

Coos Bay/North Bend/Charleston VCB

Strategic Planning Stakeholder Presentation
November 4, 2022

Process Overview

		Mo. 1	Mo. 2	Mo. 3	Mo. 4
Phase I: Discovery & Analysis	Kickoff Meeting (virtual)				
	Data Review				
	Survey Development & Analysis				
	Current State Analysis Report				
Phase II: Strategy Development	Workshop 1: Board Visioning Workshop (in-person)				
	Workshop 2: Staff Workshop (in-person)				
	Workshop 3: Stakeholder Engagement Meeting (in-person)				
	Workshop 4: Strategic Plan Revision (virtual)				
	Workshop 5: Implementation Roadmap (virtual)				
Phase III	Final Plan Documentation				
	Quarterly Check-Ins				>>>

Global Tourism Trends

Generational Shifts in Traveler Behavior

Younger generations tend to be more conscious consumers when it comes to travel choices, focusing on environmental and social justice concerns more than older generations. Expedia Group research found that 65% of travelers are more willing to book accommodations with diversity and inclusion policies, but that overall trend is very different by generation—of respondents over 40, only 57% expressed this preference, while 77% did in the under-40 set.

Baby Boomers tend to have the ability to be more spontaneous about travel booking, with 64% reporting that they would book their trips a month or less in advance.

Millennials tend to look more for local experiences and authenticity, to travel with friends, and to use social media as a guide—and as a travel log.

The European Travel Commission reports that Gen Z travelers have five major drivers: “greener travel by land and sea; travel for skills and self-confidence; invisible borders online and offline; judging destinations by their values; and sustainability performance in the spotlight.”

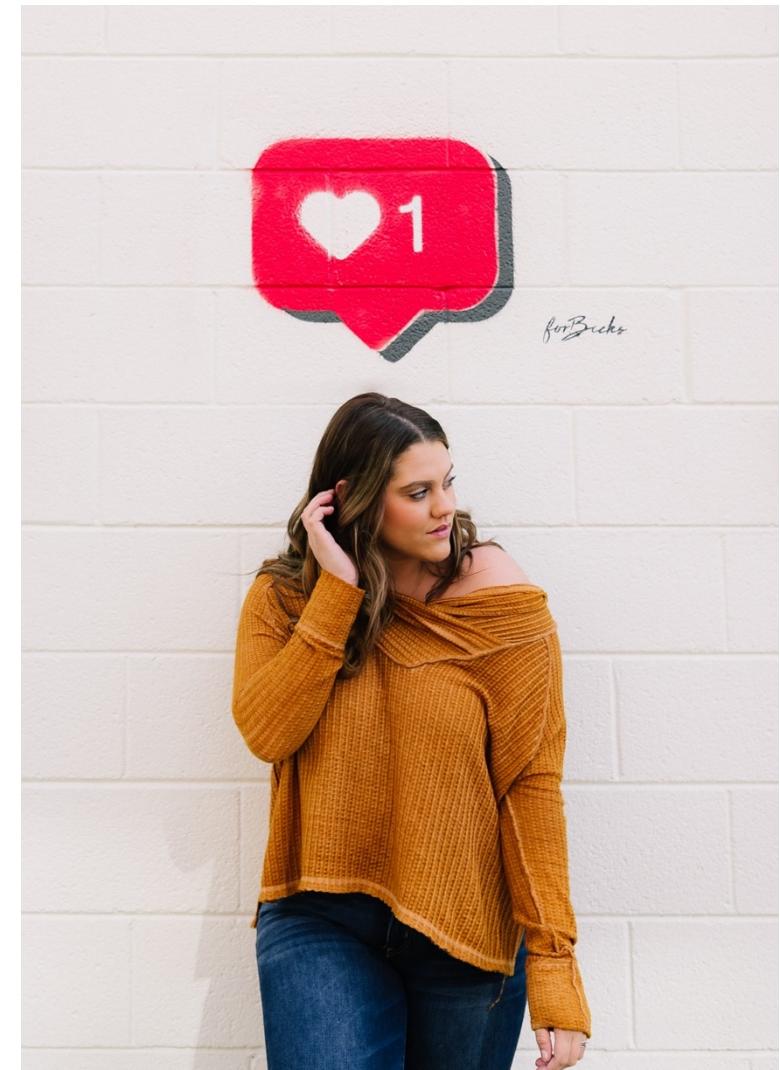


Photo: Karsten Winegeart on Unsplash

Generational Shifts in Purchasing Power

Because of the size of their cohort, Millennials and Gen Z already spend more than Baby Boomers on travel in aggregate. But in the post-COVID travel world, Gen Z is leading the comeback with their spending intention, with 72% of them indicating they intend to spend at least as much, if not more, on travel in 2022 vs. pre-pandemic.

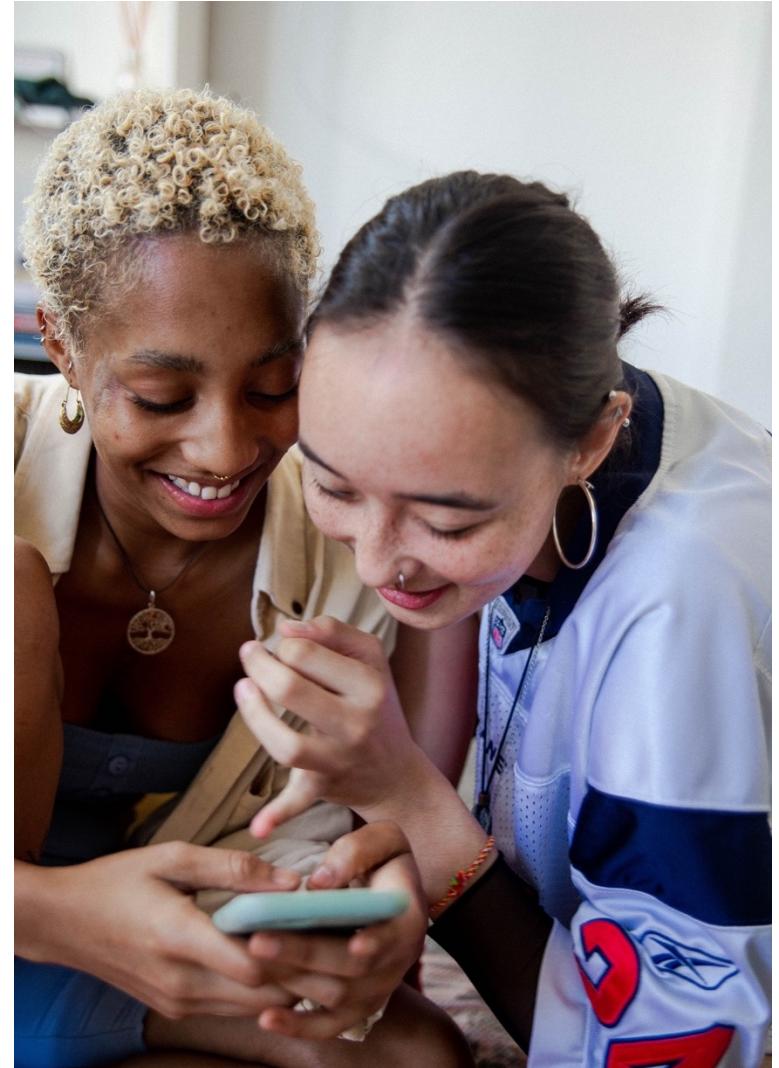


Photo: Shingi Rice on Unsplash

Outdoor Recreation Swells

Outdoor recreation surged during the pandemic, as travelers flocked to less-populated places and wide open spaces. An Outdoor Industry Association Outdoor Participation Trends report from 2021 cites the most popular activities as: running (21%), hiking (19%), all types of fishing (18%), all types of biking (17.3%), and camping/backpacking/RV camping (15.8%). Americans participated in outdoor recreation at a record level in 2020, when 53% of those ages 6+ participated in outdoor recreation at least once, the highest level ever by more than 7.1 million people.

When OIA looked into new outdoor recreation participants, they found that more than 60% of those who started or resumed walking, biking, fishing or running during the pandemic intend to continue when restrictions lift. They identified that this cohort is a younger, more urban group of participants and that the social or group aspect is important to them.

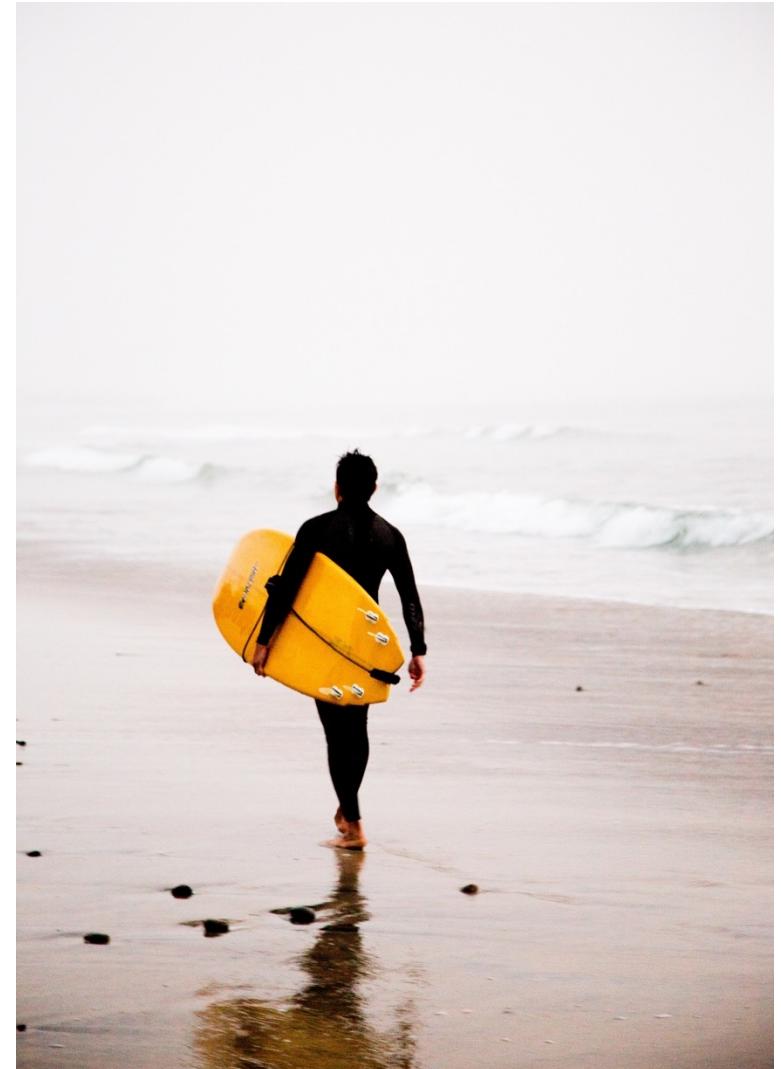


Photo: Blake Hunter on Unsplash

Sustainable Tourism Drives Choice

Travelers were already trending toward demand for more sustainable destinations before the pandemic, and the disruption seems to have accelerated the trend. A 2021 Booking.com study found that 46% of travelers said that the pandemic made them want to travel more sustainably. That same study also indicated the top four sustainability impact concerns for travelers: excess waste (43%), threats to local wildlife and natural habitats (38%), overcrowding popular sites or destinations (34%), and carbon emissions (22%). A 2022 Skift study of 1000 U.S. travelers identified a similar trend: 24% said that green tourism and business practices was more important to them than before the pandemic, while only 8% said it was less important.

A 2021 study by Agoda also pinpointed these same attitudes among American travelers. They prioritized: renewable energy (36%), energy saving (26%), eliminating single use plastics (25%), and buying local (25%).

A 2022 Expedia study found that 60% of travelers report having made transportation or lodging choices based on sustainability factors, and that 70% have opted out of destination or transportation options where the sustainability commitment wasn't credible.

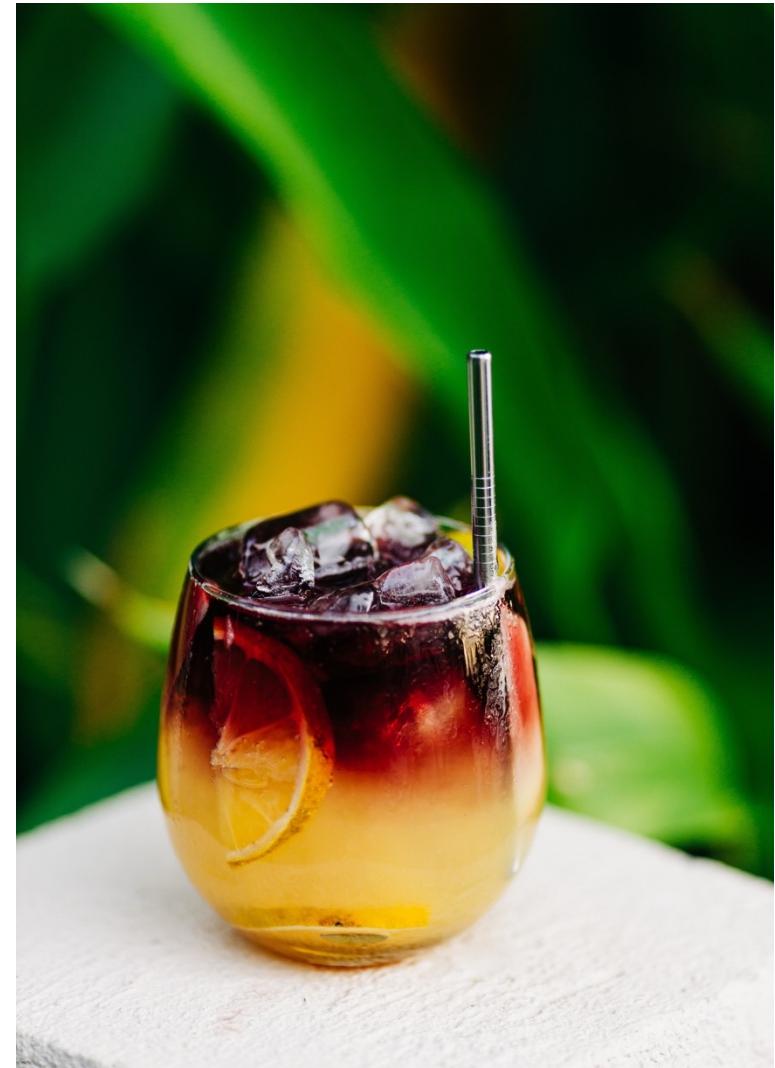


Photo: Erick Chévez on Unsplash

The New Road Trippers Are Here to Stay

Like outdoor recreation, road trip activity increased during the pandemic, and appears to have some staying power. The Road.travel 2022 Road Trip Survey found that almost 75% of destinations reported an increase in automobile arrivals over the last two years and nearly two-thirds of this group believe that this trend will continue for at least two more years. That same report cites Travel Oregon research pointing to a road-trip traveler spend of \$1,876.

A 2022 Summer Travel Survey by The Vacationer found that nearly 80% of Americans planned to take a road trip in the summer of 2022.



Photo: Leio McLaren on Unsplash

Digital Nomads Will Work From Anywhere

Many office workers became remote workers during the COVID-19 pandemic, and those workers will by and large continue to work remotely for the foreseeable future. So-called “digital nomads” can work from anywhere they can charge their laptop and get a decent WiFi signal. A 2022 Skift study identified several data points related to this trend:

- 27% of workers reported being fully remote, and an additional 12% are mostly remote.
- While a significant percentage (averaging between 15-20%) of remote workers report that their work arrangement has led them to take more frequent short trips, a growing number—rising to about 23% in June of 2022—report that their work arrangement has led them to take extended trips of 10 days or more.
- Airbnb CEO Brian Chesky reported in late 2021 that 40% of visitors to the Airbnb website have either no fixed dates or no set destination in mind, implying that a growing share of visitors are open to discovering a new place to exercise their untethered workplaces.
- This trend may also contribute to the continued higher-than-before prevalence of short booking windows—an April 2022 Expedia Group survey found that 53% of travelers are comfortable booking travel within 30 days of departure.

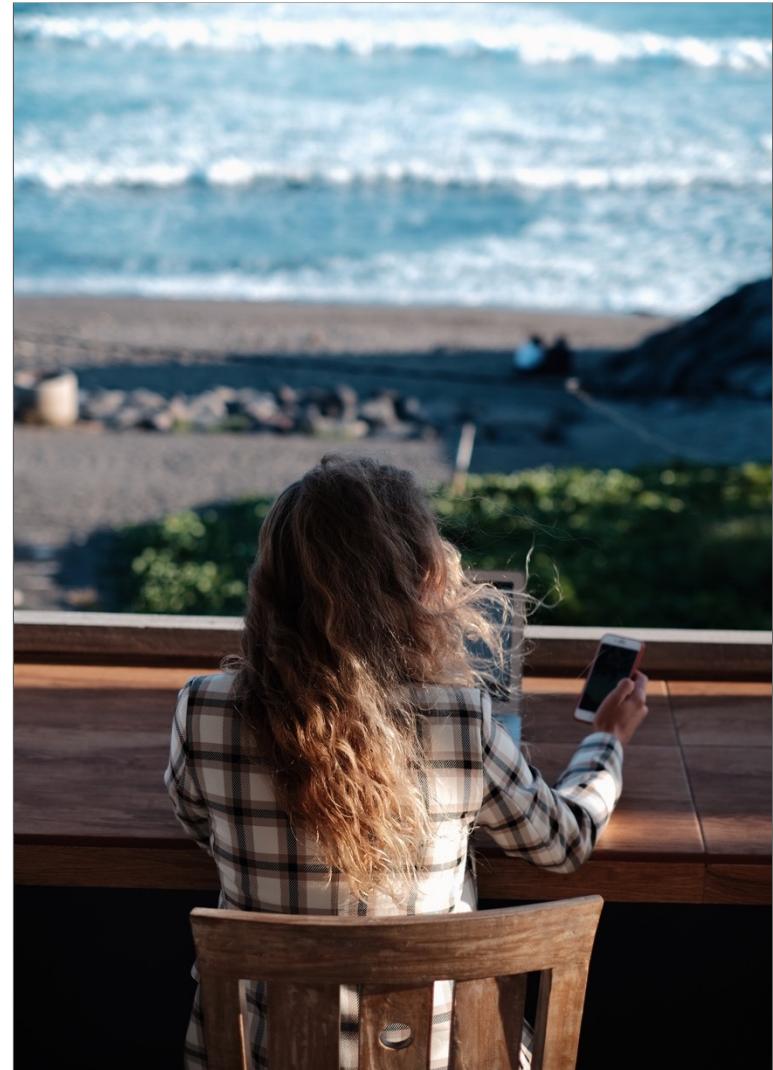


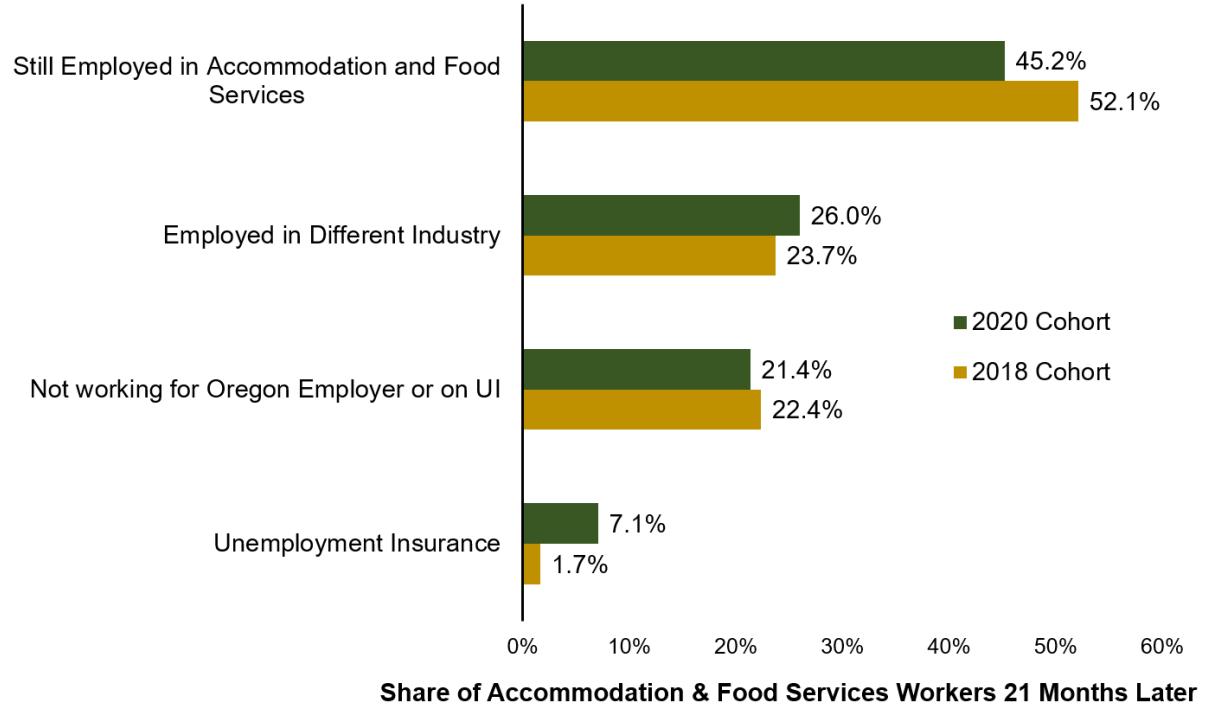
Photo: Daria Mamont on Unsplash

Just Can't Shake Those Workforce Blues

A tremendous number of jobs were lost in the travel & tourism industry during the pandemic, and the recovery is far from complete. As of April 2022, U.S. Travel is reporting that leisure & hospitality accounts for 93% of jobs lost and not yet recovered.

At the same time, many service-sector employers are reporting challenges in recruitment and retention of employees, dampening their ability to extend hours and serve a full complement of customers. The Oregon Employment Department reported in August 2022 that a significant proportion of those who were formerly employed in the hospitality sector have not returned, with some leaving for other industries, and some leaving the workforce altogether. Unemployment Insurance claims remain high for this group of workers, in contrast to the high number of job openings in this sector.

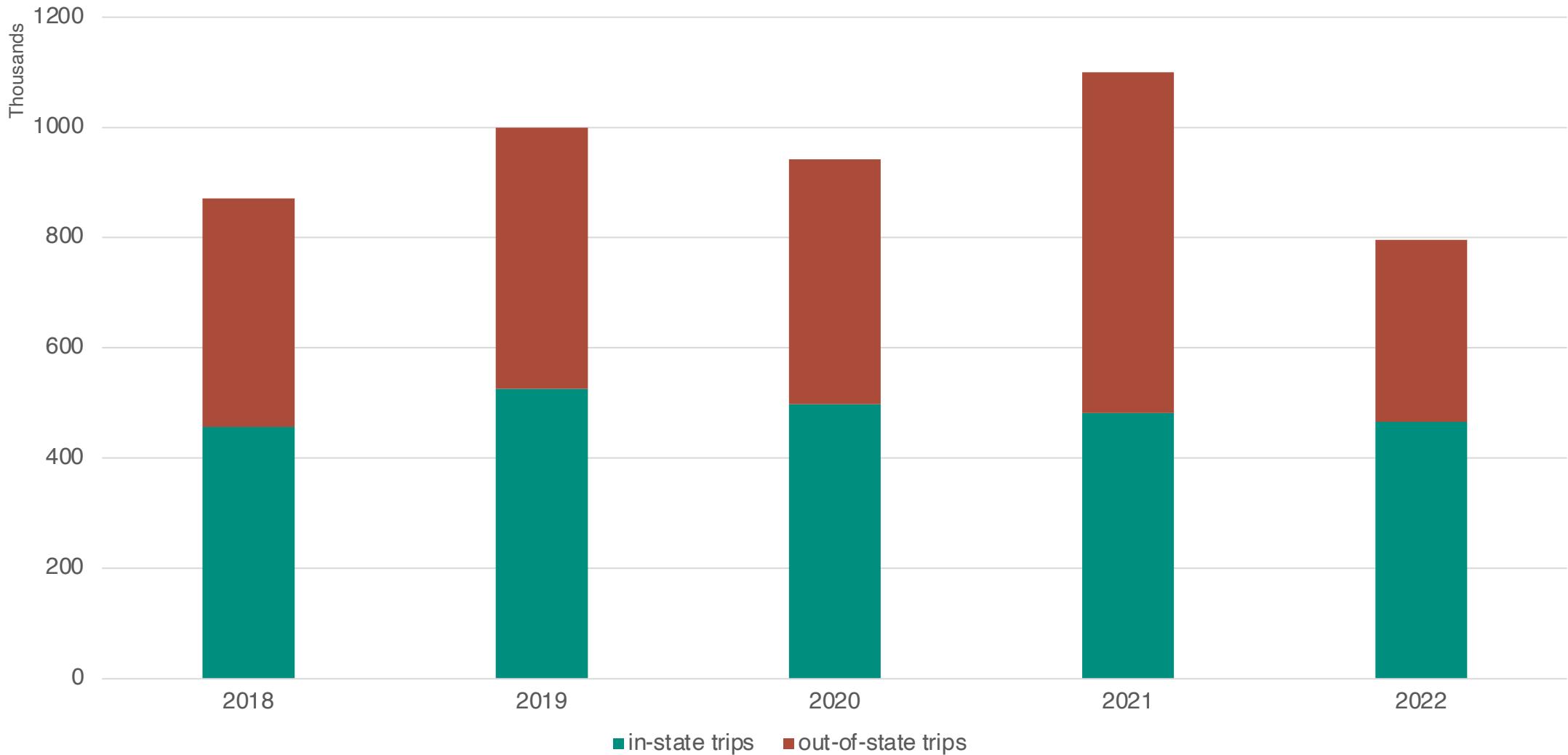
COVID-19 Impacted Accommodation & Food Services Workers Left the Sector at a Higher Rate than During Pre-Pandemic Times



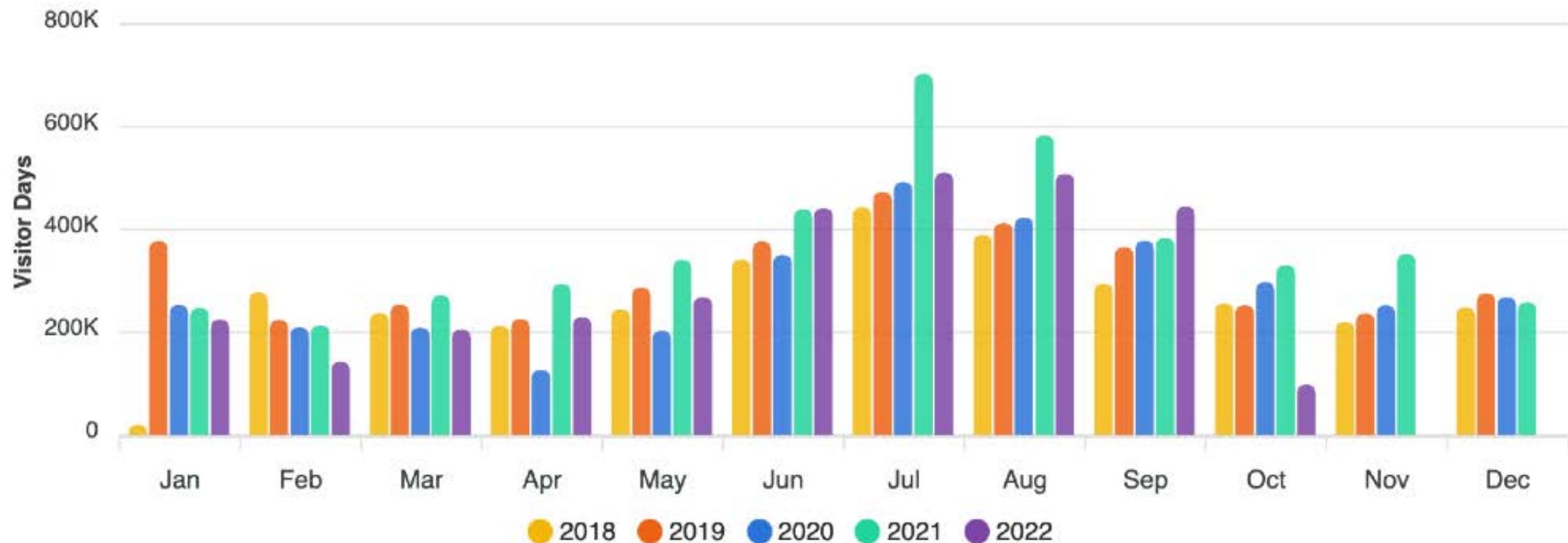
Source: Oregon Employment Department

Local Tourism Data

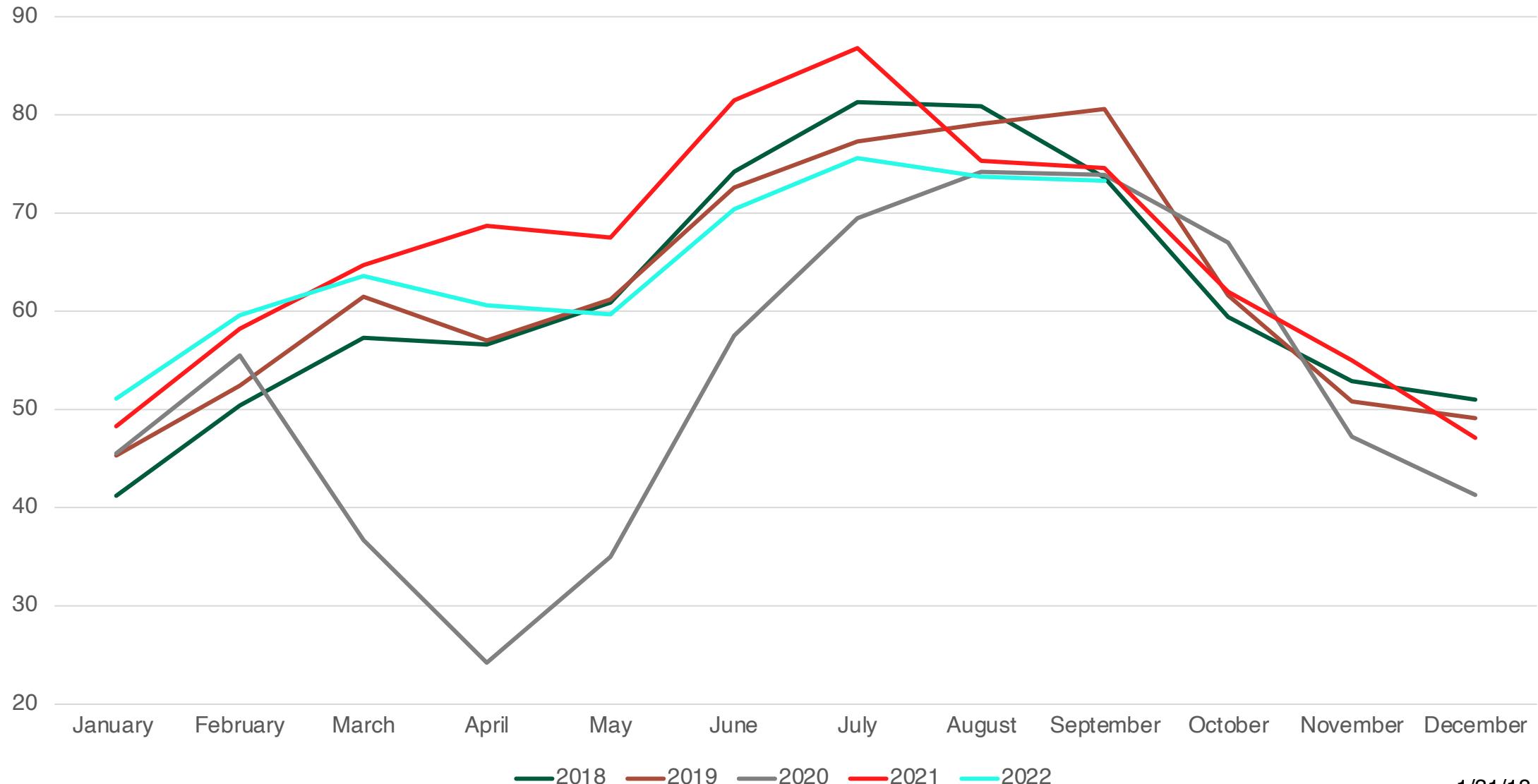
Annual Visitation: VCB Area



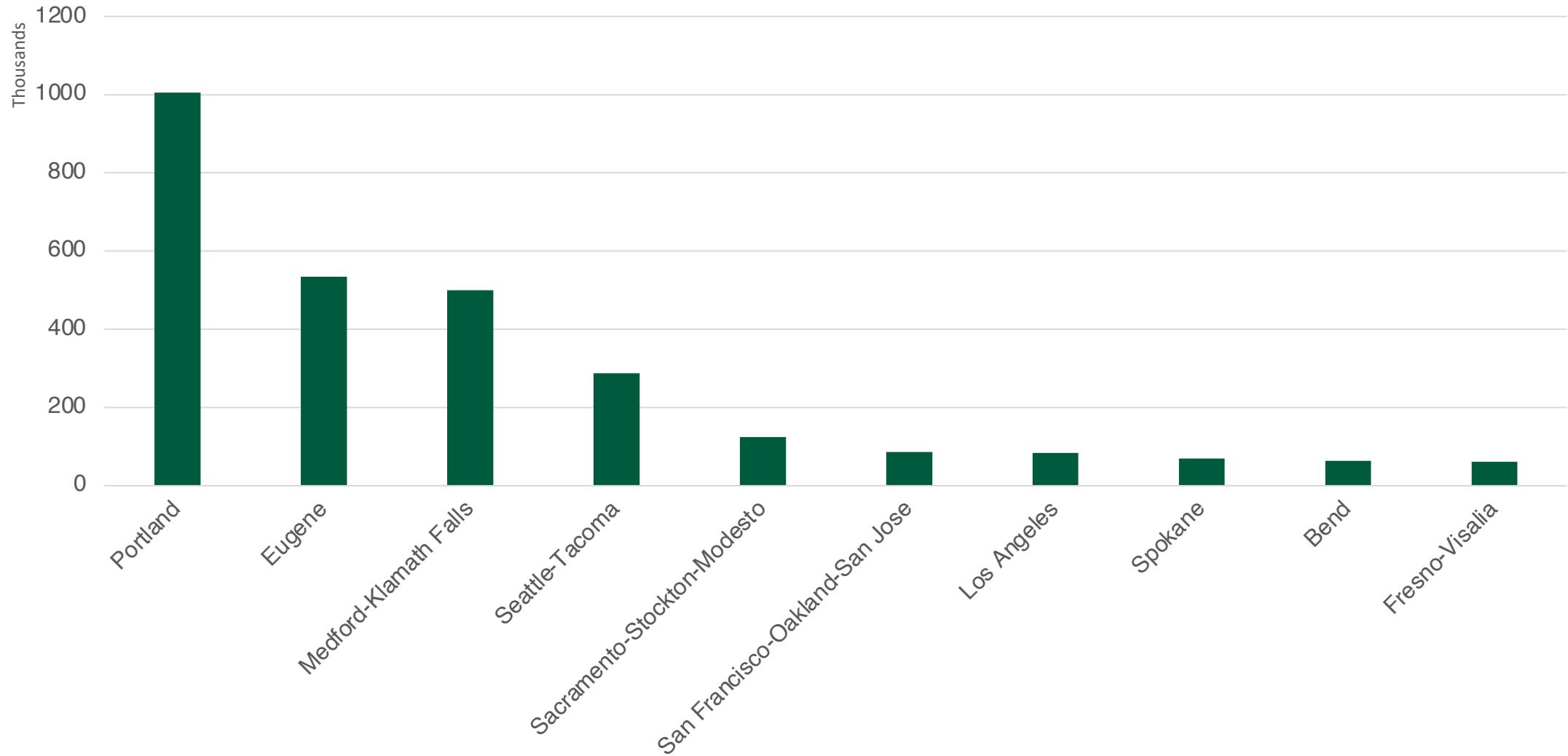
Monthly Visitation by Visitor Days: VCB Area



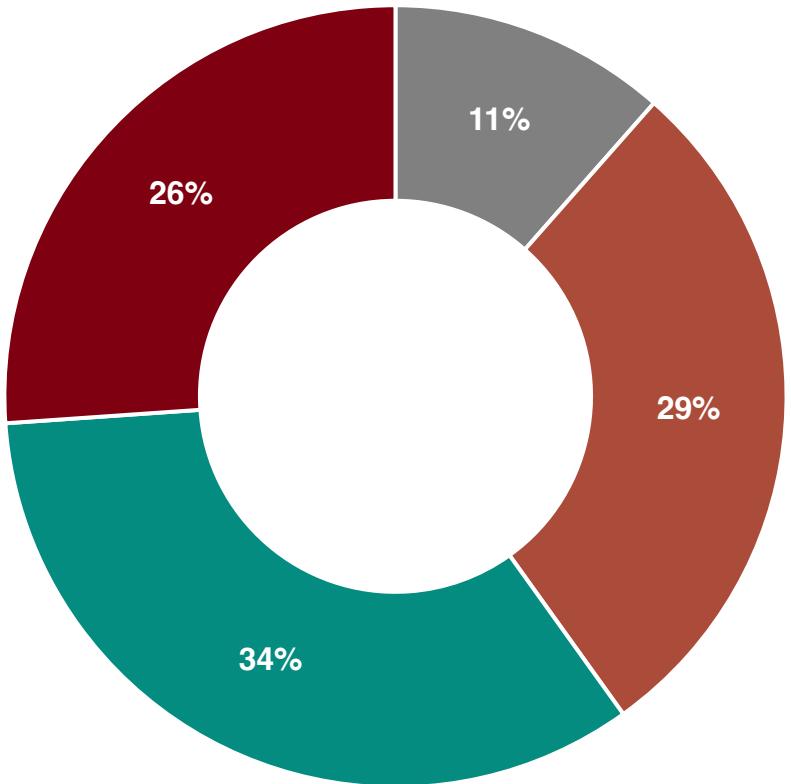
Monthly Occupancy: County-Wide



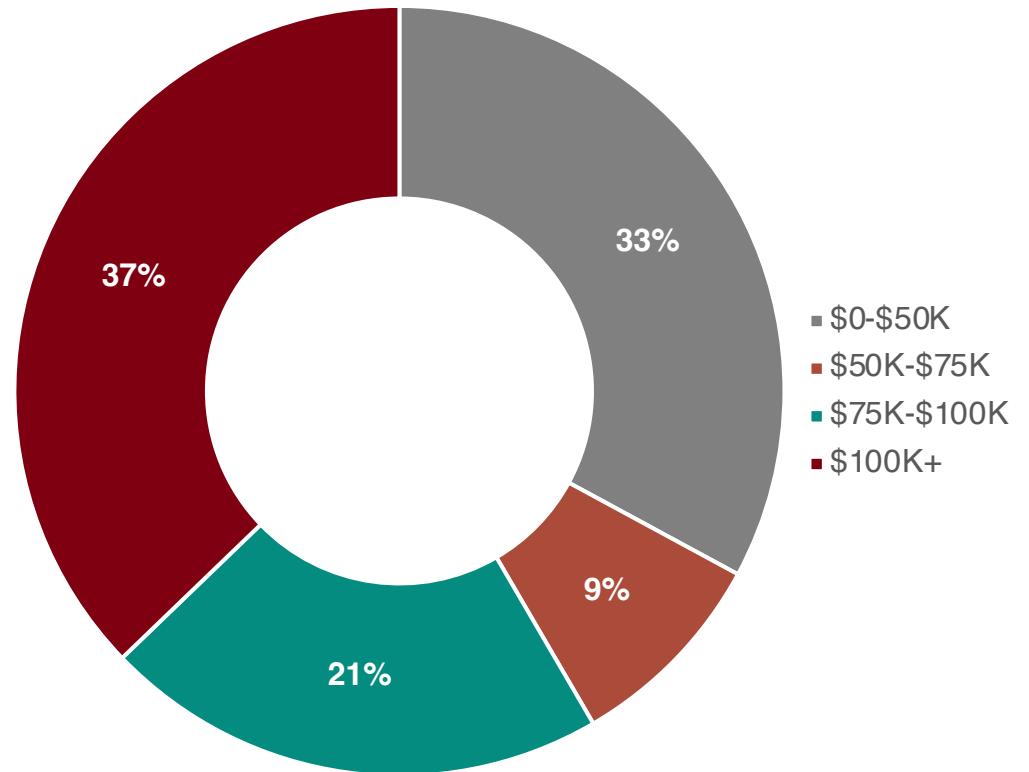
Top Ten Origin Markets by MSA



Visitor Demographics: Age & Income

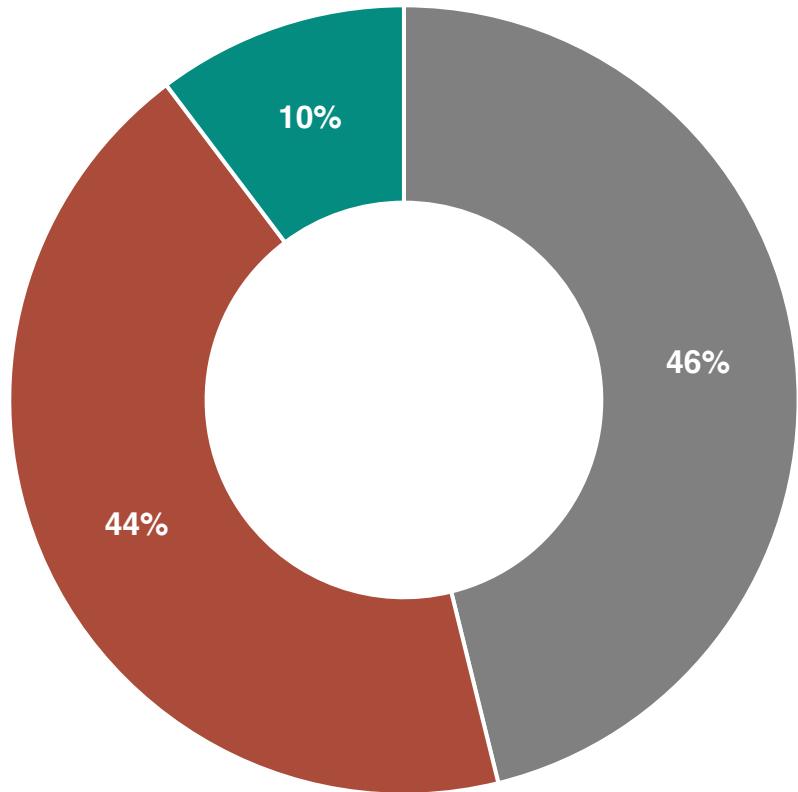


- 16-24
- 25-44
- 45-64
- 65+

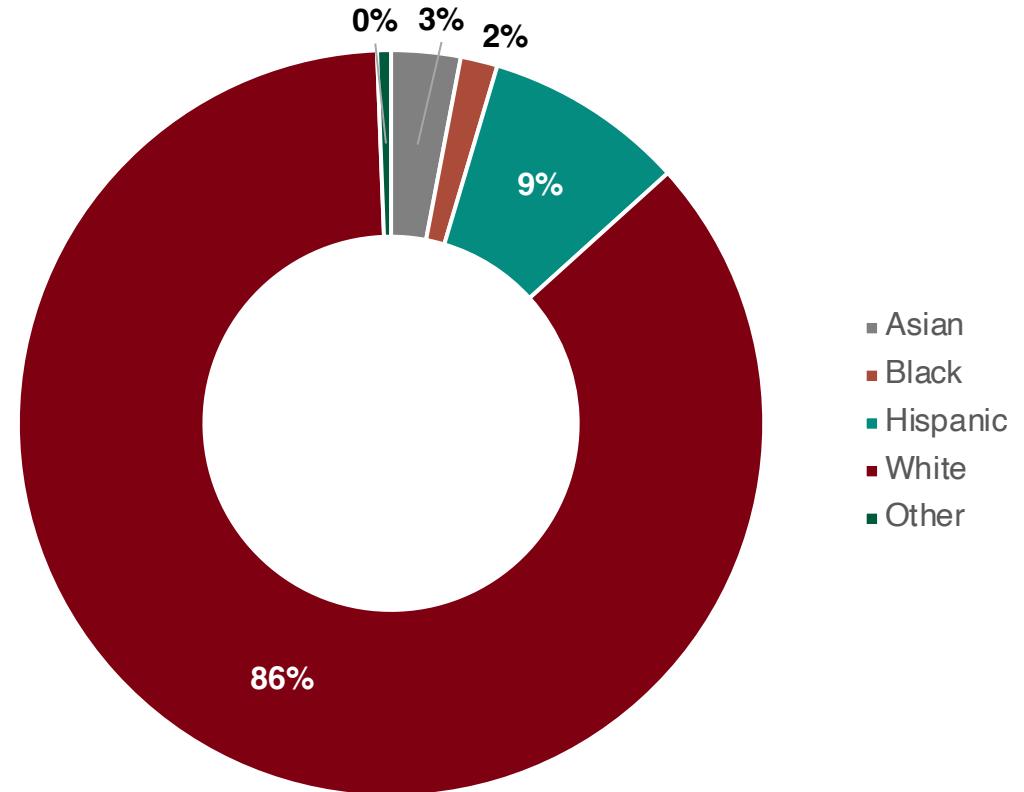


- \$0-\$50K
- \$50K-\$75K
- \$75K-\$100K
- \$100K+

Visitor Demographics: Household Size & Race

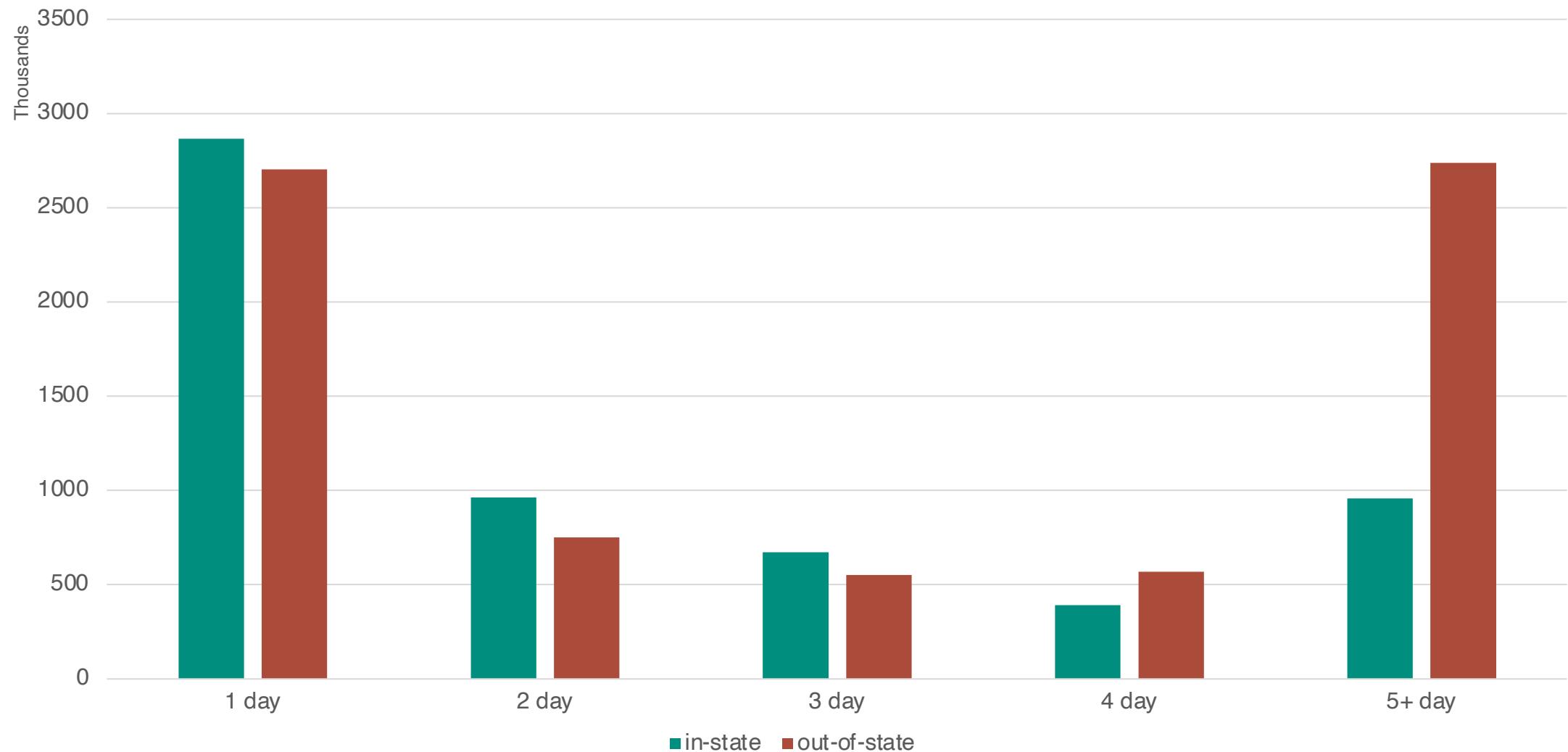


■ 1-2
■ 3-5
■ 6+

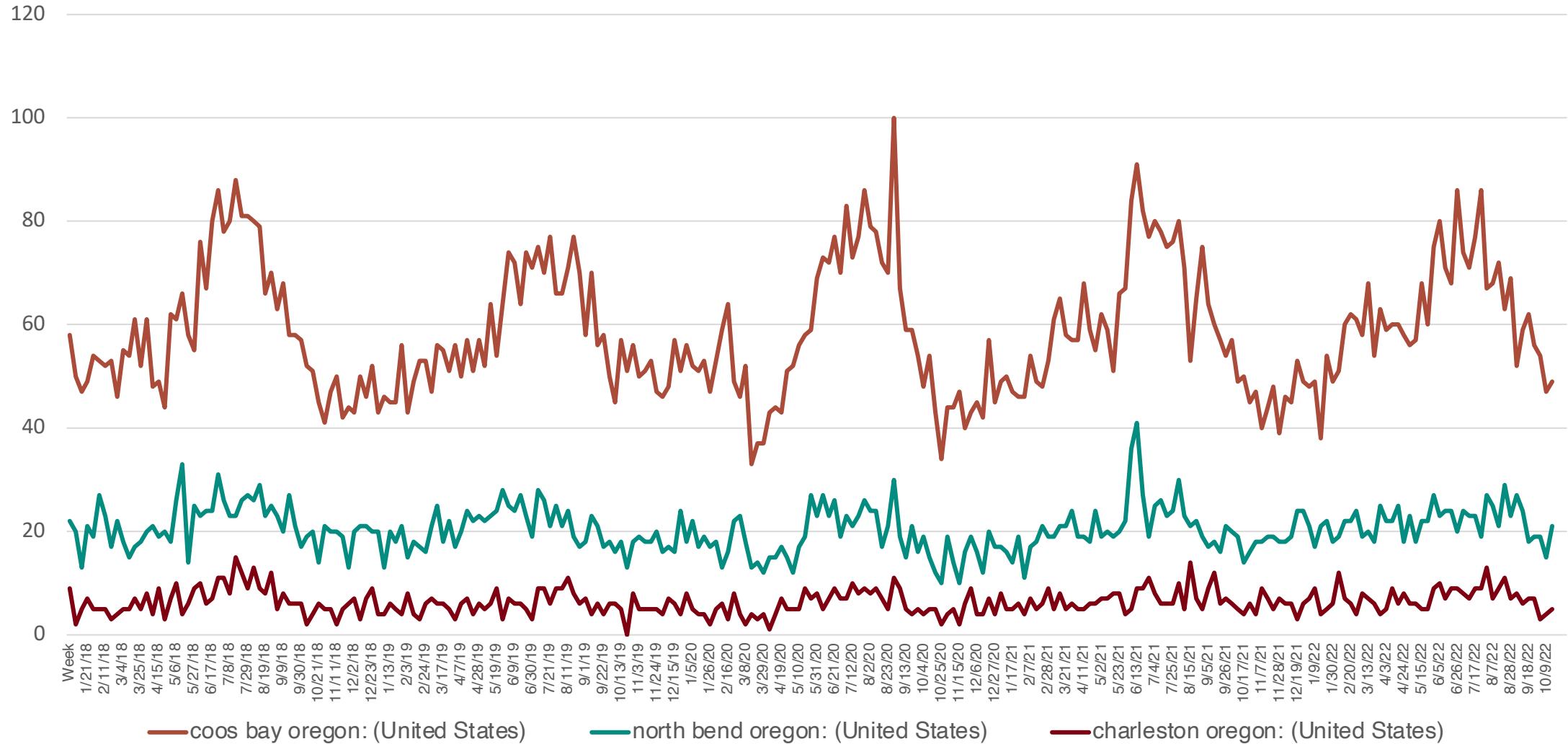


■ Asian
■ Black
■ Hispanic
■ White
■ Other

Length of Stay

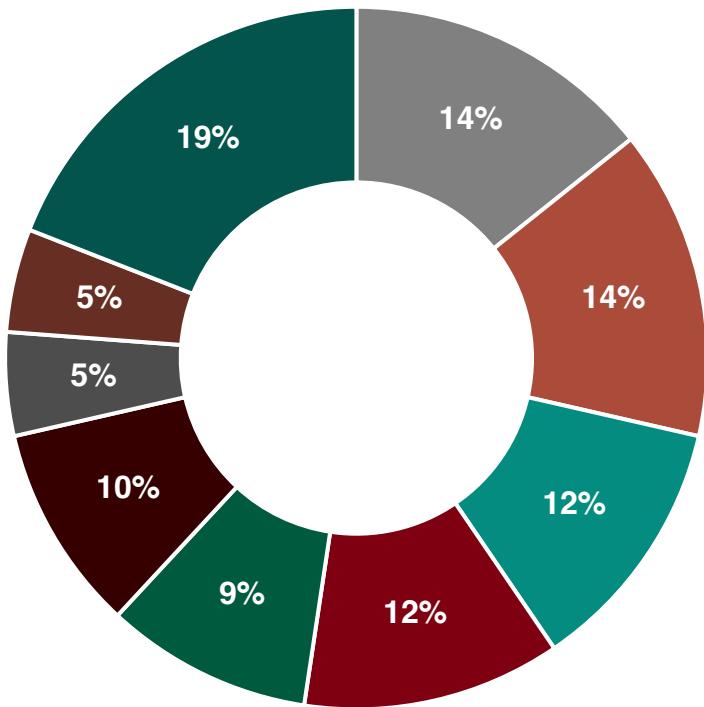


Search Trends: Google



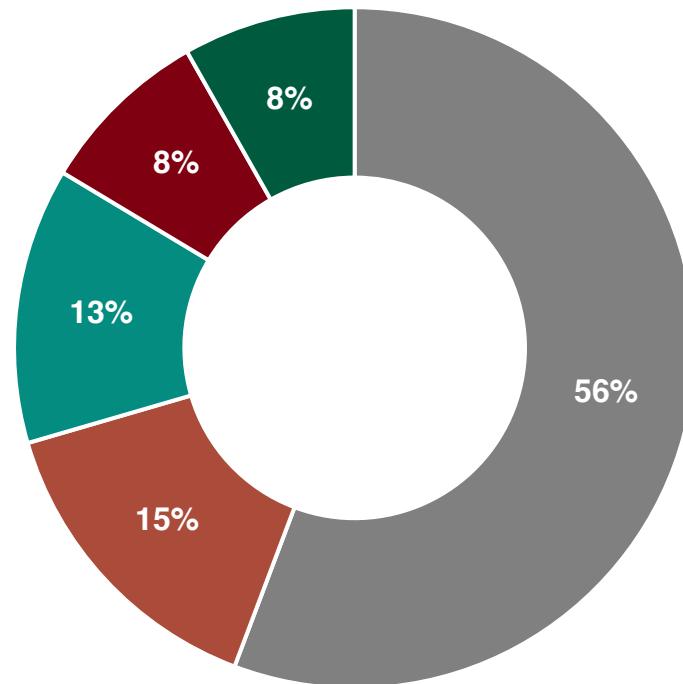
Survey Results

Which choice below BEST REPRESENTS the sector you work in, or your relationship to the Coos Bay–North Bend–Charleston visitor economy?



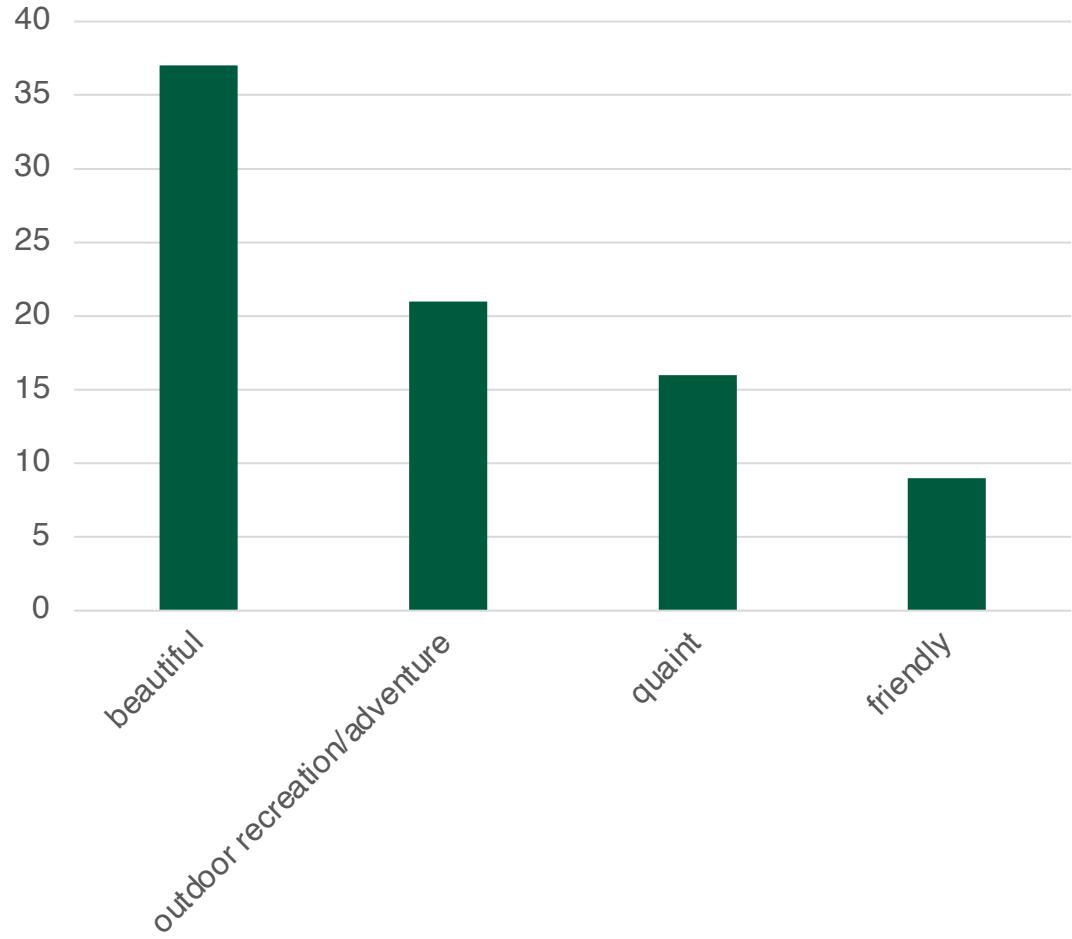
- Non-Profit (501c3 or 501c6)
- Arts & Cultural
- Accommodations
- Guides, Rentals, & Activities
- Government
- Marketing
- Parks & Outdoor Recreation
- Media
- Other (please specify)

How long have you worked in the tourism industry or in a tourism-related role in or related to Coos Bay–North Bend–Charleston?

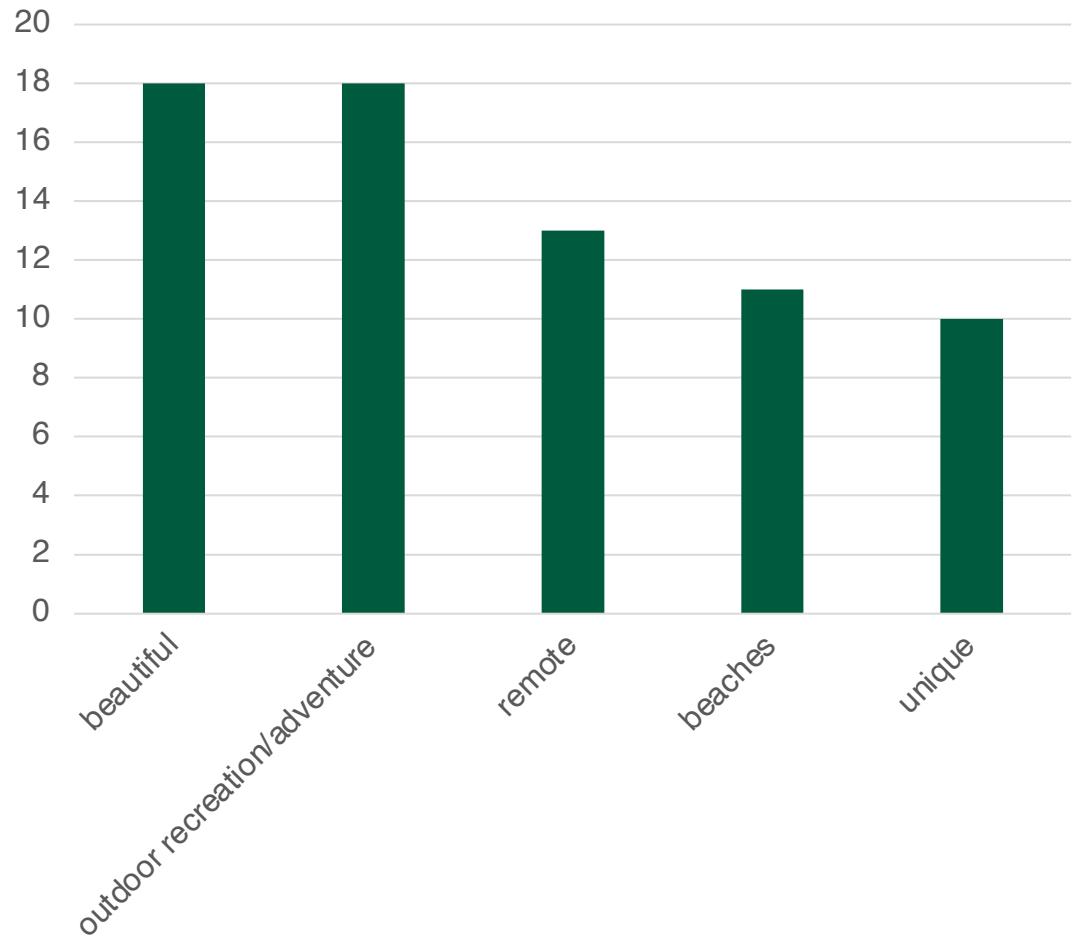


- More than 10 years
- I don't work in the tourism industry
- 6-10 years
- 0-2 years
- 3-5 years

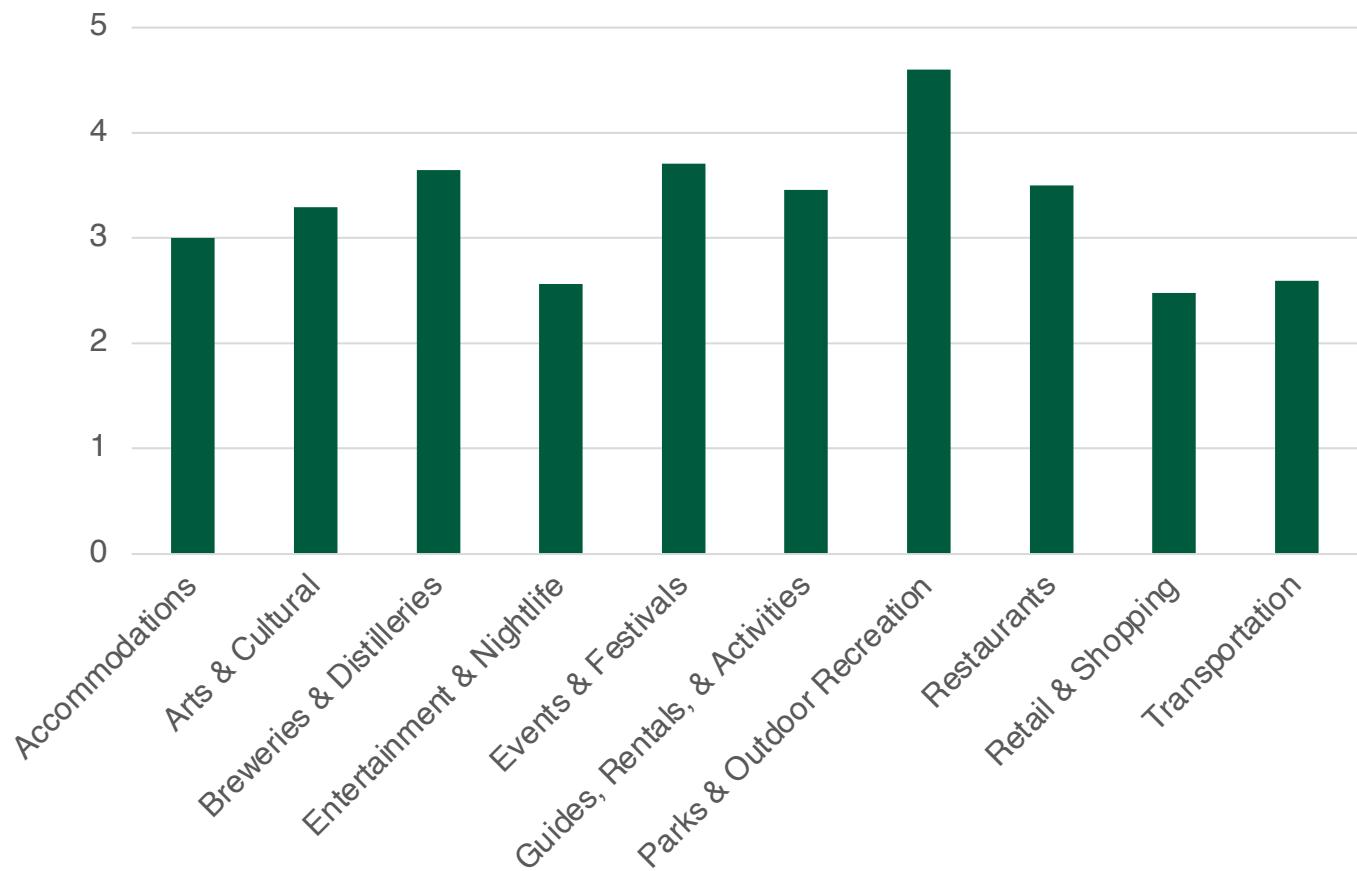
What are the top THREE words you have heard visitors use to describe the Coos Bay–North Bend–Charleston region?



What THREE words would you use to describe the Coos Bay–North Bend–Charleston region to a potential visitor?



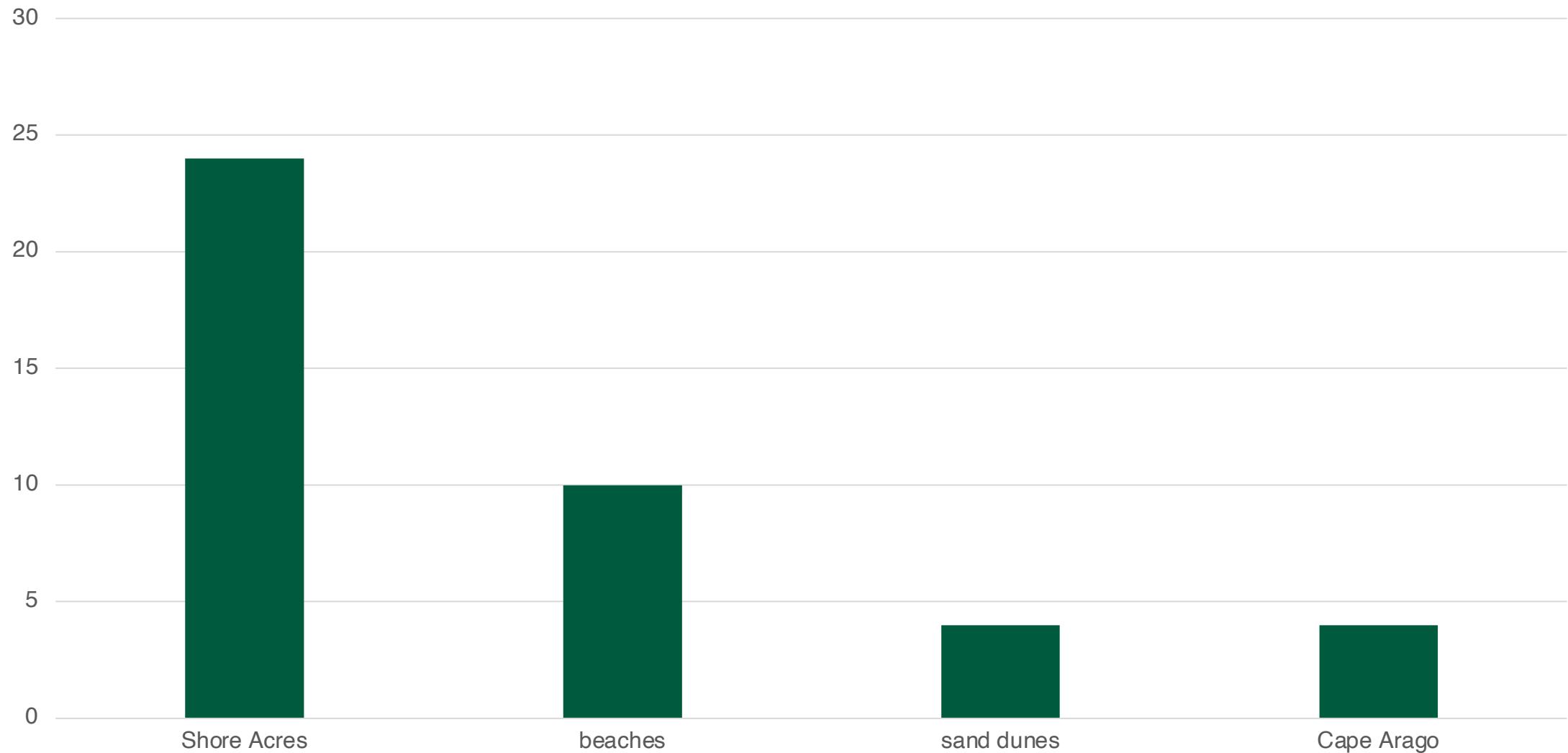
Thinking about the following dimensions of the Coos Bay–North Bend–Charleston region AS A DESTINATION, how would you rate the quality of visitor experience for each, where 1=poor and 5=excellent?



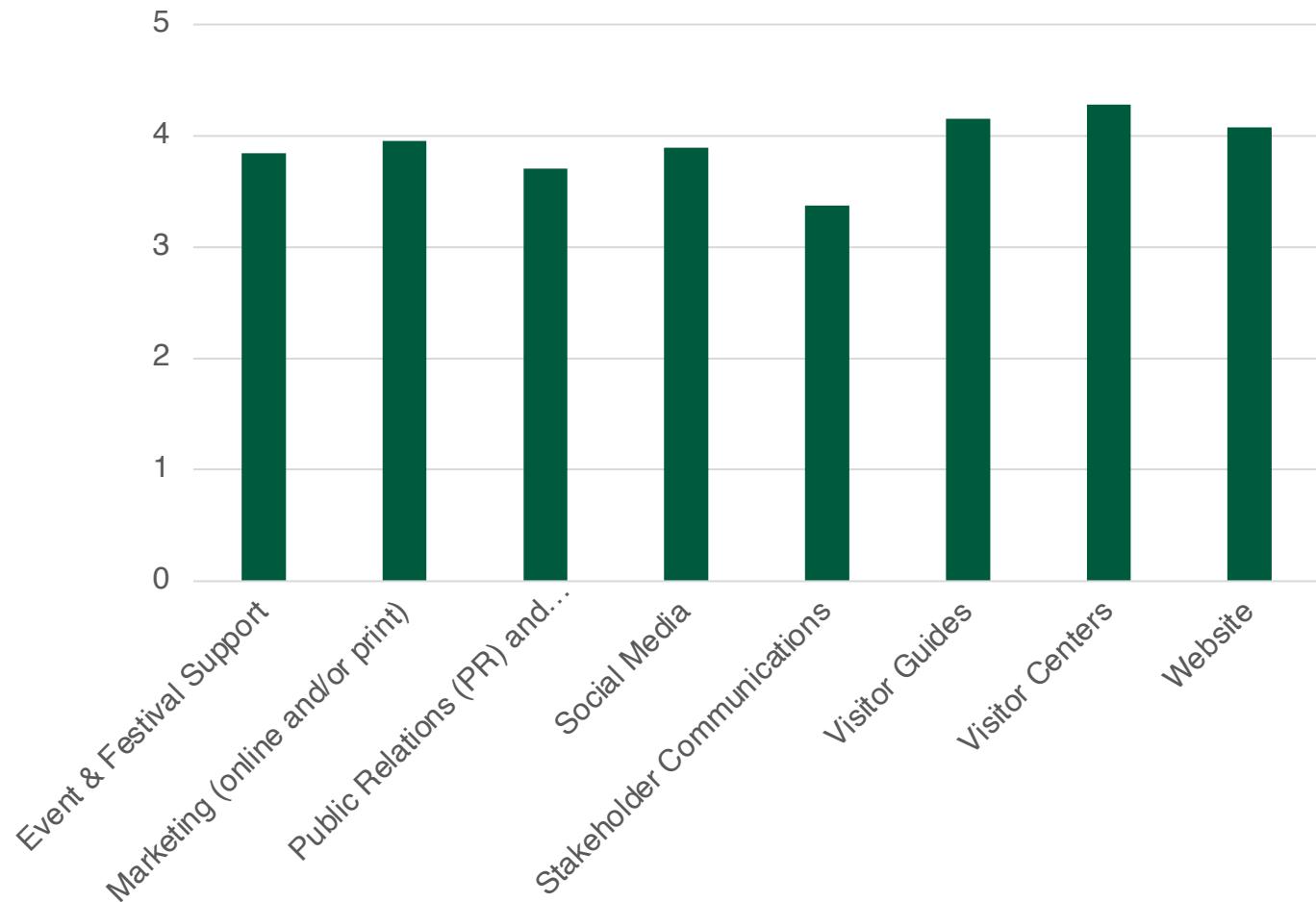
From the previous question, for the items you rated below 3, please provide a short explanation of why you believe that element falls short:

- Limited selection of lodging, restaurants, and bars
- Transportation difficult—extremely car-dependent
- Hours and seasonality of amenities and when they are open

If you were to send a visitor to ONLY ONE thing in the Coos Bay–North Bend–Charleston region, what would it be?



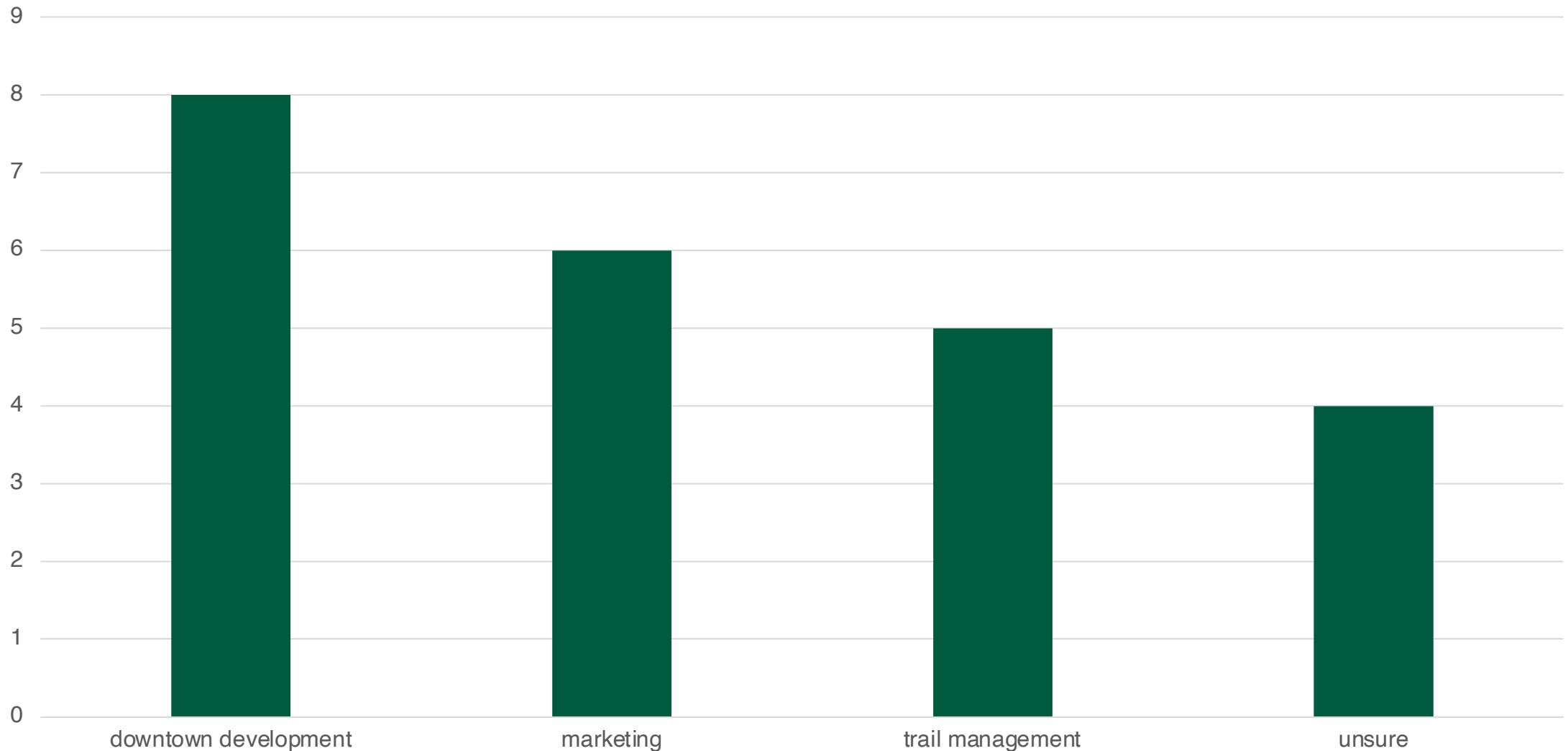
Considering the following elements of the Coos Bay–North Bend–Charleston visitor economy, how would you rate the quality of each, where 1=poor and 5=excellent?



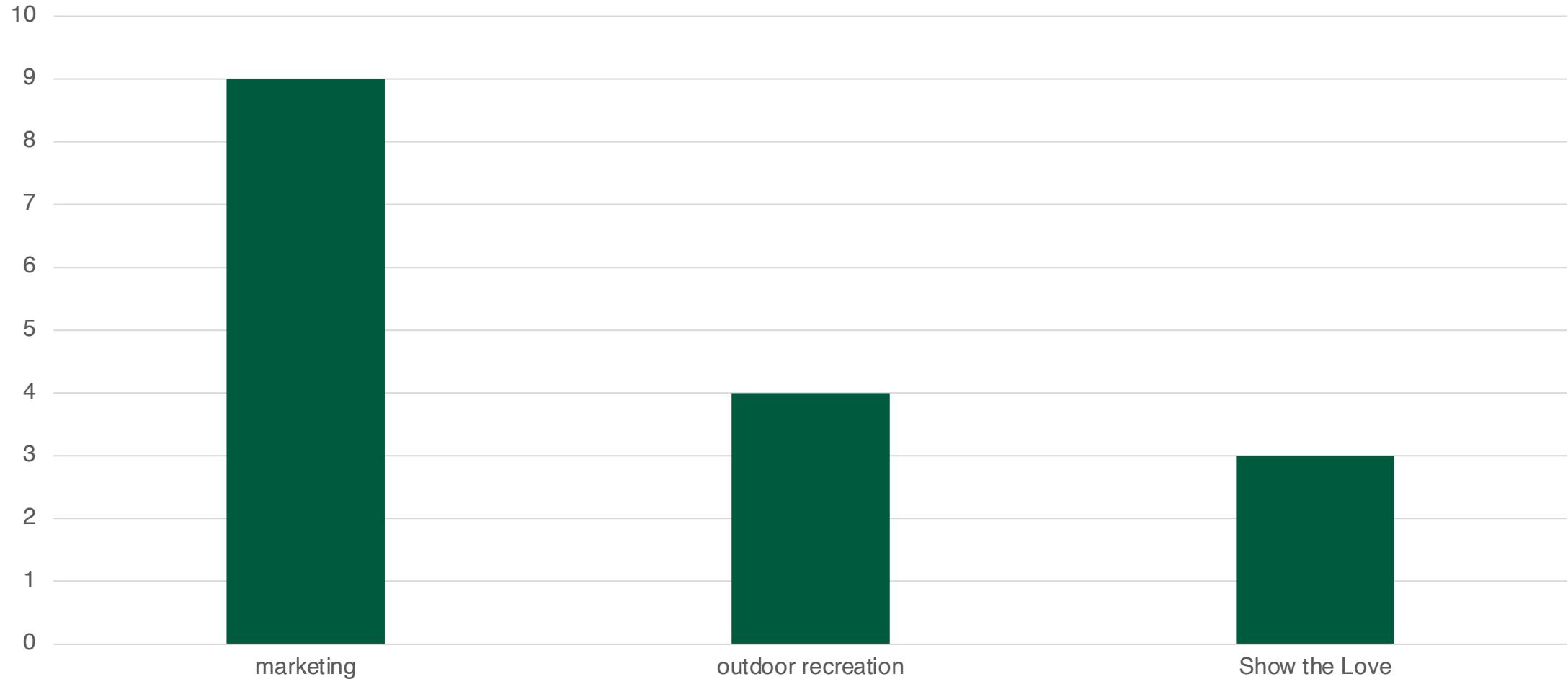
From the previous question, for those elements you rated below 3, please provide an explanation of why you scored it low:

- Communications sometimes unclear—particularly for locals
- Different events marketed at different levels
- Needed improvement on stakeholder communications

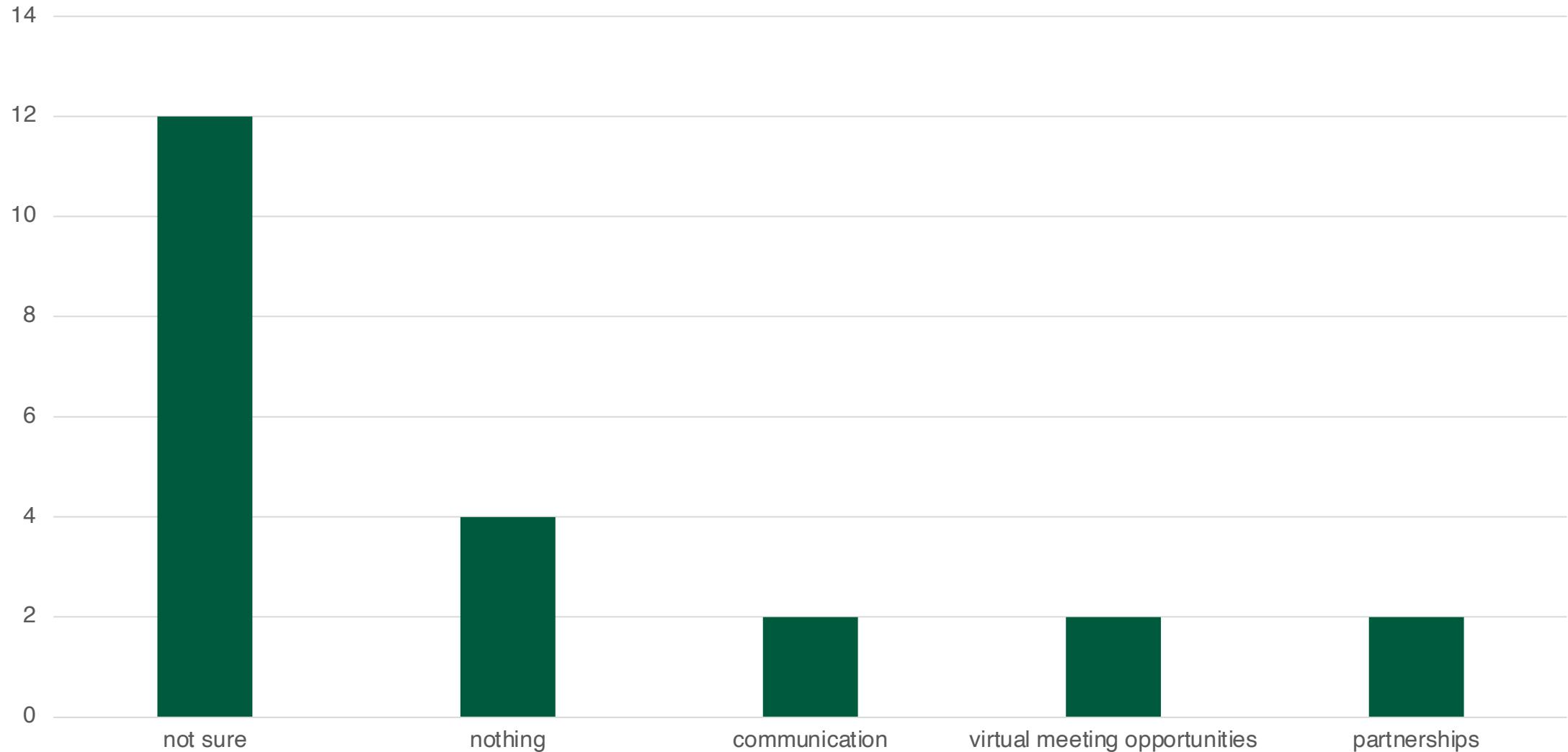
What other ongoing efforts are you aware of that are related to the Coos Bay–North Bend–Charleston visitor economy?



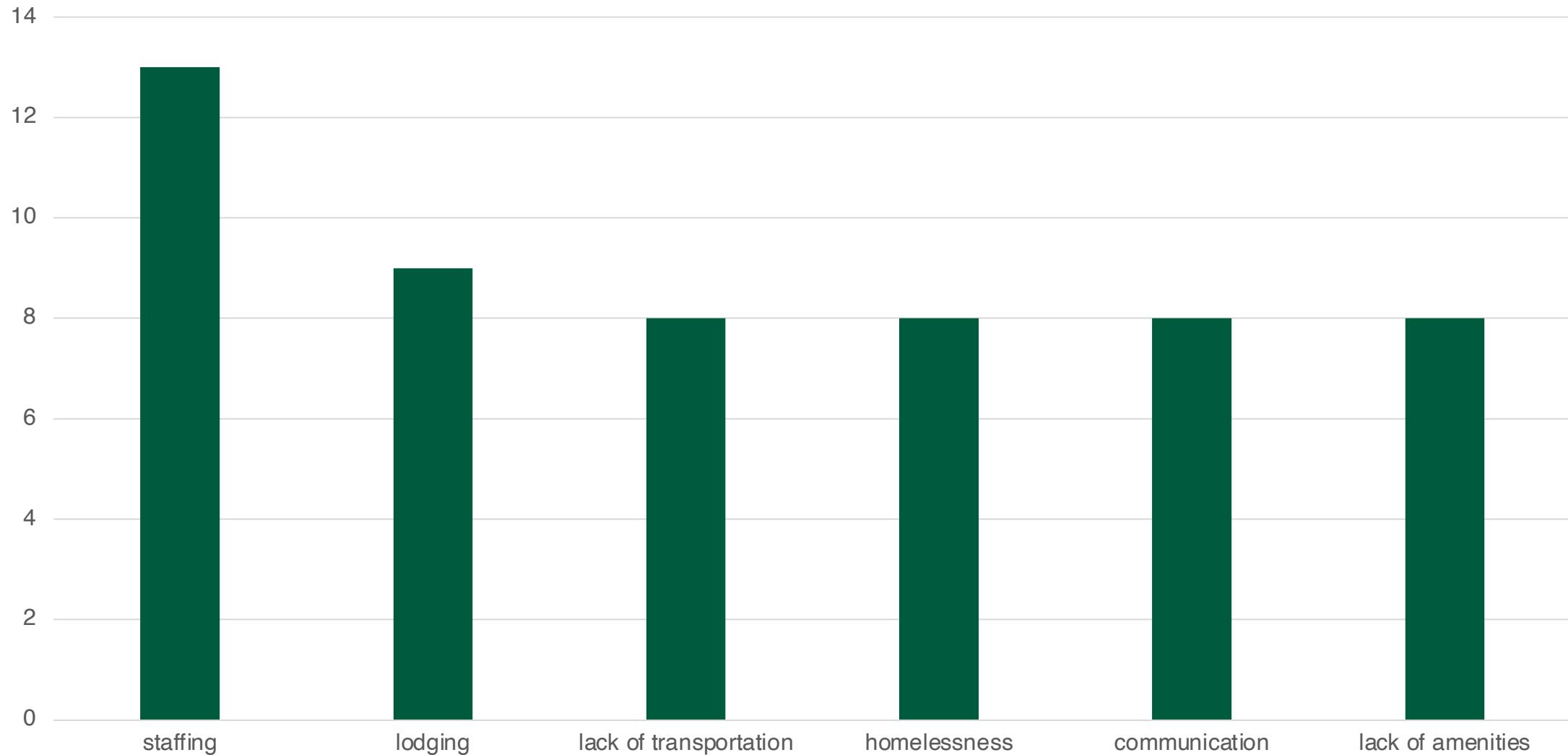
Thinking back over the last few years where the tourism industry was severely disrupted, what do you think the VCB did best to support tourism and tourism businesses in the Coos Bay–North Bend–Charleston region?



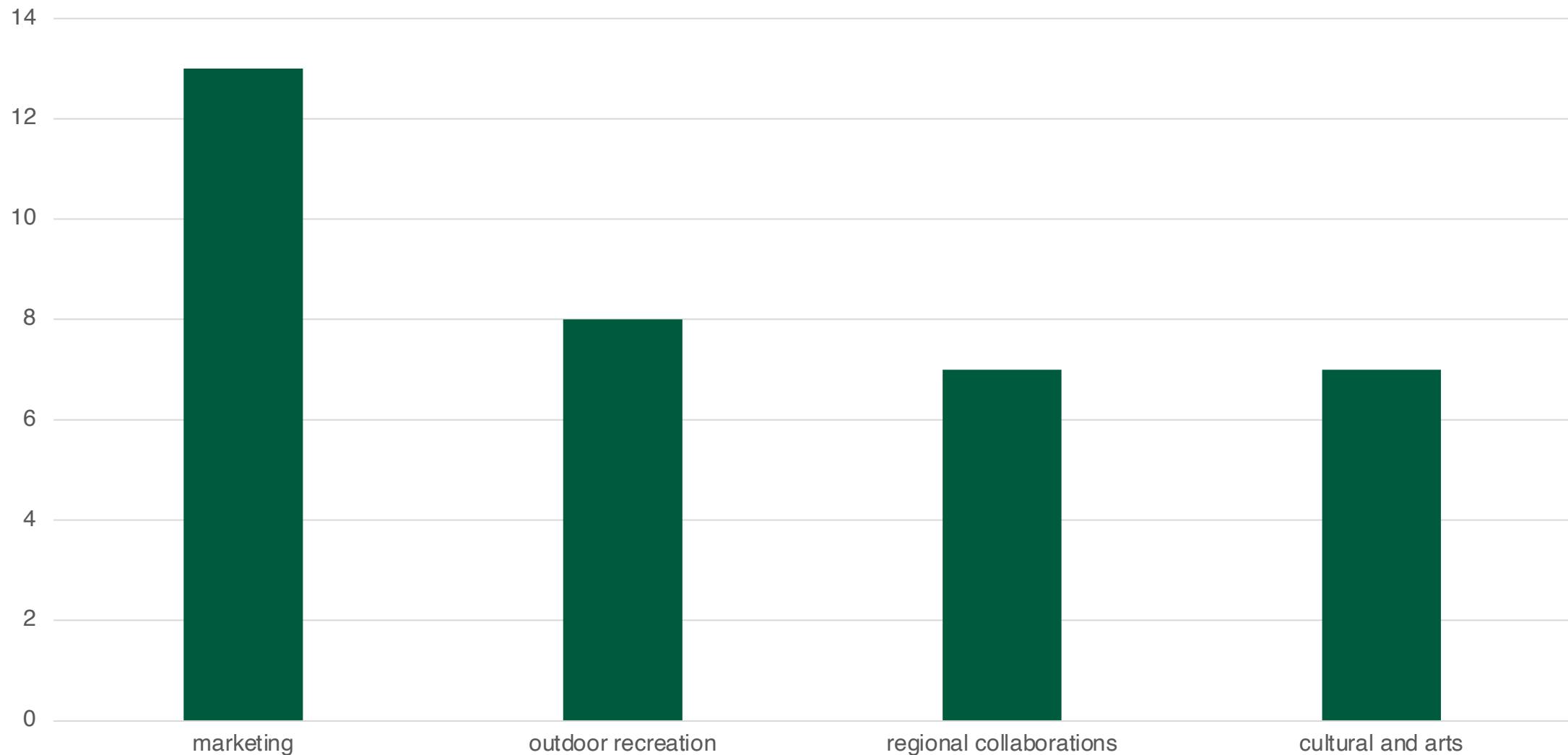
Over that same period of time, what could the VCB have done better?



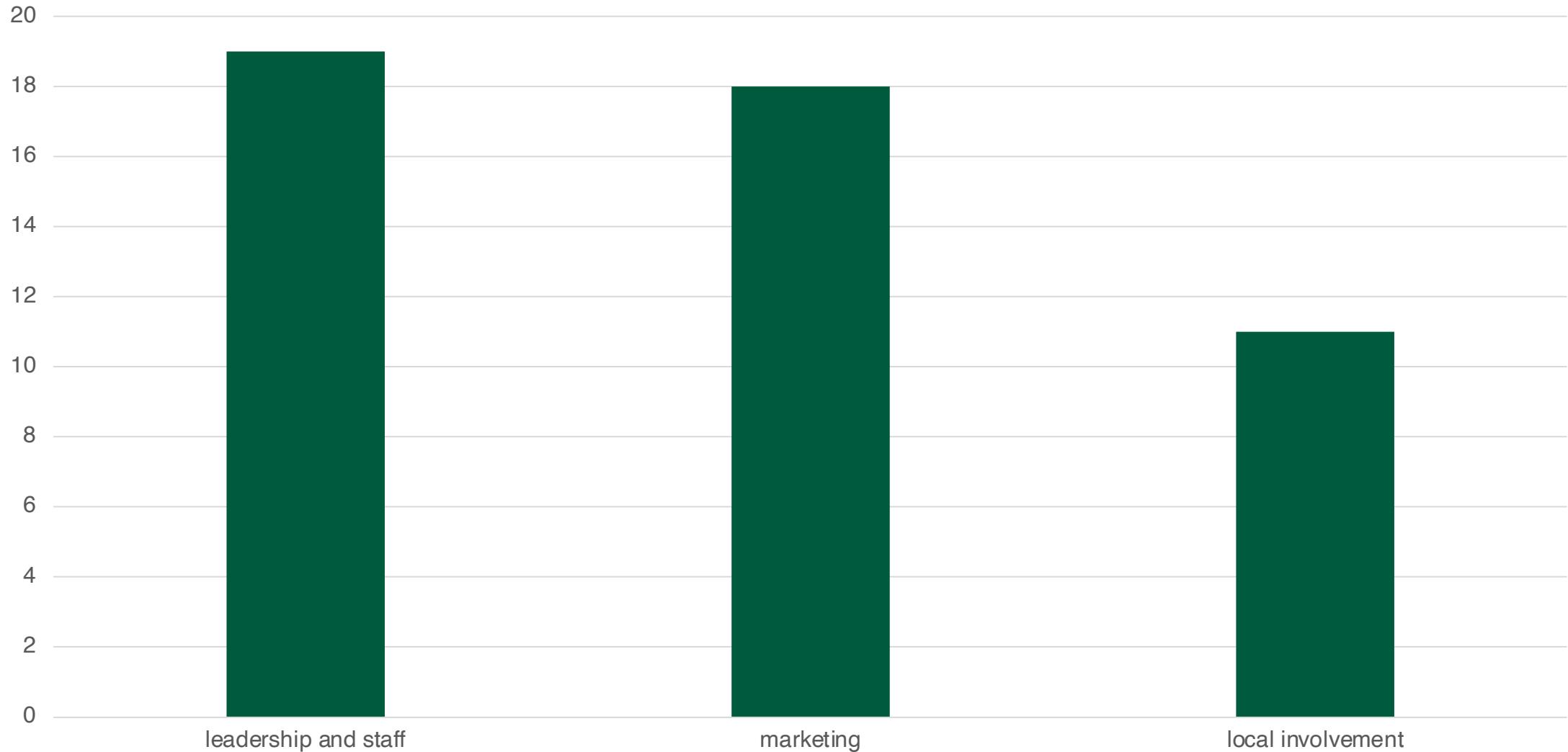
In your opinion, what are the top three CHALLENGES that the Coos Bay-North Bend-Charleston tourism economy faces TODAY?



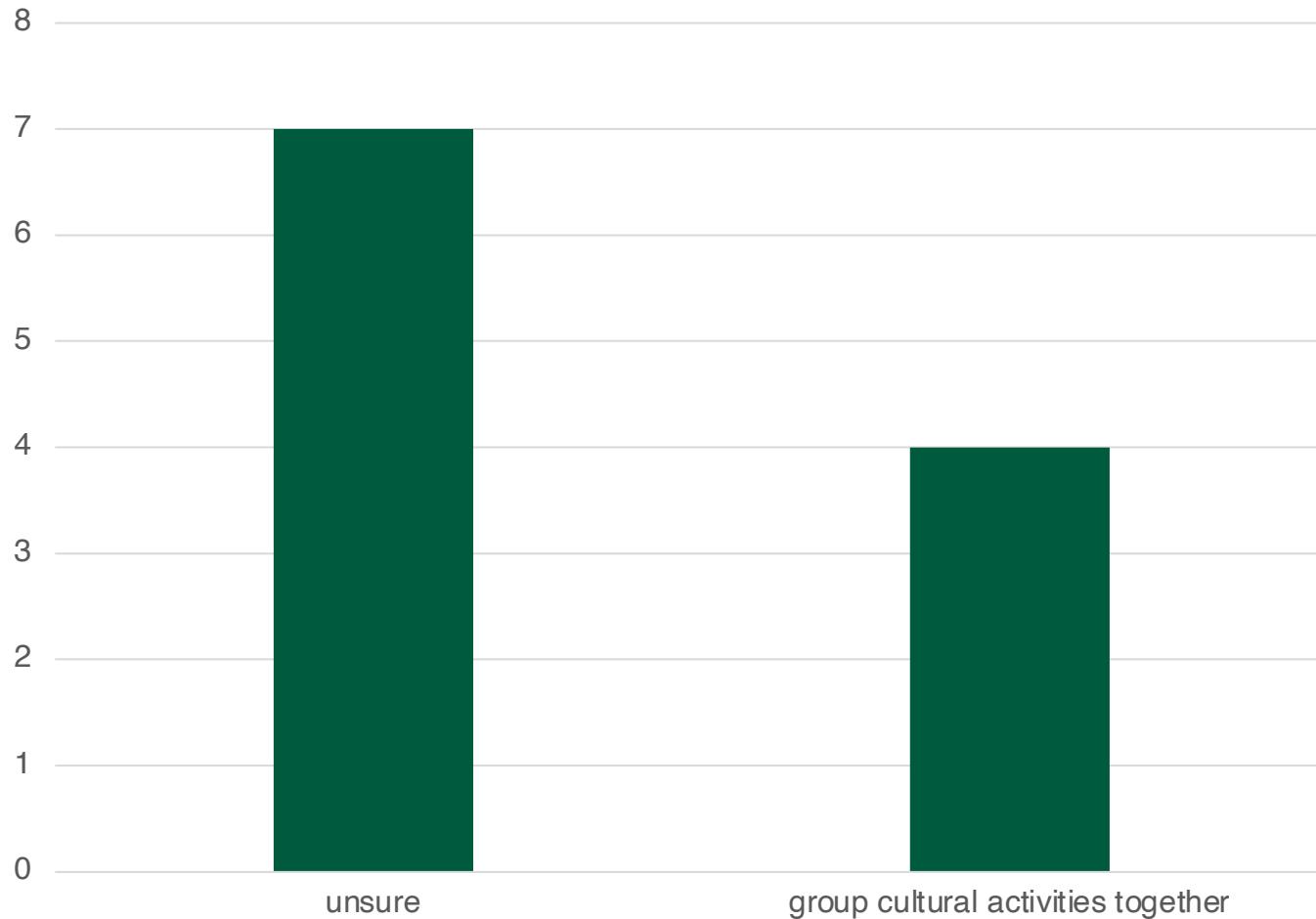
In your opinion, what are the top three strategic OPPORTUNITIES the Coos Bay–North Bend–Charleston VCB should take advantage of IN THE NEXT THREE YEARS?



In your opinion, what are the three greatest strengths of the Coos Bay–North Bend–Charleston VCB?



What actions/programs/promotions haven't you seen from the Coos Bay–North Bend–Charleston VCB that you'd like to see?



Is there anything else you'd like to share that might be important for the strategic planning team to consider?

- Overall very positive, limited feedback
- Desire for regional collaboration and marketing the South Coast as a whole destination
- Destination Stewardship ideals—overtourism fears, conservation, tourism serving and improving the community

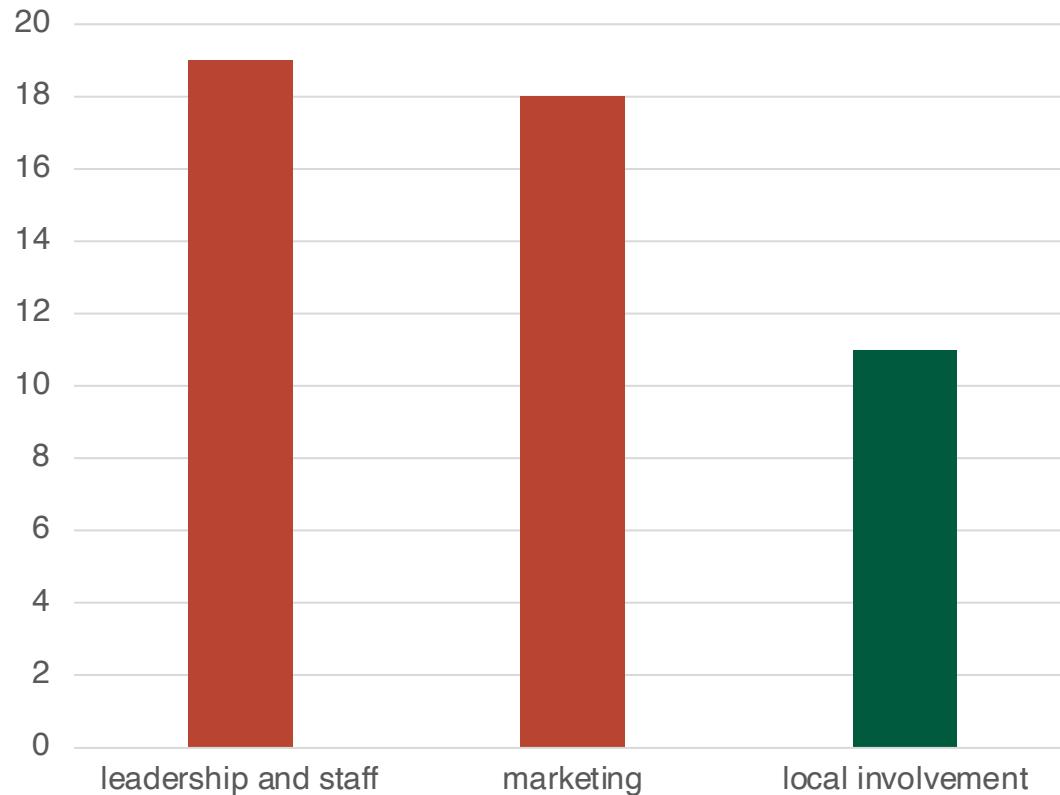
Strategic Perspectives

Overview of Strategic Perspectives

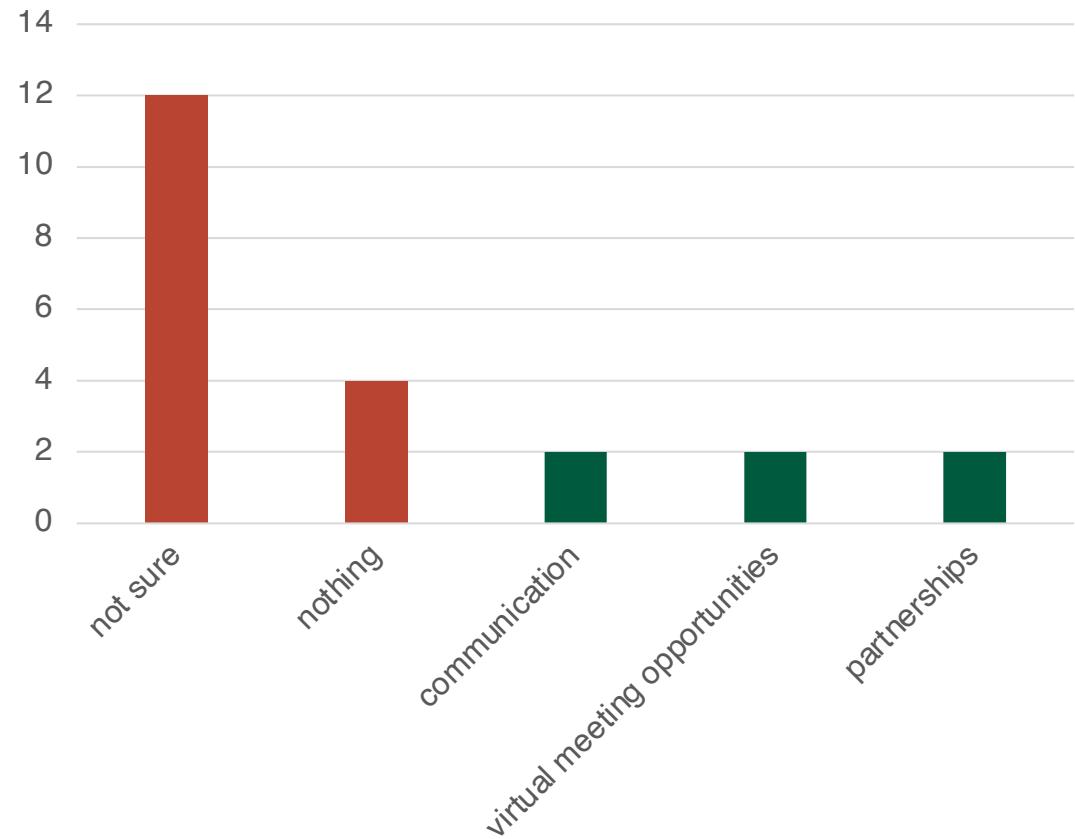
1. The VCB is seen as a strong, effective organization and can leverage its reputation and growing position to accelerate the visitor economy
2. The VCB has an opportunity to bolster stakeholder communications to foster greater industry momentum
3. The VCB area's core assets of natural beauty and outdoor recreation could provide a basis for building up adjacent areas of the visitor economy, thereby better supporting shoulder and off-seasons
4. Social challenges and infrastructure deficits may be limiting the visitor economy in the VCB area
5. Workforce challenges combined with relatively consistent hotel occupancy points toward strategies that bolster the area's already strong length-of-stay
6. Generational and pandemic-influenced shifts in the labor market provide an opportunity for the VCB area to capture remote work stays
7. Generational shifts in traveler expectations mean the VCB needs to be taking meaningful steps on sustainability and Diversity, Equity, and Inclusion (DEI), including the diversification of its visitor base

1. The VCB is seen as a strong, effective organization and can leverage its reputation and growing position to accelerate the visitor economy

In your opinion, what are the three greatest strengths of the Coos Bay–North Bend–Charleston VCB?



Over that same [pandemic] period of time, what could the VCB have done better



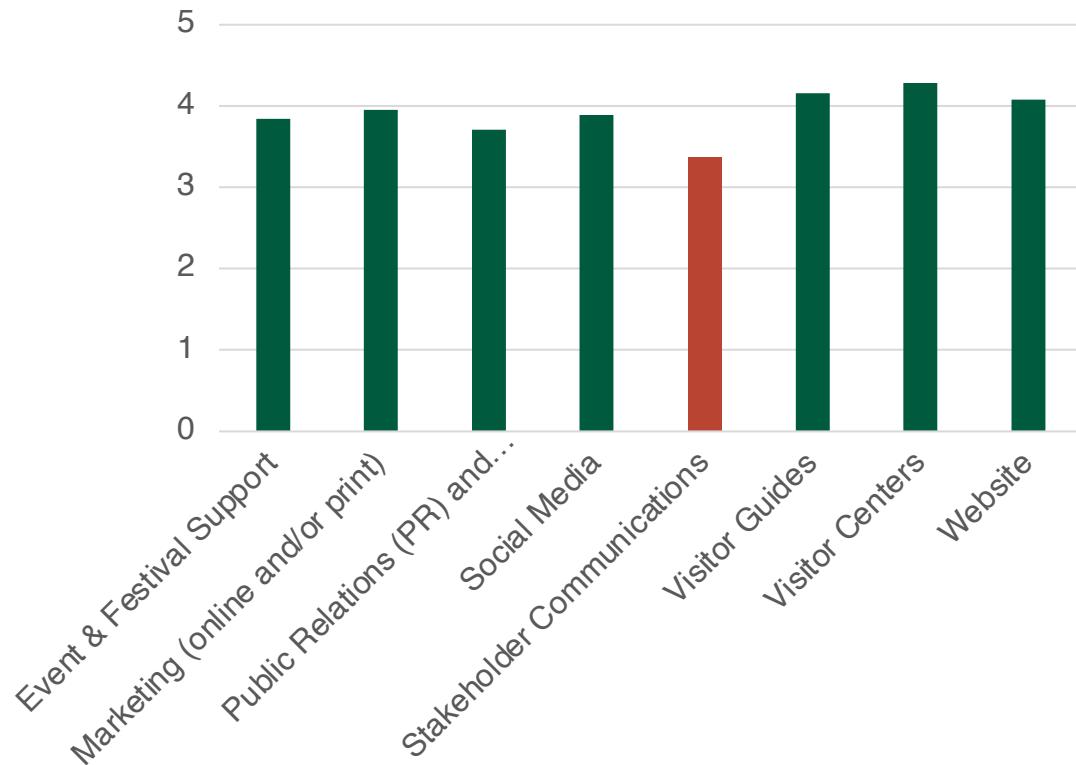
1. The VCB is seen as a strong, effective organization and can leverage its reputation and growing position to accelerate the visitor economy

Strategic Conclusions

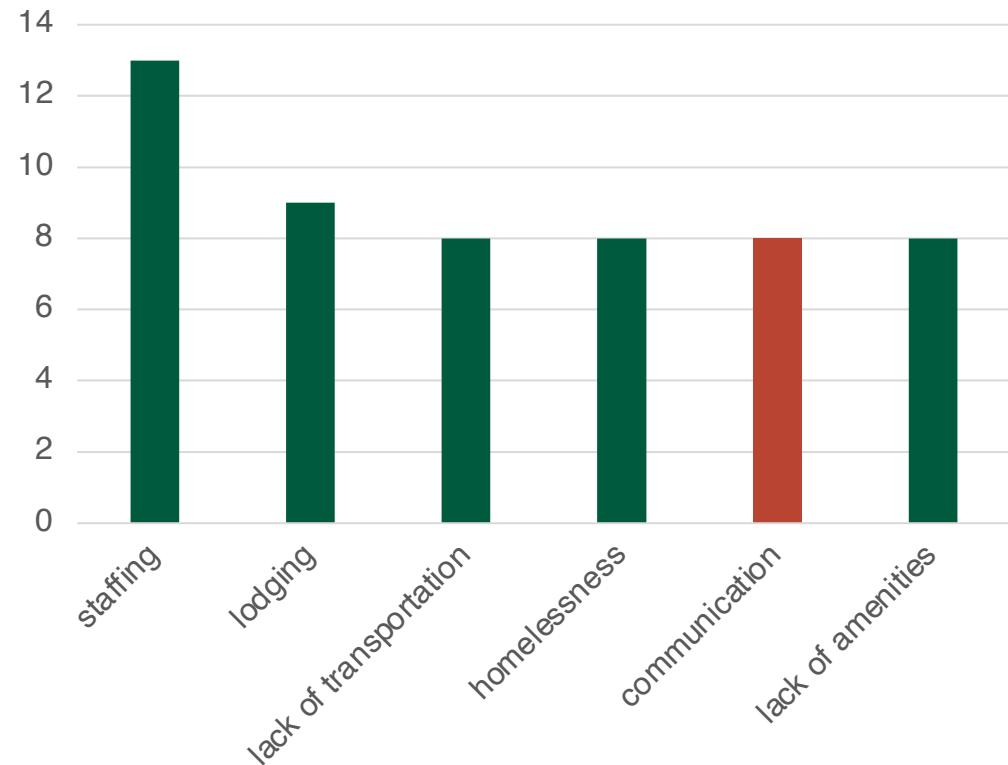
- Survey respondents struggled to find fault with the VCB, and cited leadership and staff as a core strength.
- Given this trust that has been built with the community, combined with the expansion of geographic scope and attendant increase in budget, the VCB can likely begin taking more bold steps to lead the local visitor economy into the future.
- This expansion of budget and geography, and a continued focus on the core mission and the additive work of strategic objectives point to a need for an organizational evaluation to ensure that the VCB has the skills and competencies needed to achieve its mission.

2. The VCB has an opportunity to bolster stakeholder communications to foster greater industry momentum

Considering the following elements of the Coos Bay–North Bend–Charleston visitor economy, how would you rate the quality of each, where 1=poor and 5=excellent?



In your opinion, what are the top three CHALLENGES that the Coos Bay–North Bend–Charleston tourism economy faces TODAY?



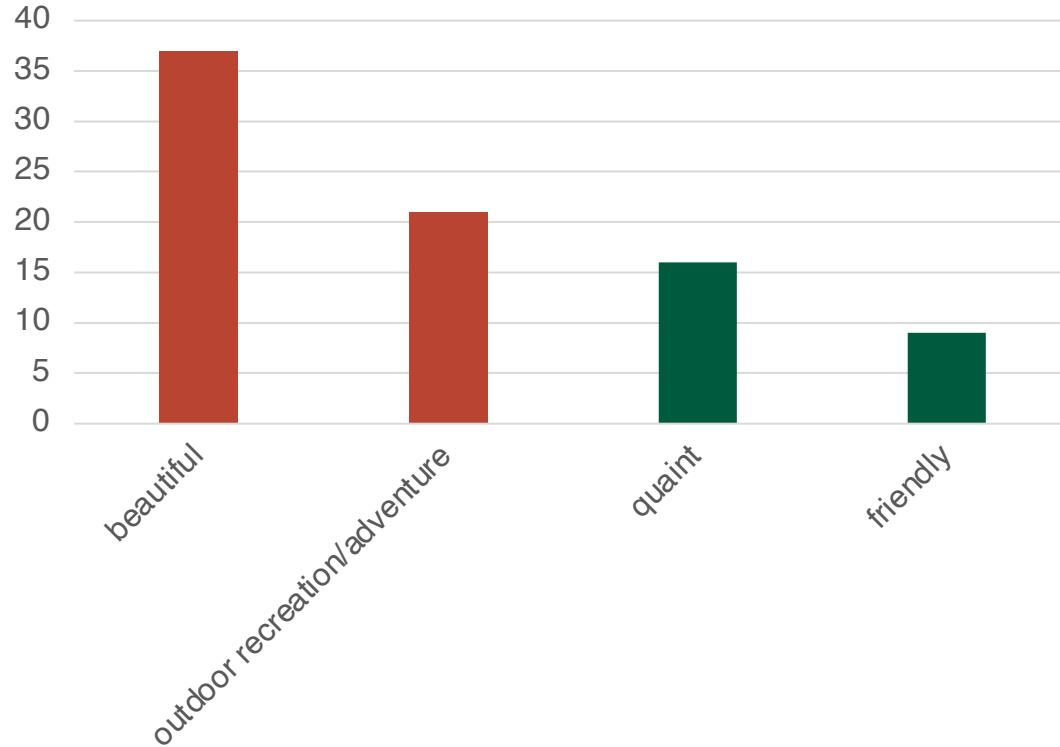
2. The VCB has an opportunity to bolster stakeholder communications to foster greater industry momentum

Strategic Conclusions

- Communications are cited as a challenge in nearly every organization, and for a VCB whose focus is on communicating to the visitor, it's not surprising to hear that stakeholders wish they heard more.
- Stakeholder and resident communications are the first line of defense in protecting the budget and empowerment of a destination organization—if the community loses faith, elected officials won't be far behind.
- Deliberate strategies to communicate the priorities, actions, and priorities of the VCB to the community are likely to pay great dividends.
- At the same time, stakeholders must feel that their concerns are heard.

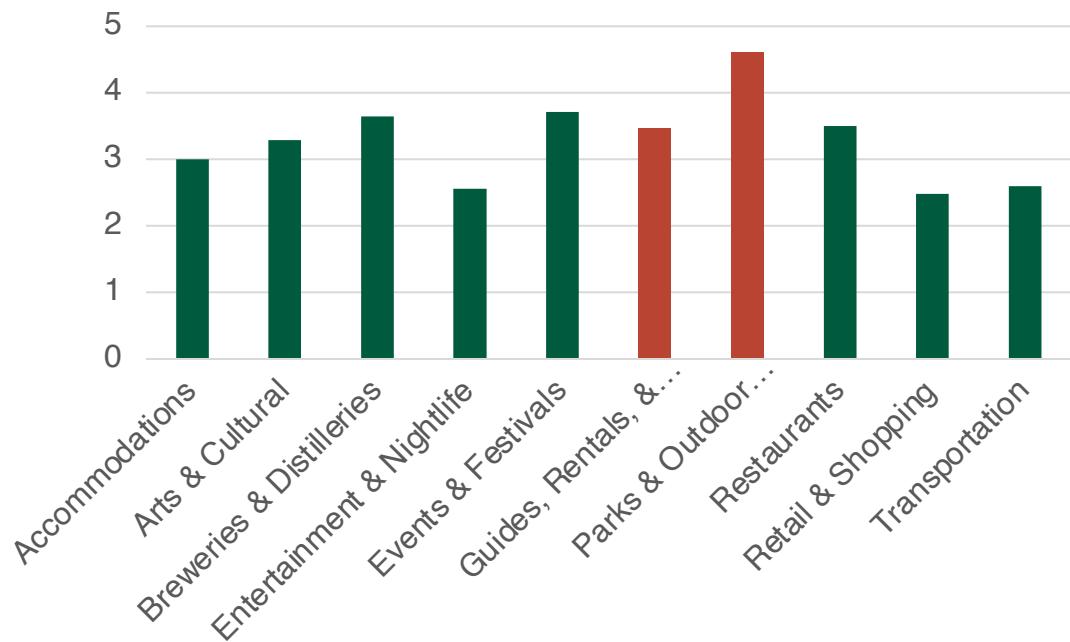
3. The VCB area's core assets of natural beauty and outdoor recreation could provide a basis for building up adjacent areas of the visitor economy, thereby better supporting shoulder and off-seasons

What are the top THREE words you have heard visitors use to describe the Coos Bay–North Bend–Charleston region?



3. The VCB area's core assets of natural beauty and outdoor recreation could provide a basis for building up adjacent areas of the visitor economy, thereby better supporting shoulder and off-seasons

Thinking about the following dimensions of the Coos Bay–North Bend–Charleston region AS A DESTINATION, how would you rate the quality of visitor experience for each, where 1=poor and 5=excellent?

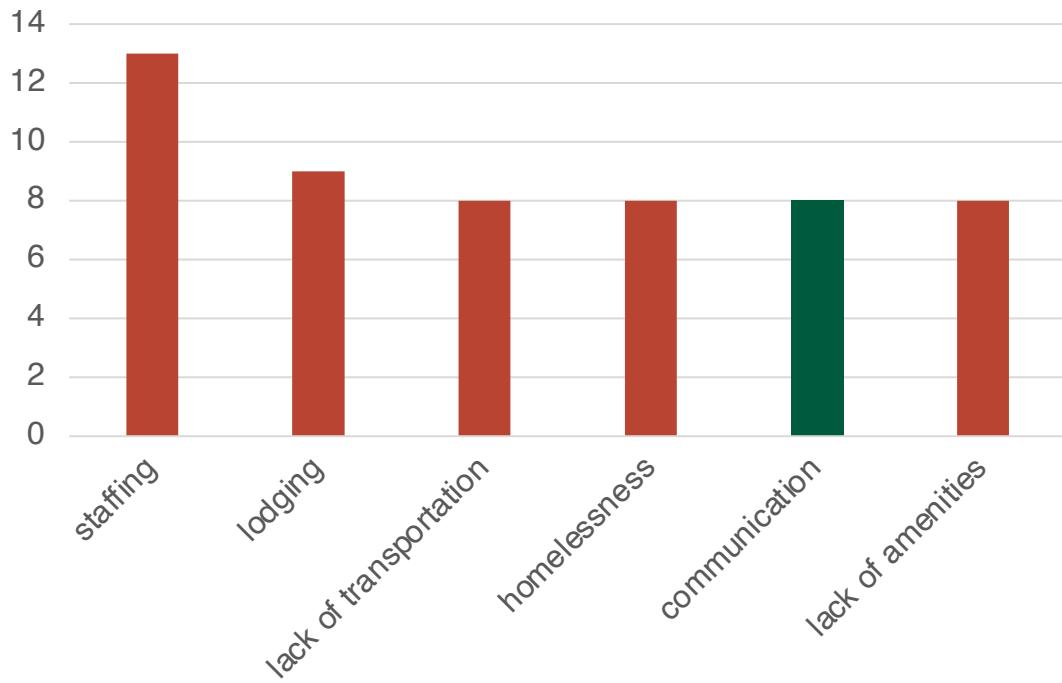


Strategic Conclusions

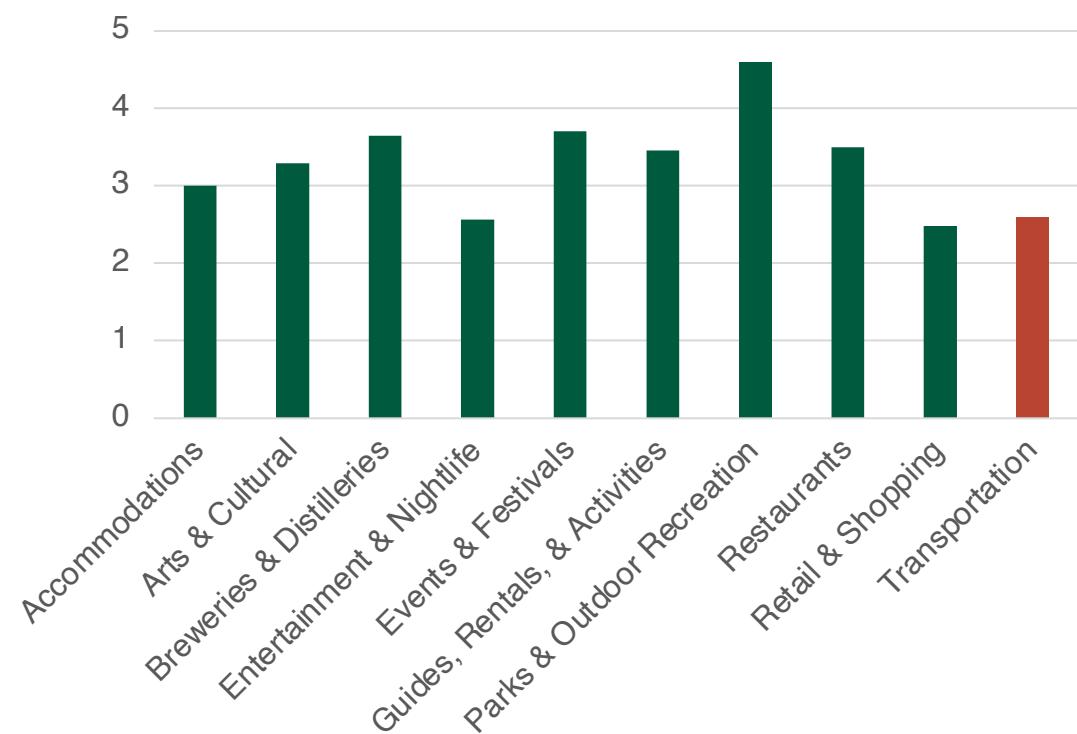
- The natural beauty of the area and its ample outdoor recreation opportunities dominated responses in the survey.
- Because outdoor recreation is a growing sector that drives visitation, especially among a desirable age demographic, this can be used as a keystone to the VCB's strategies.
- Adjacent or complementary portions of the outdoor recreation sector could be developed to pull visitation into slower months, such as breweries & distilleries, events & festivals, and restaurants.
- Working with municipal and county economic development partners to bolster these sectors would pay dividends.

4. Social challenges and infrastructure deficits may be limiting the visitor economy in the VCB area

In your opinion, what are the top three CHALLENGES that the Coos Bay–North Bend–Charleston tourism economy faces TODAY?



Thinking about the following dimensions of the Coos Bay North Bend–Charleston region AS A DESTINATION, how would you rate the quality of visitor experience for each, where 1=poor and 5=excellent?



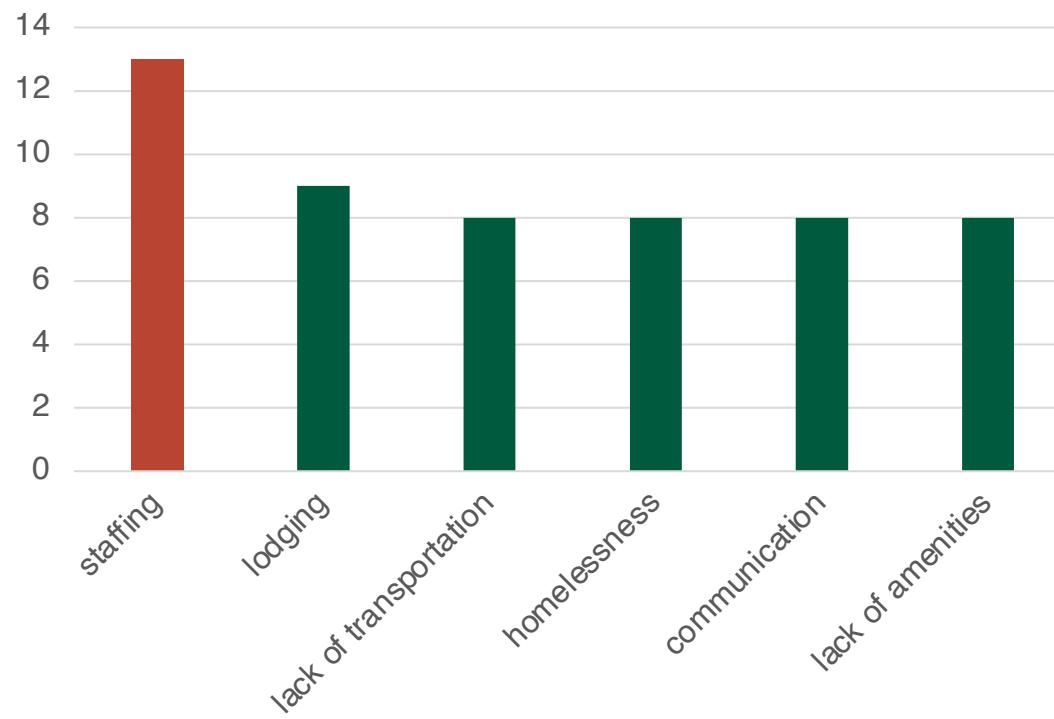
4. Social challenges and infrastructure deficits may be limiting the visitor economy in the VCB area

Strategic Conclusions

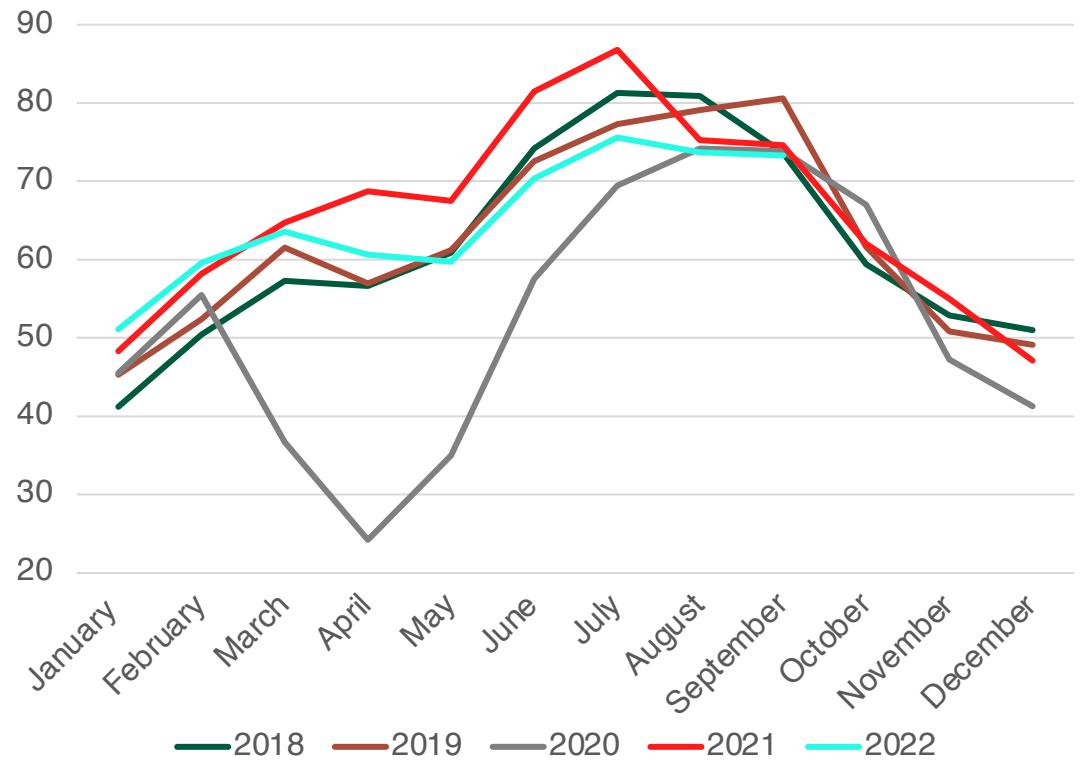
- With the exception of communication, all the main destination challenges cited by survey respondents focused on either social challenges or inadequate infrastructure.
- Homelessness and an insufficient workforce are complicated social and economic issues that are hindering the visitor economy.
- Inadequate transportation, lack of amenities, and limited lodging are development opportunities whose solutions would foster a more robust tourism sector.
- Although these issues are outside the traditional scope of a VCB, finding ways to advocate for solutions will alleviate many stakeholders' concerns.

5. Workforce challenges combined with relatively consistent hotel occupancy points toward strategies that bolster the area's already strong length-of-stay

In your opinion, what are the top three CHALLENGES that the Coos Bay–North Bend–Charleston tourism economy faces TODAY?



Monthly Occupancy: County



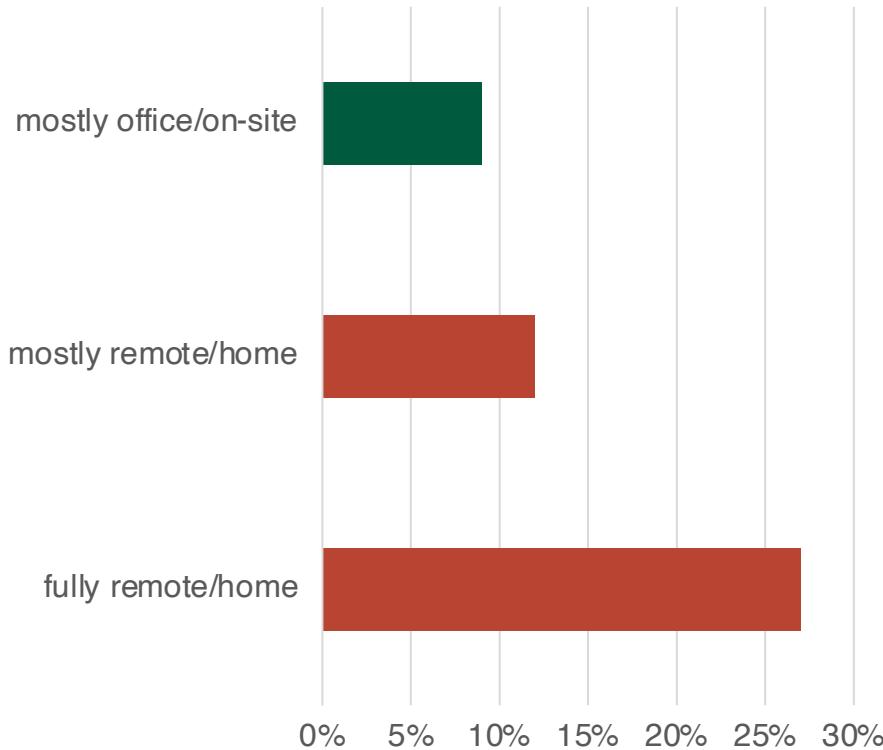
5. Workforce challenges combined with relatively consistent hotel occupancy points toward strategies that bolster the area's already strong length-of-stay

Strategic Conclusions

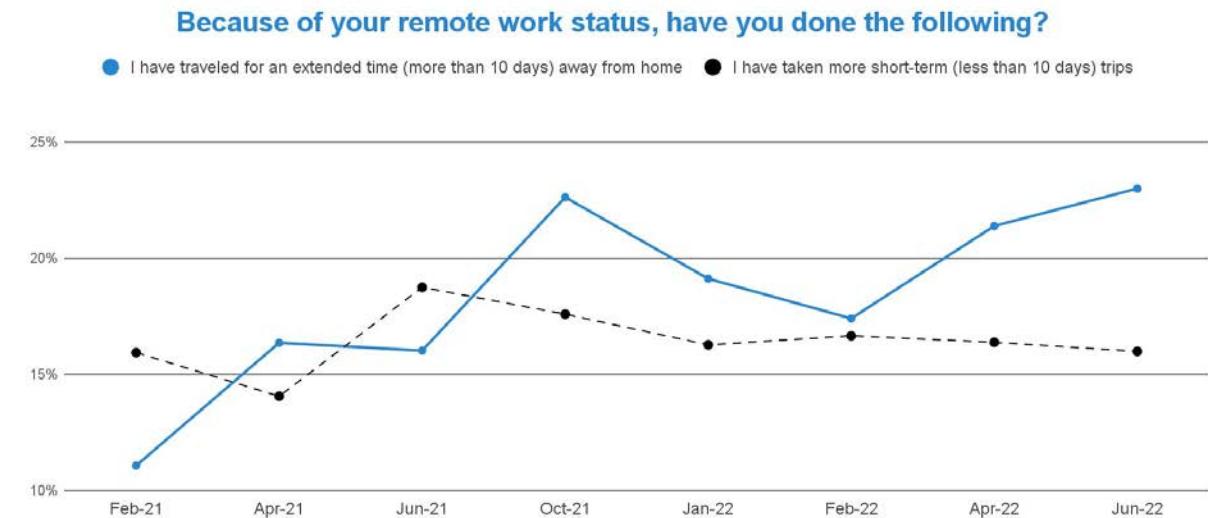
- The VCB area has a very good average length of stay (LOS) of 3.6 days.
- Out-of-state visitors are much more likely to stay for longer than 5 days
- Although the top out-of-state market (Seattle-Tacoma MSA) represents only 29% of the visitors of the top in-state market (Portland), half of the top ten origin markets are out-of-state
- Longer visitor stays require fewer service workers, especially in the accommodations sector, meaning that an equal number of total visitor nights could be achieved with fewer visitors and with the need for fewer workers

6. Generational and pandemic-influenced shifts in the labor market provide an opportunity for the VCB area to capture remote work stays

U.S. Remote Work Status, August 2022



Working From Anywhere Boosts Travel Activity



Source: Skift Research U.S. Travel Tracker, August 2022. N = 1,000

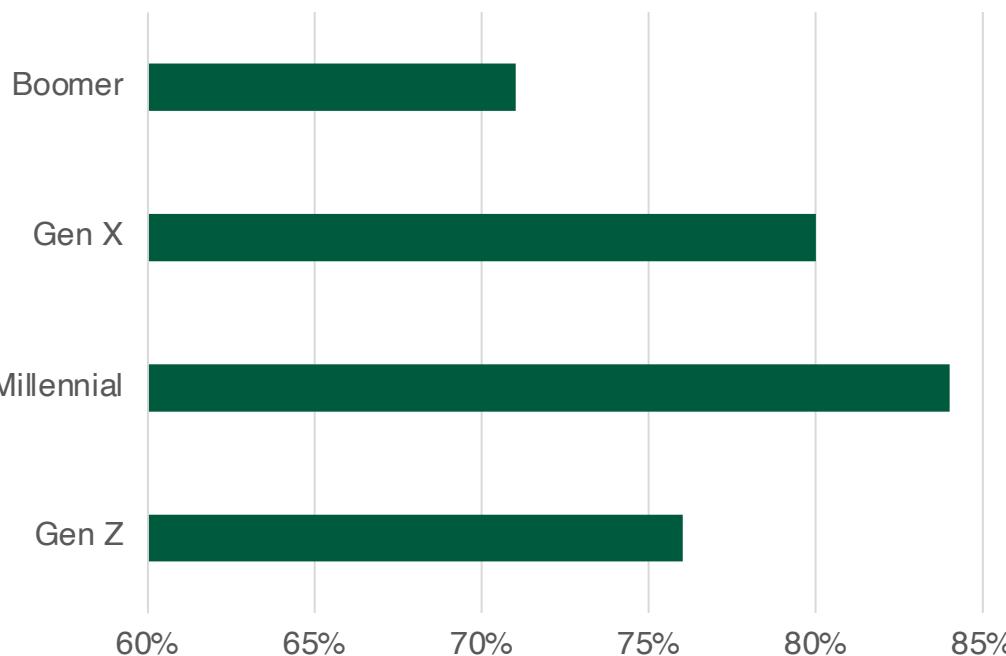
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Strategic Conclusions

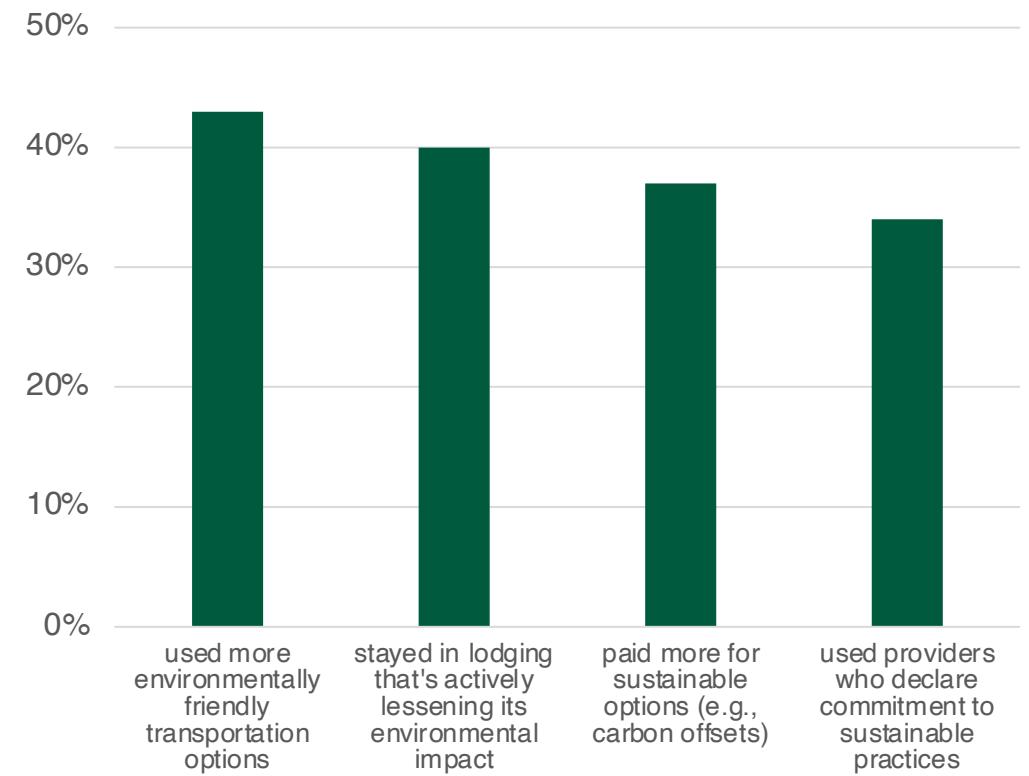
- Longer visitor stays are conducive to a vibrant visitor economy with a lower impact on resident quality of life
- One growing driver of longer stays is the “digital nomad” trend
- Three of the top six origin market MSAs for the VCB area are cities with significant tech sectors, which correlate highly with mobile workforces
- A strategy to target high-tech workers in these locations and pair them with properties in the VCB area that can accommodate remote work may drive an even longer length of stay (LOS) for the VCB

7. Generational shifts in traveler expectations mean the VCB needs to be taking meaningful steps on sustainability and Diversity, Equity, and Inclusion (DEI), including the diversification of its visitor base

Percentage who have made travel choices based on promotions or advertisements that they felt represented them through messaging or visuals



Percentage of travelers who have made more sustainable choices



7. Generational shifts in traveler expectations mean the VCB needs to be taking meaningful steps on sustainability and Diversity, Equity, and Inclusion (DEI), including the diversification of its visitor base

Strategic Conclusions

- Today's travelers increasingly have expectations to see their destinations—and businesses within those destinations—be welcoming to a variety of backgrounds and abilities, and to meet a high sustainability standard.
- Because purchase decisions are sometimes made with this lens as an input, the VCB should be proactive in encouraging and promoting a highly welcoming and sustainable visitor economy in the Coos Bay/North Bend/Charleston area.

Vision

How will our destination evolve over time? What will be different from today? What future visitor experience do we intend to create?

Destination Vision: DRAFT

Big ideas:

- More outdoor recreation opportunities, better supported
- Expanded transportation options
- More events, festivals, and family activities
- Diversified accommodations
- Locally-owned restaurants sourcing local food
- Stronger focus on tribal tourism



Mission

How would we succinctly describe the purpose
of the VCB today?

Mission: DRAFT

To inspire visitors and create desire to explore the region, and to contribute to our visitor economy through creative marketing, effective communication, and destination stewardship



Values

What core, shared beliefs drive the way
we work together?

Values: DRAFT

Acceptance

Our trust, care, and mutual respect enable us to bring our whole selves to work

Wonder

We never lose sight of the joy it is to work in this industry and in this place

Engagement

Our dedication, ownership, and focus on continuous improvement keeps our eyes on the prize

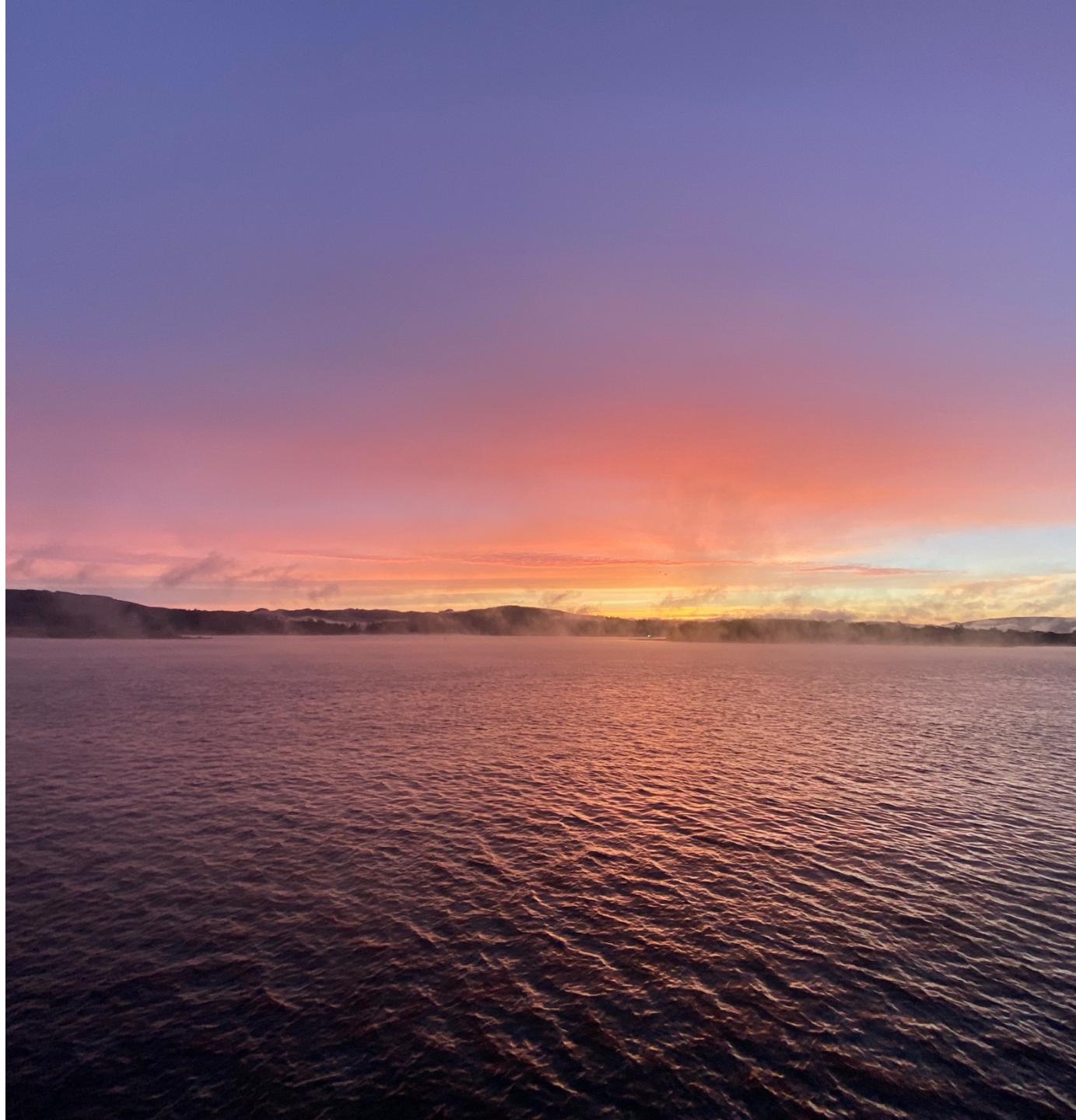


Objectives

What major bodies of work will we undertake
to make our Vision a reality?

Objectives: DRAFT

1. Drive visitation and length of stay
2. Deepen community engagement and education
3. Nurture and promote a sustainable, diverse, and welcoming community
4. Advocate for asset and infrastructure improvements
5. Build our organizational capacity



Stakeholder Feedback

Objective 1: Drive visitation and length of stay

- What makes us unique?
- Build itineraries
- Get them to come back three times
- Voluntourism
- Transportation connections to cities
- Attract statewide events
- Visitor center volunteer training
- Partnerships with cities (use QR codes)
- Guided opportunities
- Highlight events
- Diverse lodging options
- Reliable & consistent business hours
- Welcome wagon

Objective 2: Deepen community engagement and education

- Education of community
- Resources to stakeholders: what's going on
- Volunteer trainings
- Partner with businesses to share information
- Youth mentorship
- Museum hop

Objective 3: Nurture and promote a sustainable, diverse, and welcoming community

- Partner with community college
- Watch short-term rental trends re: housing
- Feature actual workers
- Diversify our visual assets
- Be real re: diversity
- Highlight and promote the fishing industry

Objective 4: Advocate for asset and infrastructure improvements

- How do we help the VCB get invited to the table?
- Build for future demographics
- Potholes, trail maintenance
- We're underbuilt in multi-family housing
- WiFi improvements

Objective 5: Build our organizational capacity

- Spread the burden of business travel for staff by using volunteers?
- Don't depend on older folks for volunteers
- Make it easy to volunteer
- Give volunteers specific tasks
- Workshops for youth to be ambassadors
- Give kids a "what's in it for me"
 - Go TO the youth
 - Get involved in youth programs
 - High school 100-hour community service requirement