



RURAL TOURISM STUDIO

Southern Oregon Coast

Rural Tourism Studio

Baseline Assessment

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Southern Oregon Coast Rural Tourism Studio

Baseline Assessment

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I. Introduction

This report includes qualitative and quantitative baseline information for the Southern Oregon Coast region at the start of its work with Travel Oregon on the Rural Tourism Studio (RTS) in January 2017. The region comprises **Coos County along with the coastal communities of Douglas County from Reedsport south**. In most cases, area profile data is provided for Coos County only. This is because Douglas County data would obscure and distort trend analysis for the Southern Oregon Coast region: the coastal Douglas County communities account for just 5% of the county population. Where available, Reedsport-area specific data is included.

Background:

In 2013, Travel Oregon, along with the Bandon-based Wild Rivers Coast Alliance, launched a similar RTS initiative on the southern coast of Oregon focused from the Coquille River watershed down to the Chetco River watershed- roughly from Bandon down to the California-Oregon border just south of Brookings. Self-declared the *Wild Rivers Coast* region, this region includes the majority of Curry County and the southern portion of Coos County. The success of this effort did not go unnoticed by leaders in the rest of Coos County. Inspired, they formed a local steering committee for county-level initiatives, and they approached Travel Oregon to host a Rural Tourism Studio for all of Coos County. Steering committee members also invited coastal Douglas County to participate, due to strong similarities in current and potential tourism assets. As the RTS launches, a significant new resource is also on the table. Starting in January 2017, Coos County will for the first time have a steady source of funding for tourism development county-wide, as a result of a voluntary assessment on lodging revenue offered by the Bandon Dunes Golf Resort. An organization, currently called the Coos County Tourism Workgroup, has been established to manage these funds. This RTS process for this new portion of the Southern Oregon Coast will help guide the Workgroup's efforts.

Program Goals:

The Rural Tourism Studio program aims to stimulate new tourism development activities that generate business revenue, jobs, entrepreneurial opportunities, and revenue for public services over time. The RTS workshops are designed to help the community learn about and organize around key sustainable tourism products, services and markets; connect with new partners and resources for implementation; and generate local momentum for action. The baseline report aims to provide a common base of regional understanding to RTS participants, and data with which they can gauge their progress over time.

II. General community profile and context

A. Geography, History and Access

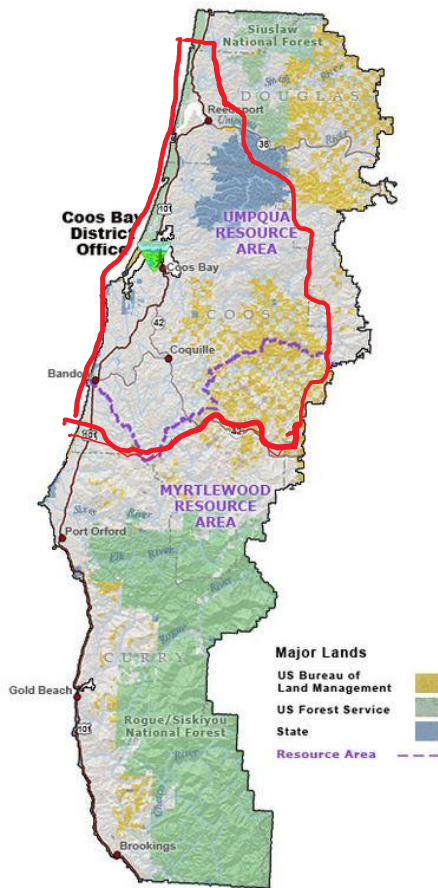
As per the region's Rural Tourism Studio application, "On any visit, you can experience impeccable beaches filled with marine life, dense beautiful forest lands, waterfalls, rivers and streams that have majestic viewpoints are ideal for fishing and boating. You'll find miles upon miles of dunes for ATV enthusiasts, trails for hiking and mountain biking, waves for surfing, lakes for sailing and much more."

Geography

Coos County lies between the crest of the Coast Range and the Oregon Coast, with a mountainous forested interior that opens into the Coquille River Valley. The highest point is 4321 feet above sea level, at Mount Bolivar in the Coast Range. The lowest point is, of course, sea level. At some places, the sea meets the shore at sandy beaches, and at other places it crashes against high cliffs. This part of the coast is also blessed with fine natural harbors in and around Coos Bay and Winchester Bay.

The RTS region contains two major river systems, both fully contained in a single county. The 111-mile Umpqua River in Douglas County is the largest river between the Columbia and Sacramento Rivers; it terminates at Winchester Bay. The 36-mile Coquille River terminates at Bandon. Because of the flat landscape around the rivers, both areas have experienced significant flooding: agriculture in the Coquille River Valley consists of crops and livestock that can withstand great variations in water depth.

Coos County contains 1806 square miles, 12% of which is water. This equates to 1,028, 104 acres of land. Most of this land (69.3%) is privately owned. This is unusually high for Oregon's timber dependent counties. Of the public lands, the U.S. Bureau of Land Management is the largest owner, with 162,862 acres. The U.S. Forest Service holds another 11,295 acres.



Douglas County has nearly three times as much land mass as Coos County, with just a small coastal sliver in the Southern Oregon Coast region. The Douglas County Coastal Resources Plan calculates the size of the county's coastal estuary region as 34.4 square miles, all west of Highway 101. Doubling that to include an equal amount of land east of Highway 101 yields an estimate of 69 square miles in Coastal Douglas County: this is 3.7% of the Rural Tourism Studio region.

Within Coastal Douglas County, the U.S. Forest Service has a much larger presence, including the Siuslaw Forest Service land on the north shore of the Umpqua River, and the Oregon Dunes National Recreation Area that it manages. The Oregon Dunes, a world-class natural asset, stretch 40 miles from the Siuslaw River in Florence (to the north of Douglas County) to the Coos River in North Bend. The Douglas County segment is in the middle of the dunes, and the visitor center is located in Reedsport as a result. The nearby Dean Creek Elk Viewing Area is also significant public land (managed by BLM) with respect to its tourism value.

In terms of additional public lands, detail is available at the full county level only. The 93,000 acre Elliott State Forest spans the Douglas/Coos County boundary southeast of Reedsport. The portion in Coos County is the largest parcel of state land there: together with state parks, 6.9% of Coos County land is state-owned, and 4.9% is County-owned.

History:

The South Coast has been a prosperous place for much of the time of its human settlement. As its economy developed beyond subsistence, however, it experienced roller-coastering cycles of boom and bust. As the Oregon Historical Society's Oregon Encyclopedia notes in describing Reedsport, "In many ways, the story of Reedsport is a microcosm of the story of Oregon. Since the mid-1800's, the town has seen economic booms driven by abundant natural resources and has endured long periods of bust as those resources dwindle and priorities changed. Reedsport has both flourished and floundered." The boom and bust cycle has similarly disrupted Coos County communities. Both conditions are tied to the region's relationship with its seemingly infinite natural resources.

The temperate region has been extraordinarily rich in natural resources, so much so that for millennia, indigenous Indian tribes- the Coos, Coquille, and Lower Umpqua Indians- could live well off the same land year-round. Archaeological evidence confirms human settlement for at least 10,000 years on this part of the coast. The Native population, was however, decimated starting early in the 19th century: first by disease introduced by traders; then by battles, especially after gold discoveries near the mouth of the Coquille River triggered a rush of miners; and finally by forced relocation of Southern Oregon tribes to reservations on the North Coast after the Rogue River Indian War in 1857. Some tribal members evaded the authorities and sustained their connection to the land in more remote locations. Although nearly all south coast tribes had signed treaties with the U.S. Government, those treaties were never ratified. As a result, the Southern Oregon tribes were subjected to multiple relocations, homesteading allotments that infringed on the North Coast reservation lands, and finally legal termination of many tribes throughout Western Oregon in 1954. All this did not, however, eradicate the indigenous population of this region. Those who remained or found their way back to the south coast were successful in restoring the legal status of their Tribes- the Confederated Tribes of Coos, Lower Umpqua and Siuslaw in 1984, and the Coquille Indian Tribe in 1989.

Against this tragic backdrop, new pioneer communities and settlements started to form in Coos and Douglas Counties, almost 300 years after British explorer Sir Francis Drake dropped anchor in Cape Arago's South Cove in 1579. The first known contact between the Native population and white explorers was during a twelve-day trading expedition in 1791 at the mouth of the Umpqua River. Until 1851, the South Coast was an unorganized portion of the Oregon Territory, when Umpqua County was created, stretching west from the crest of the Cascade Mountains to the sea and south from present-day Florence to the newly minted state of California.

Over the next ten years, Umpqua County was divided up multiple times among what today are Coos, Curry, Douglas, Jackson Josephine and Lane Counties. Coos County was established in 1853. Douglas County, established the year before, expanded westward to include the coast around Reedsport in 1862, and this expansion enveloped the last of Umpqua County.

The first permanent white settlements (vs. seasonal trading posts) were Empire City (now part of Coos Bay) and Bandon were first established as permanent settlements in 1853. They incorporated as Marshfield (later renamed Coos Bay) in 1874 and 1891 respectively. Homesteaders started to settle around Reedsport at the same time, but it did not incorporate until 1919. North Bend was settled in 1856 around lumber production and shipbuilding and incorporated in 1903. The Coquille River Valley inland was settled in

the late 1850s by a group of homesteaders known as the “Baltimore Colony” given their place of origin. The first group was not particularly successful at farming, but others arrived, and the cities of Coquille and Myrtle Point were incorporated in 1885 and 1887 respectively.

The region has a number of notable “firsts” as catalogued by the Coos History Museum:

- First and last lighthouse on the Oregon Coast were built in this region. The first, located below the present-day Umpqua lighthouse, was built on the south beach of the Umpqua River in 1861, but burnt down 3 years later. The last, the Bandon lighthouse at the mouth of the Coquille River, was built in 1896 and ceased operation in 1939.
- Coos County’s first county road was built in 1854, and given the area’s topography, it used the beach itself as part of the route. For several decades, beaches were critical transportation routes here and elsewhere on the coast. According to the Coos History Museum, “Governor Oswald West convinced the state legislature to designate all of Oregon’s beach property as public land, primarily to preserve a vital north-south transportation link. He could have pointed to the precedence set by the Coos County ‘Beach Route.’”
- In 1872, the Coos Bay Wagon Road was one of four new routes funded by the federal government to facilitate freight travel to and from Oregon’s four corners. For the first time, one could travel overland between Coos Bay and the Willamette Valley. These wagon roads were also called military roads, as the original justification had been “defensive necessity.” (Steve Duin, “Drive the Coos Bay Wagon Road”, Oregonian, 2012)
- Oregon’s first state forest, established in 1929, is the 93,000 acre Elliott State Forest: it spans the Douglas/Coos county line between Reedsport Coos Bay in the Coast Range. The state acquired the site much earlier, after a massive forest fire in 1868 left such environmental damage behind, that the land was considered uninhabitable for settlers. The future of this land as a state forest is uncertain.
- Local runner and Olympian Steve Prefontaine (born 1951) helped popularize the national “running boom” in the 1970s, and held all at seven American records in distance running at one time. By challenging the policies of the American Athletic Union (AAU), he also paved the way for improved livelihoods for amateur athletes. He tragically died in a 1975 car accident at age 24.

Early economic activities in this region included coal mining (the gold mining rush was short-lived), lumber (for which demand was fueled by the California Gold Rush population), agriculture, and fishing. “This early constellation of natural resources, money and muscle set the south coast on its path of becoming a supplier of raw materials to the rest of the world. It also ensured that the sea, not the interior, would be the area’s most important gateway to the outside world until the railroads arrived in the early 20th century.” (Oregon History Project)

In 1885, cranberries were first introduced, and while this crop grew in importance over the years, the region’s economy became increasingly dominated by large scale production of forest products and mining. Leading up to the Great Depression of 1929, coal mining collapsed as fuel oil came into play, and wooden shipbuilding also declined. What is now Shore Acres State Park was originally the estate of timber baron and civic leader Louis Simpson, who sold the land to the state after his 1940 bankruptcy. Timber production rebounded, aided by port improvements at Coos Bay, as well as road construction that facilitated transport. The Port of Coos Bay developed into the largest lumber shipping port in the world

during these years. Peak years for forest employment were 1960-61: after that, production became more capital-intensive so that even with higher output, labor needs did not increase.

With transportation infrastructure improving, it became easier for people to move around as well: by 1936, one could travel by automobile between Coos Bay and the Willamette Valley along Highway 42 which paralleled the Coos Bay Wagon Road in places. Also in 1936, the mile-long McCullough Bridge, a Public Works administration (PWA) project across Coos Bay, closed the final gap on US 101, Oregon's coastal highway. This, along with the creation of the Oregon Dunes National Recreation Area in 1972 and later Bandon Dunes Resort, has fueled a nascent tourism economy. Since that time, the region has been recognized as a worthy visitor destination:

- Sunset Magazine 2007- North Spit (North Bend) as one of the top 10 beach strolls in the West
- Budget Travel 2010- Bandon as one of the "Ten Coolest Small Towns in America," characterized as "Farm to Table hub on Oregon's rugged coast."
- Sunset Magazine, Feb 2017- Coos Bay as one of "20 Western Dream Towns:" in the top 4 for Pacific NW
 - "This once faded fishing port on the southern Oregon Coast has seen its fortunes rebound, thanks to public redevelopment efforts and private enterprise." Cited:
 - Coos History Museum Building
 - Reopening on historic Egyptian theater 2014
 - Family friendly 7 Devils Brewing Co. established in 2013

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, and is designated in its entirety as the Pacific Coast National Scenic Byway. Between coastal Douglas County and Coos County, **this Rural Tourism Studio region encompasses approximately 90 miles, or nearly one quarter of the highways' total length in Oregon.**

Coos County is home to the Southwest Oregon Regional Airport in North Bend, which is served by two airlines offering nonstop commercial service to Portland, San Francisco and (seasonally) Denver. Passenger traffic declined sharply between 2011 and 2014, counter to trends in Southern Oregon's largest airport. However, with expanded commercial service in North Bend, enplanements (the number of people boarding planes at this airport) began to grow again in 2015 as shown on the table below.

Airport Enplanements (Boarding)	2011	2012	2013	2014	2015	% change 2011-2014	% change 2014-2015
Southwest Oregon Regional Airport (North Bend)	22,066	18,283	16,864	15,080	16,207	-32%	7%
Rogue Valley International Airport (Medford)	301,742	313,638	306,450	323,563	370,187	7%	14%

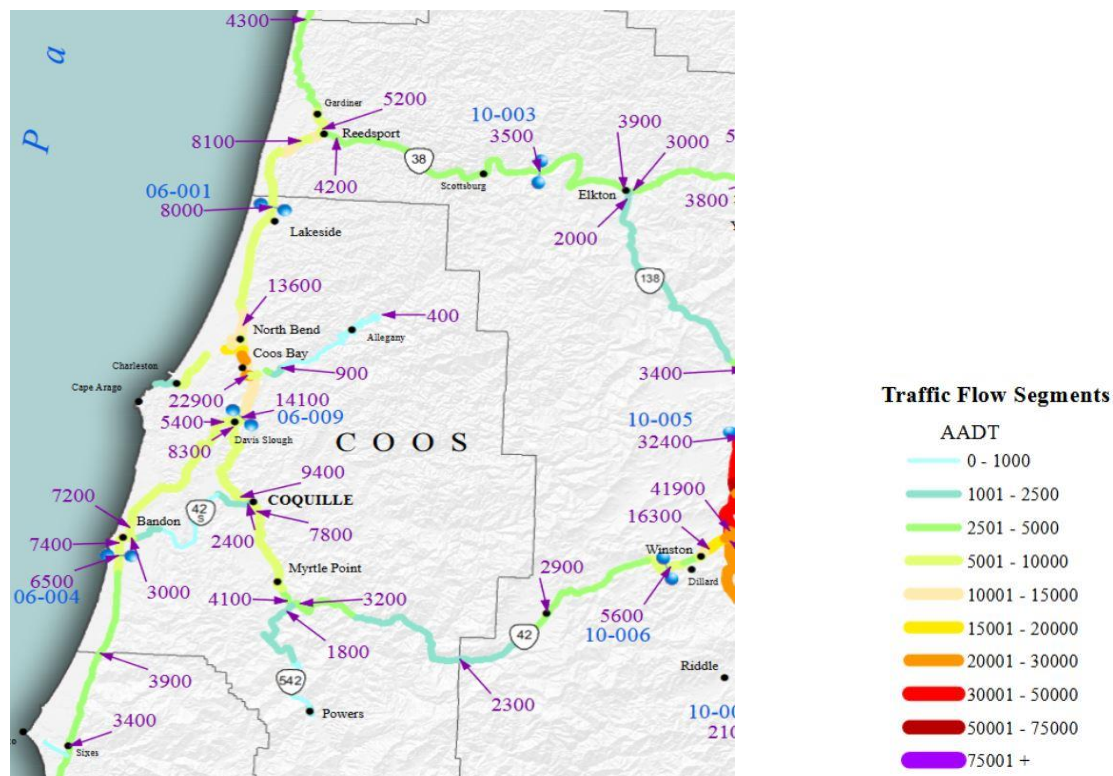
Source: U.S. Department of Aviation

The closest international airport is technically in Medford (@ three hours from Coos Bay), but the closest airport with current international service is Portland, the state's largest metropolitan area. Portland is approximately four hours away, depending on exact point of trip origin. There are state airports in Bandon and Lakeside for private flights, and several airstrips as well.

Bus service is available to the coastal communities from Eugene and Medford, and points beyond from those stations. There is no passenger train service.

In terms of east-west travel, travelers from the populous I-5 corridor can reach Reedsport in an hour via State Highway 38; Coos Bay in 1.5 hours via either State Highway 38 or 42 (through the Coquille River Valley); and Bandon via State Highway 42.

The table below shows average daily traffic flow during 2015 on the main routes leading to and from the region. The Appendix shows more detail on the change in traffic counts along these routes between 2011 and 2015. counts on Highway 101 between the Lane-Douglas County border south to the Coos-Curry County border. Much highway traffic in rural areas statewide had been declining since 2005, exacerbated by recession and high fuel prices: traffic counts are now increasing, however, on most arterial roadways in the RTS region.



Source: Oregon Dept. of Transportation

B. Demographics

The Southern Oregon Coast region includes eight incorporated communities: **Bandon, Coos Bay, Coquille, Lakeside, Myrtle Point, North Bend, and Powers in Coos County; and Reedsport in Douglas County.** Most of the region's population lives near the coast, and to a lesser extent in the inland Coquille River Valley. Coos Bay is the largest city in the region and the largest city on the Oregon Coast, with a 2016 population of 16,615. Reedsport is the second largest city in the region, with 4,155 inhabitants. Two unincorporated communities, Charleston in Coos County and Winchester Bay in Douglas County, have tiny year-round populations yet significant visitation due to fishing and boating launched from their marinas.

The total population of Coos County is 63,190 (U.S. Census, 2016) and coastal Douglas County adds another estimated 5,000 people between Reedsport and unincorporated communities to its south. Coos County's population has been relatively stable since 1980, when its population peaked at 64,047 residents. The make-up of the population has shifted as young and working age adults have left the county in search of sustainable work. (Coos County SDAT- Sustainable Design Assessment Tool- 2010)

A defining feature of the Coos County population is its high proportion of retired residents. In 2016, 21.4% of County residents are over the age of 65, compared with the 13.9% statewide average. Like many rural areas, Coos County is home to a lower percentage of residents under the age of 18 than the state: 18.6% of Coos County residents are under the age of 18, compared with the statewide average of 21.4%.

There is little racial or ethnic diversity in the area's population even by Oregon standards: 90.4% of Coos County's total population is white as compared with 87.6% statewide: the largest minority group is people of Hispanic/Latino descent: they comprise 6.3% of the population. American Indians and Alaska Natives are represented more heavily in Coos County than in the state as a whole: 2.9% of the local population is Native American as opposed to 1.8% statewide. 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

As noted in the Rural Tourism Studio application for this area, "The Coos County area historically was dominated by timber, fishing and dairy farming jobs. While timber, fishing and the organic dairy industry are still important sectors, they do not employ people at the same rate as they previously have. Today, Coos County's largest employers are Bandon Dunes Golf Resort, Bay Area Hospital, North Bend Medical Center, North Bend School District, Roseburg Forest Products, Southwestern Oregon Community College, South Coast Education Services, The Mill Casino and Walmart." The largest employer in Reedsport is Fred Wahl Marine Construction: no other single employer exceeds 50 employees.

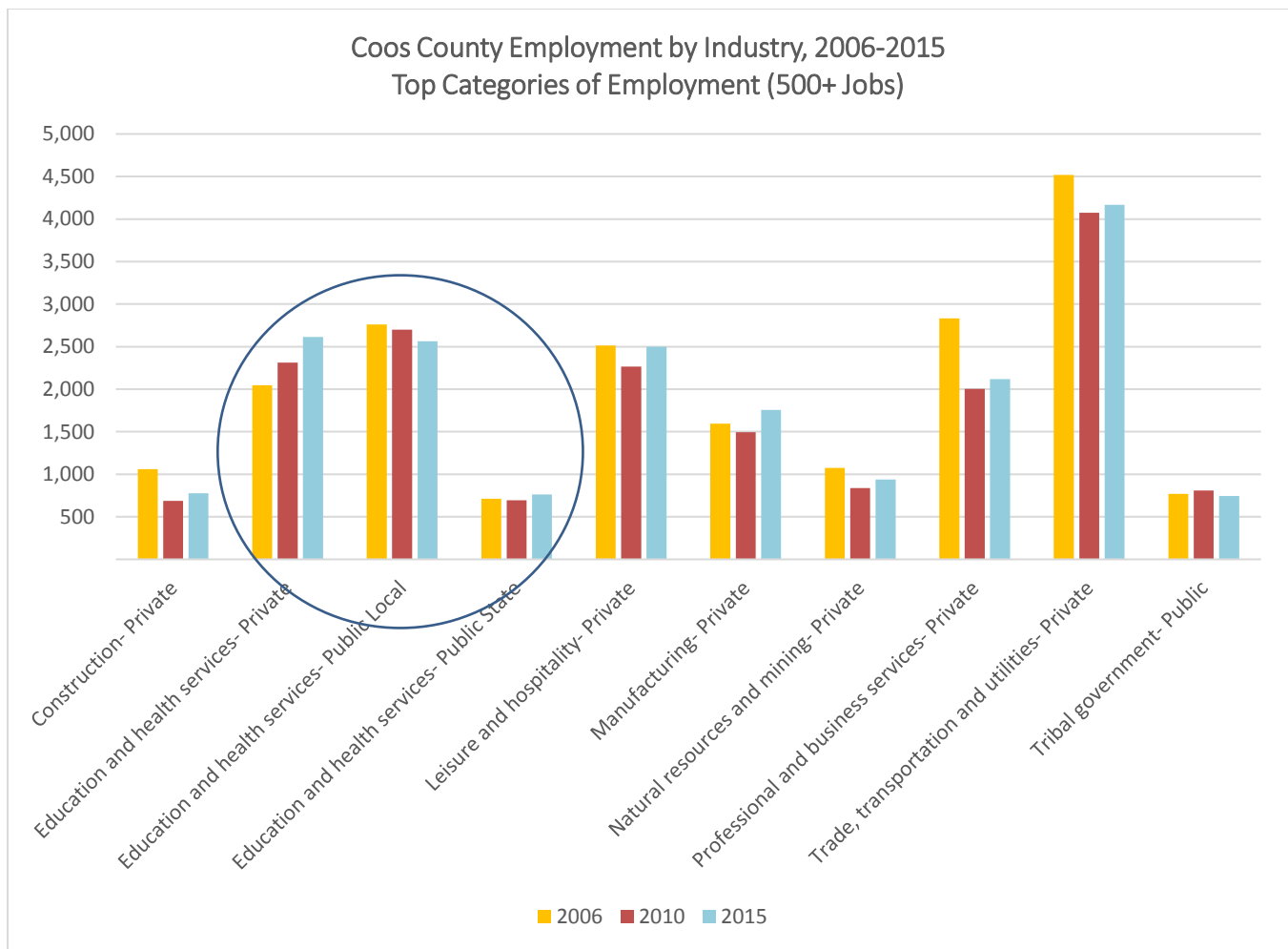
Agriculture is a significant activity in Coos County that does not show up in most employment data. According to the 2012 U.S. Census of Agriculture, 15.3% of land is in agricultural use across 654 farms. The amount of agricultural acreage has actually increased since 2007 by 8%, while the number of farms has contracted by 12%. The County ranks #1 statewide in sales of aquaculture products and acres in cranberries. It ranks 5th statewide in the number of sheep and lambs, as well as the sale of sheep, goats, mohair and milk. This could be tapped as a greater asset for tourism.

While Coos Bay is no longer the world's largest lumber shipping port as it was in recent decades, "Trade, transportation and utilities" remain a key employment source. The Port of Coos Bay still reigns as the largest natural harbor on the Pacific coast between San Francisco and the Puget Sound, and it is consistently one of Oregon's top three fishing ports as well. (Coos Curry Douglas Comprehensive Economic Development Strategy 2014-2018).

In May, 2016, the Oregon Employment Department (OED) released "[Ten Key Points About the Southern Oregon Economy](#)," a region that for the purposes of OED data, includes both Coos and Douglas Counties as well as Curry, Jackson and Josephine. Its main points are:

- Unemployment rates in Southern Oregon are generally higher than the state (this is no surprise)
- Employment growth in Southern Oregon is generally slower than the state. Coos and Curry County employment growth at 1.5% was the slowest among Southern Oregon counties between March 2015 and March 2016. During the same period, statewide employment growth was 3.5%.
- All counties in Southern Oregon had net out-migration of young people aged 20-29 years old between 2000 and 2010 (the last U.S. Census). Coos and Curry counties also had out-migration of people over 75 years of age.
- The health care industry had the strongest employment growth in all five Southern Oregon counties between 2011 and 2015: Coos County gained 713 new health care jobs during this time period. Health care is expected to continue growing through 2024.
- Wood products is still a major employer in Southern Oregon. Coos County is the only county in the region that did not lose jobs in this sector between 2011 and 2015. In fact, the county gained 63 new jobs in wood products manufacturing.
- Some job loss in wood products occurred as a result of mechanization or technology that increased production efficiency.
- The only county to lose population between 2010 and 2015 was Coos County, which lost 53 people—.08% of the total population.
- For the OED group of Southern Oregon counties, the "leisure and hospitality" sector was second only to health care (private education and health services) in generating new jobs.

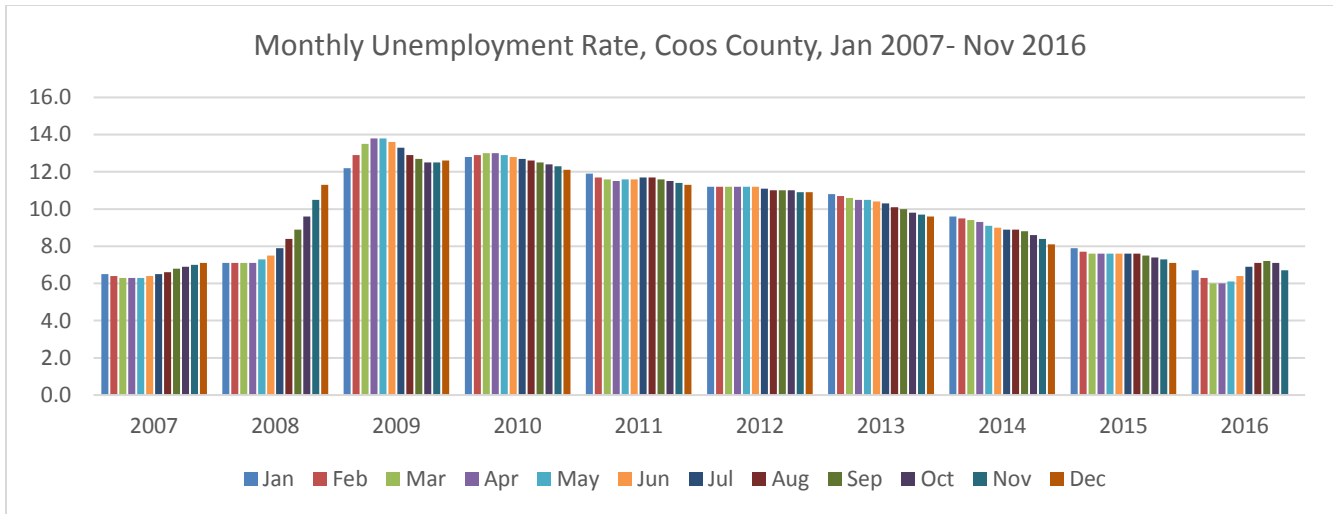
The chart below shows Coos County employment by industry before, during and after the most recent national recession. The largest number of jobs are in the "Health and Education Services" category which spans private and public sector employers as circled below. As noted above, "Trade, transportation and utilities" also remain a key employment source **During the past five years, jobs actually increased in both "leisure and hospitality" (closely affiliated with tourism) and manufacturing.**



Source: Oregon Employment Department.

On a bright note, 400 new jobs were created between 2014 and 2015: [90% of these new jobs were evenly split between what the Oregon Employment Department categorizes as high wage jobs \(above \\$43,000 annually\) and low wage jobs](#) (under \$29,000 annually). Unlike for the state as a whole, there was very little job growth in middle wage jobs.

In terms of overall economic vibrancy, Coos County's unemployment rate has fallen significantly since the peak of the 2007-09 recession, but it still has exceeded the state average by 40-50% in the years since 2013. Most recently, summer unemployment spiked in 2016- an unusual pattern given prior years.



Source: Oregon Employment Department

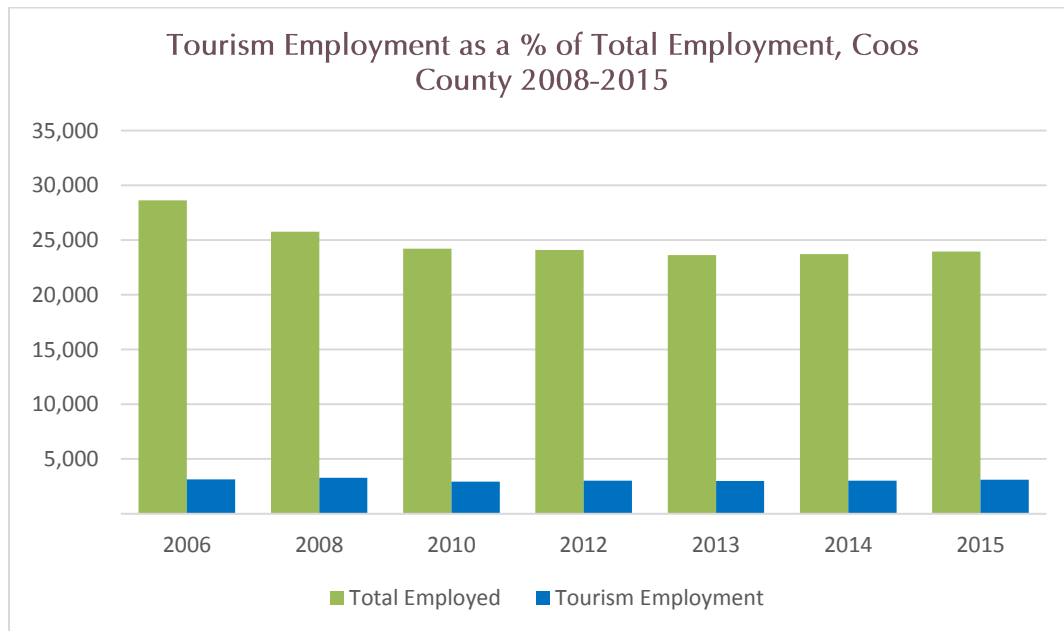
Tourism-related employment has remained relatively steady over the past decade, despite the turbulence in other parts of the region's economy. However, because of decline in other types of jobs, tourism's share of total Coos County employment has expanded from 11% to 13% over this time period.

Tourism Sector Jobs, South Coast Region 2006-2016

Year	2006	2008	2010	2012	2013	2014	2015*
Coos County Tourism Jobs	3,140	3,300	2,940	3,020	3,010	3,030	3,120

* = preliminary 2015 estimate, Dean Runyan Associates, Oregon Travel Impacts, 1992-2015p

Totals differ from "Leisure and Hospitality" job counts through OR Employment Dept. due to different definitions and methodologies

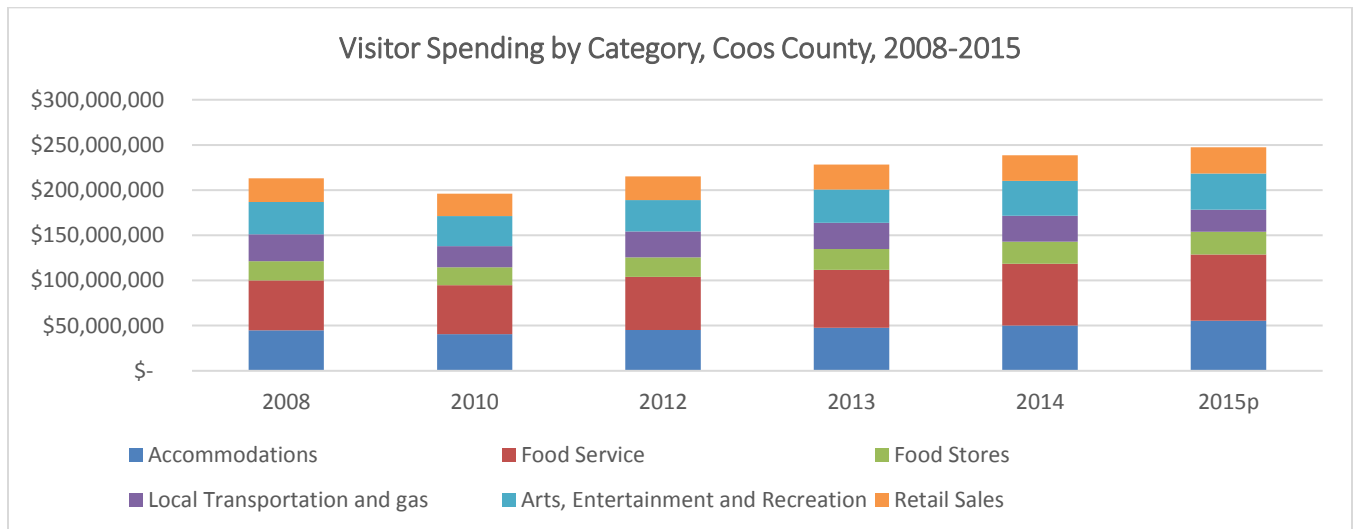


*Source: Oregon Department of Labor for Total employment, and Dean Runyan Associates for Travel Oregon for tourism employment
2015 tourism employment numbers are preliminary*

III. Visitor Information

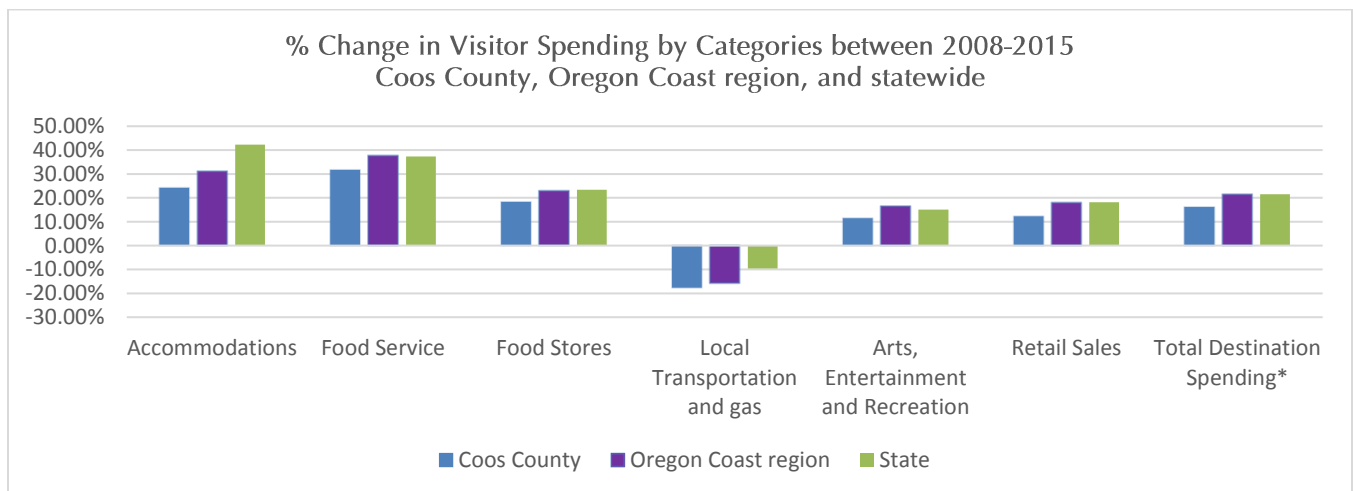
A. VISITOR VOLUME AND SPENDING

Travel Oregon's "Tourism Impacts" annual reports by Dean Runyan Associates include county-by-county breakouts of the economic impact of tourism. After a clear downturn during the 2007-2009 national recession, total visitor spending in Coos County is up by 16.2% since 2008, from \$213 million to \$247.4 million. The Appendix contains a table that details the numbers behind this chart.



Source: Dean Runyan Associates for Travel Oregon

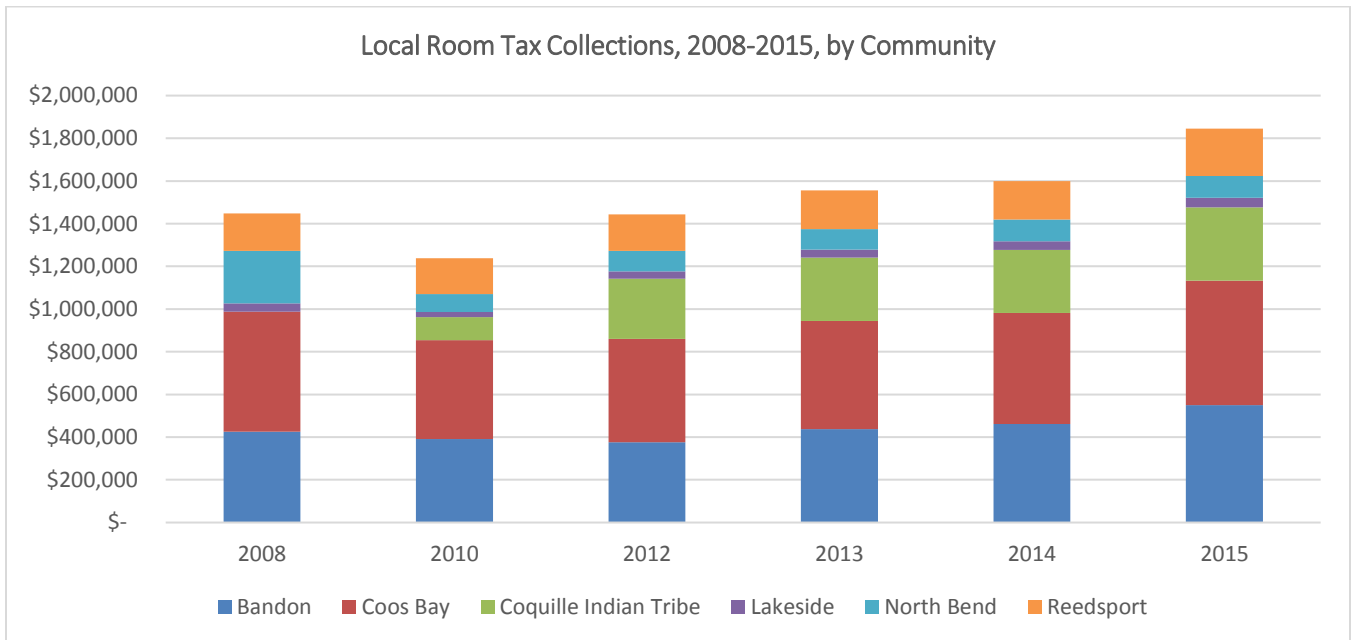
The direction of change in Coos County visitor spending from 2008-2015 is similar to both the larger Oregon Coast region and the state, but the losses are deeper and the gains more modest, as shown below. Expenditures on food services (restaurants and catering) grew faster in Coos County than any other category. Local transportation and gasoline costs are the only category with a decline, driven by lower cost fuel.



Source: Dean Runyan Associates for Travel Oregon

Transient Room Tax for Lodging:

In Oregon, sixteen counties and 91 cities collected transient room tax on lodging, at rates ranging from 2% to 13.5%. Coos County does not have a county-wide lodging tax, but four Coos County cities, the Coquille Indian Tribe, and the City of Reedsport each collect their own transient room tax at rates between 5% and 8%. **Coos Bay and Bandon together accounted for more than half of room tax receipts in 2015: each take in over \$350,000 annually.** Since taking over direct collection of transient room tax for its Mill Casino and Hotel property, the Coquille Indian Tribe's receipts have growing faster than any other community in the South Oregon Coast region.



Source: Dean Runyan Associates: Note that prior to 2010, Coquille Indian Tribe transient room tax was collected by the City of North Bend

Hidden within the lodging tax revenue data is a significant shift in visitor lodging preferences from hotels, motels and campgrounds to vacation rentals, such as Airbnb. In the Bandon area, 20% of likely visitors reported an interest in such lodging in 2014.

Section B: Visitor Profile includes additional information about lodging preference trends. Section D, "Seasonality" more information about seasonal patterns of lodging tax receipts by quarter. The Appendix includes a table of the numbers behind the above graph.

Impact of visitor spending on local income and employment:

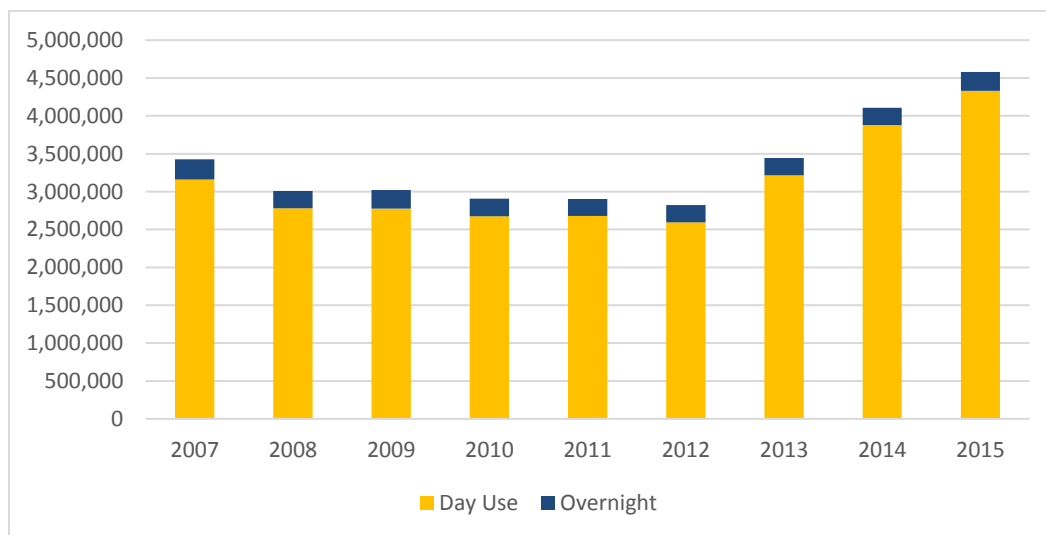
Tourism contributes significantly to the local economy and public sector budgets through the transient room tax. The "Travel Impacts" annual report (Dean Runyan Associates) calculates the scale of effort needed to increase tourism's economic impact. One Coos County household inviting one person to visit Coos County one night per year (and stay in commercial lodging!) can make a tremendous cumulative difference in jobs and wages.

Travel Impact Indicators for Coos County, 2015	Coos County
Amount of visitor spending that supports one job	\$81,870
<i>Additional visitor spending if each resident household encouraged one overnight visitor per year</i>	<i>\$4,280,000</i>
Employee earnings generated by \$100 in visitor spending	\$27
Local and state tax revenues generated by \$100 in visitor spending	\$3.40
<i>Additional employment if each resident household encouraged one additional overnight visitor per year</i>	<i>52</i>

Source: Dean Runyan Associates for Travel Oregon

Other visitation data:

Data about visitation to parks is another source of information about visitor volume. Visitation has rebounded past pre-recession levels. In fiscal year 15-16 (July 1, 2015-June 30, 2016), the eleven state parks in the Southern Oregon Coast region hosted 4,331,586 day-use visitors and 248,586 overnight campers. If local residents were the only ones using the parks, each person would have to visit a local state park every five days year-round!



Source: Oregon State Parks and Recreation

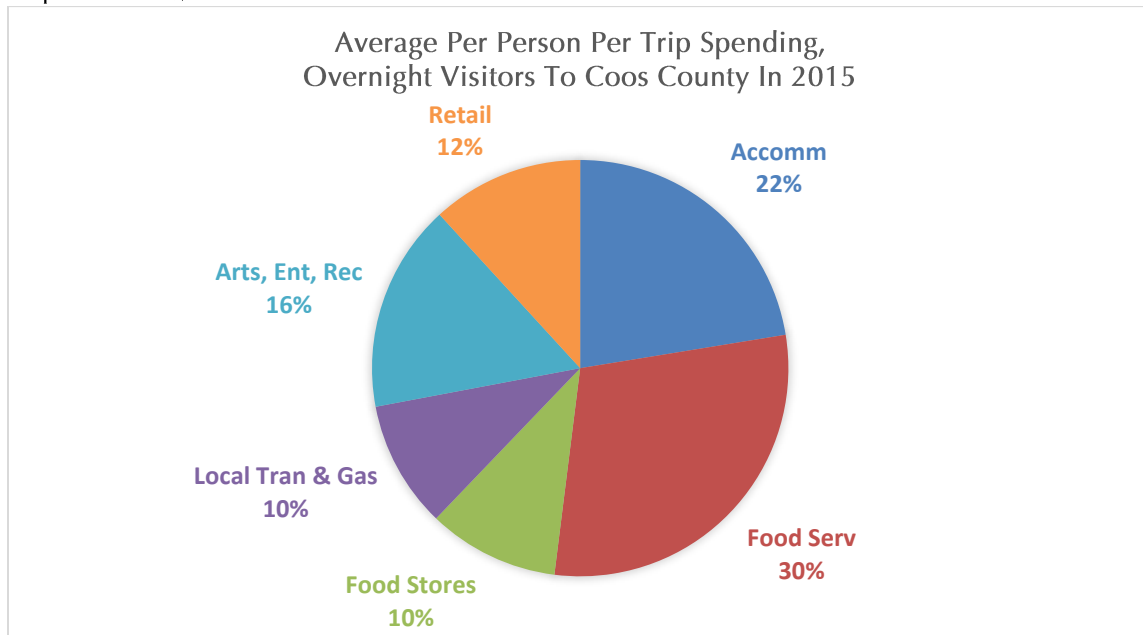
For day visitors, Sunset Bay State Park is the busiest of the region's 11 state parks: the park hosted 1,360,386 visitors in 2015. Of the four parks that offer overnight camping, Bullards Beach State Park is the busiest destination: the park hosted 105,976 overnight visitors in 2015.

The Oregon Dunes National Recreation Area, managed by the Forest Service, is actually the largest "parks" destination overall. According to the 2011 Visitor Use Report (NVUM) for the Siuslaw National Forest, 1.6 million people visited: USFS recreation staff estimate that 1.8 million people visited in 2016. Comprehensive updated data on visitation was collected for the 2016 NVUM and will likely be available by the end of 2017.

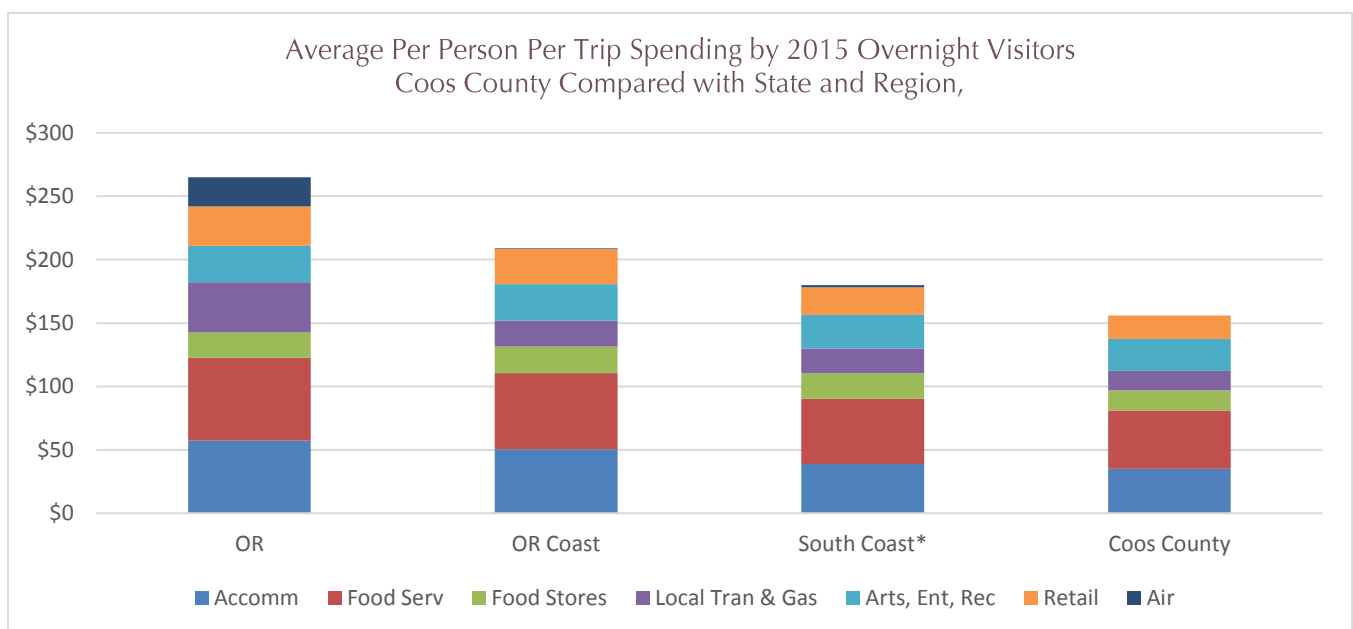
Average Daily Expenditures by Visitors:

Overnight visitors to Coos County stay for an average of 2.4 days. This is less than the regional (2.7-2.8 days) and state (3.4 days) average, naturally, because the county is smaller geographically. The average party size (2.7 people) is similar to that of other Coast visitors (2.8 people).

The average overnight Coos County visitor spends \$156 per trip, or roughly \$65 per day (over the 2.4 day average trip duration), allocated as follows:



This is significantly less than the average for the state and region:



Source: Dean Runyan Associates for Travel Oregon

*= Coos and Curry County region

Average daily expenditures for day-trippers have historically been calculated only at the state level. That last time that data was calculated, in 2011 by Longwoods International, such day visitors spent less than a third of what overnight visitors spend each day of their visit. This underscores how important overnight visitors are to tourism's revenue potential for the regional economy.

B. VISITOR PROFILE

Where visitors come from:

For the entire Oregon Coast region, Oregon tops the list of visitors' home states, followed by Washington and California. The *percentage* of visitors from Oregon is declining, and the percentage from Washington and Idaho is increasing. The most common home urban areas for coast visitors are Portland, Eugene and Seattle, in that order.

Top urban zip codes for Oregon Coast Visitors, 2011 and 2015

City of Residence	2011 % of Visitors to Coast	2015 % of Visitors to Coast	Trend
Portland	54%	47%	Down
Eugene	10%	11%	
Seattle- Tacoma	10%	11%	
Medford/K'Falls OR/CA	3%	6%	Up
Sacramento-Stockton-Modesto CA	3%	1%	Down
Boise ID	2%	3%	Up
Spokane ID/WA		2%	Up
Yakima WA	2%	2%	
San Francisco/Oakland/San Jose	2%	2%	

Source: Longwoods International for Travel Oregon

Top home states for Oregon Coast Region Visitors, 2011 and 2015

Home State	% of visitors to Coast region, 2011	% of visitors to Coast region, 2015
Oregon	64%	57%
Washington	18%	21%
California	8%	7%
Idaho	2%	3%

Source: Longwoods International for Travel Oregon

Between 2012 and 2014, both Bandon and the Adventure Coast (Charleston, Coos Bay, and North Bend) commissioned DCG Research to conduct surveys of website visitors and visitor center in-person traffic. This gives an unusually detailed picture of the local visitor profile. This Baseline report contains just a sampling of available information from that research.

Despite its location close to California, the RTS region has a smaller percentage of visitors from that state than the Coast as a whole, according to the DCG Research. It also appears to have visitors from a broader range of places, given the higher number of respondents in the "other" category.

Home States of Southern Oregon Coast Visitors compared with Oregon Coast

	Bandon Visitor Center, 2012-2013		Adventure Coast Visitor Center, 2012-2013		OR Coast Region 2015
Local	6.7%	43.9%	20.4%	36.9%	57%
Oregon	37.2%		16.5%		
Northern CA	10.3%	15.2%	10.8%	17.2%	21%
Southern CA	4.9%		6.4%		
Washington	9.9%		6.2%		7%
Idaho	2.7%		3.4%		3%
Other	28.3%		36.3%		12%

Source: DCG Research for Bandon and Adventure Coast, based on visitor center survey. Longwoods International: OR Coast region

Other Sources of Visitor Origin Information:

According to the Friends of Shore Acre Park, the annual Holiday Lights displays drew an estimate 47,336 visitors in 2012, based on guest book signatures. These visitors represented 28 countries and 45 states.

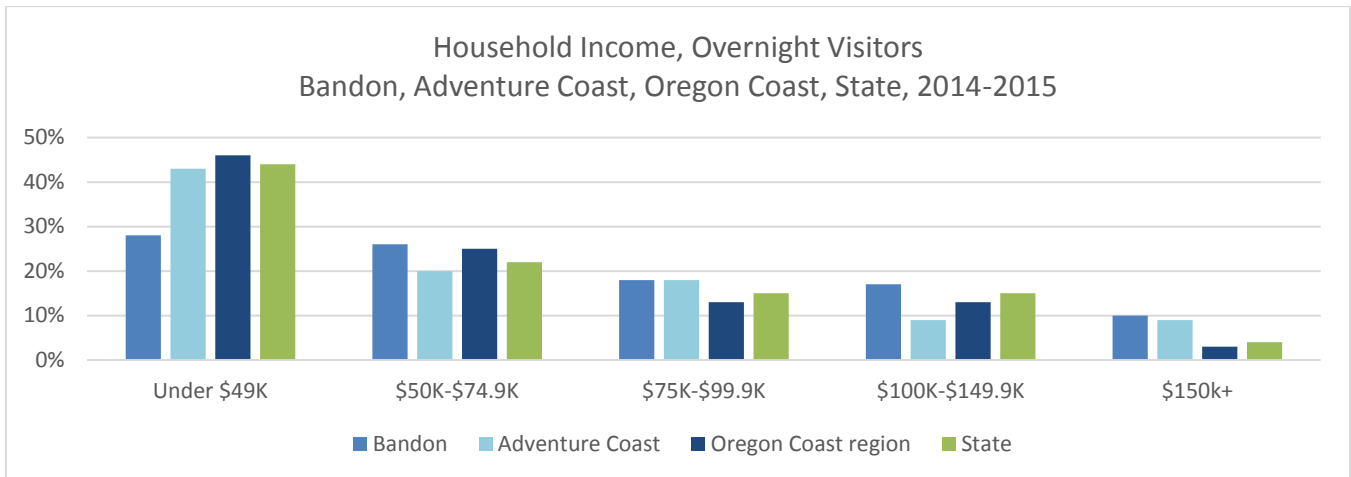
For the Siuslaw National Forest as a whole, “30% of visits come from within 25 miles, but nearly a quarter come from over 200 miles away.” Roughly 84% of visits are made to just a single place in the Forest for recreation: 11.4% of visits are made by people who visit more than 50 times per year. (2011 National Visitor Use Report for Siuslaw National Forest). According to Chris Lacosse of the Siuslaw National Forest, the Forest Service, the Oregon Dunes National Recreation Area receives a high number of international visitors who are passing through the area as part of a longer Coast tour. In his experience, this is different from other National Forests that tend to be more of a destination in and of themselves.

Specific data is available from Travel Oregon about international visitors for the State of Oregon and the Oregon Coast region. More detailed information will be available after April 2017.

- Visitation to Oregon from overseas increased by 41% between 2010 and 2015.
- International visitors (overseas plus Canada) disproportionately account for the economic impact of tourism in Oregon. They account for 12% of the total economic impact of tourism in Oregon.
- Canada is the top international market for both Oregon and the Oregon Coast. Canadian visitation dropped by 10% in 2015, due to the strength of the U.S. dollar. However, Oregon outperformed the U.S. which experienced an 11% decrease in Canadian visitor over this time period: for some border states, the decrease was 20%.
- Besides Canada, Germany & the United Kingdom are the top international markets to the Coast. In terms of its recognition as a destination by UK and Germany visitors, the Coast is only second to Portland among Oregon regions.
- With double digit growth since 2010 that is forecasted to continue through 2020, China is the fastest growing market for both the United States, Oregon and the Oregon Coast, demonstrating double digit growth since 2010. This is an important market as Chinese visitors spend approximately \$6,000 per trip.

Visitor Incomes:

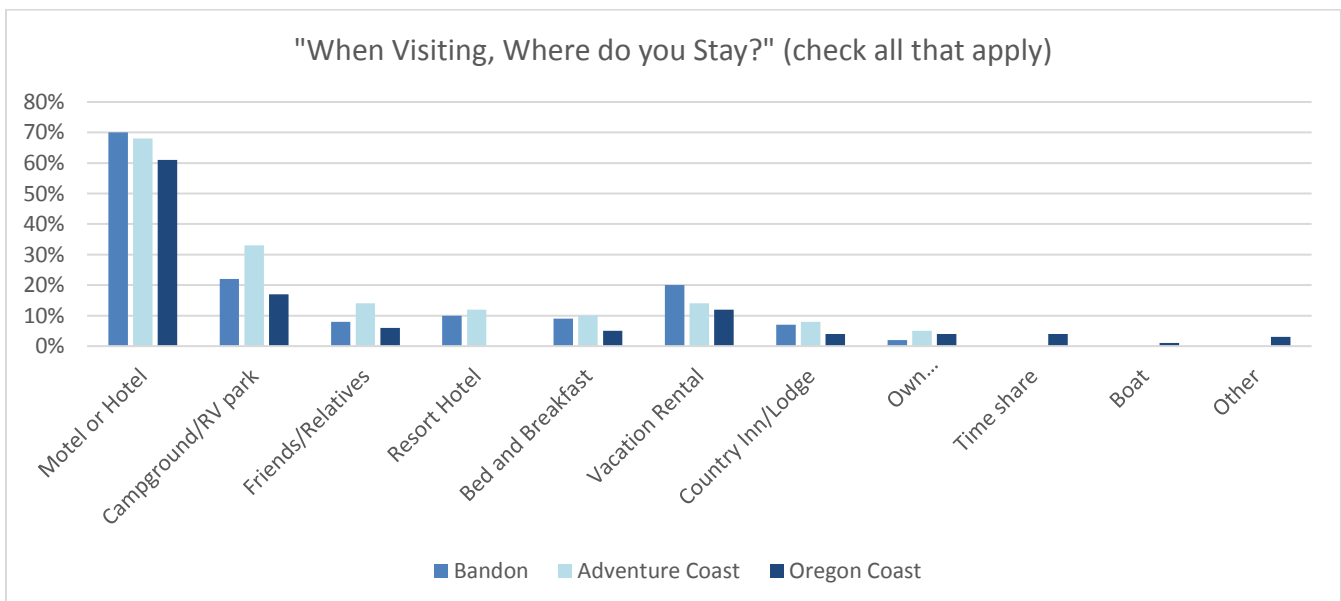
Average household incomes for visitors to the Oregon Coast (\$61,500) are slightly less than the state average (\$63,700). **But household incomes are significantly higher for prospective Bandon travelers. Both Bandon and the Adventure Coast attract a significantly higher percentage of potential travelers with annual household incomes between \$75-\$99,000 and over \$150,000: for the latter category, this is far more than either the state or the Oregon Coast as a whole.**



*Source: Oregon Coast and Oregon, Longwoods International. For "marketable trips" only
DCG Research, Bandon and Adventure Coast website visitor profile*

Visitor Lodging Preferences

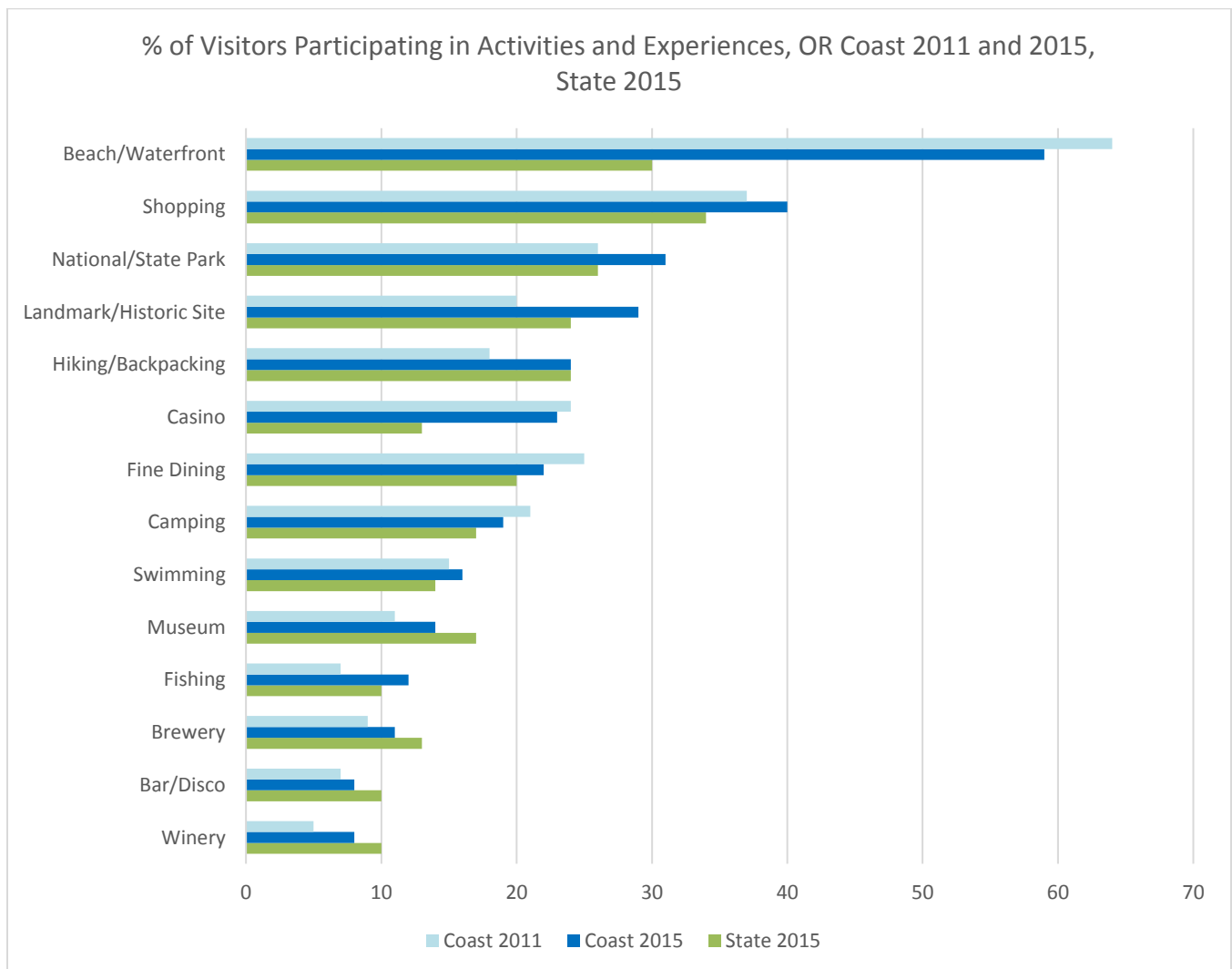
While hotels and motels are still the most common type of lodging for visitors, there is growing interest in vacation rentals. In Bandon, 20% of travelers to the region in 2014 indicated they are using such accommodations.



Source: Oregon Coast, Longwoods International, 2015: DCG Research, Bandon and Adventure Coast visitor center survey, 2013

C. VISITOR ACTIVITIES

Not surprisingly, beach activities are the most common denominator for visitors to the Oregon Coast, as shown on the chart below. Shopping, visits to parks and historic sites, and hiking/backpacking are also popular. Participation in all of these popular activities except for the beach increased between 2011 and 2015.

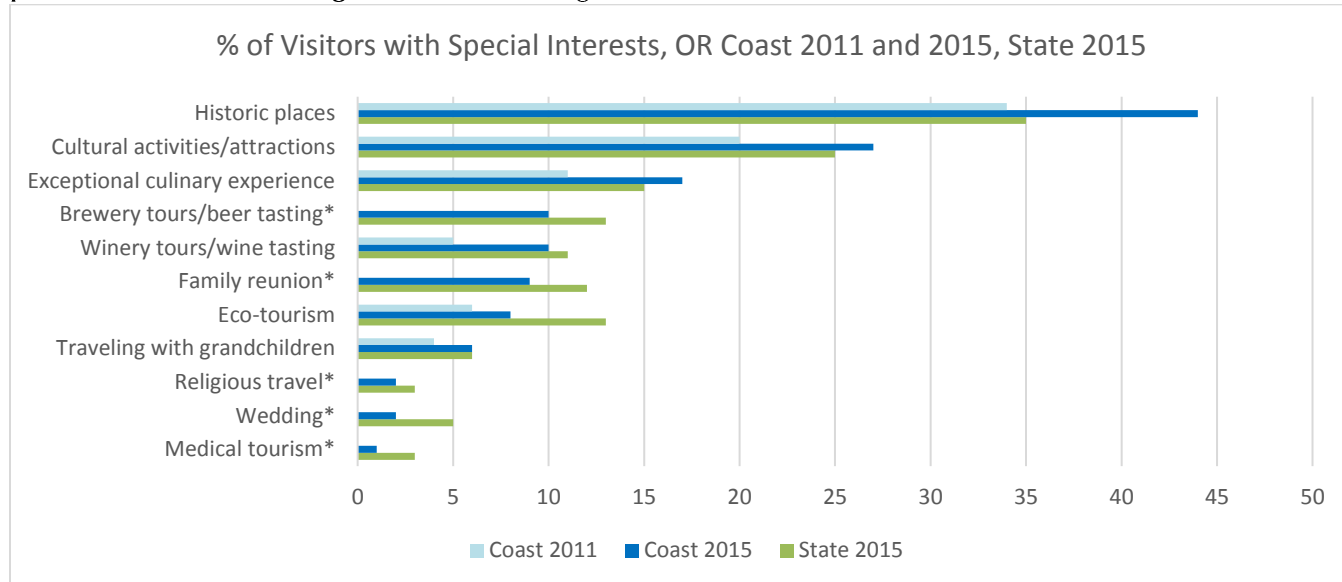


Source: Longwoods International

Bicycling (not shown on this table of the most common activities and experiences- the full table is 3 pages long) is growing as an area of interest in Coastal Oregon- with participation rates up from 1.5% of visitors in 2011 to 5% of visitors in 2015. It still, however lags the average for visitors statewide: 7% participate in bicycling during their Oregon travels. Furthermore, many bicyclists riding *through* the area on the Oregon Coast Bicycle Route may not be captured in this data, although they represent a potential market for local businesses.

The chart below shows “special interests” of travelers: things they specifically seek out when traveling. **Interest in heritage, culture, food and drink has grown significantly on the Coast between 2011 and**

2015. And for the first three experiences (heritage, cultural and culinary), that interest has surged past the statewide average for all three categories.



*Longwoods International: Special Interests with * were added to the reports for the first time in 2015*

The 2012-2013 local visitor surveys for Bandon and the Adventure Coast included an open-ended question about what researchers called “trip-makers”- the activities respondents planned to enjoy. The list is consistent with the Coast-wide trends in terms of relative ranking, but there are some variations worth noting between Bandon and the Adventure Coast.

Top “Trip-makers” for visitors to Adventure Coast and Bandon areas, 2013

Activities	Adventure Coast	Bandon
Beach activities	36.0%	63.8%
Sightseeing	41.0%	25.7%
Shopping	6.2%	22.0%
Hiking/Backpacking	15.0%	10.6%
Bird Watching	1.8%	5.0%
Culinary Experiences (Dining)	0.9%	5.0%
Fishing	4.7%	4.1%
Cultural Activities/Attractions	0.6%	4.6%
Museums/Historical Sites	4.1%	2.3%

DCG Research, Bandon and Adventure Coast visitor center survey, 2013: Top five activities for each area are in boldface

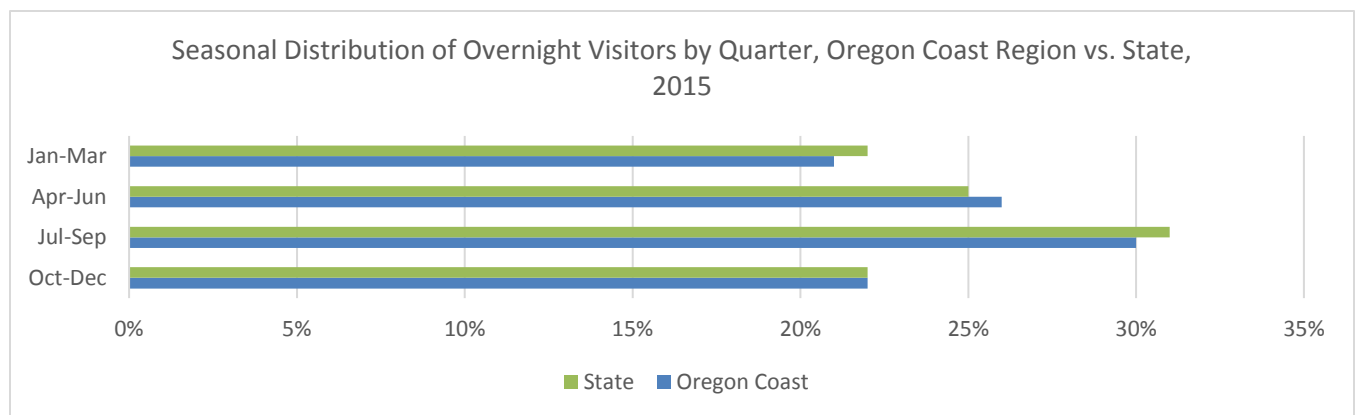
That wildlife viewing and fishing are important Coos County draws is confirmed by data from a 2008 analysis of traveler expenditures related to fishing, hunting, wildlife viewing and shell fishing in Oregon (Dean Runyan Associates). In 2008, these activities generated \$33,452,000 in visitor spending. Wildlife viewing accounted for 42.2% of this spending, closely followed by fishing with 36.6% of spending.

For the Siuslaw National Forest, which includes the Oregon Dunes National Recreation Area (ONDRA), the most popular “main” activities are: viewing natural areas (22.7% of visitors), Hiking/walking (22.4%) and OHV (off-highway vehicles) use (18.2%). According to a 1999 Oregon State University study, “The

Economic Importance of OHV Recreation in Oregon,” the South Coast of Oregon (defined for that study as Coos and Curry counties, as well as coastal Lane and Douglas counties) captured 59.8% of all statewide expenditures for OHV recreation, and 78% of all such spending by out-of-state visitors. At the time of the study, the region generated \$27,773,693 in OHV related expenditures. According to Forest Service recreation manager Chris Lacosse, OHV use is still growing today, but also changing as older adults and family-oriented groups ride more expensive side-by-side utility vehicles vs. the dune buggies of old. Two outfitting/tour companies, both based in the Florence area, are licensed to operate in ODNRA.

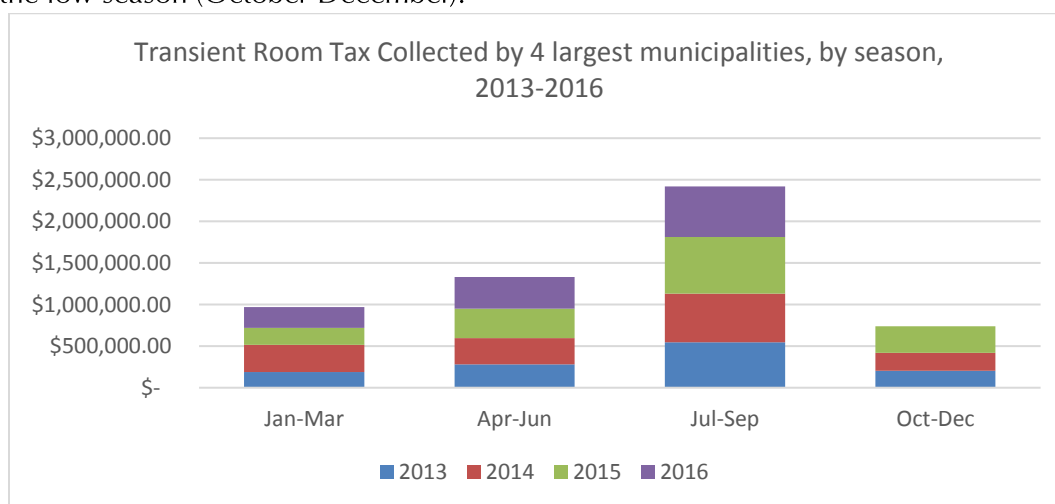
D. SEASONALITY

The seasonal pattern of visitors to the Oregon Coast as a whole is similar to that of the state, except that the coast receives a slightly greater percentage of visitors in the spring than the state average. Still, summer is the busiest season.



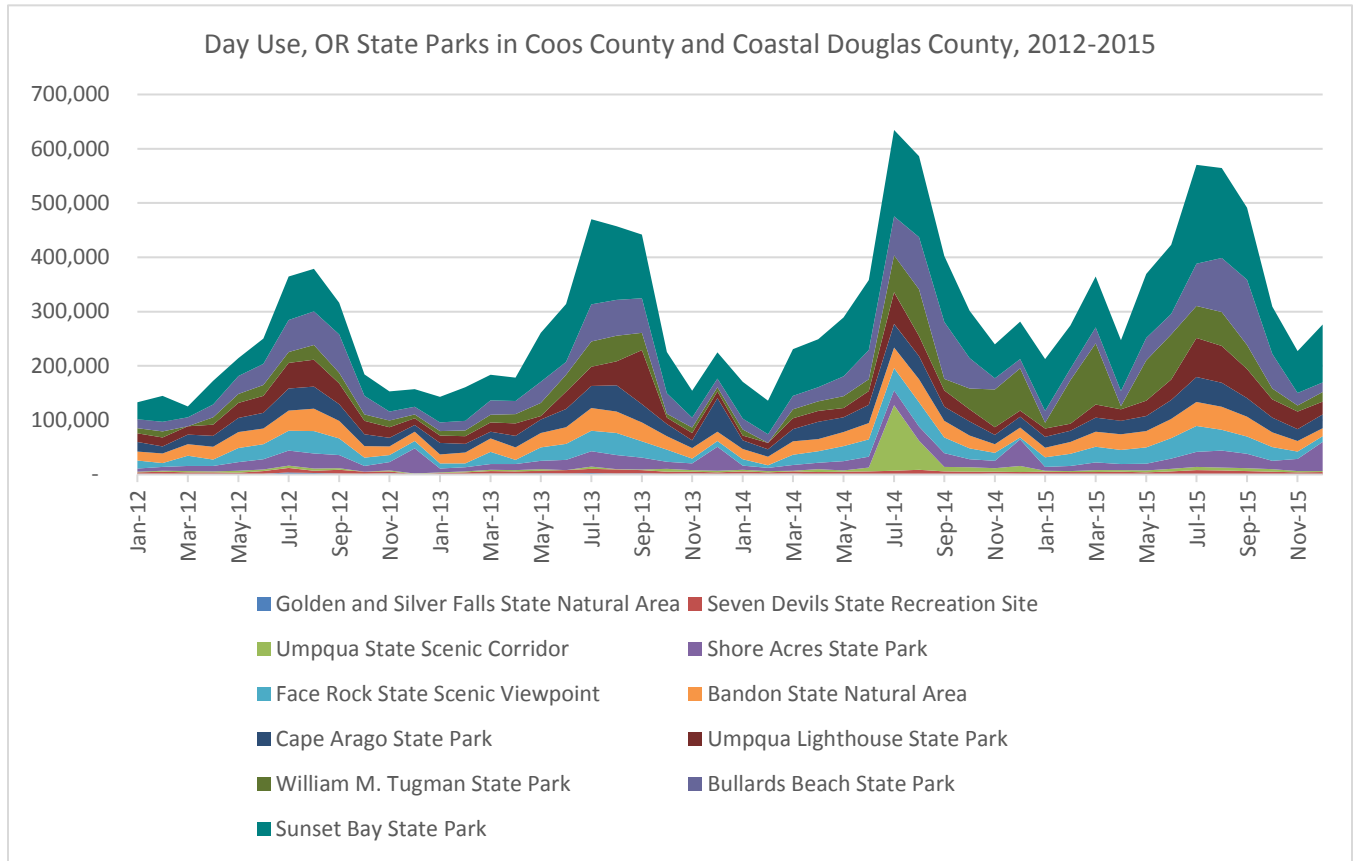
Source: Longwoods Research

Visitation is even more seasonally skewed toward summer in the Southern Oregon Coast RTS region, as shown on the chart below. Peak season (July-September) transient room taxes are 250% higher on average than in for the low season (October-December).



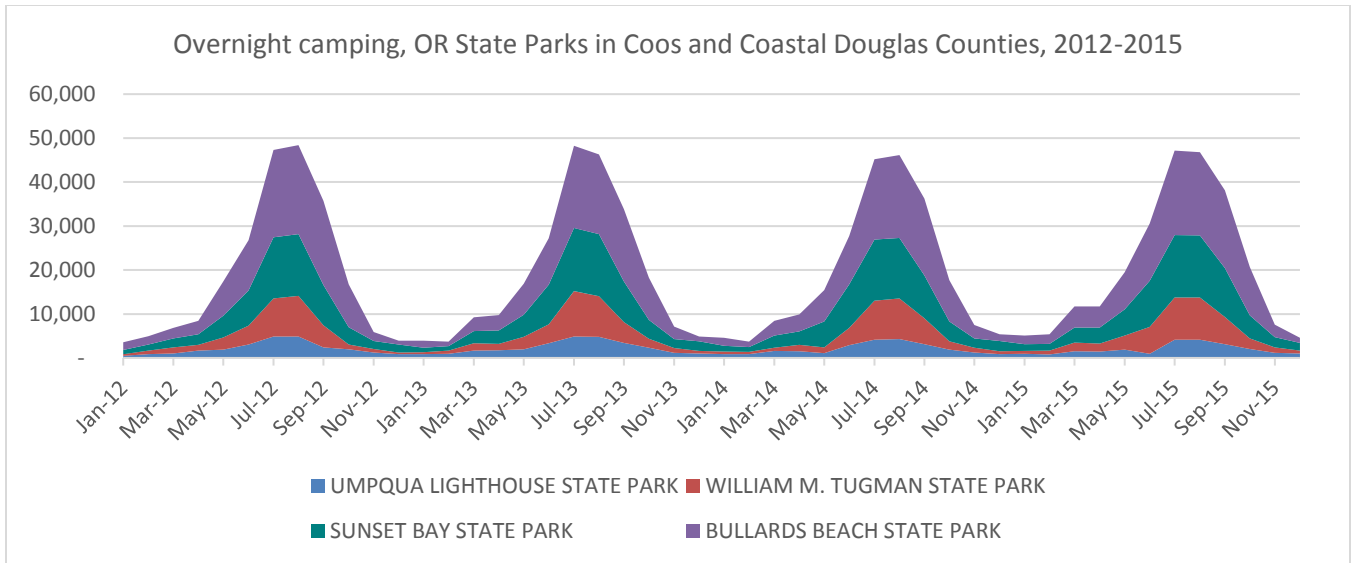
Source: City Finance Depts., Bandon, Coos Bay, North Bend and Reedsport

Day visitation rates at Oregon State Parks provides yet another lens on seasonal variation. In 2014 and 2015, July was the busiest month for the busiest location, Sunset Bay State Park: it attracted 182,568 day-use visitors in July 2015. Popular Shore Acres State Park creates a December bump in day use levels, with its annual Christmas lights display, which draws national and international visitors.



Source: Oregon Department of Parks and Recreation

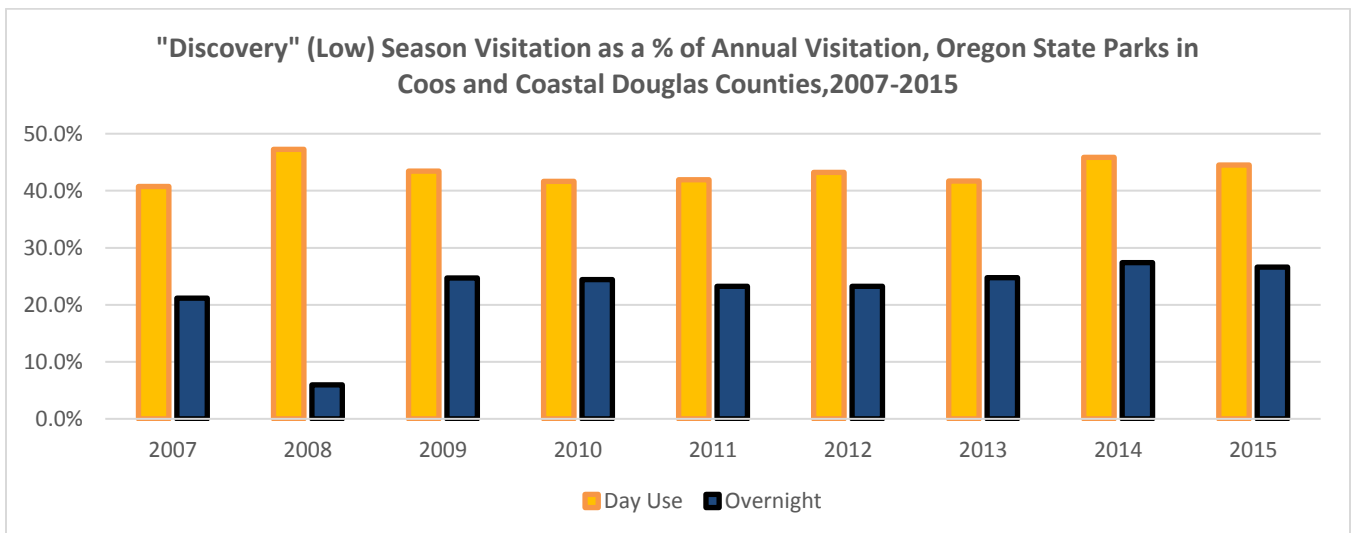
Overnight camping numbers mirror regional trends in an exaggerated fashion, since winter weather dissuades many campers. In 2014 and 2015, July was the busiest month for the busiest location, Bullards Beach State Park: it attracted 19,163 campers in July 2015.



Source: Oregon Department of Parks and Recreation

The following chart shows how much state park utilization occurs in the off-season, or “Discovery Season” in Oregon State Park terminology, as a percentage of annual visitation. The discovery season covers the seven-month period from October 1 to April 30, while the prime season extends five-months from May 1-April 30.

On the chart, the closer the bars are to 50%, the more even the usage between prime season and discovery season. For the Southern Oregon Coast region, **day use in the discovery season is already close to 50% of annual usage, demonstrating the value of area parks as true four-season outdoor destinations.** Even if the current off-season mix is mostly local people, this shows parks as a potential year-round recreational amenity for visitors. This is not typical for the state as a whole.



Source: Oregon Department of Parks and Recreation

IV. Organizations and Assets for Tourism

In lead-up work for the Rural Tourism Studio, the Southern Oregon Coast RTS Steering Committee has created the following Statement of Intent. The statement encapsulates the purpose and desired outcomes for the work ahead.

“We the community leaders of the Southern Oregon Coast are committed to the development of our region’s tourism economy and to optimizing the economic impact of tourism by:

- Improving collaboration between communities/community leaders and tourism organizations in the region
- Developing new unique and compelling experiences in outdoor recreation, culinary and agritourism, arts and local culture that will draw in visitation and be an asset to the community
- Protecting and enhancing natural and cultural assets in the region”

This section notes existing conditions and potential assets that relate to the three key elements above.

A. CAPACITY AND ENERGY FOR COLLABORATION

An economy built on logging and fishing is bound to attract and foster independent souls. An economy under chronic stress can foster divisiveness as easily as unity. And with these ingredients, collaboration has not always been a strength in this region. As illustration, an outside team of invited experts conducted a “Sustainable Design Assessment Tool (SDAT) planning process in 2010. They observed a “tendency toward ‘unproductive finger pointing’ on important issues that require collaborative dialogue. Furthermore, the team noticed signs that institutions, organizations and residents of the region have not established significant levels of trust between each other.”

That observation makes it all the more striking how much cooperative work has happened since, laying a firm foundation for future collaboration around tourism.

- The multi-year Ford Institute Leadership Program, which built a cadre of skilled, networked community leaders throughout the RTS region.
- The Wild Rivers Coast Alliance is now fully operational as a community resources, both investing in and facilitating collaborative projects throughout Coos and Curry Counties.
- As noted in the RTS application, “In 2015, a group of over 20 community members came together to discuss regional tourism. The group formed in response to a proposed county-wide transient lodging tax . . . We found that as a group we had incredible cohesion in what we wanted to accomplish and how we would go about building a foundation to make it happen. While the tax did not pass, the group has remained committed to strengthening tourism and our locale economy.
- Initiative of Bandon Dunes to support tourism development through a voluntary lodging assessment to be managed by a collaborative process starting in 2017.
- Increased collaboration of Chambers of Commerce in marketing, market research and planning
- Out of the 2013 Wild Rivers Coast Rural Tourism Studio to the south of this region, two new staff positions were created to specifically foster collaboration and tourism product development on the South Coast, including the Southern Oregon Coast RTS region.

- OSU Professor of Tourism and Business Development
 - Oregon Coast Visitors Alliance (OCVA) South Coast Coordinator position
- In Travel Oregon's Regional Destination Marketing Organization (RDMO) network, this region is affiliated with the Oregon Coast Region, currently administered by OCVA. Travel Oregon is expanding its regional investments and reorganizing its regional promotion and development system, so new parties may become critical players in this arena within the next year.

B. NEW AND COMPELLING VISITOR EXPERIENCES

The region's RTS application describes the challenge of focusing tourism development efforts. "Our community has a broad spectrum of tourism opportunities from agritourism (cranberries, fisheries, cheese, beer, organic dairies, cattle ranches, sheep ranches, etc.), adventure tourism, surfing, dune riding, bicycling, kite surfing, kayaking, sailing, etc.), golfing, birding, storm watching and historical tours, to name a few. This diversity, while a good thing, has also made it difficult to effectively brand our region and market it to those who would enjoy . . ."

Trails are emerging as a key strategy for encouraging visitors to explore more of the region's unique features and stay longer.

- Regional trails plan, with an initial focus on Mountain Biking
 - Trail funding received through RTP for Coos Mountain Biking Trail System and Lower Rogue Trail
 - A new International Mountain Biking Association (IMBA) chapter has emerged with a focus on development of trail systems
- Oregon Coast Trail (OCT)
 - Discussions with OCVA and local stakeholders around creating a coast wide plan for completing and re-routing sections of the OCT that are currently on HWY101
- Opportunities to expand trail riding beyond the Dunes

Other assets described in this report include:

- The region's many and diverse farms. There are over 600 farms in Coos County alone. A recent Farm Trail organizing project involving Bandon and North Curry County could provide useful lessons.
- Reputation as authentic, uncrowded, and delicious place to visit
- High quality and unique heritage assets, including Shore Acres and the Coos History Museum.

C. NATURAL AND CULTURAL ASSETS

- The Siuslaw National Forest, including the Oregon Dunes National Recreation Area, is not considered to be crowded by visitors, according to the 2011 Visitor Use Report. Only parts of the ODNRA is open to motorized vehicles.
- Active tribal presence in the region, with an interest in cultural tourism
- Extensive and varied waterfront (rivers, bays, open ocean, lakes): North Bend created a waterfront boardwalk in 2009 to further connect its community to the water.
- The future of Elliott Bay State Forest is uncertain in terms of ownership, recreational and industry access.
- As described in Appendix C, County and Tribal Cultural Coalitions are an underutilized resource for surfacing and stewarding cultural assets.

V. Appendix: Additional Regional and County Level Data

A. TRANSPORTATION DATA

Traffic Counts for Main Highway Routes to and from the Region, 2011-2015

Mile marker	Highway 101 Average Daily Traffic	2015	2013	2011	Change 2011-15
198.58	Lane-Douglas County line	4,300	4,000	4,000	7.5%
211.11	Reedsport, north city limit	5,200	5,800	5,400	-3.7%
211.65	just south of OR38 intersection	8,400	9,500	9,000	-6.7%
213.4	Reedsport, west city limit	8,100	9,300	8,700	-6.9%
215.97	just north of 8th St, Winchester Bay	10,900	12,800	8,900	22.5%
216.81	just south of Umpqua Lake Rd	7,200	7,700	7,100	1.4%
220.58	Douglas-Coos County line	7,100	8,000	6,900	2.9%
222.75	just south of Airport Way	7,900	8,700	7,700	2.6%
233.09	Hayes Inlet bridge	12,100	12,600	10,900	11.0%
234.03	North Bend, north city limit	13,600	15,300	14,100	-3.5%
236.77	North Bend-Coos Bay line	19,800	21,100	17,300	14.5%
237.58	Bayshore Ave, just north of Hemlock	20,100	21,800	19,000	5.8%
239.22	Coos Bay, south city limit	22,800	25,600	22,700	0.4%
244.02	just north of OR42 intersection	14,100	13,000	13,500	4.4%
244.97	just south of OR42 intersection	5,400	5,100	4,800	12.5%
260.64	Bandon, north city limit	7,200	6,000	6,200	16.1%
261.51	just north of OR42S intersection	6,600	5,400	5,800	13.8%
273.47	just west of Michigan Ave	10,300	9,400	8,500	21.2%
274.84	Bandon, south city limit	7,400	8,500	7,400	0.0%
285.78	Coos-Curry County line	3,900	3,400	3,300	18.2%

Mile marker	Highway 38 Average Daily Traffic	2015	2013	2011	Change 2011-15
56.78	Just west of I-5 at Curtin	4,900	4,800	4,100	19.5%
51.2	Drain, north city limit	5,200	4,900	4,100	26.8%
50.2	Drain, west city limit	3,800	4,100	3,800	0.0%
36.39	Elkton, east city limit	4,500	4,900	4,300	4.7%
35.87	Elkton, west city limit	3,900	3,700	3,900	0.0%
17.63	just east of Main St Scottsburg	3,300	2,900	3,500	-5.7%
0.1	Just east of 101 at Reedsport	5,400	5,100	5,100	5.9%

Mile marker	OR Highway 42 Average Daily Traffic	2015	2013	2011	Change 2011-15
76.4	just west of I-5 south of Roseburg	21,000	18,200	22,000	-4.5%
73.27	just west of intersection with Highway 99	9,800	8,800	9,900	-1.0%
23.03	just west of Powers Highway turnoff	4,100	3,700	3,800	7.9%
20.01	Myrtle Point, north city limit	5,500	5,600	6,300	-12.7%
12.8	Coquille, south city limit	7,800	7,300	7,500	4.0%
10.87	just south of Highway 42S turnoff	9,000	8,700	8,800	2.3%
0.7	just east of 101 btwn Bandon and Coos Bay	8,300	8,000	8,200	1.2%

Mile Marker	OR Highway 42S Average Daily Traffic	2015	2013	2011	Change 2011-15
16.89	just west of OR42	3,300	3,000	2,600	26.9%
16.78	Coquille, south city limits	2,400	2,600	2,300	4.3%
7.24	Just east of Myrtle Point-Lampa Rd	860	1,100	1,100	-21.8%
1.61	Just east of Prosper Junction Rd	1,400	1,500	1,400	0.0%
0.19	Bandon, east city limit	3,000	3,400	3,200	-6.3%
0.4	Just east of Highway 101 at Bandon	5,100	5,000	4,900	4.1%

Source for all traffic count tables: Oregon Department of Transportation

B. SELECTED MARKET AND ECONOMIC IMPACT INFORMATION FOR KEY NICHE MARKETS

Bicycle Tourism:

Many useful bicycle tourism studies can be found on Travel Oregon's industry website at <http://industry.traveloregon.com/research/cycling-research/>, some of which are referenced below.

- Oregon Bicycle Industry Regional Economic Significance: 2014, Dean Runyan Associates
- The Economic Significance of Cycling on Oregon Scenic Bikeways: 2014, Dean Runyan Associates
- The Economic Significance of Bicycle-Related Travel in Oregon: 2012, Dean Runyan Associates. A 2012 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.
- 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)
- 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 [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.

Outdoor and Nature-Based Recreation

Travel Oregon has shared many useful outdoor recreation reports in the Research and Reports section on their Industry website at: <http://industry.traveloregon.com/research/outdoor-recreation-research/>, some of which are referenced below:

- A [2014 national study on Outdoor Recreation](#) profiles market and activity trends by age group.
- 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.
- Fishing, Hunting, Wildlife Viewing and Shell fishing in Oregon: May 2009, Dean Runyan Associates

Heritage and Cultural Tourism

- In partnership with the Oregon Cultural Trust, each county and Tribe in Oregon has a Cultural Coalition and Cultural Plan for investing in local arts, heritage and humanities. In addition to local investments, the Oregon Cultural Trust invests in nonprofits statewide that undergo a vetting process for their focus on this broad definition of culture. Here are links to the vetted nonprofits in [Coos](#) and [Douglas](#) County.
- [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.
- [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.

Culinary & Agritourism

Travel Oregon has shared many useful culinary and agritourism reports in the Research and Reports section on their Industry website at: <http://industry.traveloregon.com/research/culinary-and-agritourism-research/>, some of which are referenced below

- 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.
- 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 [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.

C. DETAILED DATA ON COOS COUNTY VISITOR EXPENDITURES

Visitor Expenses by Category, Coos County, 2008-2015p

Year	2008	2010	2012	2013	2014	2015p
Accommodations	\$4,700,000	\$40,700,000	\$45,300,000	\$47,600,000	\$50,100,000	\$55,500,000
Food Service	\$55,500,000	\$53,900,000	\$58,700,000	\$64,100,000	\$68,500,000	\$73,100,000
Food Stores	\$21,300,000	\$19,900,000	\$21,700,000	\$23,000,000	\$24,200,000	\$25,200,000
Transportation and gas (Local)	\$29,600,000	\$23,500,000	\$28,600,000	\$29,100,000	\$28,900,000	\$24,400,000
Art, Entertainment and Recreation	\$35,900,000	\$33,100,000	\$34,800,000	\$37,000,000	\$38,500,000	\$40,000,000
Retail Sales	\$26,000,000	\$24,800,000	\$26,100,000	\$27,600,000	\$28,400,000	\$29,200,000
Total Destination Spending	\$213,000,000	\$195,900,000	\$215,200,000	\$228,400,000	\$238,600,000	\$247,400,000

Visitor Expenses by Category, Coos County compared with State and Regional Averages, 2015

Commodity Purchased	OR	OR Coast	South Coast*	Coos County
Accommodations	\$57	\$50	\$39	\$35
Food Service	\$65	\$60	\$51	\$46
Food Stores	\$20	\$21	\$20	\$16
Local Tran & Gas	\$40	\$20	\$19	\$15
Arts, Ent, Rec	\$29	\$29	\$26	\$25
Retail	\$31	\$28	\$22	\$18
Air	\$23	\$0	\$2	\$0
Total	\$265	\$209	\$180	\$156

Local Transient Room Tax Collections, 2008-2015

	2008	2010	2012	2013	2014	2015
Bandon	\$ 426,000	\$ 391,000	\$ 376,000	\$ 438,000	\$ 462,000	\$ 550,000
Coos Bay	\$ 561,000	\$ 464,000	\$ 485,000	\$ 507,000	\$ 520,000	\$ 583,000
Coquille Indian Tribe	\$ -	\$ 108,000	\$ 281,000	\$ 296,000	\$ 295,000	\$ 343,000
Lakeside	\$ 40,000	\$ 23,000	\$ 35,000	\$ 37,000	\$ 40,000	\$ 46,000
North Bend	\$ 246,000	\$ 84,000	\$ 96,000	\$ 96,000	\$ 102,000	\$ 102,000
Reedsport	\$ 175,000	\$ 168,000	\$ 170,000	\$ 182,000	\$ 181,000	\$ 221,000
Total	\$ 1,448,000	\$ 1,238,000	\$ 1,443,000	\$ 1,556,000	\$ 1,600,000	\$ 1,845,000

Source all data on this page: Dean Runyan Associates

D. RURAL TOURISM STUDIO STEERING COMMITTEE MEMBERS

Deb Rudd	South Slough NERR
Kyle Wirebaugh	Coquille City Councilor
Joe Benetti	Benetti's Italian Restaurant (and Coos Bay Mayor)
Julie Miller	Bandon Chamber of Commerce
Kat Hoppe	The Mill Casino
Melissa Cribbins	Coos County Commissioner
Kathi Simmoneti	Coquille Chamber of Commerce
Roger Craddock	City Manager, Coos Bay
Emily Groves	42 & Spruce Downtown
Connie Stopher	South Coast Development Council
Fiona Bai	Port of Coos Bay
Dave Lacey	Oregon Coast Visitors Association
Trish Mace	Charleston Marine Life Center
DeeDee Murphy	Reedsport MainStreet
Jim Seeley	Wild Rivers Coast Alliance
Marie Simonds	Wild Rivers Coast Alliance
Jeff Stump	Confederated Tribes of the Coos, Lower Umpqua and Siuslaw Indians
Alison Arnold	USFS - Rogue River National Forest
Larry Becker	Oregon Parks and Recreation Dept
Kay Claybourn	Powers School District
Jennifer Groth	Southwest Oregon Regional Airport
Kat Hoppe	The Mill Casino
Miles Phillips	Oregon State University