travel Oregon, overnight visitors to the South Coast spent an average of \$105 per day. Curry County overnight visitors spent even less: \$99 per day. That is 60% of what the average Oregon overnight visitor spends!



**= county data for visitors who stay in commercial lodging facilities only
Source: Longwoods International and Dean Runyan Associates for Travel Oregon*

The markedly lower expenses in most categories of spending suggest room for growth in the market if new attractions and visitor services are developed.

Data is only available for expenditures by day trippers at the state level, and according to that data, they spend \$52 per day: less than a third as much as overnight visitors. Thus, **lodging is a key element for capturing higher**

visitor spending across all categories of expense. The appendix includes a chart of the actual dollar amounts spent per category.

D. Businesses

There is not a consolidated inventory of tourism related businesses in the WRC region. Consolidating an inventory of tourism businesses, especially the small businesses that offer experiential tours and guiding, would be a useful short term project.

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

A. Transportation data

Highway Traffic Volume for major routes to the Wild Rivers Coast (average daily traffic)

Mile marker	Highway 101 Average Daily Traffic	2011	2009	2007	2005	Change 2005-2011
222.71	just north of SOR airport turnoff	6800	7100	7800	7700	-12%
222.75	just south of SOR airport turnoff	7700	8000	8900	8700	-11%
236.77	Coos Bay, north city limit	17300	17600	21300	22100	-22%
239.22	Coos Bay, south city limit	22700	22600	26400	29900	-24%
243.99	just north of Highway 42 turnoff	13500	13700	14800	15100	-11%
244.99	just south of Highway 42 turnoff	4800	4800	6100	6400	-25%
260.64	Bandon, north city limit	6200	6200	7700	8000	-23%
275.87	Bandon, south city limit	7400	7600	8500	8500	-13%
285.78	Coos-Curry county line	3300	3400	4600	4800	-31%
299.83	Port Orford, north city limit	3500	3700	4400	5000	-30%
307.78	Entrance to Humbug Mtn Picnic area	2300	2400	2600	2700	-15%
327.85	Gold Beach, north city limit	5600	5900	6700	5900	-5%
328.75	Gold Beach, south of 1st St	8700	9100	9800	10300	-16%
339.10	Pistol River Bridge	3100	3200	3400	10300	-70%
355.88	Brookings, north city limit	8100	8400	9000	10000	-19%
357.98	Brookings, south city limit	18600	19500	18300	24500	-24%
363.11	Oregon-California border	7500	7900	7400	7600	-1%

Mile marker	Highway 99 Average Daily Traffic	2005	2007	2009	2011	Change 2005-2011
4.68	just west of Grants Pass	10500	10900	11400	11700	-10%
27.71	Cave Junction, north city limit	7600	8900	8000	7700	-1%
29.27	Cave Junction, south city limit	6600	6900	7800	8600	-23%
41.32	O'Brien, just north of CA border	2800	2900	2900	2900	-3%

Mile marker	Highway 42 Average Daily Traffic	2011	2009	2007	2005	Change 2005-2011
76.4	just west of I-5 south of Roseburg	22000	22400	25200	22400	-2%
73.27	just west of intersection with Highway 99	9900	10100	11000	10900	-9%
23.03	just west of Powers Highway turnoff	3800	3700	4300	5300	-28%
20.01	Myrtle Point, north city limit	6300	6400	7600	6900	-9%
12.8	Coquille, south city limit	7500	7700	8600	9400	-20%

10.87	just south of Highway 42S turnoff	8800	8900	8600	9400	-6%
0.70	just east of 101 btwn Bandon and Coos Bay	8200	8400	10600	10400	-21%

Source: Oregon Department of Transportation

Airport Enplanements (Boarding)	2012	2011	2010	2009	Change 2011- 2012	Change 2009-2010
Southwest Oregon Regional Airport (North Bend, OR)	18283	22066	21124	22395	-17.14%	3.26%
Del Norte County Airport (Crescent City, CA)	12547	14887	14341	11490	-15.72%	24.81%
Mahlon Sweet Field (Eugene OR)					3.45%	8.09%
Rogue Valley International Airport (Medford OR)					3.94%	8.44%

Source: U.S. Department of Aviation

B. Selected Market and Economic Impact Information for Key Niche Markets

Bicycle Tourism

- A [1999 economic impact study of Maine's bicycle tourism](#) concluded that the state's 2 million bicycle tourists contributed \$66.8 million in direct and indirect economic benefits. This amounts to expenses, or an average of \$34 per person. The vast majority of visitors were day trip cyclists, who averaged \$25/day if from out of state and \$4/day if in-state. However, the 2% of bicyclists on guided tours (self-guided or guided) accounted for 17% of the economic benefits, spending \$55 and \$115 per day respectively. This underscores the importance of developing value-added services and overnight lodging to the bicycle tourism mix in order to generate economic benefits.
- A [2004 study of the economic impact of bicycle tourism in the outer Banks of North Carolina](#) in the Outer Banks of North Carolina concluded that each visitor who reported bicycling while in the region spent \$88, which, for 680,000 visitors adds up to \$60 million per year. Bicycle tourism at this scale also generated 1,400 jobs, or 1 job for every 486 bicycle-related visits.
- In [Quebec, a 2005 study](#) found that bicycle tourists spent \$83/day on average, which was 24% higher per day than the overall average for tourist spending.
- A [2010 study of the economic impact of Wisconsin's bicycle tourism](#) estimated the average daily expenditures of different types of bicyclists. Trail riders generated the smallest economic impact (\$17.99 in daily expenses if a resident, \$33.95 if a non-resident) and riders on multi-day tours generated the highest economic impact (\$80.84 per day)
- A [2009 study of the economic impact of a multi-day championship cyclocross event in Bend, Oregon](#) found that the contestant/traveling party expenditures per person per day averaged \$72.80 per day. The total contestant related travel spending was \$847,000. Non-contestants (vendors, spectators, etc) generated another \$228,576 in expenditures, so the total economic impact of a single 3 day event was \$1.08 million. 86% of visitors came from outside Oregon, which is a much higher percentage than the 60% average for all Bend's tourism. Surprisingly, when visitors were asked about their interest in moving or buying real estate in Bend as a result of their visit, 10% answered "definitely yes", suggesting a potential longer term multiplier effect on the local economy.
- Another [2010 study of the economic impact of a specific bicycle event](#) in Menomonie, Wisconsin found that *spectators* for the professional road race each spent an average of \$47 on refreshments, souvenirs.
- Oregon just completed a statewide study of the economic impact of bicycle tourism.
<http://industry.traveloregon.com/research/archive/the-economic-significance-of-bicycle-related-travel-in-oregon-2012-dean-runyan-associates/>

Nature Based Recreation

- This 2002 [Sierra Institute report](#) catalogues past tourism and economic development projects in Port Orford as a case study of the Northwest Forest Plan Economic Adjustment Initiative years. It describes the Canopy Project: the actual canopy project report produced by Egret Communications is not available.
- [Oregon State Parks and Recreation Department Master Plan for Curry County](#): last updated in 2003.

Heritage and Cultural Tourism

- A [2006 study by the Oregon Arts Commission](#) cites a 2003 national study finding that cultural and heritage tourists spend more than other travelers (\$623 vs. \$457), are more likely to spend \$1,000, are more likely to stay in a hotel, motel or B and B, and take longer trips.

- [Nebraska’s 2011 Heritage Tourism Plan](#) cites even more recent research finding that 78% of adult leisure travelers in the United States are considered “heritage traveler.” They are more likely to take part on a wide variety of activities when they travel: 17% participate in four or more activities, as compared with. 5% of all travelers Baby boomers make up one of the strongest heritage tourism markets.

Agritourism

- The [most recent and comprehensive study on the economic impact of agritourism](#) was completed in 2009 in California. Results: 43% of small farms earned at least \$25,000 in supplemental income from their agritourism activities. However, these include wineries, so the results need further analysis.
- In 2010, [Travel Oregon commissioned a market study connected with its “Oregon Bounty”](#) promotional plan featuring Oregon products and especially Oregon food products. As such, its findings relate to agritourism and culinary tourism. Key findings include:
 - Over 55% of surveyed visitors participated in at least one culinary-related activity (including touring wineries, breweries, wine trails and farmers markets, attending wine and culinary festivals, sampling local foods and taking cooking classes).
 - Those aged 35-64 (GenX and Baby Boomers) were more likely to participate in such activities
 - Higher income people were also more likely to participate
 - Food products were the Oregon product with the highest visitor awareness, followed by forest products
 - Oregon visitors spend an average of \$142 on local food products per visit.
 - 42% said the opportunity to buy local food products made them more likely to visit again in the future
- The national Outdoor Industry Association commissions an annual [Active Outdoor Recreation Economy Report](#) (2013) as well as other specialty reports such as a [Special Report on Paddlesports](#) in 2009.

C. Regional Travel Oregon Data for Oregon Coast

Top urban zip codes for Oregon Coast Visitors, 2011

City	% of O.C. visitors from urban areas
Portland	54%
Eugene	10%
Seattle	10%
Medford/K'Falls OR/CA	3%
Sacramento-Stockton-Modesto CA	3%
Boise ID	2%
Yakima WA	2%
San Francisco/Oakland/San Jose	2%

Source: Longwoods International for Travel Oregon

Top home states for Oregon Coast Region Visitors, 2011

State	% of visitors to Oregon Coast region	(for comparison: % of visitors to Southern Oregon (Medford area) region)
Oregon	64%	42%
Washington	18%	12%
California	8%	26%
Idaho	2%	4%

Source: Longwoods International for Travel Oregon

Average Daily Visitor Expenses, Oregon and Oregon Coast region, 2011

	Oregon day trip	Oregon overnight	Coast, overnight
Lodging	n/a	\$62	\$51
Restaurant	\$19	\$40	\$32
Retail	\$16	\$27	\$21
Transportation	\$9	\$24	\$14
Recreation/Entertainment	\$8	\$14	\$13
Total	\$52	\$167	\$131

Source: Longwoods International for Travel Oregon