

TRAVEL  OREGON

# NORTH COAST TOURISM STUDIO

Baseline Assessment  
August 2018



Prepared for Travel Oregon by:  
Write to Know Consulting, Eugene Oregon  
[www.write-to-know.com](http://www.write-to-know.com)

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\* All photographs by Gary Halvorson, Oregon State Archive

## I. Introduction

This report includes qualitative and quantitative baseline information about Clatsop and Tillamook Counties, the North Coast region of Oregon. This Tourism Studio is an adaptation of Travel Oregon's award-winning Rural Tourism Studio, which aims to stimulate new tourism development activities that generate business revenue, jobs, entrepreneurial opportunities, and revenue for public services over time. In the North Coast, the focus is as much on managing and distributing existing tourism as it is on increasing tourism, so that the region can continue to mature as a world class destination while preserving its unique environment and vibrant community cultures.

The North Coast Tourism Studio workshops, which will launch in September 2018, are designed to help public agencies, private enterprise, community leaders and youth work together for a healthy regional tourism economy. According to local steering committee notes, the program specifically aims to help this region address key challenges it faces in the areas of:

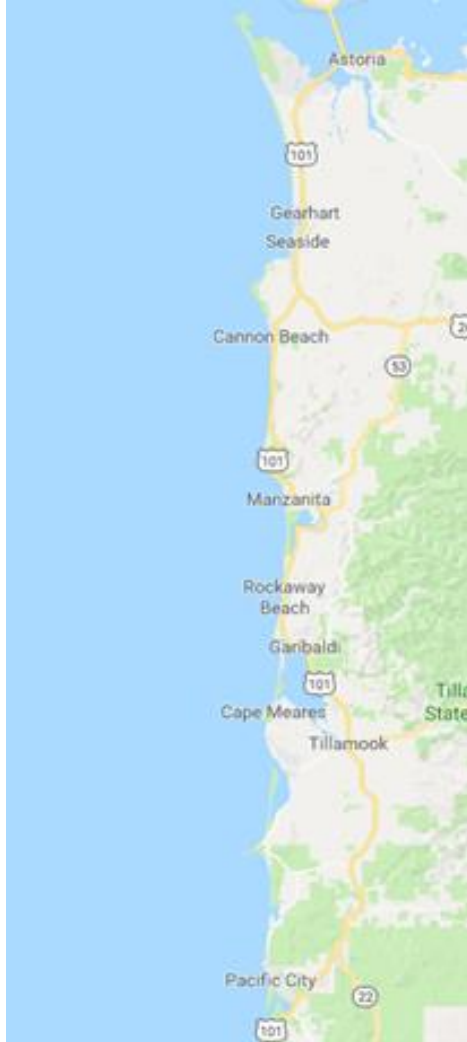
- A sustainable system of tourism that helps to support a stable year-round economy.
- Improved transportation system to ease congestion and expand transportation options
- Better work force training to improve level of service
- Effectively and broadly communicating locally to build deeper understanding of how tourism benefits and contributes to the regional economy.
- Greater understanding and respect for our historical cultures and natural surroundings

A list of the local Steering Committee members, who have worked to customize and organize the North Coast Tourism Studio, is included as an Appendix. Baseline report data will be combined with workshop participant surveys, ongoing key stakeholder interviews and project implementation updates to assess the value of the Tourism Studio program and provide useful information to help local participants gauge their progress.



## II. General community profile and context

The North Coast region is defined by its coast, the 90 mile stretch of coastal communities from Pacific City north to Astoria. This accounts for the majority of population and development within the two counties on this part of the coast, Clatsop and Tillamook.



The region covers 2417 square miles of land mass, and another 159 square miles that lies under water. Unlike most other rural counties in Oregon, there is very little public land along the coast except for the beach itself which is publicly owned in its entirety.

The region's coastal communities are unusually diverse, from working harbors to boardwalk-lined beaches, from fishing cottages to luxury developments, from century farms to cutting edge art galleries. The ecology is diverse, from the blustery mouth of the Columbia River to teeming estuaries, wide beaches, sheltered coves with rain-shadowed microclimates, dramatic rock formations, low flat fields that butt up to the Coast Range and high bluffs that jut into the ocean. This area also holds the coast's largest concentration of nationally significant heritage resources at the terminus of Lewis and Clark's epic journey to the Pacific Ocean.

With the closest coastline to the Portland Metropolitan area, the North Coast draws large crowds that threaten to overwhelm the small communities and limited infrastructure. Issues of concern include traffic congestion, overuse of fragile natural areas, insufficient and increasingly expensive housing, limited off-season job opportunities, and potential loss of authentic cultural identity.

For these reasons, Clatsop and Tillamook Counties, with many local, regional and state partners, are sponsoring a Tourism Studio that focuses on Destination Management as a means of continuing to gain the benefits of tourism while retaining a high quality of life for the folks who call this place home.

A key goal for the Tourism Studio, as per the region's application, is to cultivate ideal "visitors who seek natural, historical and artistic beauty while bringing a societal and community-based mindset with them as they travel" as a strategy for sustainable, beneficial tourism

## **A. History and Topography**

### ***History***

The fertile natural environment of this region has been home to permanent Native American villages for thousands of years, bands and tribes including the Clatsop, Chinook, Tillamook, Kathlamet and more whose descendants are largely part of the Confederated Tribes of Grande Ronde. The region was an important center of inter-tribal trade as well.

The first known white person to land on the Oregon Coast, Robert Gray, arrived here on the North Coast. He first came ashore in Tillamook Bay in 1788, thinking the bay was the mouth of a large river. Four years later, he “discovered” the mouth of the Columbia River at Astoria.

Not long after, the Lewis and Clark Expedition completed its 18-month overland journey from Illinois to the Pacific Ocean in 1805: the party famously (and miserably) wintered over at Fort Clatsop. In 1811, a fur trading station was established at the mouth of the river, and the settlement was named Astoria after John Jacob Astor, a wealthy New York-based investor and fur trader who was active in the region. Astoria is now recognized as the oldest American city west of the Rockies. Its long settlement has left it with nationally significant heritage landmarks, sites and architecture.

With Astoria’s direct river access, Clatsop County grew more quickly than Tillamook County. Clatsop County was organized in 1844, four years before the Oregon Territory itself. By the time Tillamook County’s first permanent white settler, Joseph Champion, arrived in 1851, Astoria was well on its way to being one of the wildest towns on the West Coast. In 1853, Tillamook County was formed. In 1855, Clatsop and Tillamook County communities were connected over the ocean by the Morning Star. This boat, made partly from salvaged shipwreck parts, provided the only transportation between Tillamook and Astoria to bring products and supplies to market and back.

While the economies of both regions evolved around fishing and timber, which are still important today, their topography gave each some unique competitive advantages. The flat land and abundant fresh water in Tillamook County created ideal livestock grazing conditions. Agriculture, and particularly dairy, flourished. In Clatsop County, access to shipping resources led to an abundance of fish canning operations and associated fish processing technologies.

### ***Access***

The North Coast is the most accessible ocean region from the Portland metropolitan area. There are two primary routes to Astoria on the north edge of the region: Interstate 5 via Longview Washington to US Highway 30, or US Highway 30 directly from Portland. The state of Washington is accessible via the Astoria-Megler Bridge at the mouth of the Columbia River. The next closest bridge over the river is 60 miles to the southeast.

Cannon Beach and Tillamook connect to the metropolitan area via US 26 and OR 6. The Pacific Coast Highway, US 101 is the primary, in fact the only, north-south connector. The highway is prone to flooding in the Tillamook area and to high winds from winter storms.

Sunset Empire Transportation District (Clatsop County) and Tillamook County Transportation District (The Wave) provide regularly scheduled bus service connecting local communities. A recently completed strategic plan for the Sunset Empire District concludes that the routes are well-located, but that hours of operation don’t adequately serve the needs of workers or visitors.

The two Districts are also part of a five-county collaborative that connects the North Coast to Portland, Lincoln City and Salem and locations on route. Greyhound Bus has a route to Astoria from Portland. Greyhound Bus serves Astoria, Tillamook, Seaside, Gearhart, Arch Cape and Warrenton.

The nearest international airport is in Portland, 85-100 miles away depending on local location. There are two local public use airports in Tillamook County at Garibaldi and Pacific City, and one in Clatsop County at Astoria.

The scenic beauty of the region is confirmed by its two official scenic byways: the nationally designated “Pacific Coast” Scenic Byway (US Highway 101 along the entire Oregon Coast) and the new Oregon-designated “Trees to Seas” Scenic Byway between Banks and Cape Meares.

## B. Demographics

Most of the North Coast is rural: Astoria, the region’s largest city, has less than 10,000 residents. Most of the population of each county is concentrated near the coast and the jobs located there. Clatsop County’s population is larger, and its land mass smaller, than Tillamook County.

Population change by County, compared with Oregon						
	2010	2012	2014	2016	2017	% Change 2010-2017
Clatsop County	37070	37190	37495	38225	38220	4.72%
Tillamook County	25260	25305	25480	25920	26175	3.62%
Oregon	3837300	3883735	3962710	4076350	4141100	7.92%

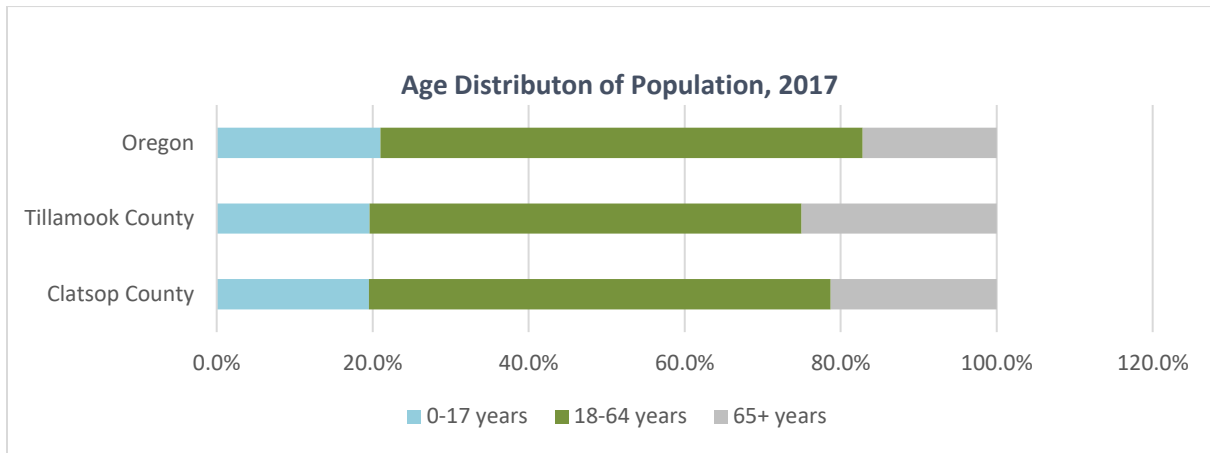
*PSU Population Research Center*

In Clatsop County, the majority of people (64.6%) live in one the five incorporated cities. In Tillamook, however, only 37.2% of people live within city limits. Throughout the region, population has grown slowly since 2010, with the exceptions of Warrenton and Manzanita: both cities grew significantly faster than the regional average. For the smallest communities in particular, population trend information can be misleading: a few more or less people can cause dramatic swings in percentage changes.

Population Change by City					
County	City	2010	2014	2017	% Change 2010-2017
Clatsop	Astoria	9475	9590	9735	2.74%
Tillamook	Bay City	1290	1320	1340	3.88%
Clatsop	Cannon Beach	1695	1705	1705	0.59%
Tillamook	Garibaldi	780	790	790	1.28%
Clatsop	Gearhart	1465	1475	1480	1.02%
Tillamook	Manzanita	600	615	635	5.83%
Tillamook	Nehalem	270	280	280	3.70%
Tillamook	Rockaway Beach	1315	1325	1350	2.66%
Clatsop	Seaside	6460	6560	6620	2.48%
Tillamook	Tillamook	4920	4880	4930	0.20%
Clatsop	Warrenton	5000	5175	5285	5.70%
Tillamook	Wheeler	415	405	405	-2.41%

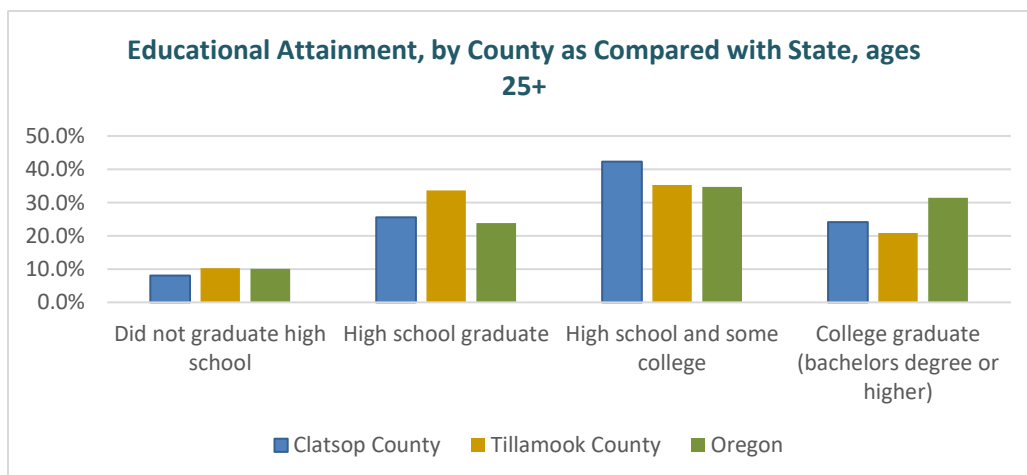
The population of the region is primarily white, but the Latino population is growing. In 2016, 8.2% of Clatsop County residents and 10.1% of Tillamook County residents were Latino/Hispanic, the majority of whom were of Mexican ancestry. This is less than the statewide average of 12.4%.

Rural populations are in general older than metropolitan areas, and this affects the size of the available workforce. In terms of age distribution on the North Coast, both counties have a similar share of the young people under the age of 18, and both are similar to the statewide average. However, Tillamook County has significantly more people of retirement age (over 65), and thus, a smaller working age population (see chart below).



Source: US Census

In terms of educational attainment, Clatsop County’s workforce (aged 25+) has more education on average than Tillamook’s. In the category of “high school and some college” (post-secondary education, including Associate Degrees), Clatsop County significantly exceeds even statewide averages. This is primarily driven by the fact that **in Clatsop County, a higher proportion (10%) of 25+ year old people hold Associate Degrees.**



Five-year average for 2012-2016, US Census American Community Survey, 2016

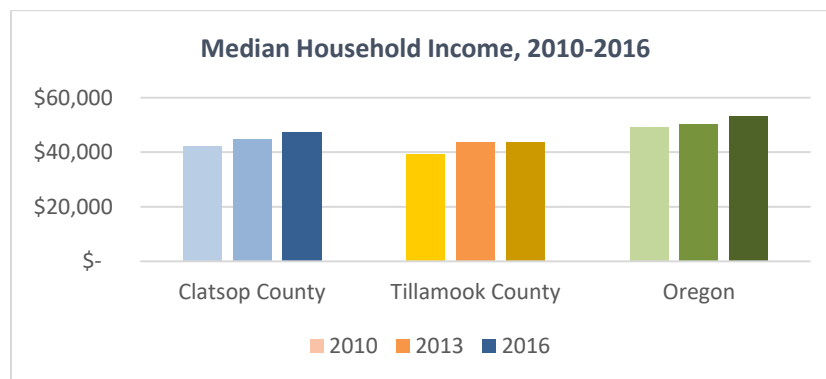
For residents between the ages of 18-24, the region mirrors the state in terms of high school graduates and those who have some post-secondary education. **Both Clatsop and Tillamook Counties, however,**

have a higher proportion of high school dropouts and a lower proportion of college graduates in this age group. This could negatively affect workforce readiness and income potential for the younger generation of workers. Tillamook County is closer to the state average than Clatsop.

Educational Attainment by County, as Compared with State, ages 18-24			
	Clatsop County	Tillamook County	Oregon
Did not graduate high school	20.6%	18.2%	13.4%
High school graduate	27.2%	30.7%	29.8%
High school and some college	48.8%	45.3%	48.2%
College graduate (Bachelor degree or higher)	3.4%	5.8%	8.7%

Five-year average for 2012-2016, US Census American Community Survey, 2016

Incomes have been growing since 2010, the depth of the national recession. However, incomes are lower and slower growing in Tillamook County. In 2016, Tillamook County’s median household income was \$43,777, or 82.2% of the state average. That same year, Clatsop County’s median household income was \$47,492, or 89.2% of the state average. This is despite the slightly higher educational attainment rates in Tillamook County as compared with Clatsop.



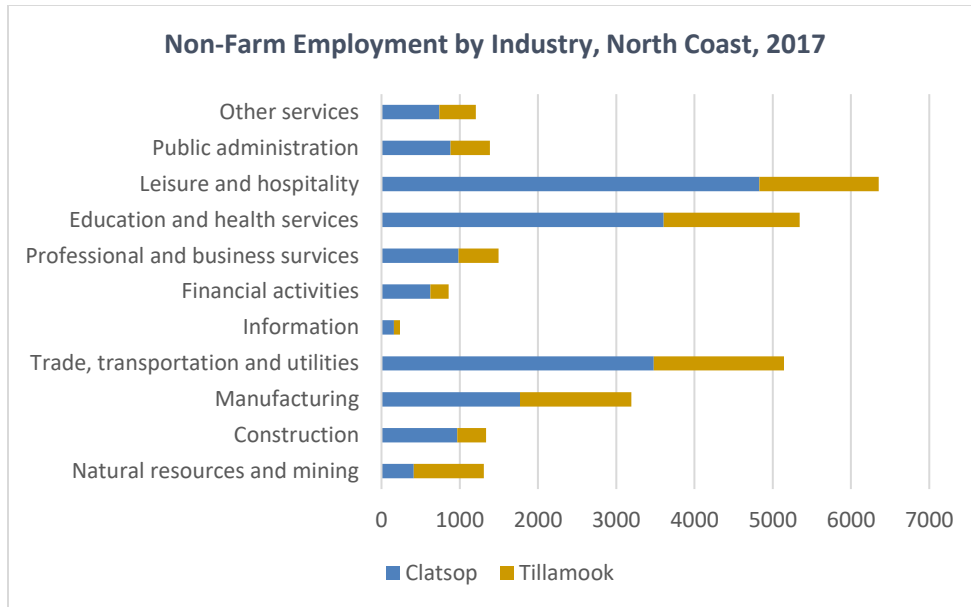
Source: US Census

In 2016, the percentage of people in the region who live in poverty (14% in Clatsop County: 15.4% in Tillamook) was slightly lower than the state average of 15.7%. The [Oregon Department of Human Services](#) has identified three “hot spots” of concentrated poverty in Clatsop and Tillamook counties, however, including a census tract on the east side of Astoria where the poverty rate approaches 25%.

### C. Economy

The chart below shows combined public and private sector employment by industry, excluding agriculture. More than 80% of all jobs are in the private sector. Tourism is the single largest industry, as shown by “Leisure and Hospitality” employment. Education and health services, as well as trade, transportation and utilities, both in the public and private sectors, are also large sources of employment. While traditional employment sectors continue to be important, including natural resources and manufacturing, the region is evolving toward being a service economy. (Oregon Bureau of Economic Analysis)



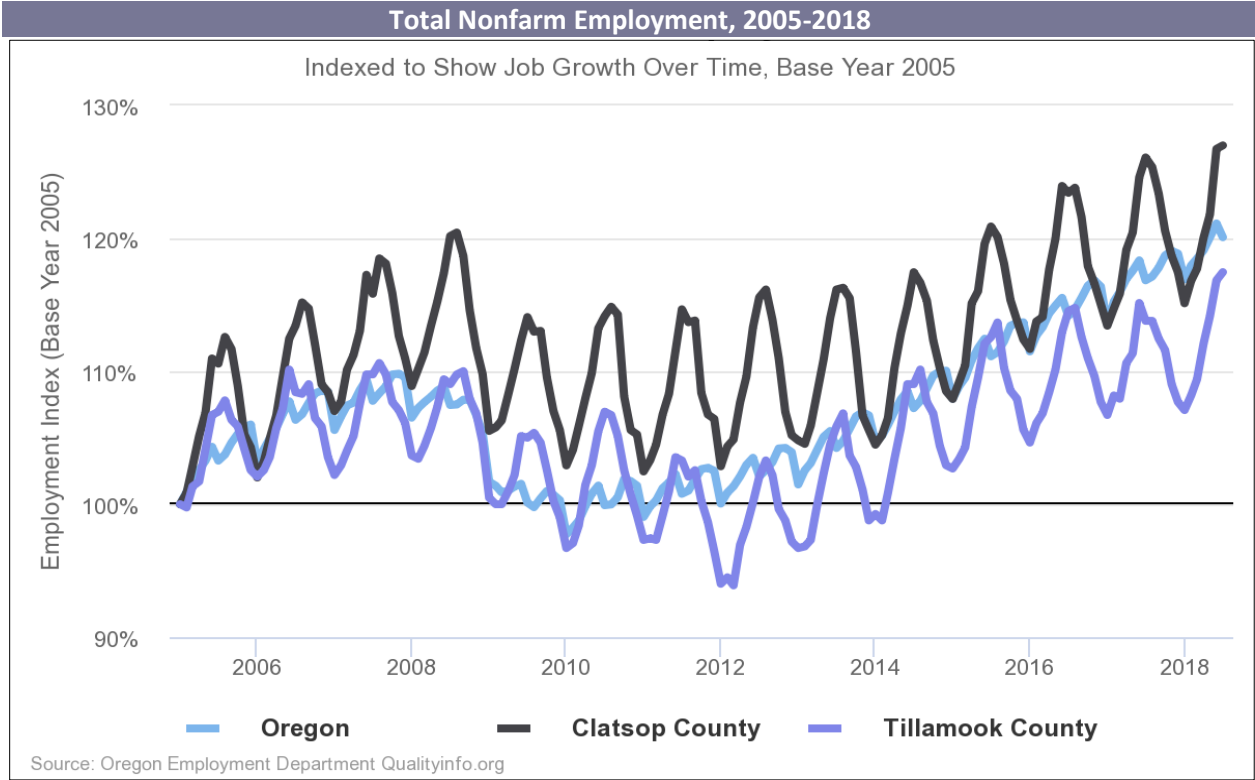


*Source: Oregon Employment Department*

Despite the perception that tourism jobs tend to be low wage and unstable sources of employment, a recent study by the U.S. Bureau of Labor Statistics determined such jobs disproportionately support career advancement. In [Travel: America’s Unsung Hero of Job Creation](#), the Bureau points to:

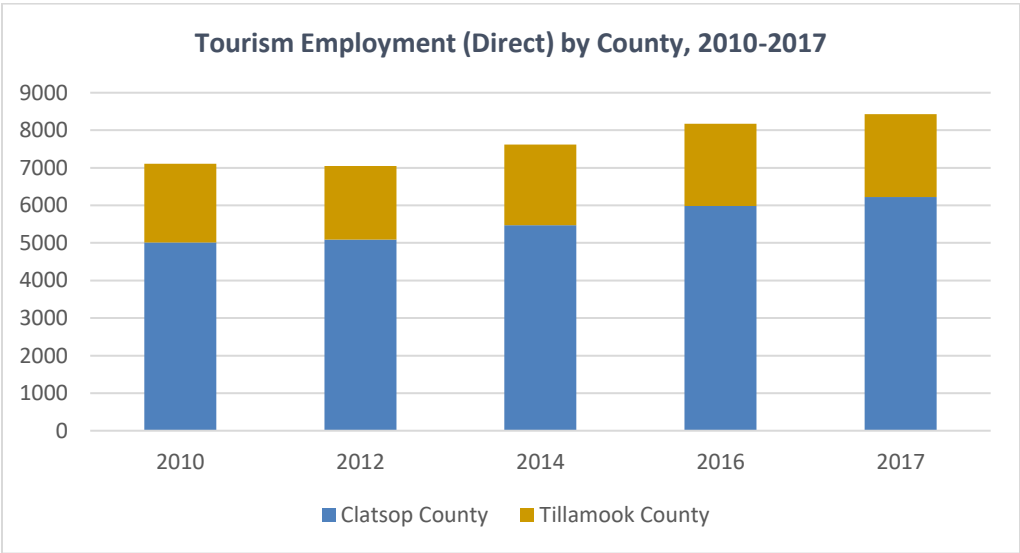
- Overall, Americans whose first job was in a travel-related industry obtain an average career salary of \$81,900—significantly higher than those whose first jobs were in manufacturing, construction, healthcare and most other U.S. industries.
- Nearly 40 percent of workers who began their career in travel reached an annual career salary in excess of \$100,000.
- The travel industry also offers a statistically better career starting point for Americans with less education: workers with a high school degree or less whose first jobs were in travel reached an average career salary of \$69,500, five percent greater than the average salary attained by workers who started off in other industries.

Jobs are growing in the region: by 2015, the total number of jobs passed surpassed pre-recession levels.



**Tourism employment has rebounded above pre-recession levels in both counties, though its growth has been more robust in Clatsop County.**

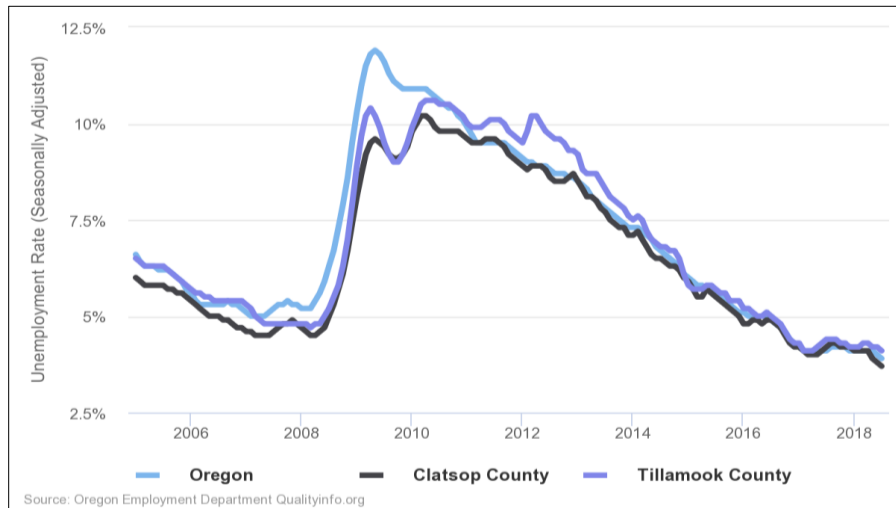
- In Clatsop County, tourism accounts for 24.3 % of total employment.
- In Tillamook County, tourism accounts for 16.4% of total employment



Source: Dean Runyan Associates for Travel Oregon

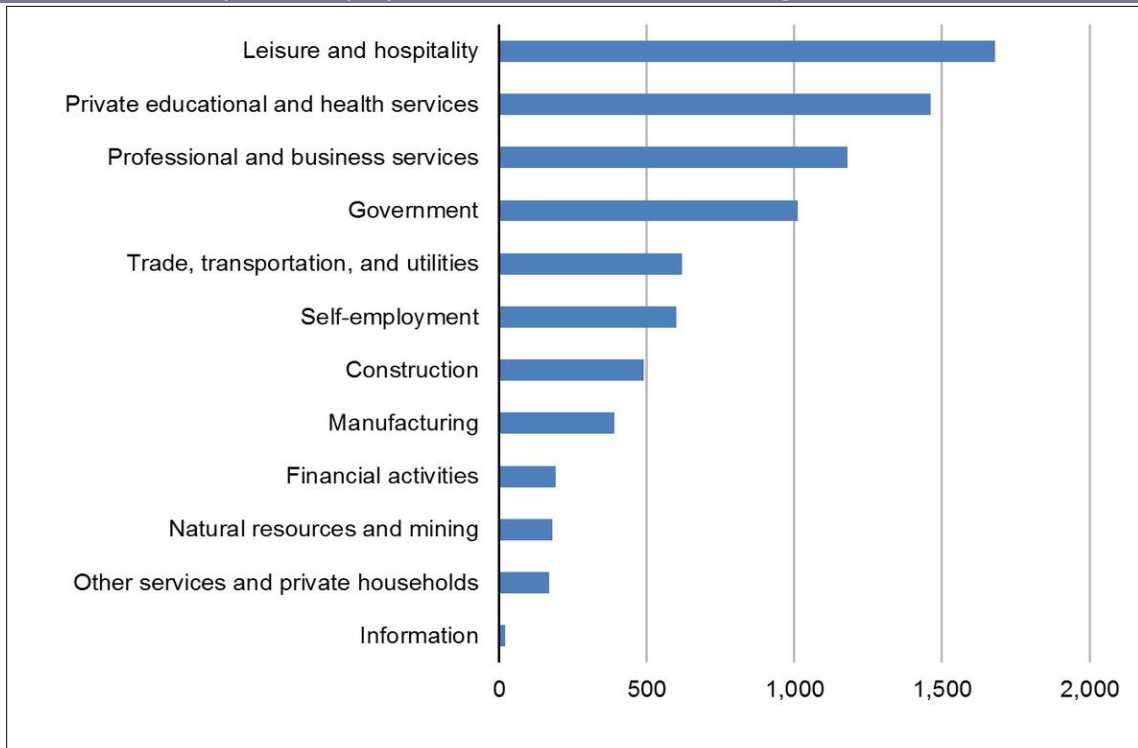
**Labor markets are tight in the region, which could slow future job growth.** Employers report worker shortages. Unemployment rates in Clatsop and Tillamook Counties have improved from recession levels, and now track closely with the state average.

**Unemployment rate 2005-2017**



For the larger region of “Northwest Oregon” (Benton, Clatsop, Columbia, Lincoln and Tillamook Counties), “leisure and hospitality” jobs are expected to grow the most quickly through 2027.

**Projected Employment Growth in Northwest Oregon, 2017-2027**

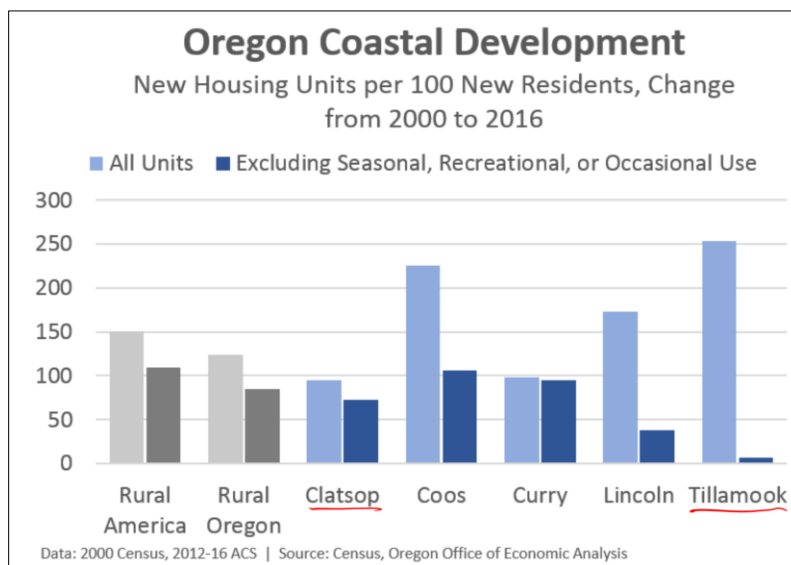


Source: Oregon Employment Department, “[Long Term Projections Show Broad-Based Job Opportunities in Northwest Oregon](#)”

## D. Workforce Housing

Affordable housing is another indicator of community well-being, and it is common to see housing costs rise in communities that are attractive to visitors, especially if located close to metropolitan areas. Lack of affordable housing can generate localized labor shortages for lower-paying part-time and entry-level jobs as well.

**Along the Oregon Coast, housing construction is increasingly tilted toward seasonal and recreation housing rather than accommodations for year-round residents.** In Tillamook county, this trend is extreme, with nearly all units built between 2000 and 2016 were vacation homes even as year-round population increased. This means, as shown below, that **the pace of year-round housing development is not keeping pace with population growth.**

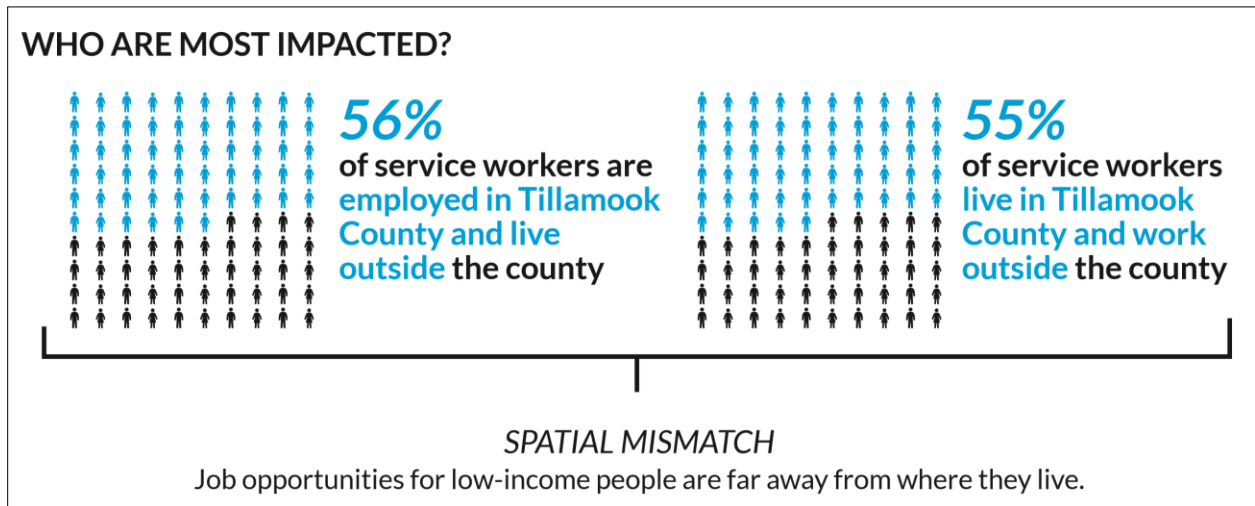


The shortage of year-round accommodations, especially in tourism destinations, is problematic in rural areas throughout the state because it drives up prices. **While rural incomes in Oregon are similar to other parts of rural America, it cost 30% more to buy and 16% more to rent a home here.** This holds true for all types of and ages of housing units. ([Oregon Office on Economic Analysis](#))

Recognizing this, Tillamook County developed a [dedicated housing strategy](#) in 2017 to expand the supply of quality, affordable housing for all residents. Clatsop County launched a similar effort that same year. The Tillamook study identified five barriers to address:

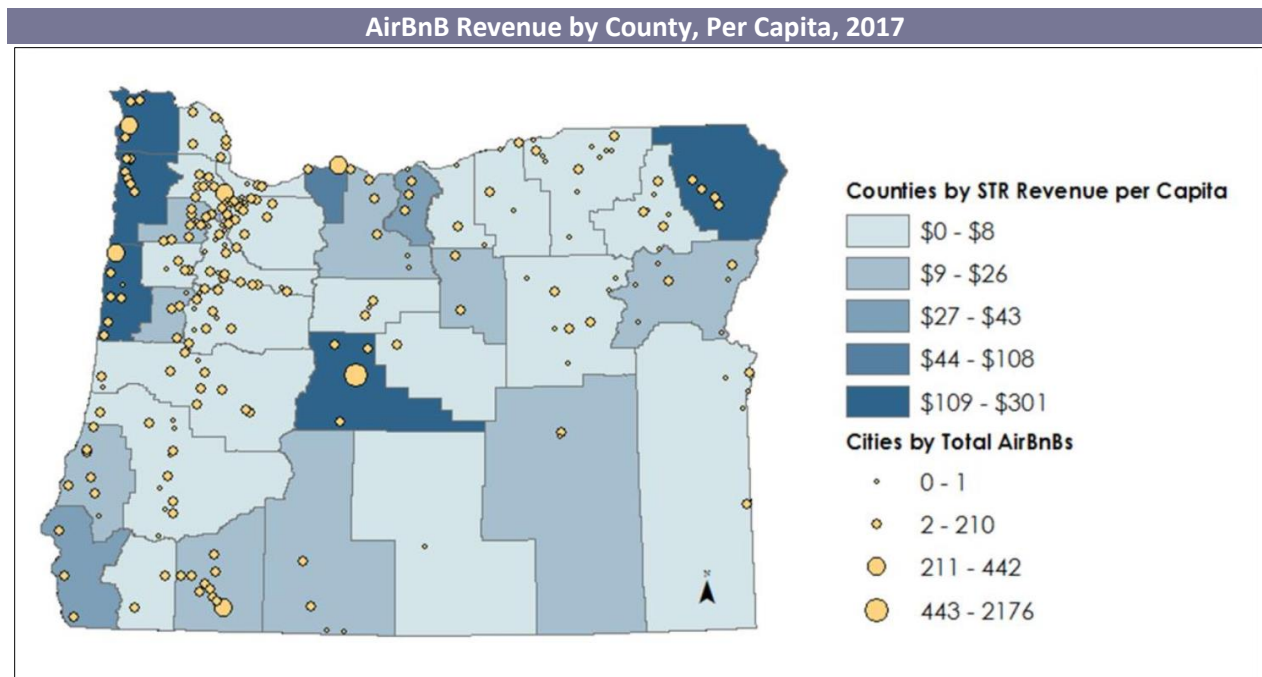
- Two distinct markets with different needs: a strong coastal market with rising prices, and a stable inland market without conditions for investment in improvements and new construction
- A low wage economy, where there are ten times as many workers in food and retail services making \$20,000/year as there are affordable rentals.
- Scarce land supply given the topography as well as regulations
- With limited supply, there are few options for residents to upgrade or downsize their housing, so people tend to stay put and the market stagnates. This lack of mobility makes it more difficult for seasonal employees from elsewhere to find a place to live.
- Tired-looking housing stock that weakens confidence in investing in improvements.

One specific impact on workforce housing is that lower income/wage people who can least afford to do so must travel further to work. And those who are seasonal workers have trouble finding housing at all.



Source: [Creating a Healthy Housing Market for Tillamook County, 2017](#)

While the impact of short term rentals (STRs) on local housing markets can vary depending on the regulatory environment, [a recent study examining the prevalence of AirBnB short term rentals](#) alone shows a per-capita concentration of such properties on the North Coast of Oregon. One can reasonably assume that the same trend would hold for STRs as a whole. It is not surprising then, to see increasing policy activity around STRs in the region, including in Manzanita, Gearhart, Seaside and Astoria.



Source: AirDnA property data, 2017, excluding Portland, Eugene, Salem and Gresham, from ["Assessing and Responding to Short-Term Rentals in Oregon"](#), DiNatale.

### III. Visitor Information

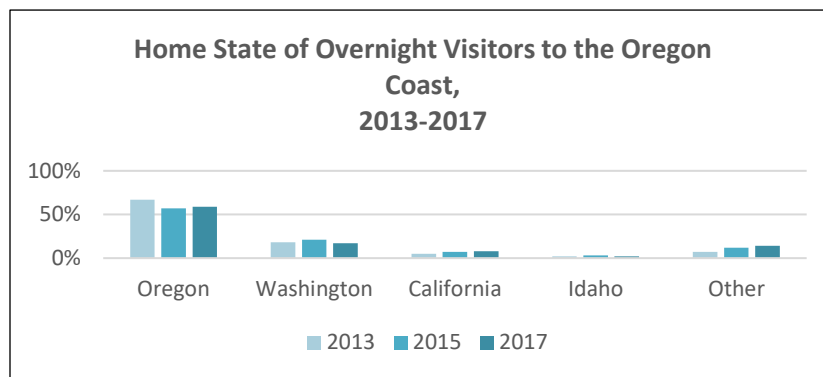
Each section of this chapter includes data for Oregon, the Oregon Coast as a whole, as well as data for the North Coast where available. More county-level data is available for Tillamook County than for Clatsop County. While recognizing that the two counties have differences in their tourism markets, the Tillamook data is included even when parallel data does not exist for Clatsop.

#### A. Visitor Profile:

##### 1. All Oregon Coast:

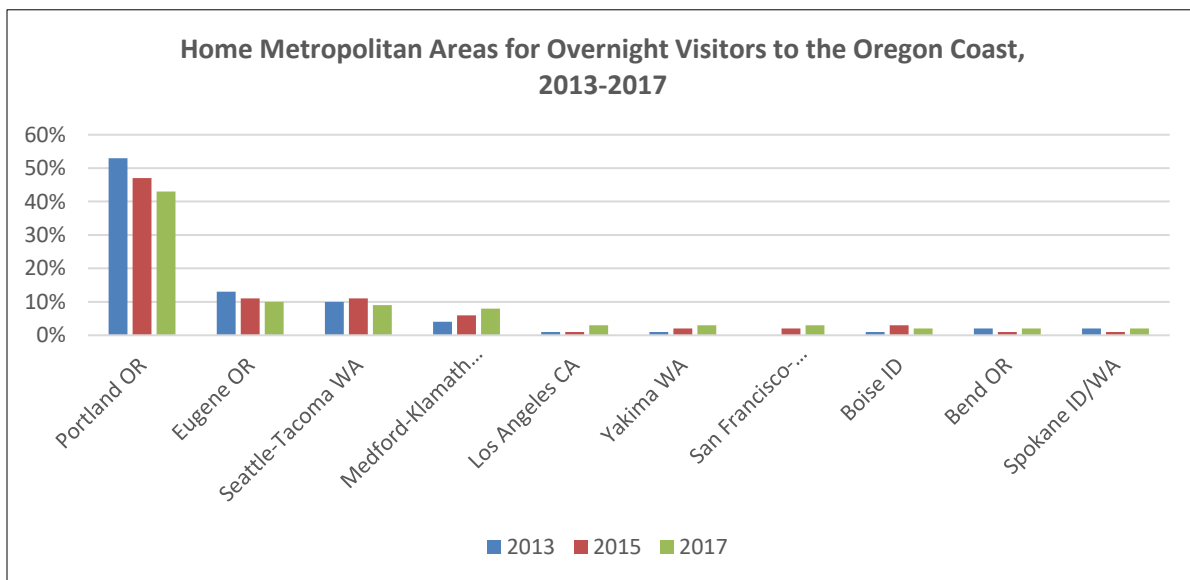
The following broad information about visitors to the Oregon Coast in general is drawn from research by Longwoods International, commissioned by Travel Oregon to track major trends over time. It is only available for the Coast as a whole, and the categories and definitions used by Longwood are consistent across all the states in which it works.

Visitors come to the Coast from around the world, but the majority come from Oregon and Washington.



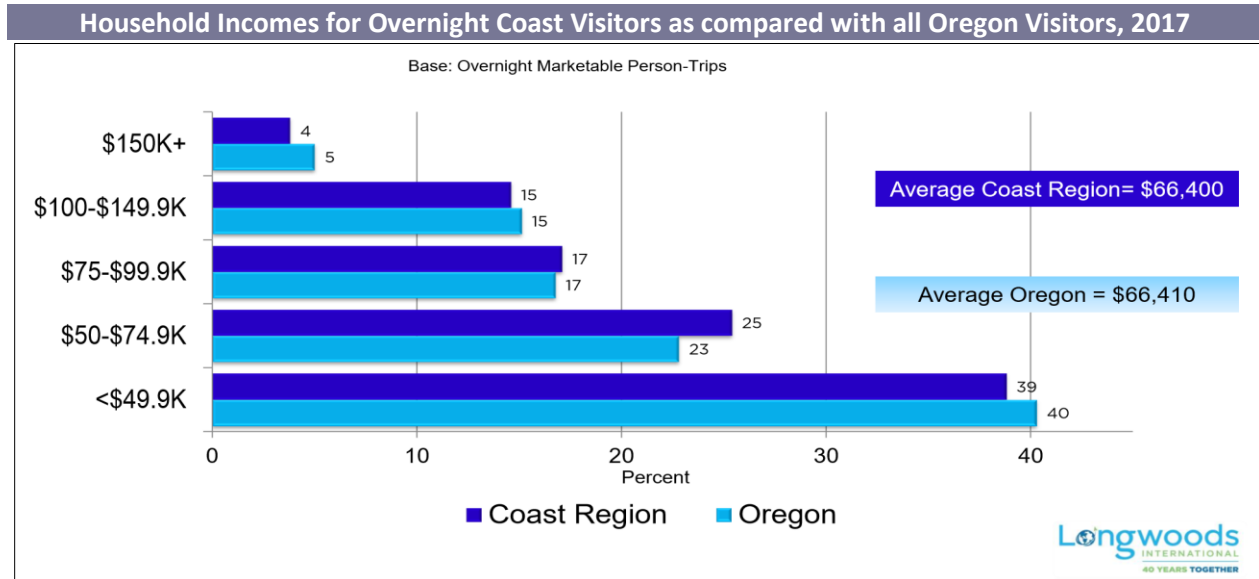
Source: Longwoods International for Travel Oregon

Of in-state visitors, fewer come from Portland and Eugene: more are coming from Medford and Bend.



Source: Longwoods International for Travel Oregon

Household incomes of Coast Region visitors are similar to those of all Oregon visitors. Since 2013, the portion of visitors with incomes under \$49,999 has dropped and the portion of visitors with incomes between \$50,000 and \$99,999 has increased.



In terms of travel party size, Coast visitors are fairly typical of the state. In terms of age, more coast visitors are of retirement age. In terms of gender, women significantly outnumber men as visitors, comprising 58% of all Coast visitors. The gender balance is much more skewed than the state average of 52% women to 48% men.

## 2. North Coast Specific

A 2016 branding project commissioned by “Visit Tillamook Coast” notes that Seattle, Portland, and Eugene, in that order, are the top three major markets for visitors to the region.

Oregon Parks and Recreation Department conducted Visitor Surveys in 2017 at three North Coast parks. Findings included:

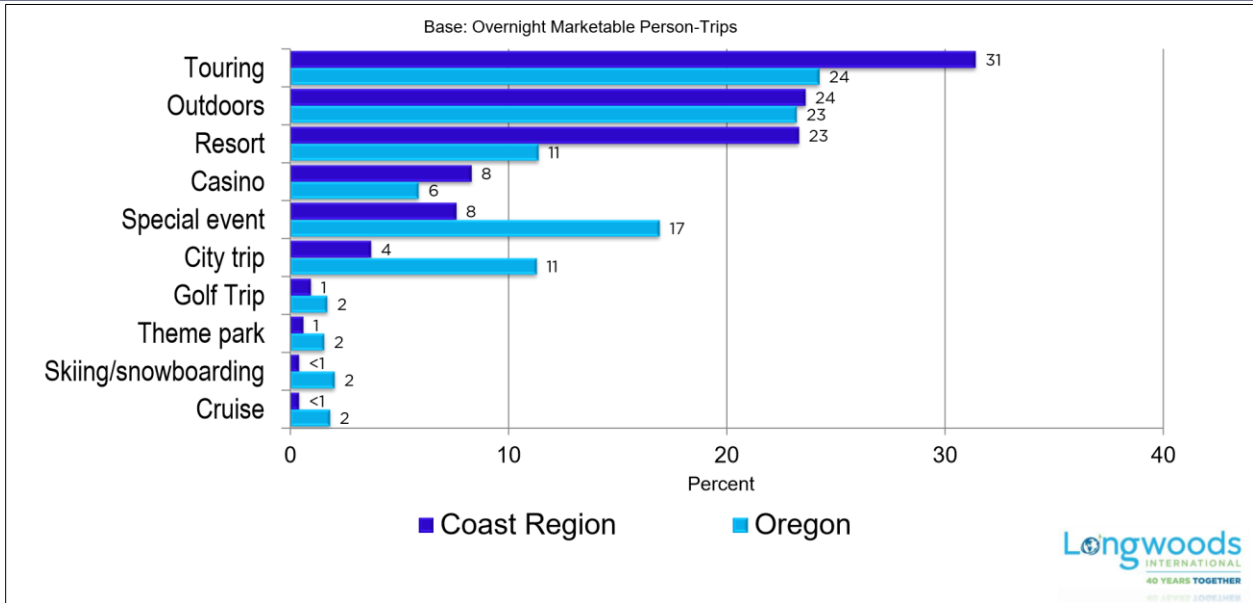
- 39% of overnight visitors at Nehalem Bay State Park were Oregon residents
- 35% of day-use visitors at Cape Meares State Scenic Viewpoint were Oregon residents
- 53% of all visitors (day-use and overnight) at Fort Stevens State Park were Oregon residents.

## B. Visitor Draws and Activities

### 1. All Oregon Coast

The Oregon Coast visitor is similar to the state visitor in terms of main draws for traveling in most cases. Keeping in mind that the categories are not custom-defined for Oregon, general **“Touring” is most cited as the primary motivation for travel**, although for the Coast, it is a stronger draw than for the state. “Special events” and “city trips” are less important draws for the region than for the state.

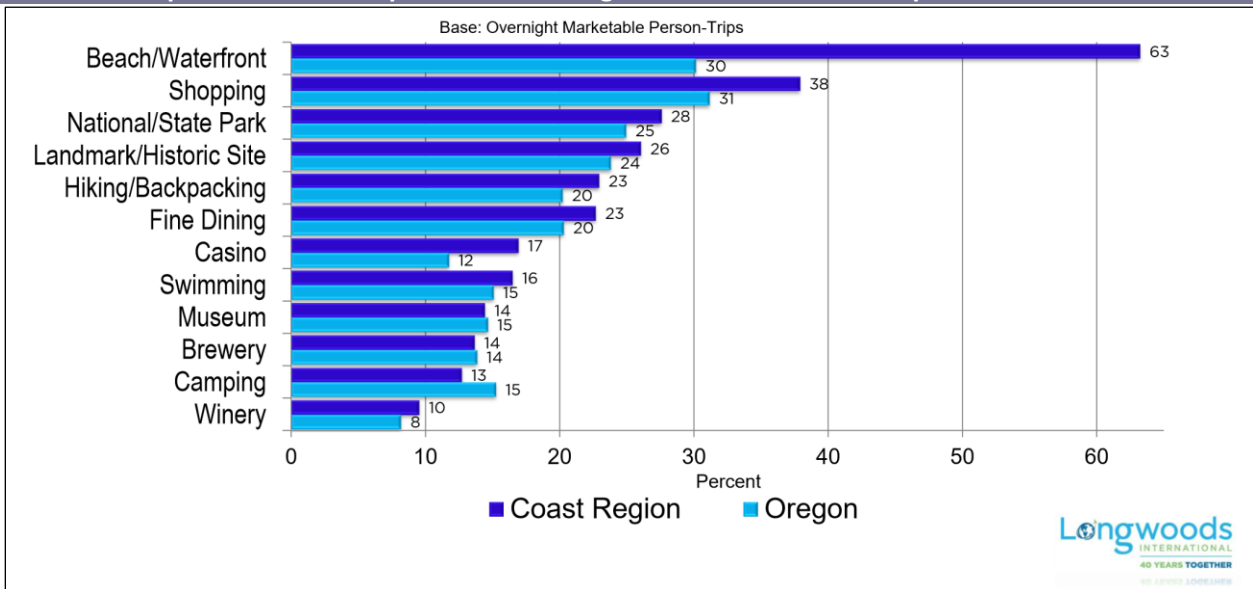
### Main Purpose of Marketable Trip, 2017



The vast majority of travelers engage in multiple activities during their visit. The following chart reflects **what visitors actually do when they are here. Not surprisingly, the beach/waterfront are by far the most common base of visitor activities in this region, and shopping is a sizable, but distant, second.**

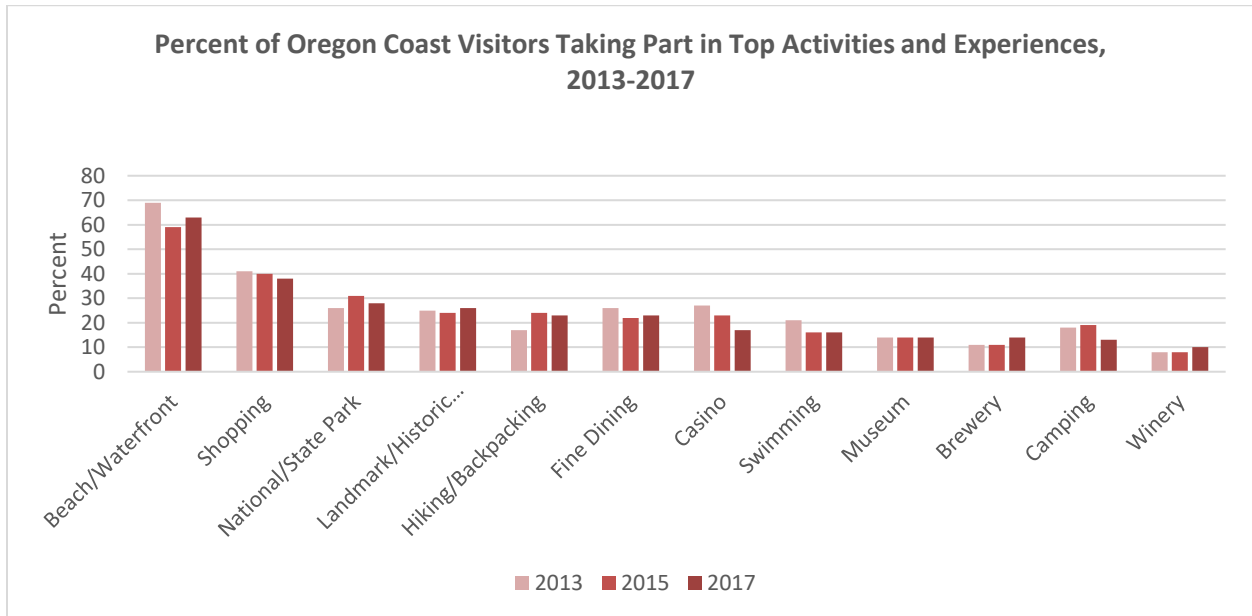
**Historic places and landmarks are also popular coastal activities.** It is also worth noting that travelers who are primarily motivated to experience heritage and culture tend to stay longer and spend more at their destination than other tourists (see “Heritage and Cultural Tourism” references in Appendix).

### Top Activities and Experiences for Oregon Coast Visitors as Compared with State





Since 2013, visitation to national/state parks and historic landmarks has increased, while visitation to casinos and campgrounds has waned along the Oregon Coast as a whole. However, in the North Coast region, campground use is actually increasing (see data in Section D: Seasonality).



Source: Longwoods International for Travel Oregon

Oregon’s [State Comprehensive Outdoor Recreation Plan \(SCORP\) 2013-2017](#) is another source of information about regional trends in local outdoor recreation. According to the SCORP, the population of the Pacific Northwest (from which the majority of Oregon tourists hail) has an extremely high proportion of residents who enjoy outdoor recreation, and participation continues to grow at a faster rate than the population. A new SCORP plan with updated data will be completed in the next twelve months.

## 2. North Coast Specific

The “Visit Tillamook Coast” Brand analysis, and associated “Tourism 2025 Strategy,” includes results from a survey of Portland metropolitan area residents. The survey identifies their perceptions and attitudes toward Tillamook County as a destination for a variety of experiences.

Tillamook County was most strongly associated with being:

- A place to get close to nature
- A place that is not over-developed and has retained its original qualities
- A place to be active in state parks and forests
- A place of outstanding scenic beauty
- A place to be active in estuaries and bays
- A place with miles of unspoiled festivals

It was least associated with being:

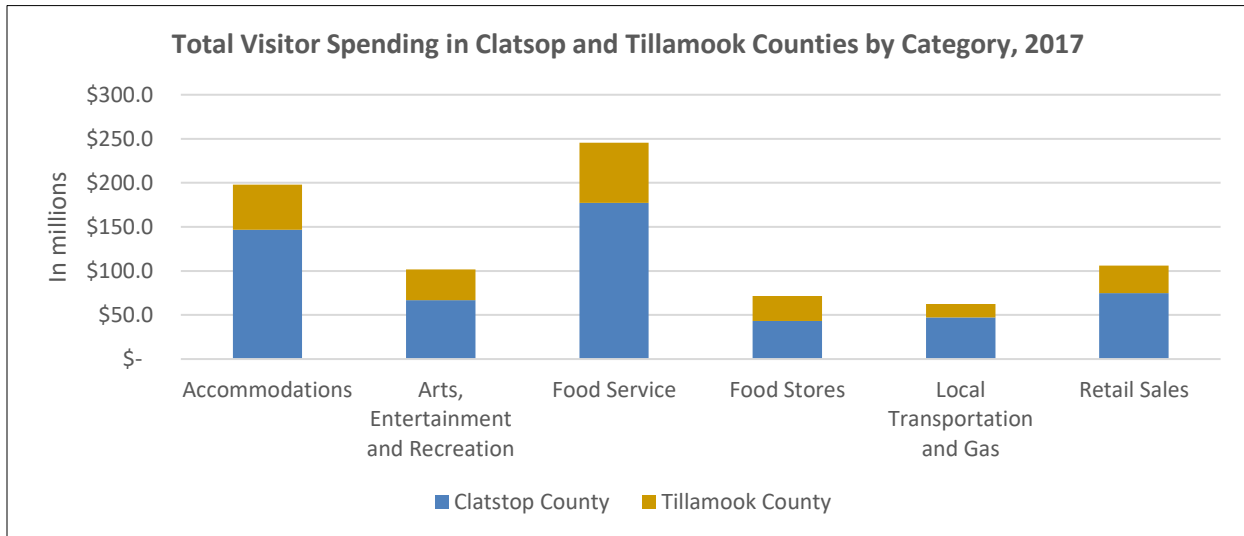
- A place to attend events and festivals
- A place with lots to see and do
- A good reputation as a visitor destination

- A place to reward yourself

Comparable data is not available for Clatsop County.

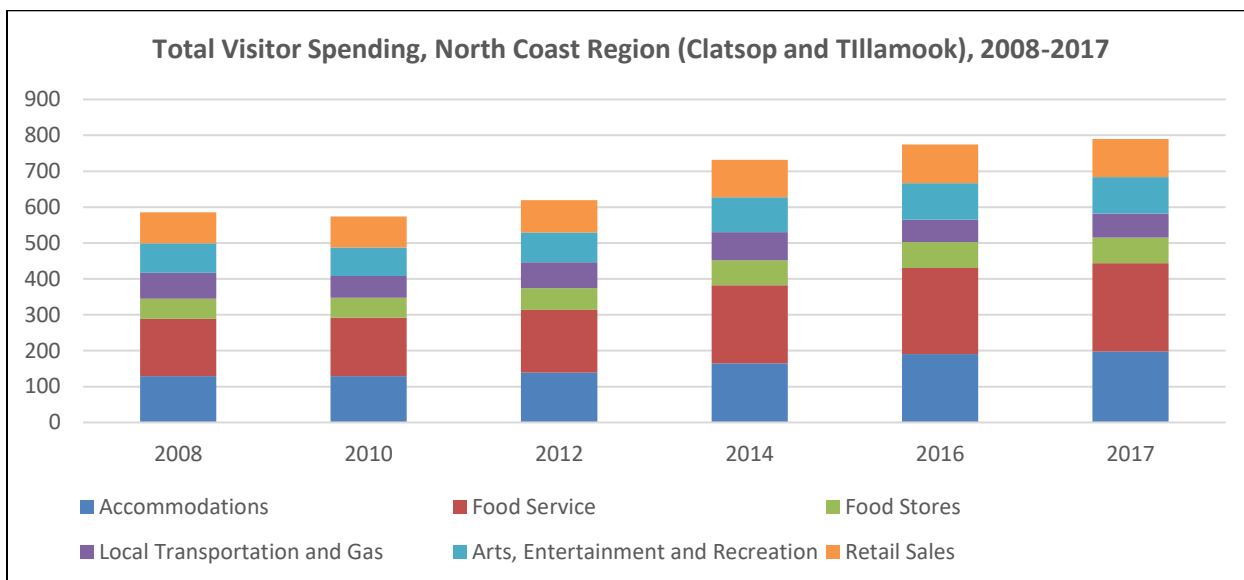
### C. Visitor Expenditures:

The following data is North Coast specific. The bar chart below shows a snapshot of the spending mix in each county. Overall, visitor spending is much higher in Clatsop County than in Tillamook. Spending has, however, been growing in both areas.



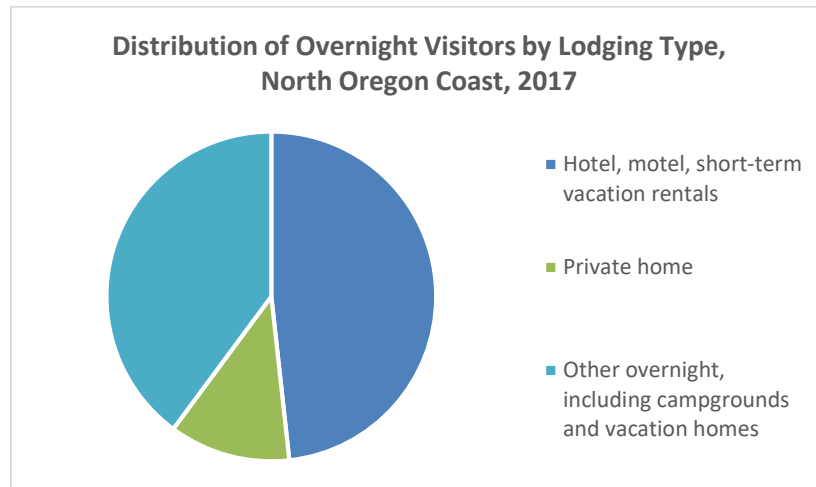
Source: Dean Runyan Associates for Travel Oregon 2017p

Visitor spending has recovered past pre-recession levels.



Source: Dean Runyan Associates for Travel Oregon, 2017p

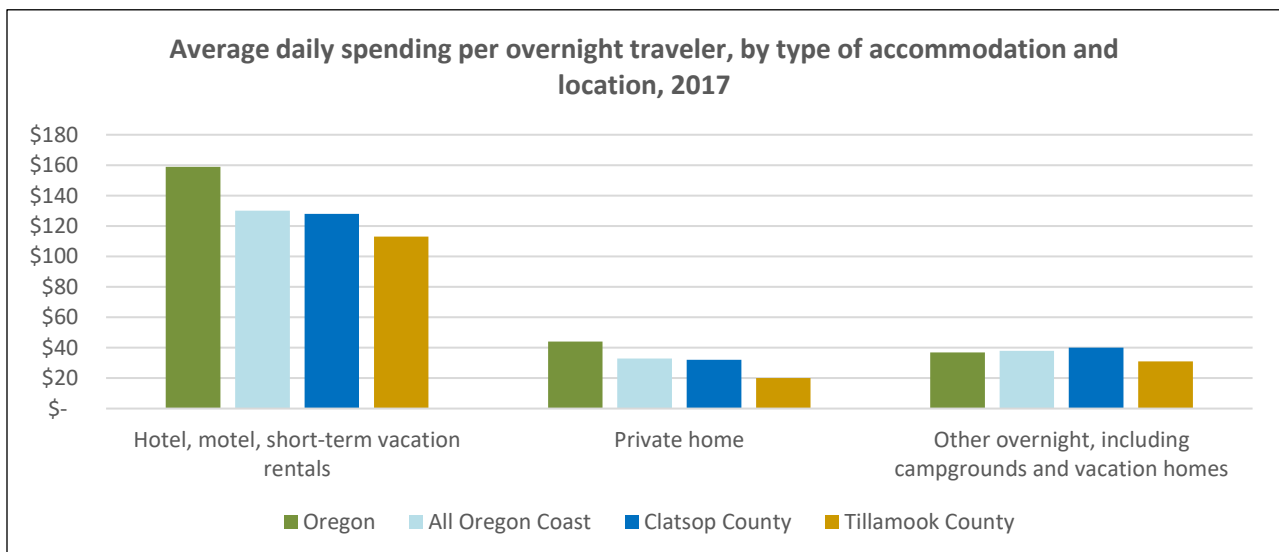
While day trippers do spend more than no visitors at all, **lodging is a key element for capturing higher visitor spending across all categories of expense**, because overnight visitors spend far more per day than day trippers. This comparison of expense for overnight vs day visitors is no longer calculated for Oregon: however, past reports estimated that overnight visitors spent three times as much as day visitors each day. But all overnight visitors are not created equal in terms of economic impact. The chart below shows the mix of visitors in each type of accommodations.



Source: Dean Runyan Travel Impacts Report, 2017p

**Overnight visitors spent \$498 million in the North Coast region in 2017. The chart below shows daily spending by overnight visitors, sorted by lodging type. Visitors staying in hotels, motels or short-term vacation rentals spend far more per day**, and far more on average statewide vs. the Coast region. Higher lodging rates in the state’s larger urban areas may account for a large part of this difference.

**Day trippers spent another \$292 million in the North Coast in 2017**, but reliable data is not available for daily spending by day-trippers.



Source: Dean Runyan Travel Impacts Report, 2017p

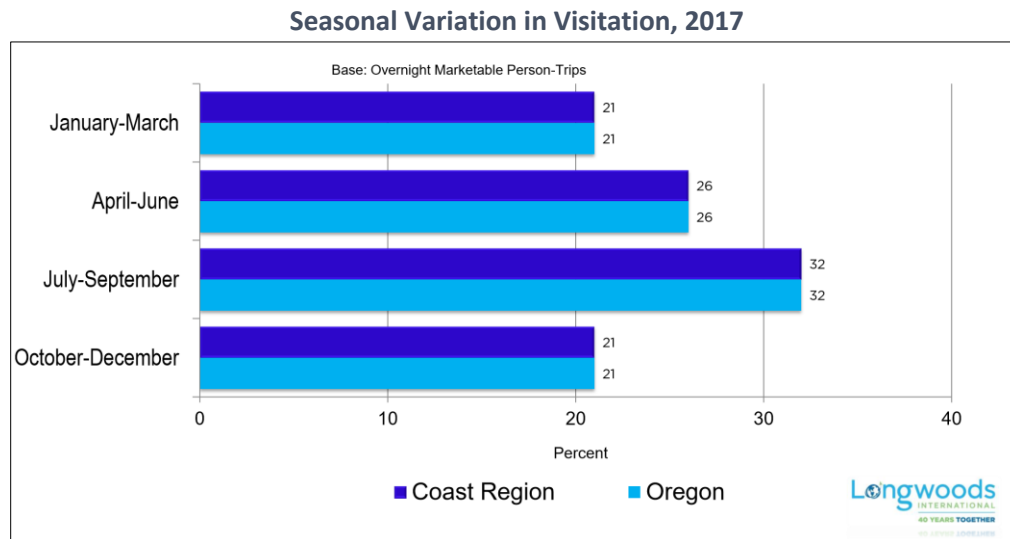
The Dean Runyan Annual Travel Impact Reports also include a table illustrating the economic impact of tourism in each county as shown on the following page. Visitor spending and employment impacts vary according to the mix and cost of tourism goods and services in each county. The economic impact derived from each household encouraging one overnight visitor per year is especially notable.

Summary of Tourism Economic Impacts by County, 2017			All Oregon Coast
	Clatsop	Tillamook	
Amount of visitor spending that supports one job	\$89,577	\$104,065	\$87,612
Employee earnings generated by \$100 in visitor spending	\$32	\$34	\$31
Local and state tax revenues generated by \$100 in visitor spending	\$4.77	\$3.28	\$4.26
Additional visitor spending if each resident household encouraged one overnight visitor per year	\$3,479,000	\$1,440,000	\$22,174,000
Additional employment if each resident household encouraged one additional overnight visitor per year	39	14	253

Source: Dean Runyan Associates for Travel Oregon, 2017p

## D. Seasonality

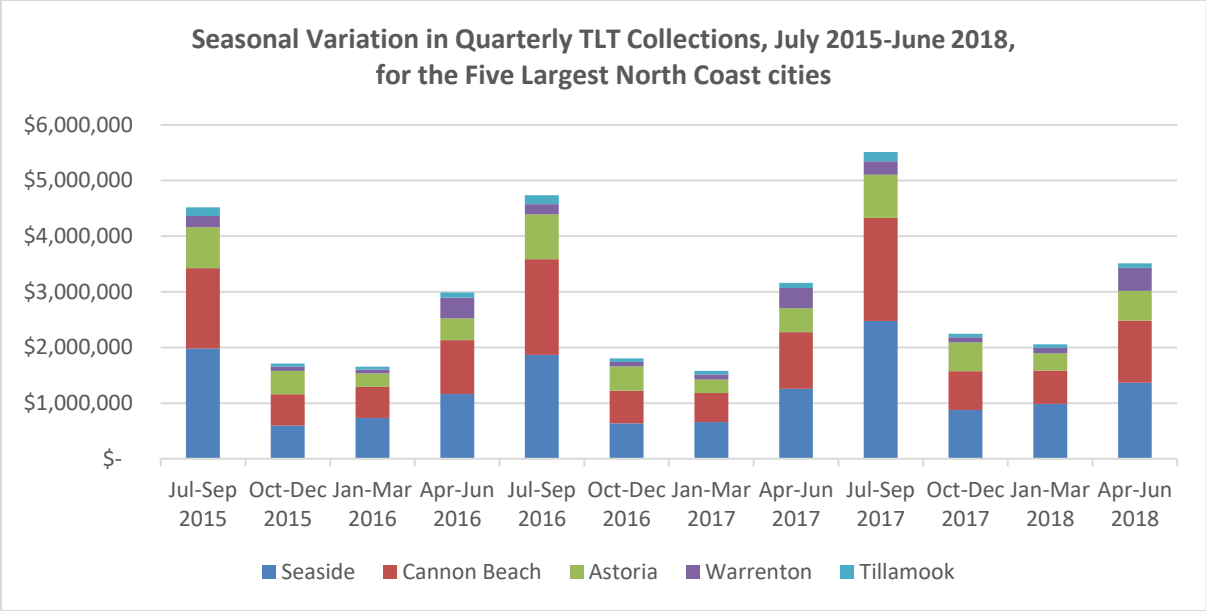
The seasonal patterns of visitation for the Oregon Coast are similar to those for the state as a whole



Several sources of local data provide a closer look at how seasonality shapes tourism on the North Coast.

### 1. Transient Room Tax Collections

The five largest cities in the North Coast region collected over \$12.5 million in Transient Room taxes from hotels, motels and seasonal vacation rentals in 2017. The chart below shows the seasonal distribution of collections, by city. TRT rates range from a low of 7% and a high of 12%. Seaside and Cannon Beach collect the most TLT funds by far.



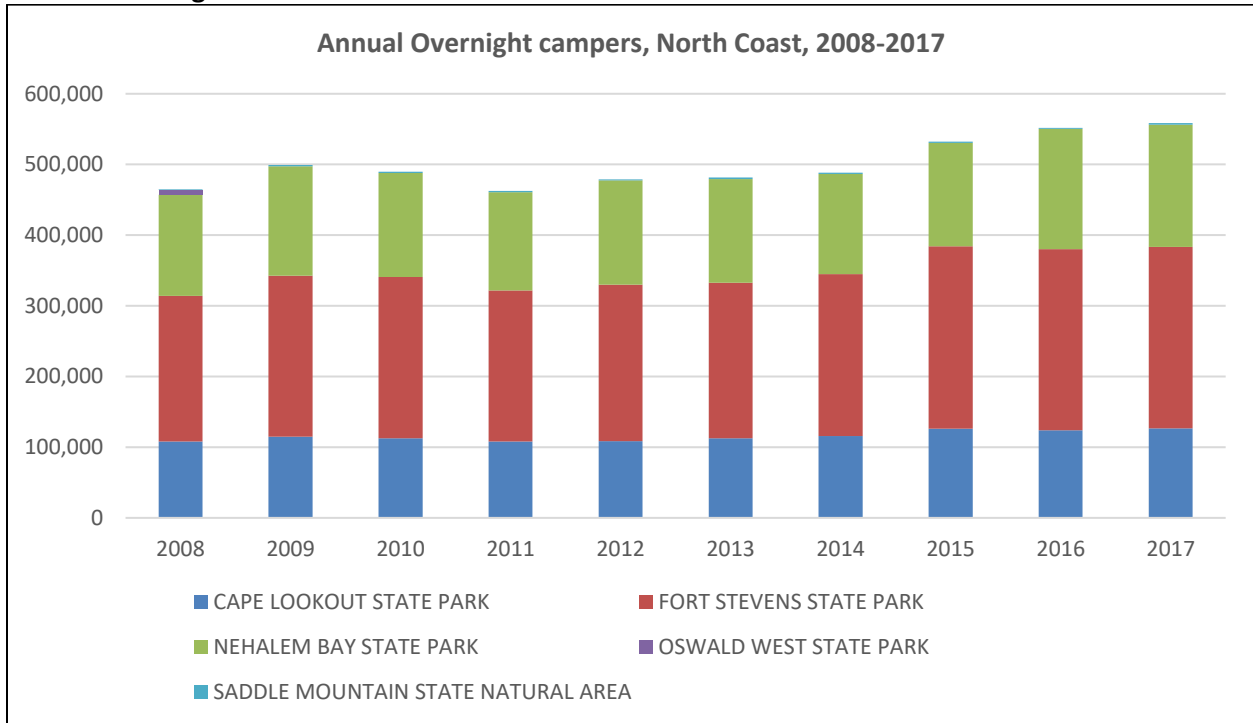
**2. State Park Visitation**

While state parks are enjoyed both by locals and visitors, seasonal patterns of use highlight potentially crowded locations. The following chart shows how much state park day-use is concentrated into the “prime” season of May-September: “50%” indicates that the visitation is evenly split between prime season and off-season. **In several locations, day-use has become MORE concentrated during the prime season since 2008.** Destination management activities to shift visitation away from the high season can help reduce congestion.

Percentage of Annual Day Use Park Visitation during Prime Season (May-September)										
	2008	2009	2010	2011	2012	2013	2014	2015	2016	2017
Arcadia Beach State Recreation Site	62%	63%	66%	64%	68%	65%	64%	57%	61%	74%
Bob Straub State Park	59%	64%	62%	68%	60%	61%	59%	60%	63%	63%
Bradley State Scenic Viewpoint	55%	61%	67%	53%	55%	44%	58%	45%	45%	53%
Cape Meares State Scenic Viewpoint	68%	67%	72%	68%	66%	67%	67%	65%	76%	76%
Clay Myers State Natural Area at Whalen Island	0%	0%	58%	58%	57%	59%	57%	58%	57%	68%
Del Rey Beach State Recreation Site	57%	58%	53%	60%	58%	58%	75%	50%	56%	51%
Ecola State Park	73%	69%	60%	62%	67%	67%	72%	63%	66%	67%
Fort Stevens State Park	63%	64%	62%	67%	36%	58%	63%	61%	62%	59%
Hug Point State Recreation Site	70%	67%	79%	65%	62%	59%	74%	64%	65%	71%
Manhattan Beach State Recreation Site	52%	59%	59%	63%	61%	58%	59%	55%	54%	64%
Nehalem Bay State Park	64%	66%	58%	69%	72%	68%	69%	69%	55%	64%
Oceanside Beach State Recreation Site	62%	59%	61%	61%	66%	63%	63%	61%	62%	62%
Oswald West State Park	59%	66%	67%	73%	73%	66%	71%	73%	71%	65%
Saddle Mountain State Natural Area	72%	58%	60%	62%	75%	61%	61%	56%	65%	59%
Sunset Beach	77%	57%	59%	56%	44%	59%	60%	52%	59%	43%
Tolovana Beach State Recreation Site	67%	66%	65%	65%	58%	62%	61%	61%	54%	56%

Source: Oregon State Parks and Recreation Department

Unlike general trends of flat or declining campground visitation in Oregon, campgrounds on the North Coast are seeing increased use.



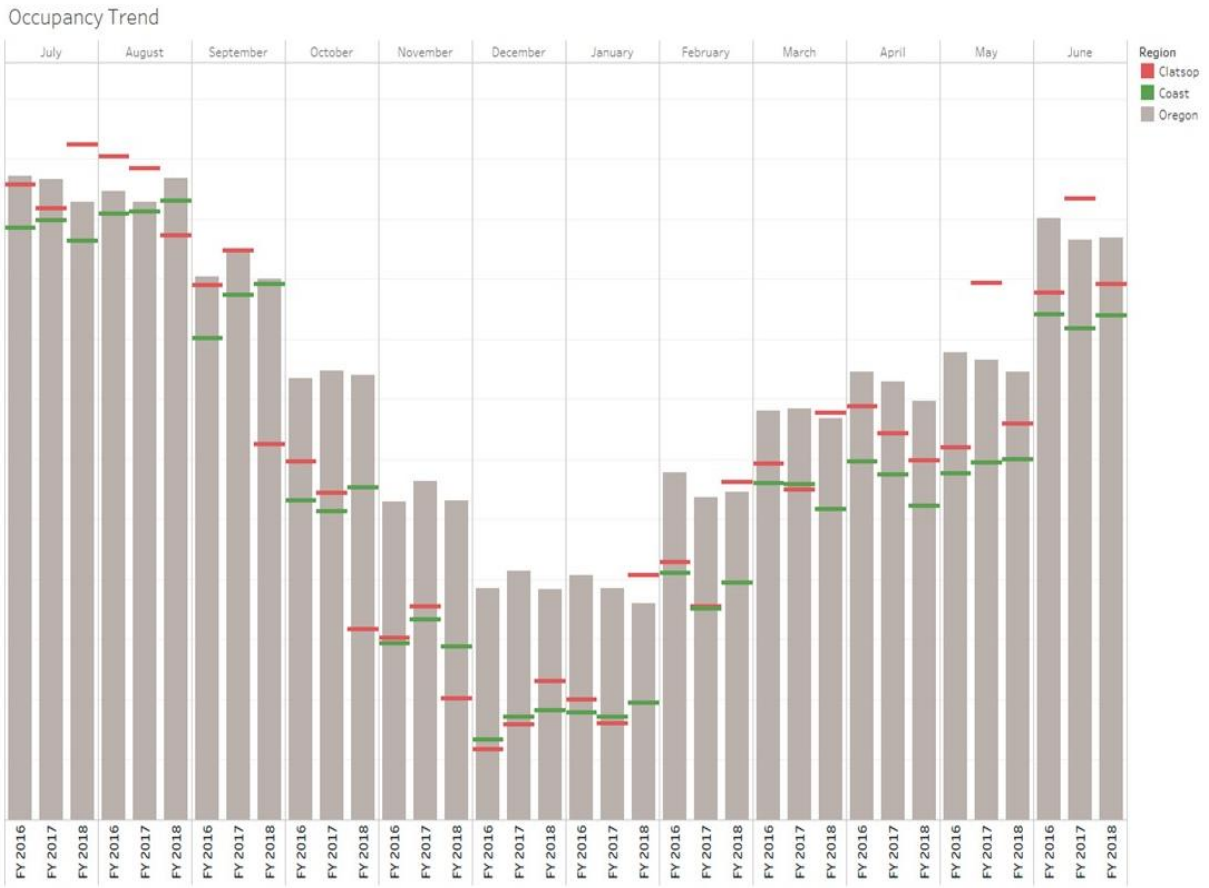
Source: Oregon Parks and Recreation Department

### 3. Hotel Occupancy Rates

Travel Oregon’s research department has compiled data on Clatsop County occupancy rates from a proprietary data source, Smith Travel Research: comparable data is not available for Tillamook County.

In Clatsop County, hotel occupancy rate are down for May and June of 2018 compared with prior years, but it increased over prior years during January-March, the first quarter of this calendar year.

## Hotel Occupancy by Month and Year, Clatsop County compared with Entire Oregon Coast and State, FY2016-FY2018



Source: Smith Travel Research via Travel Oregon

## IV. Tourism Planning, Development and Management

This section includes relevant data and project descriptions for issues identified through a stakeholder survey and North Coast Tourism Studio steering committee discussions.

### A. Destination Development and Marketing

**Collaboration is common** across county lines. Examples related to tourism marketing, development, and management include:

- The Northwest Connector, a collaboration among five transit districts to better connect communities in Clatsop, Tillamook, Lincoln, Benton and Columbia counties.
- Development of the “Trees to Seas” Scenic Byway from Banks to Cape Meares, a collaboration between Tillamook County, the Oregon Dept of Forestry and Washington County Visitors Association
- Creation of the North Coast Food Trail with 59 participating businesses in its first year. This project grew out of the North Coast Agritourism Studio, itself a partnership with Travel Oregon.
- A new effort to develop a “Recipe to Market” program and local food branding, located in Tillamook County but focused on the North Coast as a whole. Partners include Tillamook Bay Community College, OSU Extension, Small Business Development Center, and Visit Tillamook County.

#### Marketing Focus

The three largest tourism destinations in Clatsop County- Astoria, Seaside and Cannon Beach, market themselves through their respective Chambers of Commerce with distinctive brands rather than under a county-level umbrella. However, since 2011, the three communities have been collaborating behind the scenes on their marketing activities as the “North Coast Collaborative. This effort has significantly increased room occupancy rates.

Tillamook County is marketed under a unified Tillamook County branding strategy with the tagline “Venture Coastward.” This effort has full-time dedicated staff.

#### Development Focus:

Tillamook County is a less “mature” destination in terms of both visitor awareness and visitor services; thus, tourism development activities includes a greater focus on promotion, industry capacity building (e.g. a pilot project shared on-line reservation system), and workforce training.

The destinations in Clatsop County are more “mature” destinations that already have high national market recognition: tourism development activities include a focus on off-season events and activities and stewardship education.

### B. Addressing Congestion and Crowding

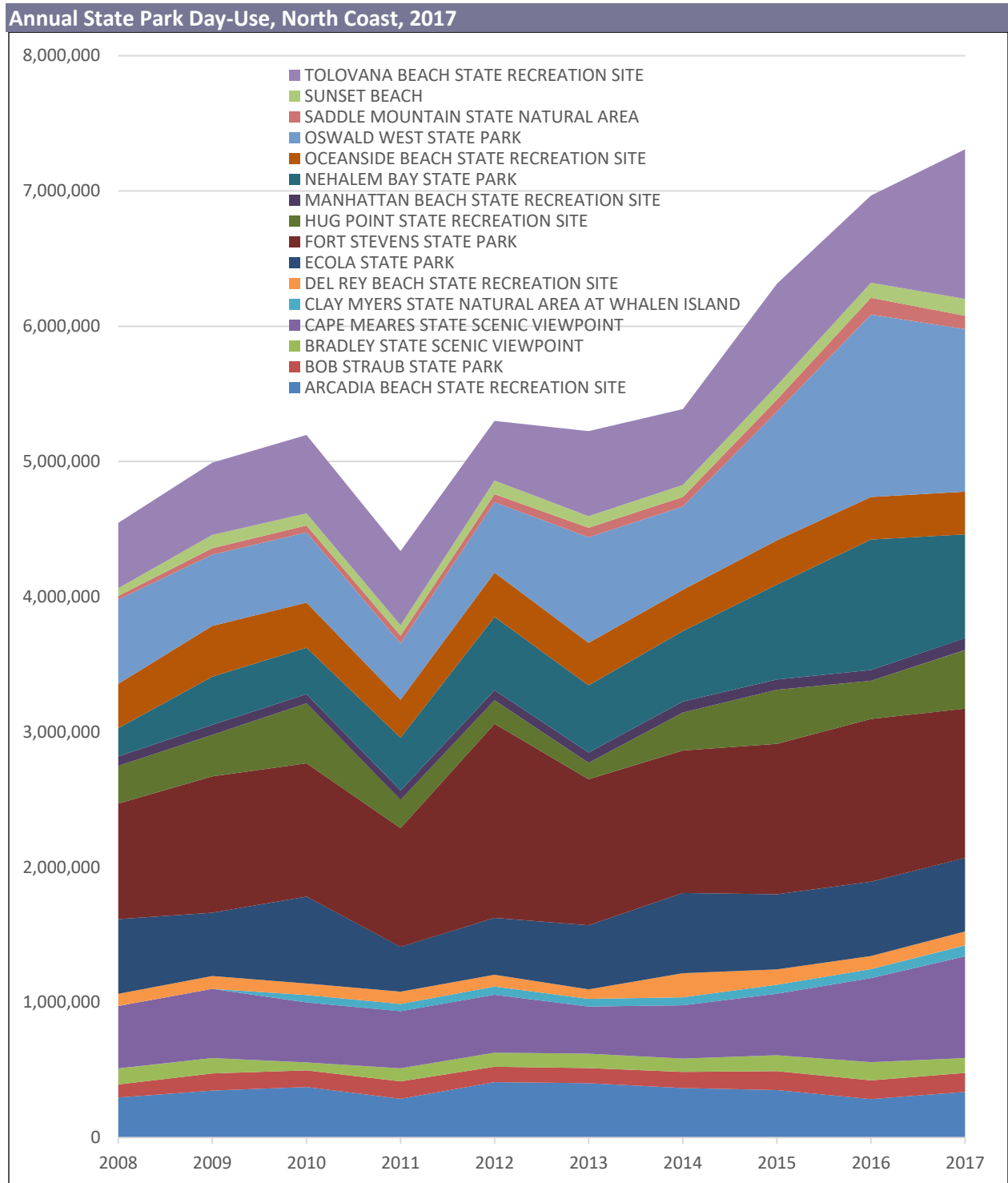
Two relevant data sets can provide context for future planning around congestion and crowding.

#### 1. Use of Public Lands and Natural Areas

**State park use is highly concentrated. The sites with the highest visitation are Oswald West, Tolovana, and Fort Stevens: these three sites account for 47% of all visitors to day-use sites on the North Coast.**



The sites with the fastest growth in use since 2008 are Oswald West, Nehalem Bay, Bradley, Tolovana and Saddle Mountain.

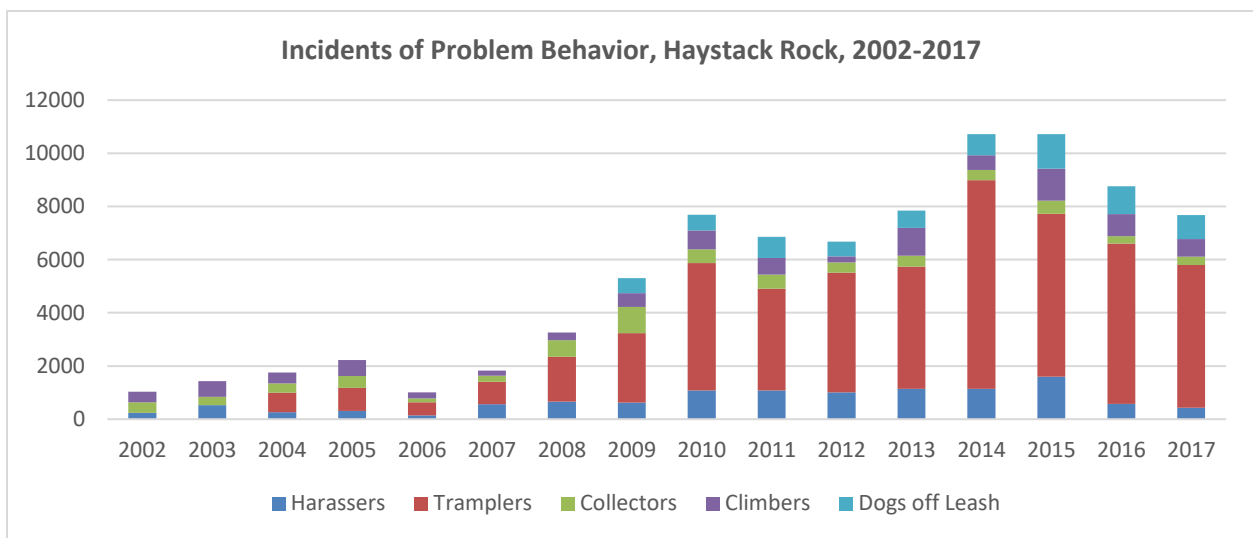


Source: Oregon Parks and Recreation Department

Oregon Parks and Recreation Department conducted Visitor Surveys in 2017 at three North Coast sites.

- 78% of park users at Nehalem Bay State Park felt somewhat crowded; overnight visitors felt more crowded, an indicator of hitting capacity limits.
- 67% of day-use visitors at Cape Meares State Scenic Viewpoint felt somewhat crowded, indicating the need for more visitor management actions.
- 60% of all visitors (day-use and overnight) at Fort Stevens State Park felt crowded, especially overnight campers. In fact, 76% of overnight visitors felt crowded, which indicates that camping areas are operating at “more than capacity”

Crowding can also cause damage to fragile ecosystems. Since 2002, The nonprofit Haystack Rock Awareness Program has collected statistics on behaviors that threaten the site’s ecology. These behaviors include “harassers, trampers, collectors,” and more. management concerns since 2012. These incidents rise and fall from year to year, but in the past few years, there have been fewer problems.



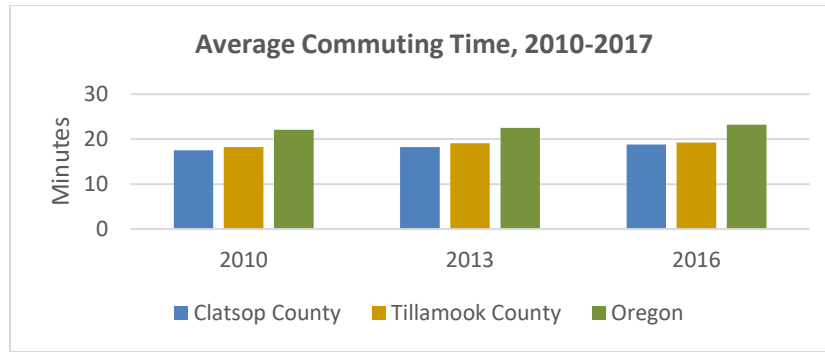
Source: Haystack Rock Awareness Program

Finally, a potential example of visitor appetite for active destination management emerges in results from a [2016 visitor intercept survey at the Cape Falcon Marine Reserve](#) site. While only 16% of visitors were aware of the designation as a marine reserve, a sizable majority felt the reserve was a good thing for Oregon. Nearly half thought it would encourage them to visit again. These findings point to the need for more communication and education about stewardship activities.

## 2. Traffic Congestion

The inefficiencies and associated frustration of traffic congestion is a commonly voiced concern in this region: [Travel Oregon’s 2017 Regional Tourism Stakeholder Survey](#) to guide future tourism investments on the Coast is filled with traffic-related comments.

**Even though congestion is painful during peak visitor season, the average annual level of traffic has modestly increased over the last five years.** See next page for color-coded traffic flow maps with average daily traffic counts for key locations. Larger versions of the color-coded traffic flow maps are available via the hyperlink “source” notation.



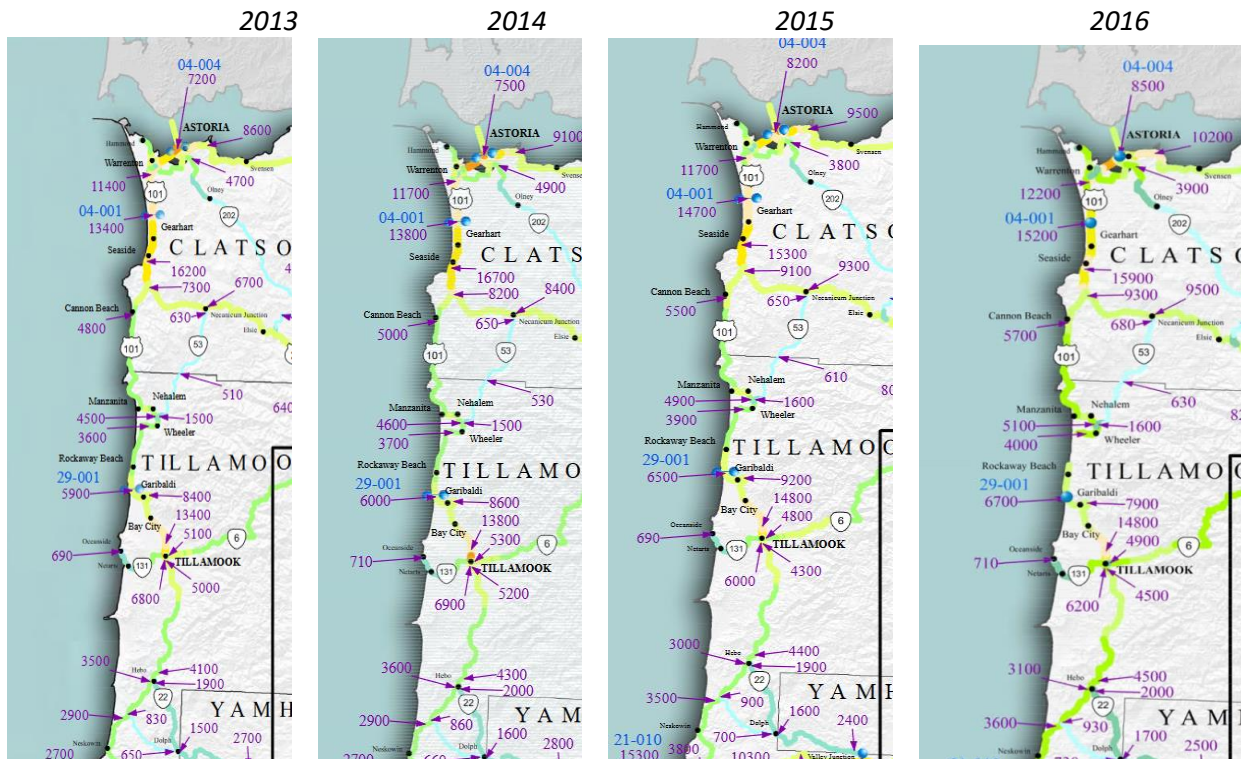
Source: US Census

This being said, it is notable that local transit providers have a disclaimer for congestion-related delays that exceed 30 minutes!

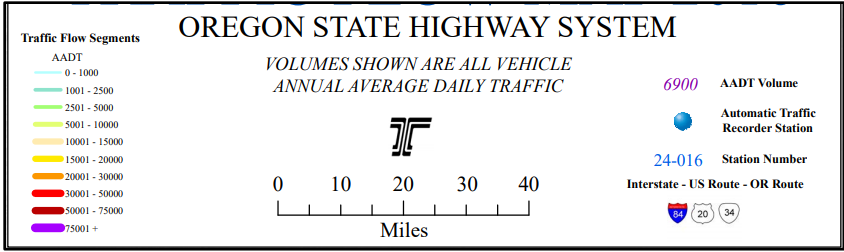
Posted on [July 6, 2018](#)

Due to heavy traffic in the Seaside, Oregon area, Route 20, 21, 101, and the Pacific Connector will experience delays most days during the Summer. Delays occur mainly occur in the afternoons. If the bus is off of its schedule by over 30 minutes, it may skip a loop to start at the correct time for the next loop. For more information, call 503-861-7433, option 3.

### Traffic Flow Maps, 2013-2016, North Oregon Coast



[For higher resolution maps, see Source: Oregon Department of Transportation](#)



## V. Appendices

### A. Selected Market and Economic Impact Information for Key Niche Markets-

#### *Bicycle Tourism*

- Oregon completed a comprehensive statewide study of the economic impact of bicycle tourism in 2012: <http://industry.traveloregon.com/research/archive/the-economic-significance-of-bicycle-related-travel-in-oregon-2012-dean-runyan-associates/> as well as a 2014 study of the [projected economic impact of bicycle tourism on the Historic Columbia River Highway](#) when improvements are complete.
- 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 cycle cross 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.
- A new study of the [economic impact of mountain bicycling events in Oregon](#) documented the how two 3 day events (held in July and again in August) in rural Oakridge pumped \$1.2 million into the local economy.

#### *Nature Based Recreation*

- 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.
- A [2014 national study on Outdoor Recreation](#) profiles market and activity trends by age group.
- [The Outdoor Recreation Economy](#), (2017) also from the Outdoor Industry Association, presents national data on the economic impact of outdoor recreation activities.

#### *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.

- [Yamhill County](#) participated as one of the rural counties in the 2017 national Arts and Economic Prosperity research efforts to document the local economic impact of arts and culture. This report may have useful insights for the North Coast region.
- Cultural Coalitions exist to expand access to diverse local culture (defined as humanities, heritage and the arts) through grant-making that is funded through the Oregon Cultural Trust. Each county and most Tribes in Oregon have had a local Cultural Coalition in place for over a decade. Each Coalition has developed an inventory of cultural assets and resources as the foundation for its grant-making priorities. Few of the funded organizations or events are promoted to visitors, but there may be opportunity to build stronger connections where appropriate. [The Clatsop County Cultural Coalition](#) is especially active.

### ***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.
- [Colorado explicitly links agritourism and heritage tourism development](#), and has recently completed implementation of its first strategic plan toward this end.
- 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
- In 2014, Oregon convened a statewide working group to advise on agritourism development goals. Travel Oregon has already begun implementing several recommendations, including an economic impact analysis. The [working group home page](#) has links to many agritourism resources, including the initial recommendations.

## B. North Coast Tourism Studio Steering Committee Members

<b>Arica Sears</b>	<b>Oregon Coast Visitors Association</b>	<b>Pacific City</b>
Chris Olson	Cannon Beach Chamber of Commerce	Cannon Beach
Chrissy Smith	Friends of Cape Falcon Marine Reserve	Cannon Beach
Claudine Rehn	Tillamook Estuaries Partnership	Tillamook
<b>Dan Haag</b>	<b>Manzanita Visitor Center</b>	<b>Manzanita</b>
Dan Goody	Oregon State Parks and Recreation	Astoria
<b>Donna Quinn</b>	<b>Cannery Pier Hotel &amp; Spa</b>	<b>Astoria</b>
Doug Pilant	Tillamook County Transportation District	Tillamook
Jeff Wong	Community Supported Fishery	Garibaldi
Jeremy Strober	Pacific City Nestucca Valley Chamber	Pacific City
Jim Paino	Cannon Beach Chamber of Commerce	Cannon Beach
Jon Burpee	National Park Service	Astoria
Joshua Heineman	City of Seaside	Seaside
Justin Aufdermauer	Tillamook Area Chamber of Commerce	Tillamook
Kathy Kleczek	Sunset Empire Transportation District	Astoria
<b>Ken Heman</b>	<b>City of Seaside Visitors Bureau</b>	<b>Seaside</b>
Ken Henson	Pelican Brewing	Pacific City
Ken Shonkwiler	Oregon Dept. of Transportation	Astoria
<b>Kevan Ridgway</b>	<b>Cannon Beach Chamber of Commerce</b>	<b>Cannon Beach</b>
Kevin Leahy	CEDR/Clatsop Community College	Seaside
Lorraine Ortiz	North Coast Land Conservancy	Seaside
<b>Marcus Hinz</b>	<b>Oregon Coast Visitors Association</b>	<b>(RDMO)</b>
Mark Ellsworth	Regional Solutions	Tillamook
Melissa Keyser	City of Cannon Beach/HRAP	Cannon Beach
<b>Nan Devlin</b>	<b>Visit Tillamook Coast</b>	<b>Tillamook</b>
Regina Willkie	Astoria-Warrenton Area Chamber of Commerce	Astoria
Teri Wing	Oregon State Parks and Recreation	Astoria

\*green= community leads