



DCG RESEARCH

A service of the Dennett Consulting Group

DECEMBER 2019

OREGON SOUTH COAST REGIONAL TOURISM NETWORK - ZIP CODE STUDY - SECTION 1



FINAL REPORT

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**ZIP CODE STUDY
OREGON SOUTH COAST REGIONAL TOURISM NETWORK**

**SECTION 1
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I. INTRODUCTION

Travel Southern Oregon Coast (TSOC) is preparing to launch its first marketing campaign in early 2020. To help define their target markets, the Dennett Consulting Group (DCG Research) was retained to prepare an analysis of visitor zip codes obtained through various partners with the goal of developing a list of markets that reflect current visitors to the South Coast. The goals of this study:

- Determine states and cities where current visitors are coming from reflected by the zip codes provided for this analysis.
- Provide target market recommendations that offer the greatest potential for increasing travel to the South Coast.

II. METHODOLOGY

Under the guidance and direction of Holly Macfee, principal of Lookout, and Travel Southern Oregon Coast's Executive Director Julie Miller, DCG analyzed more than 12,230 zip codes provided by South Coast partners. These files came from consumers that have either traveled to the South Coast, plan to visit, requested information, or attended events in the area. For this study, these individuals are referred to as South Coast Interested Travelers (study population).

ZIP CODE FILES STUDIED	COUNT	PERCENTAGE
DMO Website Studies (2012 to 2019) Selected South Coast Cities (1)	2,852	22.83%
Coos Bay-North Bend VIA Leads - Sept 2018 (two sets)	874	7.00%
Coos Bay-North Bend August Cool Coast Getaway	1,456	11.66%
Coos-Bay North Bend Guide Requests 2019	204	1.63%
Coos Bay-North Bend Relocation Requests 2019	20	0.16%
Coos Bay-North Bend September Cool Coast Getaway	1,664	13.32%
Coos Bay-North Bend South Coast Getaway	2,893	23.16%
Wild River Coast Study 2014 (2)	211	1.69%
Charleston Salmon Run Marathon 2017,18,19	821	6.57%
Lakeside Zip Codes	54	0.43%
Jerry's and Mail Boat Zip Codes	1,441	11.54%
Museum zip codes	N/A	
TOTALS	12,490	

(1) An ongoing study since 2012 of DMO website visitors with Bandon, Gold Beach and Coos Bay-North Bend participating in the study.

(2) A visitor study for The Wild Rivers Coast Alliance involving intercept surveys in the Bandon, Port Orford, Gold Beach, Brookings/Harbor, and Crescent City areas. Also included online surveys to the Wild Spring Guest Habitat guest list, past guests of Harris Beach State Park, Curry Coastal Pilot and Triplicate subscribers, and Wildland Properties guests.

RESEARCH NOTE: DCG required Excel zip code files for this study and 12 different data files were provided. Two were recap files, without individual zip codes, and could not be imported into the consolidate zip code data base. DCG did compare the results of this analysis with conclusions in these recap files and results were consistent.

A quantitative analysis of more than 12,230 zip codes from South Coast Interested Travelers required a research method that would provide TSOC actionable marketing data. Therefore, DCG used the following procedure:

- All original zip code files were sorted using CDX ZipStream technology. This advanced software identifies zip codes by State, City, Metropolitan Statistical Areas (MSA) and Core-Based Statistical Area (CBSA). These two Census/Government designations are used often in marketing because they allow for targeted campaigns via all forms of media.
 - **Metropolitan Statistical Area (MSA)** - An MSA consists of one or more counties that contain a city of 50,000 or more.
 - **Core-Based Statistical Area (CBSA)** - CBSA consists of one or more counties (or equivalent) anchored by an urban center of at least 10,000 people.
- All zip codes files were then consolidated into a master file for in-depth analysis. The initial analysis ranked all states and cities based on the number of zip codes from South Coast Interested Travelers.

Some zip codes could not be identified and foreign and military zip codes were excluded from this analysis since they were not large enough to make a statistical difference in the results. This analysis covered 99% of all provided zip codes.

- DCG then reviewed all state data to determine what states provided the most South Coast Interested Travelers. There were six states that were home to 98% of South Coast Interested Travelers: Oregon, California, Washington, Idaho, Arizona, and Nevada.
- DCG then completed an analysis of these six states and identified and ranked cities within each state based on South Coast Interested Travelers.
- The final step was to rank the top ten cities for each of the six states and provide a list of zip codes. It is important to note that zip codes shown are not total zip codes for a city. They only represent the zip codes from South Coast Interest Travelers.

II. KEY FINDINGS AND ANALYSIS

1. This zip code analysis of South Coast Interested Travelers confirms that the South Coast continues to be a drive tourism market. States within driving distance from the South Coast are the top markets. Five out of the top six states are within a day's drive.

TOP SIX STATES	VISITOR COUNT	PERCENTAGE
Oregon	9,311	76%
California	1,110	9%
Washington	518	4%
Idaho	250	2%
Arizona	135	1%
Nevada	113	1%

2. Oregon should be considered the #1 state for TSOC marketing efforts, with 76% of South Coast Interested Travelers coming from Oregon.
 - Within Oregon, the greater Eugene area (MSA 2400 and CBSA 21660) is the top market for potential visitors. The entire I-5 corridor offers 9 out of 10 of the top cities for South Coast Interested Travelers.

MSA (Metropolitan Statistical Area) – U.S. Census designated area
CBSA (Core-Based Statistical Area) – U.S. Census designated area

TOP TEN OREGON CITIES	VISITOR COUNT	MSA	CBSA
Eugene	2,023	2400	21660
Springfield	735	2400	21660
Portland	412	6442	38900
Roseburg	287	N/A	40700
Cottage Grove	256	2400	21660
Medford	248	N/A	32780
Grants Pass	172	N/A	24420
Bend	167	N/A	13460
Junction City	159	2400	21660
Creswell	157	2400	21660

- Residents of the South Coast area itself are also an important target market for TSOC and should be part of any marketing effort. Research shows that overnight visitors spend more, so marketing efforts should be prioritized to overnight visitors outside the South Coast market itself. However, these hyper local markets should be included where possible in marketing efforts.

For the purposes of Oregon's Top Ten City list, cities within the South Coast were excluded because it could skew results to a local day use market. Based on South Coast Interested Visitor counts, two coastal cities would have made it on the top ten list. Those two are Coos Bay and North Bend.

HIGHEST RATED SOUTH COAST CITIES

<i>SOUTH COAST CITIES</i>	<i>VISITOR COUNT</i>
Coos Bay	291
North Bend	191
Bandon	90
Brookings	23

3. Northern California is also a solid market, especially cities that are within the closest driving distance of the South Coast. However, based on the number of South Coast Interested Travelers, no city in California comes close to the cities in Oregon.

MSA (Metropolitan Statistical Area) – U.S. Census designated area
CBSA (Core-Based Statistical Area) – U.S. Census designated area

<i>TOP TEN CALIFORNIA CITIES</i>	<i>VISITOR COUNT</i>	<i>MSA</i>	<i>CBSA</i>
Redding	56	7362	29820
Sacramento	35	6922	40900
Eureka	33	N/A	21700
Chico	21	1620	17020
San Francisco	17	7362	41860
San Jose	16	7362	41940
Santa Rosa	14	7362	42220
Yreka	14	N/A	N/A
Fresno	12	2840	23420
Modesto	12	5170	33700

4. Washington is also a good market if TSOC focuses on cities that are adjacent to Oregon, especially Vancouver. This supports the research conclusion that targeting the drive tourism market is important. Again, total numbers are lower than Oregon cities.

MSA (Metropolitan Statistical Area) – U.S. Census designated area
CBSA (Core-Based Statistical Area) – U.S. Census designated area

<i>TOP TEN WASHINGTON CITIES</i>	<i>VISITOR COUNT</i>	<i>MSA</i>	<i>CBSA</i>
Vancouver	144	6442	38900
Seattle	43	7602	42660
Battle Ground	23	6442	38900
Camas	11	6442	38900
Tacoma	10	7602	42660
Kennewick	9	6740	28420
Olympia	9	7602	36500
Kent	8	7602	42660
Lynnwood	7	7602	42660
Puyallup	7	7602	22660

5. Idaho, Arizona, and Nevada have marketing potential and certainly deserve future marketing focus. However, the total number of South Coast Interested Travelers are small compared to Oregon, California, and Washington.

MSA (Metropolitan Statistical Area) – U.S. Census designated area

CBSA (Core-Based Statistical Area) – U.S. Census designated area

TOP TEN IDAHO CITIES	VISITOR COUNT	MSA	CBSA
Boise	48	1080	14260
Meridian	24	1080	14260
Nampa	15	1080	14260
Eagle	13	1080	14260
Idaho Falls	10	N/A	26820
Twin Falls	9	N/A	46300
Garden City	6	N/A	14260
Star	6	1080	14260
Emmett	6	N/A	14260
Mountain Home	6	N/A	34200

TOP TEN ARIZONA CITIES	VISITOR COUNT	MSA	CBSA
Phoenix	26	6200	38060
Tucson	18	8520	46060
Mesa	8	6200	38060
Scottsdale	7	6200	38060
Glendale	6	6200	38060
Surprise	4	6200	38060
Prescott Valley	4	N/A	39150
Goodyear	3	6200	38060
Sun City West	3	6200	38060
Peoria	3	6200	38060

TOP TEN NEVADA CITIES	VISITOR COUNT	MSA	CBSA
Reno	31	6720	39900
Sparks	15	6720	39900
Las Vegas	13	4120	29820
Henderson	7	4120	29820
North Las Vegas	7	4120	29820
Spring Creeks	5	N/A	21220
Yerington	4	N/A	22280
Fallon	4	N/A	21980
Fernley	4	N/A	22280
Carson	3	N/A	23820

6. Looking at all six states and all cities, DCG developed a top ten market list using CBSA (Core-Based Statistical Area) data. The following table identifies 32 cities for marketing consideration.

TOP MARKET AREAS IN THIS ANALYSIS	VISITOR ZIP CODE COUNT	CBSA CODE
#1 Eugene Area	3,084	21660
Eugene	2,023	
Springfield	735	
Junction City	159	
Creswell	157	
#2 Portland	412	3890
#3 Roseburg	287	4070
#4 Medford	248	32780
#5 Vancouver Area	178	38900
Vancouver	144	
Battleground	23	
Camas	11	
#6 Grants Pass	172	24420
#7 Boise Area	118	14260
Boise	48	
Meridian	24	
Nampa	15	
Eagle	13	
Garden City	6	
Star	6	
Emmett	6	
#8 Seattle Area	68	42660
Seattle	43	
Tacoma	10	
Kent	8	
Lynnwood	7	
#9 Phoenix Area	60	38060
Phoenix	26	
Mesa	8	
Scottsdale	7	
Glendale	6	
Sunrise	4	
Goodyear	3	
Sun City West	3	
Peoria	3	
#10 Reno Area	46	39900
Reno	31	
Sparks	15	

7. This zip code analysis offers a variety of ways to target TSOC marketing to the identified markets.

- **USE ZIP CODES** – DCG has provided a complete list of zip codes within the top ten cities in the top six states. It is important to note that this is not a comprehensive zip code list for each city. It only reflects zip codes from South Coast Interested Travelers.
- **USE MSA DATA** – Due to the fact that MSA areas are those with 50,000 or more people, many cities did not meet this criteria. Targeting MSA areas could be limiting. On the other hand, the marketing team may want to focus on larger metropolitan areas, which offer the overall potential of more visitors.
- **USE CBSA DATA** – Due to the fact that CBSA areas are those with 10,000 or more people, this may be the best way to define the top TSOC markets. In addition, there are a variety of online tools for creating maps based on CBSA areas. Many media and online companies can provide these maps at no cost. DCG used CBSA designations to develop the top ten market list of 33 cities.

On the following page is a recap of all CBSA areas (33) in the six states, all top ten markets.

STATE	CBSA
Oregon (6)	21660
	38900
	40700
	32780
	24420
	13460
California (9)	39820
	40900
	21700
	17020
	41860
	41940
	42220
	23420
	33700
Washington (6)	38900
	42660
	38900
	28420
	36500
	22660
Idaho (4)	14260
	26820
	46300
	34300
Arizona (3)	38060
	46060
	39150
Nevada (5)	39900
	29820
	21220
	22280
	21980
TOTAL:	33

The follow pages of the Section I Report provides detailed zip code lists of the top ten cities in the six states identified.

Section II contains the total zip code data base for the top six states.

Section III contains the total zip code data base studied for all cities and states. Because of its length, 247 pages, this is not being provided but it is available.

DCG is available, if needed, for additional analysis work.

Dr. Nicholas Lougee
Mr. Mark Dennett

III. DATA TABLES - SECTION 1

A. ZIP CODES FOR TOP TEN CITIES IN TOP SIX STATES

OREGON TOP 10

OREGON		
RANK	CITY (VISITOR NUMBER) ZIP CODES	MSA
1	EUGENE (2,023)	2400
	97401	
	97402	
	97403	
	97404	
	97405	
	97408	
	97440	
2	SPRINGFIELD (735)	2400
	97475	
	97477	
	97478	
3	PORTLAND (412)	6442
	97201	
	97202	
	97203	
	97204	
	97205	
	97206	
	97207	
	97208	
	97209	
	97210	
	97211	
	97212	
	97213	
	97214	
	97215	
	97216	
	97217	
	97218	
	97219	
	97220	
	97221	
	97222	
	97223	

	97224	
	97225	
	97226	
	97227	
	97229	
	97230	
	97232	
	97233	
	97236	
	97266	
	97267	
	97268	
	97293	
4	ROSEBURG (287)	N/A
	97470	
	97471	
5	COTTAGE GROVE (256)	2400
	97424	
6	MEDFORD (248)	4890
	97501	
	97504	
7	GRANTS PASS (172)	N/A
	97526	
	97527	
	97528	
8	BEND (167)	N/A
	97701	
	97702	
	97703	
	97707	
	97708	
	97709	
9	JUNCTION CITY (159)	2400
	97448	
10	CRESWELL (157)	N/A
	97426	

CALIFORNIA TOP 10

CALIFORNIA RANK	CITY (VISITOR NUMBER) ZIP CODES	MSA
1	REDDING (56)	6690
	96001	
	96002	
	96003	
	92373	
2	SACRAMENTO (35)	6922
	95817	
	95819	
	95820	
	95821	
	95822	
	95823	
	95828	
	95829	
	95831	
	95838	
	95841	
	95842	
	95864	
	95865	
	94203	
	95814	
	95825	
	95826	
	95827	
	95828	
	95837	
3	CHICO (21)	1620
	95926	
	95927	
	95928	
	95973	
4	SAN FRANCISCO (17)	7362
	94116	
	94117	
	94122	
	94102	
	94105	
	94109	
	95110	
	95112	
	95115	

	94116	
5	SAN JOSE (16)	7362
	95112	
	95119	
	95123	
	95126	
	95134	
	95112	
	95120	
	95123	
	95124	
	95129	
	95130	
	95135	
	95136	
	95138	
6	ROSEVILLE (14)	6922
	95661	
	95678	
	95747	
	95747	
7	SANTA ROSA (14)	7362
	95401	
	95403	
	95405	
	95407	
	95404	
	95405	
	95409	
8	YREKA (14)	N/A
	96067	
9	FRESNO (12)	2840
	93650	
	93704	
	93705	
	93711	
	93720	
10	MODESTO (12)	5170
	95350	
	95354	
	95350	
	95355	
	95356	
	95358	

WASHINGTON TOP TEN

WASHINGTON		
RANK	CITY (VISITOR NUMBER) ZIP CODES	MSA
1	VANCOUVER (144)	6442
	98684	
	98660	
	98661	
	98662	
	98663	
	98664	
	98665	
	98682	
	98683	
	98684	
	98685	
	98686	
	98687	
	98660	
	98662	
	98664	
	98665	
	98682	
	98683	
	98684	
	98685	
2	SEATTLE (43)	7602
	98102	
	98103	
	98105	
	98106	
	98108	
	98109	
	98111	
	98112	
	98115	
	98116	
	98117	
	98119	
	98121	
	98125	
	98133	
	98136	
	98144	
	98146	
	98155	
	98166	

	98178	
	98198	
	98199	
3	BATTLE GROUND (23)	6442
	98604	
4	CAMAS (11)	6442
	98607	
5	TACOMA (10)	7602
	98402	
	98404	
	98405	
	98407	
	98409	
	98444	
	98446	
	98402	
	98404	
6	KENNEWICK (9)	6740
	99336	
	99337	
	99338	
	99336	
7	OLYMPIA (9)	7602
	98501	
	98502	
	98507	
	98512	
	98516	
8	KENT (8)	7602
	98031	
	98042	
9	LYNNWOOD (7)	7602
	98087	
10	PUYALLUP (7)	7602
	98372	
	98374	
	98371	
	98372	
	98373	

IDAHO TOP TEN

IDAHO		
RANK	CITY (VISITOR NUMBER) ZIP CODES	MSA
1	BOISE (48)	1080
	83702	
	83703	
	83704	
	93705	
	83706	
	83707	
	83709	
	83711	
	83712	
	83713	
	83716	
2	MERIDIAN (24)	1080
	83642	
	83646	
3	NAMPA (15)	1080
	83686	
	83687	
4	EAGLE (13)	1080
	83616	
5	IDAHO FALLS	N/A
	83401	
	83402	
	83404	
	83406	
6	TWIN FALLS (9)	N/A
	83301	
	83303	
7	GARDEN CITY (6)	N/A
	83714	
8	STAR (6)	1080
	83669	
9	EMMETT (6)	N/A
	83617	
10	MOUNTAIN HOME (6)	N/A
	83647	

ARIZONA TOP TEN

ARIZONA		
RANK	CITY (VISITOR NUMBER) ZIP CODES	MSA
1	PHOENIX (26)	6200
	85012	
	85020	
	85022	
	85024	
	85027	
	85032	
	85044	
	85048	
	85050	
	85085	
	85086	
	85003	
	85017	
	85029	
	85032	
	85051	
	85080	
	85086	
2	TUCSON (18)	8520
	85704	
	85712	
	85716	
	85718	
	85730	
	85735	
	85737	
	85743	
	85745	
	85749	
3	MESA	6200
	85202	
	85205	
	85208	
	85210	

4	SCOTTSDALE (7)	6200
	85140	
	85254	
	85259	
	85250	
	85262	
5	GLENDALE (6)	6200
	85303	
	85305	
	85310	
	85311	
	85318	
6	SURPRISE (4)	6200
	85374	
	85388	
7	PRESCOTT VALLEY (4)	N/A
	86314	
	86315	
8	GOODYEAR (3)	6200
	85338	
	85395	
9	SUNCITY WEST (3)	6200
	85375	
10	PEORIA (3)	6200
	85382	
	85383	

NEVADA TOP TEN

NEVADA		
RANK	CITY (VISITOR NUMBER) ZIP CODES	MSA
1	RENO (31)	6720
	89502	
	89506	
	89508	
	89509	
	89511	
	89512	
	89521	
	89523	
	89502	
	89506	
	89508	
	89509	
	89521	
2	SPARKS (15)	6720
	89815	
3	LAS VEGAS (13)	4120
	89104	
	89115	
	89123	
	89130	
	89131	
	89139	
	89141	
	89166	
	89146	
	89149	
4	HENDERSON (17)	4120
	89012	
	89052	
	89015	
	89074	
5	NORTH LAS VEGAS (7)	4120
	89031	
	89032	
	89084	
6	SPRING CREEKS (5)	N/A
	89815	
7	YERINGTON (4)	N/A
	89447	

8	FALLON (4)	N/A
	89406	
9	FERNLEY (4)	N/A
	89406	
10	CARSON (3)	N/A
	89701	
	89705	
	89706	