

Visit

Tillamook Coast



Bus Boys, by Jarett Juarez

Annual tourism benchmark report for fiscal year 2018-2019

As required by section 2.6 in the previous IGA with the Economic Development Council,
and section 1.2 per agreement with Tillamook Coast Visitors Association

Presented August, 2019
to Tillamook County Board of Commissioners
Prepared by Nan Devlin, Executive Director
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2018-2019 HIGHLIGHTS

It's been a busy year.

This fiscal year has been one of continuing transition, both as an organization and in destination development.



ORGANIZATIONAL GOALS


- **Formed a 501(c)(6),** Tillamook Coast Visitors Association, and a new, **11-member tourism board of directors.** The organization is now its own fiscal agent, separate from Tillamook Bay Community College, which operated as our fiscal agent since 2014 through the Economic Development Council.
- Developed a new and **extensive chart of accounts** aligned to destination administration. This will provide a more complete story of our activities, and enable us to cross reference transactions to the updated **“Three R’s” benchmarks (Return on Investment, Relationships and Responsibility)** as outlined in the new funding agreement with the county.
- With objectives nearly completed in the Tourism 2025 plan created in 2014, we will develop a **new sustainable tourism strategic plan** that aligns with the Three R’s and the county’s strategy for sustainable tourism infrastructure planning.

RETURN ON RESPONSIBILITY (Destination Management)

- **Wayfinding planning** in Nehalem, Rockaway Beach, Wheeler and Pacific City. RFPs for signage fabrication and installation are being reviewed now for Nehalem.
- **Interpretive signage** for Tillamook Bay and estuaries (completed, installation being prepared), and fisheries and cultural heritage in Garibaldi. Also conducted **Interpretive Training** for staff and volunteers of cultural heritage organizations.
- **Visit Tillamook Coast is the coordinating organization for the North Coast Tourism Management Network**, working with Clatsop County and Travel Oregon on sustainable tourism programs. The **transportation options pilot program** is underway, the first volunteer training for a **Trailhead and Beach Ambassador program** was conducted in July, and the **stewardship communications and action plan** will start this fall. The network is the outcome of the North Coast Destination Management Studio conducted by Travel Oregon.
- Presented twice at the Governor’s Conference on Tourism, one on food trail development, and one on **“Caring for the Coast,” our environmental stewardship messaging**, which Travel Oregon recognized as one of the best in the state.

RETURN ON RELATIONSHIPS (Business and Community Development)

- **Completed objectives for the Business Oregon Rural Opportunity Initiative grant** to restart the Recipe to Market sessions, and conduct feasibility studies for developing a food distribution system and a north coast food brand effort (see metrics report, pg. 7).

-  **Crave the Coast successfully launched** and is named a finalist for **Sunset Magazine's** Reader Choice Travel Award for best food festival. The festival hosted 794 attendees: 40% from Tillamook County, 44% from other Oregon counties and 16% from other states. Vendors reported selling out of product at the event. Crave the Coast was a "green" event, with a 68% waste diversion rate.



- Launched second year of the **North Coast Food Trail** with 75 participants. Since July 2018, the trail has garnered multiple print, online and broadcast stories worth \$2.1 million in earned media. Travel Oregon recognized us with a **Best Niche Tourism Program award at the Governor's Conference on Tourism**.
- Co-hosted 2nd annual Beer+Cheese event, **raising \$3,750 for Food Roots**
- Sponsored a county-wide, **4-day grant writing workshop** for nonprofit organizations.
- Launching **Quilt Month in October**, celebrating the county's cultural heritage.
- Helped two organizations **develop marketing plans** and two others will start in fall, 2019.
- **Awarded \$97,800** in grants to 13 organizations and businesses (see attached list).

RETURN ON INVESTMENT (Messaging and Information)

- **New videos:** Tillamook Air Museum (cultural heritage), Trees to Sea Scenic Byway (outdoor recreation), Oregon Coast Scenic Railroad (cultural heritage), and a fourth will be unveiled in September, a music video showcasing our environment (stewardship). We helped fund a fifth video on the Garibaldi Boathouse (cultural heritage).
- **Published 25 Cultural Adventures on the Tillamook Coast**, our third guidebook.



- Continued sponsorship with Oregon Public Broadcasting: **Oregon Field Guide, Oregon Experience and Cook's Country: Test Kitchen** covering outdoor recreation and environmental education, cultural heritage and culinary/agritourism. OPB continues to be an ideal match for demographics and psychographics to attract the visitors we want to visit our area.

Grants – Received

-  **Receiving a \$25,000 grant from Travel Oregon** to help fund the North Coast Tourism Management Network program. City of Seaside, Cannon Beach Chamber, Astoria/Warrenton Chamber, Oregon Coast Visitors Association and Visit Tillamook Coast are helping fund the Network programs. VTC will administer funds.
-  Completed objectives for the \$45,000 grant from the **Business Oregon Rural Opportunity Initiative** with excellent results: restart the Recipe to Market program; develop a Tillamook Coast brand of food products to coincide with the Department of Agriculture's Oregon brand; and a feasibility study on development of a farm to market food hub (see attached report).
-  **\$5,000 grant from The Ford Family Foundation** funded an online Spanish-language business building platform on the Small Business Development Center website to help food entrepreneurs in the Hispanic community start businesses. This was part of the fulfillment of the Business Oregon ROI grant.

Visit Tillamook Coast –2018-2019

Benchmarks and Key Performance Indicators

Three Key Benchmarks						
Increase in TLT	Goal: 10% over 2017	Up 25%				
Increase in Visitor Spending	Goal: 2-3% over 2017	Up 3.15% = \$7.4M				
Increase in Brand Awareness	Goal: 15% over 2016	Up 35%				
Overnight vs day trips	2017: 2.3 million overnight stays 2017: 1.3 million day trips	2018: 2.5 million overnight stays 2018: 1.0 million day trips				
<i>More people are opting to stay overnight. Average length of stay is also increasing.</i>						
Key Performance Indicators of Investment Efforts						
KPI	2018-2019 goals	Results				
Website						
Website unique visitors	5% increase from 152,012 in 2017	Up 25.41% to 192,637 per year				
Website organic search	10% increase from 83,214 in 2017	Up 60.58% to 133,621 per year				
Average time spent on website	3% increase from 1:28	Up 4.7% to 1:32				
<i>Top 10 city locations of visitors to the website: Portland, Seattle, Beaverton, San Francisco, Vancouver WA, Hillsboro, Salem, New York, Eugene, Los Angeles, Lincoln City, Newport.</i>						
<i>Top 10 state locations of visitors to the website: Oregon, Washington, California, Idaho, Texas, Utah, New York, Colorado, Arizona.</i>						
Social media	Goal: 10% increase across platforms	As of June, 2019				
Facebook followers	From 21,425	To 24,647– 15% growth				
Instagram followers	From 3,348	To 4,338– 30% growth				
Twitter followers	From 2,110	To 2,224 – 5% growth				
Pinterest followers	From 171	To 185 – 8% growth, averaging 2000 views a week				
E-newsletter subscribers	From 9, 988	11,587 – 16% growth, averaging 14.9% open rates, higher than (11.7% industry standard)				
YouTube channel followers	From 218	To 363 – 66% increase				
YouTube video views	From 750,508	1,330,914 views – 77% increase				
<i>Comments: The Sitka Sedge State Park video has been viewed more than 179,000 times just on YouTube. Here is a sample of video views and click-through rates from January 15 to April 1, 2019 (Arizona is #1 for viewers in this time period – Travel Oregon did an Arizona campaign this last fiscal year):</i>						
Visit Tillamook Coast Report						
	Impressions	Views	CPV	Clicks	CTR	View Rate
Coast to Table Part 1	22,083	11,299	\$0.05	98	0.44%	51.17%
Coast to Table Part 2	21,440	10,417	\$0.06	79	0.37%	48.59%
Historic Boathouse	110,161	51,778	\$0.03	283	0.26%	47.00%
Hiking Neahkanie	49,367	23,605	\$0.02	120	0.24%	47.82%
Birdwatching	32,222	11,534	\$0.03	78	0.24%	35.80%
Photography	206,172	87,999	\$0.03	360	0.17%	42.68%
	441,445	196,632	\$0.03	1,018	0.23%	44.54%

Additional Metrics

Visitor Guide Requests	6,274 OCVA leads in 2016 4,829 OCVA leads in 2017	ZERO leads in 2018-2019 (OCVA stopped providing leads)
	934 website leads in 2017	6,234 in 2018 -2019 – more than 6X growth

Comments: OCVA leads are no longer available to tourism organizations, per a decision by Travel Oregon’s global sales department. However, visitor guide requests from tillamookcoast.com have increased substantially. Tillamook Creamery visitor center and Safeway go through 20,000 guides each year. Printed guides and maps continue to be the #1 visitor information piece onsite.

JackRabbit Lodging booking engine Annual cost: \$8,700	Referrals: 6,367 Estimated bookings: 231	Booking revenue: \$66,847 Average length of stay: 2.79 7.5X return
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Earned media	Goal: 75 articles	185 – 147% more than goal Ad/channel worth: \$6.5 million (\$2.1 million worth was focused on the North Coast Food Trail) 86X return on investment
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Comments: Earned media is “not paid advertising,” usually in the form of published articles about the destination. We pitch to and place articles in publications, and pitch ideas to writers, who pitch their articles to magazines. It also includes pieces that appear as a “surprise.” The advertising equivalency is determined by the length of the article and the cost of same-space advertising, and number of channels the piece appears in:

Ad worth is estimated at number of media placements (average 2 pages each) x average cost per ad page x 3 for three channels – print, social media and online.

Broadcast stories	Goal: 16	34
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Comments: Among the stories: Oregon Field Guide (Bayocean story and Pacific City surfing story), KPTV Good Oregon Andy’s Adventures – four new stories); KPTV What’s Happening (four stories), Grant’s Getaways (eight stories, including Tidepool stewardship); KATU Afternoon Live (three); Northwest Radio Network (six stories); PBS Food - The Original Fare, and Matt Freehill of Tillamook Meats, who won championship on “The Butcher.”

Event: Crave the Coast	North Coast food vendors	794 attendees (1st year)
Event: Beer + Cheese	Fundraiser for Food Roots	Raised \$3,750 for Food Roots

Community training programs	Goal: 60 participants	142 participants – 136% over goal
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*Comments: VTC hosted five training and pilot program sessions: three social media training sessions – two for Tillamook Coast History Alliance in social media; one interpretive guide training for cultural organizations, with 18 attendees; one county-wide, 4-day grant writing workshop with 52 attendees; two Guest Service Gold hospitality trainings; funded a volunteerism pilot program in Manzanita, with 28 attendees.
(See additional trainings in Business Oregon Rural Opportunity Initiative Grant activities.)*

Business Oregon Rural Opportunity Initiative Grant



Activities	Session Held	Attendance
Food Hub/Distribution System and North Coast Food Branding		
Focus Group – Producers	Feb. 5, 2019	23
Focus Group – Buyers	Feb. 6 2019	11
Recipe to Market restart*		
FarmDirect workshop	Feb. 9,2019	14 (12 under the age of 40)
Recipe to Market – first class	Feb. 20, 2019	9
Recipe to Market – second class	Feb. 21, 2019	8
Business Building and Marketing	Feb. 22, 2019	13
Social Media for Fishers and Food Businesses	May 13, 2019	21
<i>*Recipe to Market sessions were logged as non-credit community classes at Tillamook Bay Community College</i>		
Fish Biz Day – Business Building	May 17, 2019	10
	Total participants	109

In addition to the above sessions:

- Funded an online, Spanish-language business building platform through the Small Business Development Center
- Collaborating with Port of Garibaldi, ColPac, Rural Development Initiatives, EcoTrust and Food Roots to develop a farm and fisheries product distribution system, which will be an entrepreneurial effort with public/private startup needs
- Sponsoring Food Roots Farm/Table store in downtown Tillamook
- Sponsoring local farm participation in Travel Portland’s “Seed to Table” industry trip to Japan to promote the Oregon North Coast food brand

Next steps:

- **A full report will be created to share with the community.**
- **Business Oregon will inform us of additional funding to move from Concept phase to Implementation phase, which we will use for the distribution system, and expanding local food marketing.**

**Transient Lodging Tax (TLT) collected by Tillamook County
and Year-over-Year (YoY) percentage change**

Year	2014	2015		2016		2017		2018		2019	
			YOY		YOY		YOY		YOY		YOY
Q1	\$271,768	\$347,583	+28%	\$372,408	+7%	\$428,548	+15%	\$591,053	+38%	\$693,705	+17%
Q2	\$516,547	\$622,615	+21%	\$710,225	+14%	\$785,772	+11%	\$1,015,024	+29%		
Q3	\$1,175,049	\$1,374,272	+17%	\$1,463,778	+7%	\$1,573,159	+7%	\$1,743,559	+10%		
Q4	\$335,062	\$411,297	+23%	\$430,203	+4%	\$485,714	+10%	\$631,385	+22%		
TOTALS	\$2,298,426	\$2,755,767	+20%	\$2,976,614	+8%	\$3,273,193	+10%	\$3,981,021	+22%		

2014 – Q1, 2019 Total TLT Collected by county: \$15,987,726

2014 – 2018: Shoulder and off-season (Q1, Q2, Q3) up 100%

County-Wide Gross Lodging Receipts						
	2014	2015	2016	2017	2018	2019
Q1	\$4,926,624	\$6,533,832	\$6,731,876	\$8,334,802	\$10,760,740	\$12,307,045
Q2	\$9,405,545	\$11,318,943	\$12,769,920	\$14,456,140	\$18,075,890	
Q3	\$21,529,620	\$24,642,800	\$26,516,400	\$28,988,598	\$31,126,052	
Q4	\$6,369,943	\$7,381,531	\$7,941,654	\$9,226,510	\$11,239,105	
Totals	\$42,231,732	\$49,877,106	\$53,959,850	\$61,006,050	\$71,201,787	
Grand Total, 2014- Q1, 2019: \$290,583,570						
Percentage of increase from 2014-2018: 69%						

Visitor Spending in Tillamook County, per annual Dean Runyan Economic Impact Report (in \$ millions)									
2014	2015	YoY	2016	YoY	2017	YoY	2018	YoY	
\$220.9M	\$229.1	+3.76%	\$227.4	-.77%*	\$232.7	2.34%	\$240.1	3.15%	
*The minus .77% represents a drop in retail sales and cost of gas. That was the year of the tornado, which ruined several businesses in Manzanita, and transportation costs were less. All other visitor spending factors increased in 2016. (See following report for years 1992-2018 for historical overview.)									

**Annual Visitor Spending (Direct Spending) in Tillamook County:
Dean Runyan Economic Impact Report 1992-2018**

Year	Spending in Millions	YoY increase or decrease	Year	Spending in Millions	YoY increase or decrease
1992	\$80.9		2010	\$186.2	+3.76%
1993	\$86.2	+6.49%	2011	\$187.7	+.84%
1994	\$87.5	+1.58%	2012	\$199.4	+6.17%
1995	\$90.5	+3.37%	2013	\$212.8	+6.76%
1996	\$93.5	+3.32%	2014	\$220.9	+3.78%
1997	\$97.6	+4.4%	2015	\$229.1	+3.76%
1998	\$100	+2.5%	2016	\$227.4	-.77%**
1999	\$102.9	+2.86%	2017	\$232.7	+2.34%
2000	\$108.1	+5.06%	2018	\$240.1	+3.15%
2001	\$118.5	+9.5%			
2002	\$124.8	+5.3%			
2003	\$128.9	+3.37%			
2004	\$133.3	+3.4%	Since 1992, \$159.2 million increase in visitor spending, +34% Since 2014, \$19.1 million increase in visitor spending		
2005	\$138.2	+3.6%			
2006	\$181	+3.1%			
2007	\$179.5	-.84%			
2008	\$187.4	+4.41%			
2009	\$179.4	-4.27%*	*Depth of recession (\$8M drop in visitor spending) **Gas prices dropped, retail sales dipped after tornado hit Manzanita and several businesses closed; other direct spending factors increased		

Comparison of visitor spending:

Lincoln County grew from \$183,939,133 in 1992 to \$613,971,558 in 2018

Clatsop County grew from \$196,900,146 in 1992 to \$579,975,311 in 2018

