2020 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY

OREGON COAST

This report summarizes findings from a 2020 survey of tourism industry stakeholders in Oregon. The survey sought feedback from stakeholders to provide guidance and perspective on priorities for future investments from Regional Destination Management Organizations. This report summarizes findings from respondents in Oregon Coast with additional statewide results provided for context.

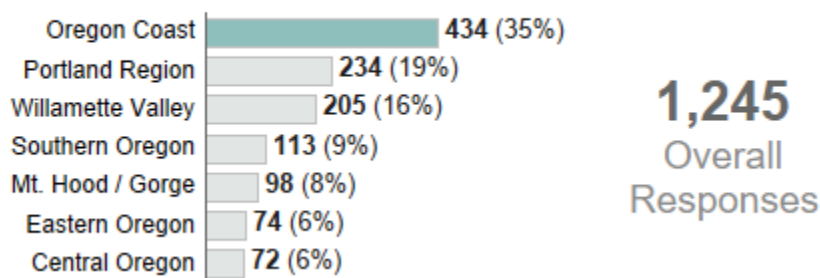# 2020 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY

OREGON COAST

SURVEY GOALS

The 2020 Oregon tourism engagement survey was designed to gather feedback from Oregon's tourism industry professionals, employees, and stakeholders to provide feedback and direction for Travel Oregon and Regional Destination Management Organizations (RDMOs) in setting strategic directions and making funding and programmatic decision in marketing, grants, tourist-related infrastructure, visitor management, and more. The survey was built on a framework of past stakeholder surveys; however, unprecedented circumstances surrounding COVID-19, wildfires, and racial injustice necessitated survey changes. The survey was developed collaboratively by Driftline Consulting, Travel Oregon, and seven RDMOs.
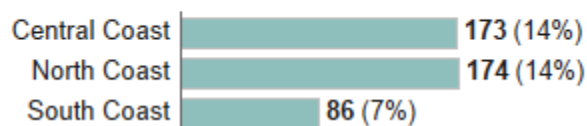
DATA COLLECTION

The survey was conducted online in October 2020 in both English and Spanish. Travel Oregon and the RDMOs distributed the survey link via email and social media resulting in a total of 434 responses from the Oregon Coast and 1,245 responses overall. Sample sizes for individual questions vary. Results presented in this report are segmented by the region in which the respondent indicated that they live or work. Figures show results from the Oregon Coast compared to the statewide survey results (referred to as the "overall" in figures).

Number of Respondents

Oregon Coast	434 (35%)
Portland Region	234 (19%)
Willamette Valley	205 (16%)
Southern Oregon	113 (9%)
Mt. Hood / Gorge	98 (8%)
Eastern Oregon	74 (6%)
Central Oregon	72 (6%)

1,245 Overall Responses

Number of Respondents by Sub-Region

Central Coast	173 (14%)
North Coast	174 (14%)
South Coast	86 (7%)

The survey results should be viewed as an aggregation of relevant and thoughtful feedback from stakeholders. The applicability of findings to real life circumstances may depend on whether the feedback is from a broad enough (or representative) swath of stakeholders and whether individual

RDMOs believe they have engaged with enough stakeholders to have a good gauge of the stakeholders' priorities. An assessment of the industries represented, and the overall response numbers suggest that for all regions, a diverse and appropriately sized cross-section of stakeholders responded, adding confidence to the applicability of results. Because the survey was not conducted from a random sample, it is not appropriate to perform statistical tests on the data.

ADDITIONAL RESOURCES

In addition to this report, results from the survey are accessible via an interactive online dashboard that enables further exploration of the data. Users of this online dashboard can segment questions by key variables to gain additional insight into segments of the Oregon tourism stakeholder population that were not addressed in this report.

The survey also resulted in an extensive number of open-ended responses. In several instances, selections of representative open-ended comments from Oregon Coast respondents are presented within the report. These comments are presented in the respondents' own words, and they do not reflect the opinions of Travel Oregon. Representative selections of open-ended responses from Oregon Coast respondents are provided as an appendix to this report. All comments are viewable in an online dashboard with accompanying word clouds and bar charts.

Access the online dashboards by going to: https://rebrand.ly/TO_Stakeholder2020

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KEY FINDINGS

BUSINESS HEALTH

- Forty-two percent of Oregon Coast respondents reported their business/organization has laid off, terminated, or otherwise let go of employees in 2020, with the most layoffs occurring 4-6 months ago. About 13% anticipate layoffs/terminations at their business/organization within the next six months, while 32% are unsure if layoffs will occur within the next six months.

- Roughly half (49%) of Oregon Coast respondents characterize the impacts of COVID-19 on their organization/business's revenue or funding as having a significant negative impact. By comparison, 11% describe the wildfires as having a significant negative impact.

RESILIENCY, RECOVERY AND REOPENING

- Thirty-one percent of Oregon Coast respondents are not at all concerned about promoting their community and feel it would benefit from visitors (compared to 37% statewide), while 31% expressed some or significant concern (compared to 24% statewide). When it comes to welcoming visitor to their communities, they are most concerned with overburdened public resources.
- By a large margin, "help advocating for effective policies and funding to support tourism businesses/organizations" is the resource that will best support Oregon Coast businesses/organizations recover. "Support developing and bolstering visitor experiences that are COVID-appropriate and that enhance local livability" will best support Oregon Coast communities, followed closely by "communication tools and message frameworks to convey safe visitor behavior in town and businesses."

PLANNING AND MANAGEMENT

- From a list of ten actions that would aid in recovery from COVID-19, wildfires, and related economic conditions, Oregon Coast respondents believe grants and funding resources should the top priority. Tourism-related infrastructure should be a key focus area in the longer term (next two to five years).
- "Managing tourism impacts in order to preserve local assets and livability" is the top tactical planning and management strategy that will advance the economic impact of tourism and ensure its vitality and sustainability.

DIVERSITY, EQUITY AND INCLUSION

- Fifty-five percent of Oregon Coast respondents think the tourism industry should play a role in advancing social and racial justice, slightly more than the 54% of respondents statewide. Twenty percent do not think the industry should play a role, while 24% are unsure.
- Fifty-three percent report having received training related to cultural awareness, anti-racism, implicit bias, or some other diversity, equity, and inclusivity related training. Fifty-one percent would be interested in participating in diversity, equity, and/or inclusivity related training. Nine in

ten Oregon Coast respondents feel somewhat or very prepared to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds.
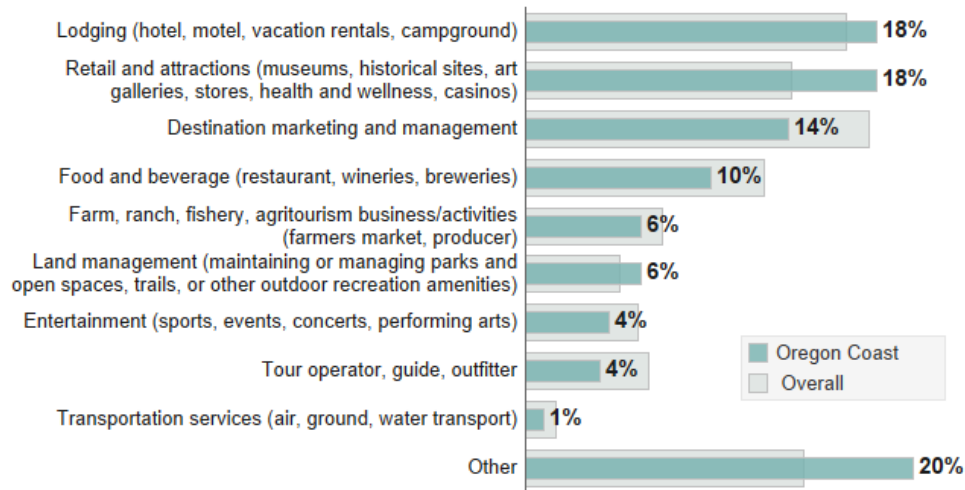
RESPONDENT PROFILE

The survey received broad participation by tourism industry sector. Overall, the destination marketing and management sector accounted for 18% of respondents, followed by lodging (16%), retail and attractions (12%), and food and beverage (12%). "Other" write-in responses, comprising 14% of the overall responses, were diverse in nature and reflect the broad reach of the survey. Relative to statewide overall results, respondents in the Oregon Coast were much more likely to work in the lodging or retail and attraction sectors. They had less representation from the destination and marketing and management and food and beverage sectors.

Over half of all statewide respondents represent for profit businesses (56%), while 27% represent non-profit organizations. The Oregon Coast had slightly greater representation among for profit organizations (60%) and government entities (18%) relative to the statewide results.
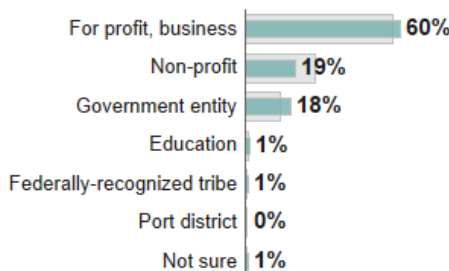
Sixty-two percent of all respondents are employed full-time in the tourism industry, 18% are employed part-time, and the remaining 10% are retired, not currently employed, or prefer not to say. The distribution of results by employment status on the Oregon Coast generally aligned with statewide results, although Oregon Coast respondents were slightly more likely to be retired (16%).

### Industry Sector, Entity Type and Employment Status

Q: In what sector of the tourism industry do you primarily work? Choose one:

Sector	Oregon Coast
Lodging (hotel, motel, vacation rentals, campground)	18%
Retail and attractions (museums, historical sites, art galleries, stores, health and wellness, casinos)	18%
Destination marketing and management	14%
Food and beverage (restaurant, wineries, breweries)	10%
Farm, ranch, fishery, agritourism business/activities (farmers market, producer)	6%
Land management (maintaining or managing parks and open spaces, trails, or other outdoor recreation amenities)	6%
Entertainment (sports, events, concerts, performing arts)	4%
Tour operator, guide, outfitter	4%
Transportation services (air, ground, water transport)	1%
Other	20%

Legend: Oregon Coast / Overall

Q: Which entity type best describes your business/organization?

Entity Type	
For profit, business	60%
Non-profit	19%
Government entity	18%
Education	1%
Federally-recognized tribe	1%
Port district	0%
Not sure	1%

Q: Which of the following best describes your current employment status in the tourism industry?

| Employment Status	
Employed full-time	56%
Retired	16%
Employed part-time	16%
Not currently employed (and looking for employment)	3%
Prefer not to say	10%
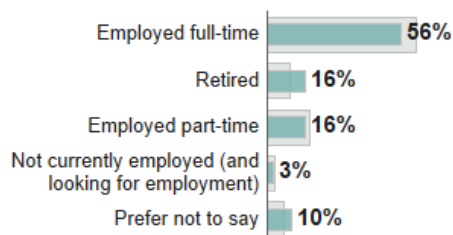
Oregon Coast respondents are slightly older on average (55) relative to the statewide results (54), and have a greater share of respondents aged 65 or older. Statewide, 61% of respondents identify as female and 37% identify as male. Oregon Coast respondents skew slightly more female at 64%.

Age and Gender

Q: Respondent age:

	Oregon Coast	Overall
Avg.	55.2	53.8
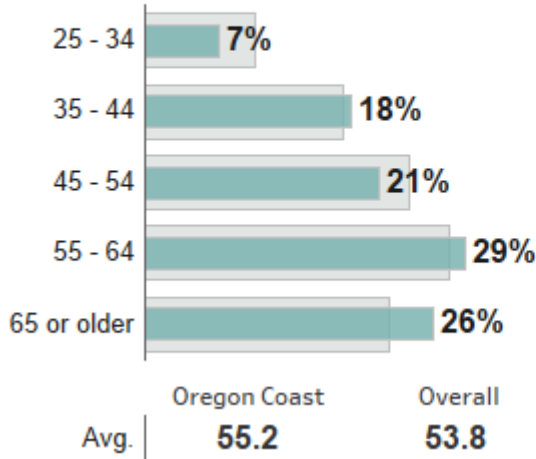
Q: What is your gender?
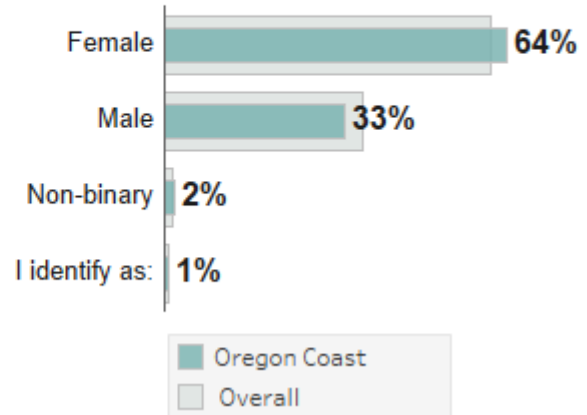
Both statewide and on the Oregon Coast, roughly nine in ten respondents describe themselves as white or Caucasian.

Forty-one percent of all tourism industry stakeholders in Oregon have annual household incomes of less than $75,000 (vs. 51% on the Oregon Coast).

Race and Household Income

Q: Which of the following best describes you? (Please select one answer)
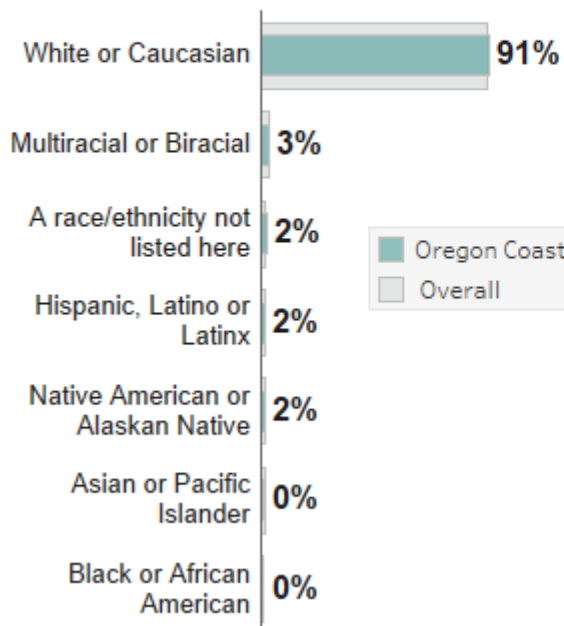
Q: Which of these categories best describes the total gross annual income of your household (before taxes)?

Overall, three quarters of respondents have a Bachelor's degree or higher level of education, while a quarter did not attain their Bachelor's degree. Respondents on the Oregon Coast are less likely to have their Bachelor's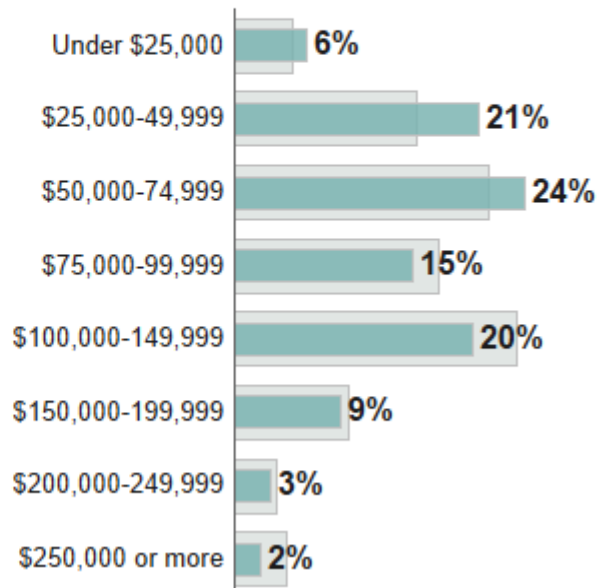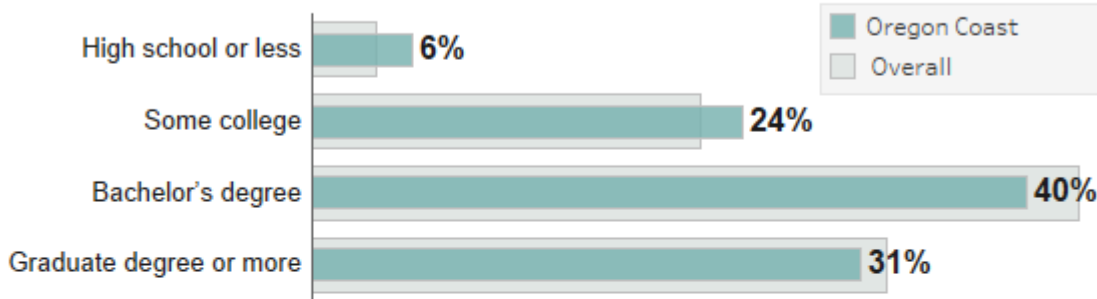 or Graduate degree relative to the statewide results. Six percent of overall respondents have a disability, with walking being the most common overall.

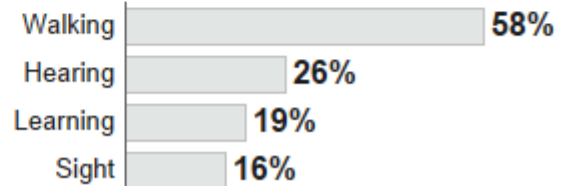## Education Level and Presence of Disabilities

Q: What is your highest level of education?

	Oregon Coast	Overall

- High school or less: **6%**
- Some college: **24%**
- Bachelor's degree: **40%**
- Graduate degree or more: **31%**

Q: Do you have a disability?

- Yes: **8%**
- No: **92%**

Q: What are these disabilities? (Check all that apply)

- Walking: **58%**
- Hearing: **26%**
- Learning: **19%**
- Sight: **16%**

Overall only due to insufficient regional sample size.

BUSINESS HEALTH AND FUNDING SOURCES

Due to recent upheavals of the travel and tourism space and prolonged economic uncertainty, a series of questions aimed to better understand the financial impacts of COVID-19 and wildfires on Oregon tourism businesses and organizations.

Forty-two percent of all respondents, both statewide and on the Oregon Coast, work for organizations or businesses that have laid off, terminated, or otherwise let go of employees in 2020. The lodging and food and beverage sectors were most likely to report layoffs (63% and 61% reporting layoffs, respectively), while the farm/ranch/fishery/agritourism and land management sectors were the least likely (8% and 37%, respectively). Of those that reported layoffs within their organization, the median number of employees let go was 5.0 (vs. 4.0 on the Oregon Coast), which represented a median of 50% of employees (vs. 50% overall).

Layoffs and Terminations

■ Oregon Coast ☐ Overall

Q: In 2020, has your organization/business laid off, terminated, or otherwise let go of employees?

Yes	42%
No	58%
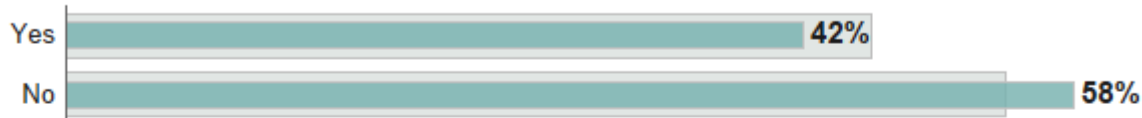
Q: [IF YES] Including both full-time and part-time employees...

roughly how many were laid off, terminated, or otherwise let go:

1 - 5	62%
6 - 20	24%
20 - 50	8%
51 - 100	4%
101 - 200	1%
200 or more	1%
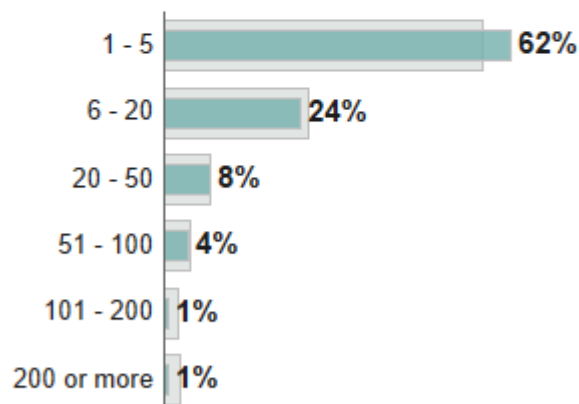
	Oregon Coast	Overall
Average	14.5	30.4
Median	4.0	5.0

roughly what percent were laid off, terminated, or otherwise let go:

Less than 10%	15%
11 - 25%	20%
26 - 50%	23%
50 - 75%	8%
76 - 100%	35%
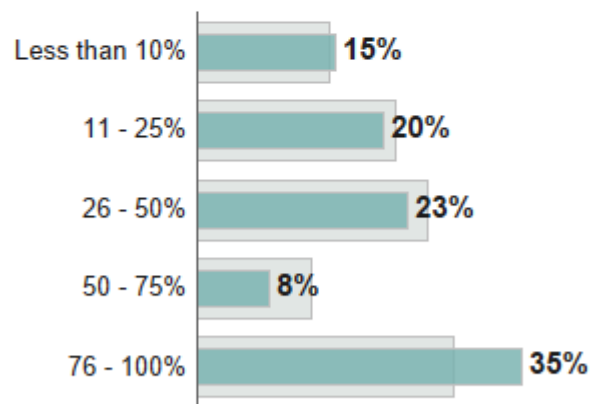
	Oregon Coast	Overall
Average	53.4%	49.7%
Median	50.0%	50.0%

The survey asked about anticipated future layoffs, and the timing of layoffs both past and future. Statewide, 14% of respondents anticipate layoffs within their business/organization within the next six months, 54% do not anticipate layoffs, and a third (33%) are unsure. Respondents on the Oregon Coast are more likely to anticipate layoffs (22%). The greatest share of layoffs occurred early during the pandemic, four or more months ago.

Layoffs and Terminations

Q: Within the next 6 months, do you anticipate laying off, terminating, or otherwise letting go of employees?

Yes	13%
No	55%
Unsure	32%
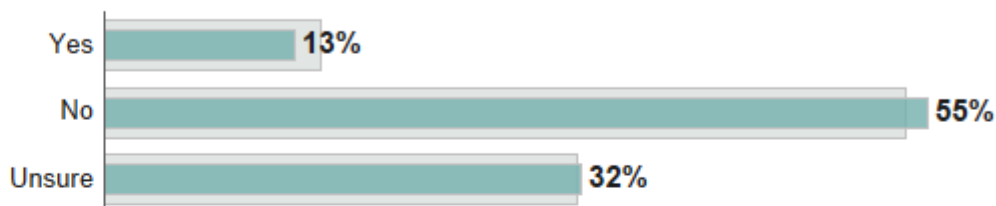
Q: When did layoffs or terminations occur and/or when do you anticipate them occurring? (Check all that apply)

More than 6 months ago	43%
4 – 6 months ago	45%
2 – 4 months ago	12%
Within the last 2 months	5%
Within the next 2 months	7%
In the next 2 – 4 months	9%
In the next 4 -6 months	3%
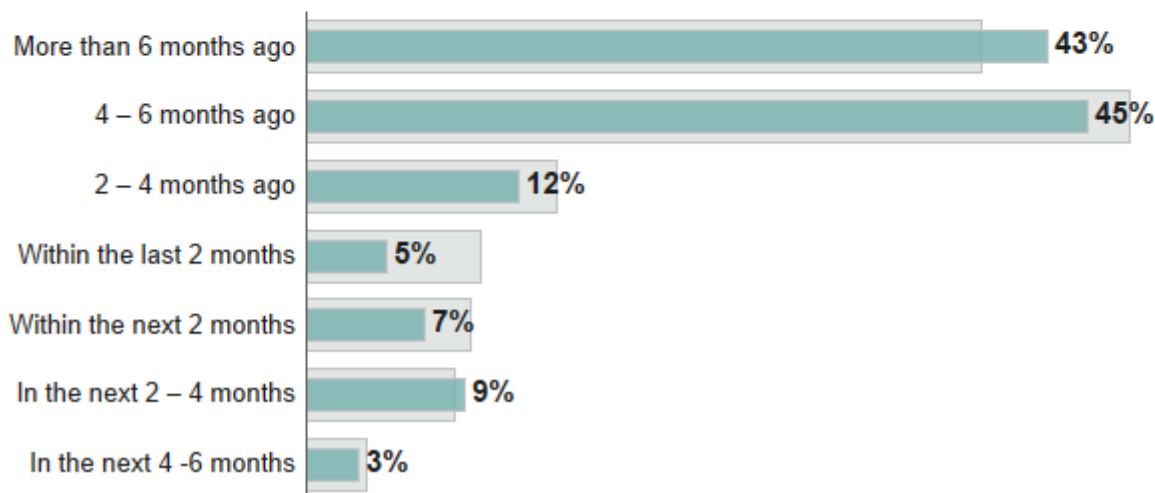
Statewide, 12% of respondents reported that COVID-19 has had little to no impact or a positive impact on their business or organization's revenue or funding. A large majority (88%) reported some or significant negative impact. Of those that experienced a negative impact, 42% are experiencing worsening impacts, while 58% are in recovery. By comparison, wildfires negatively impacted a smaller share of overall respondents (59%). A smaller share reported significant negative impacts, and, of those negatively impacted, a greater share reports their business/organization is recovering from wildfires (79%) than from COVID-19 (58%). Relative to the statewide results, Oregon Coast respondents were much more likely to report significant negative impacts due to COVID-19, and a greater share describe those impacts as worsening.

COVID-19 and Wildfire Impacts

■ Oregon Coast □ Overall

Q: How would you characterize the impacts of the following on your organization/business's revenue or funding:

COVID-19

Positive impact	7%
Little to no impact	6%
Some negative impact	38%
Significant negative impact	49%

Wildfires

Positive impact	5%
Little to no impact	42%
Some negative impact	41%
Significant negative impact	11%

[If impacted negatively]

COVID-19

Some/significant negative impact and RECOVERING	66%
Some/significant negative impact and WORSENING	34%

Wildfires

Some/significant negative impact and RECOVERING	85%
Some/significant negative impact and WORSENING	15%

Roughly two thirds of all respondents work for businesses or organizations that sought funding, while a third neither sought, nor received funding. The Paycheck Protection Program (PPP) was the most-awarded funding source overall, followed by "other grants or funding program," and Economic Injury Disaster Loan (EIDL).

Funding Sources

■ Oregon Coast □ Overall

Q: Has your business or organization received funding from any of the following: (Check all that apply)

Paycheck Protection Program (PPP)	36%
Other grants or funding program	23%
Economic Injury Disaster Loan (EIDL)	18%
Travel Oregon Emergency Grant	8%
My business/organization applied for funds, but did not receive any	4%
FEMA individual assistance	2%
None of the above	36%
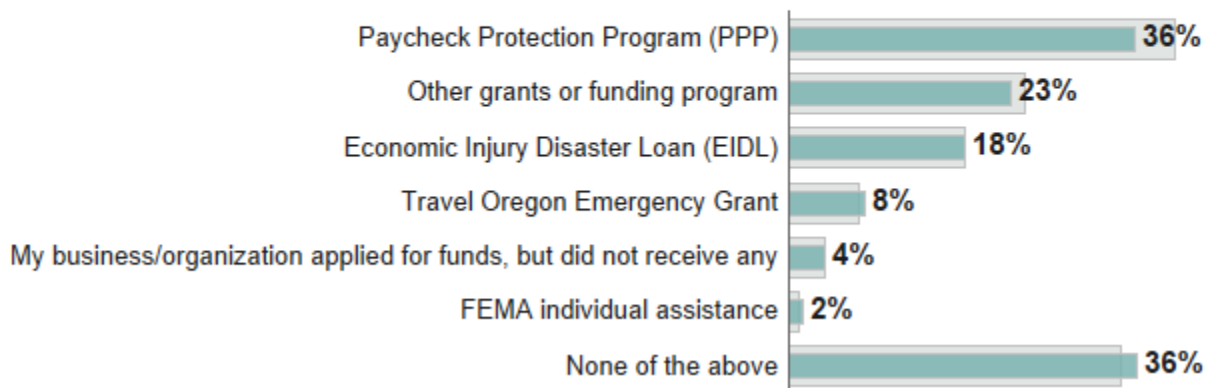
RESILIENCY, RECOVERY AND REOPENING

During these uncertain times, it is important for the tourism industry to know how its stakeholders are feeling about reopening and their priorities concerning safety and economic issues. To broadly gauge

the industry's readiness to embrace visitation, respondents were asked to rate their level of concern with promoting their community. Statewide, more than half of respondents (55%) are not concerned about welcoming visitors right now, 21% are neutral, while 24% feel their community should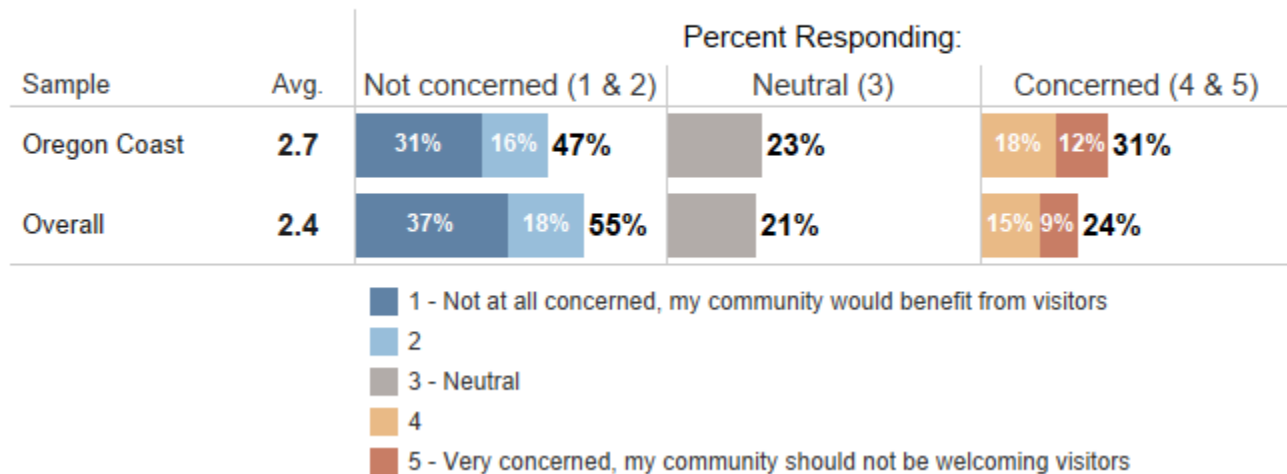 not be welcoming visitors. Respondents on the Oregon Coast express more concern about welcoming visitors relative to the statewide results, with 31% responding "4" or "5" (very concerned, my community should not be welcoming visitors).

Q: How would you feel if you saw an advertisement today promoting your community to visitors?

Sample	Avg.	Percent Responding:		
		Not concerned (1 & 2)	Neutral (3)	Concerned (4 & 5)
Oregon Coast	2.7	31% 16% **47%**	**23%**	18% 12% **31%**
Overall	2.4	37% 18% **55%**	**21%**	15% 9% **24%**

■ 1 - Not at all concerned, my community would benefit from visitors
□ 2
■ 3 - Neutral
■ 4
■ 5 - Very concerned, my community should not be welcoming visitors

A follow-up open-ended question asked respondents: "Why do you feel that way?" The survey resulted in 526 total comments from respondents that were not concerned with promoting their community (answered 1 or 2), and 241 total comments from respondents that expressed concern (answered 4 or 5). Among those concerned, commonly cited reasons include increased risk of contracting COVID-19, the fear that tourism will lead to increased cases and further, more prolonged shutdowns, and the feeling that their destination is already at maximum capacity and/or already experiencing adverse impacts due to tourism. Those that were not concerned cited primarily economic reasons for promoting their community/destination and the sense that tourism can operate safely amidst the pandemic. An additional 162 total open-ended responses were collected from respondents that were neutral, and it is worth noting that many comments on both sides recognized the fluidity of the situation and acknowledged both the risks and rewards of tourism in their communities. Selections of comments from Oregon Coast respondents by response follows. A full list of open-ended comments from Oregon Coast respondents is provided in the appendix.

CONCERNED with promotion (4 & 5): "Why do you feel that way"

At the moment it seems our community is and has been at capacity for the number of visitors is can safely serve. Without including messaging about stewardship, caring for the coast, visiting safely, I would have concerns about any advertisement promoting additional visitation.

Because our area doesn't have the services to support visitors right now. The visitors that are coming have been rude, leaving trash and garbage. I've experienced multiple examples of road rage on back country roads; been nearly run off the road by out-of-state drivers. We want to share our communities but not with this type of visitor.

Coastal Oregon has limited roads and services. We already get a great many tourists and it overloads the capacity of the area as well as overwhelming our natural resources. It is almost impossible to visit many of the

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state parks or pullouts in the summer and fall because of way too many tourists. We don't need any advertising. Plenty of folks find us without any help

COVID-19 rates are rising in our county. There has been a lot of tourism over the summer, which has been good for businesses struggling from COVID related shut downs this spring, but the community does feel somewhat overwhelmed with tourists and may need a little time to recover before the next wave of tourism.

I am concerned about visitors who ignore mask wearing, social distancing, etc. (locals too). It seems like when people are on vacation, or even just a day trip, many think those precautions don't matter. I do want business and economic recovery, but feel the COVID-19 pandemic must be addressed in order for that to happen.

NOT CONCERNED with promotion (1 & 2): "Why do you feel that way"

A significant portion of our community relies on tourism. I believe we can enjoy the outdoors, using social distancing guidelines and masks.

According to the WHO and Dr. Fauci, lockdowns have been more detrimental than good. Lockdowns have negatively affected both mental and physical health as well as having a major impact on our economy. I feel looking at the benefits and costs of already performed lockdowns as well as the knowledge gained about COVID-19, we should be moving towards returning to normal life as much as possible.
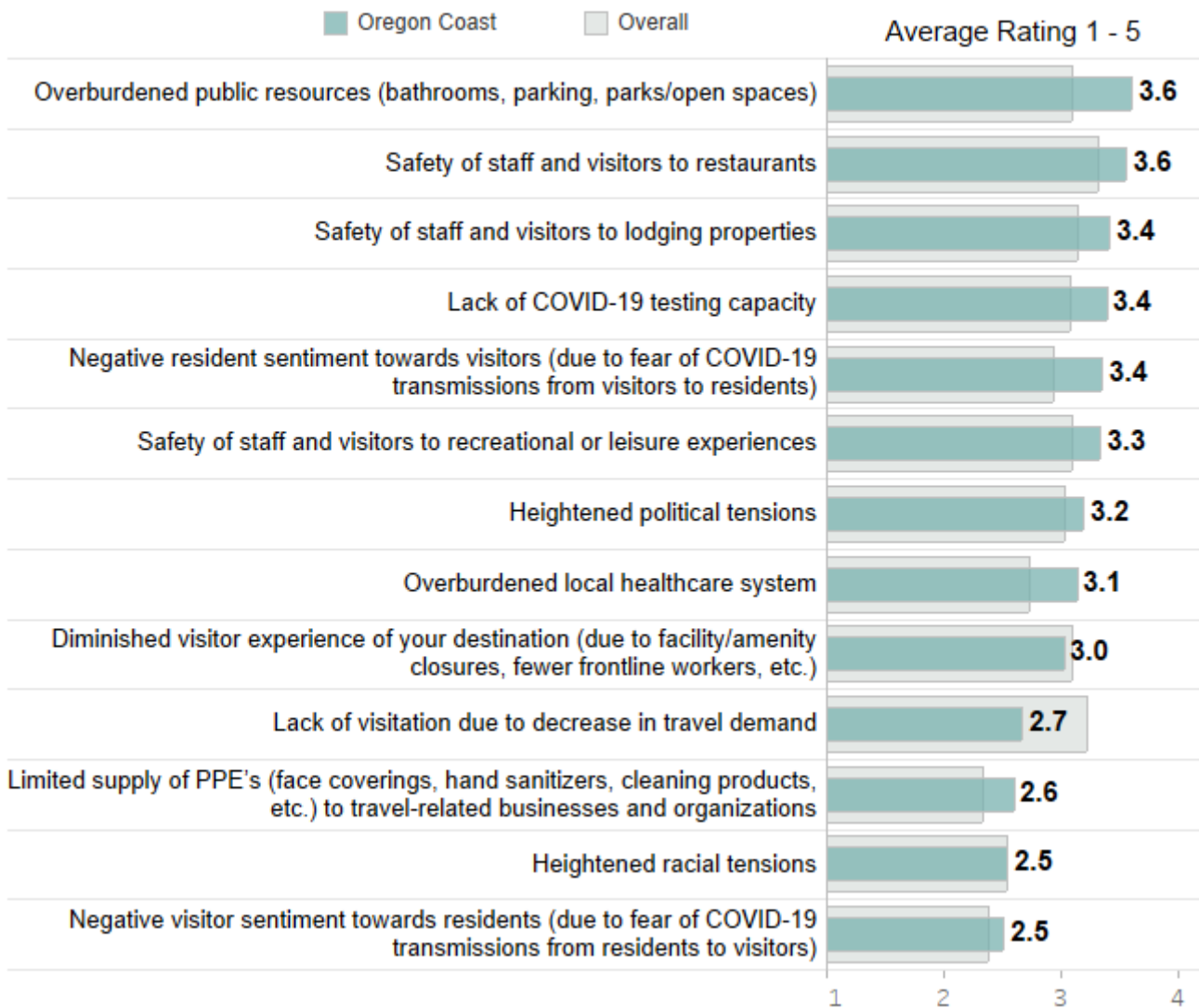
Beyond the fact that it's my job to promote travel here, our destination has thankfully been spared by wild fire impacts & our COVID precautions & lodging options (including isolated VRDs) ensure visitors can safely spend time here while social distancing. Plus travel can be a balm for troubled times.

Continued tourism brought into our community through the shoulder seasons will help mitigate the economic shortfalls brought by the forced closure due to COVID concerns in March, April, and May and the sharp reduction in travel during the wildfires.

I feel like the south coast can handle tourism because of our low populated areas. Adding tourists to towns that have very few people, does not increase the number of people in the area by much. We had one of our biggest tourism seasons in the town I'm in and everyone was respectful and wore masks and social distanced. We have a lot of space to roam here.

All respondents were asked to rate their level of concern with various aspects of welcoming visitors to their community, with "1" being "not at all concerned" and "5" being "extremely concerned." Overall, the safety of staff and visitors to restaurants, lack of visitation due to a decrease in travel demand, and safety of staff and visitors to lodging properties emerged as top concerns. Heightened racial tensions, negative visitor sentiment towards residents, and limited supply of PPE was of relatively less concern. Oregon Coast respondents indicated significantly higher levels of concern for overburdened public resources (their top concern overall). A lack of visitation due to decrease in travel demand, a statewide concern, ranked relatively low among Oregon Coast respondents. Categories in the figure below are sorted in descending order by the average rating of Oregon Coast respondents.

Q: As you think about welcoming visitors to your community, how concerned are you about the following? (1 = Not at all concerned, 5 - Extremely concerned)

Oregon Coast / **Overall**

Average Rating 1 - 5

Concern	Rating
Overburdened public resources (bathrooms, parking, parks/open spaces)	3.6
Safety of staff and visitors to restaurants	3.6
Safety of staff and visitors to lodging properties	3.4
Lack of COVID-19 testing capacity	3.4
Negative resident sentiment towards visitors (due to fear of COVID-19 transmissions from visitors to residents)	3.4
Safety of staff and visitors to recreational or leisure experiences	3.3
Heightened political tensions	3.2
Overburdened local healthcare system	3.1
Diminished visitor experience of your destination (due to facility/amenity closures, fewer frontline workers, etc.)	3.0
Lack of visitation due to decrease in travel demand	2.7
Limited supply of PPE's (face coverings, hand sanitizers, cleaning products, etc.) to travel-related businesses and organizations	2.6
Heightened racial tensions	2.5
Negative visitor sentiment towards residents (due to fear of COVID-19 transmissions from residents to visitors)	2.5

To further differentiate between concerns related to welcoming visitors, respondents were then asked to identify their two greatest concerns related to welcoming visitors to their community. Diminished visitor experience and lack of visitation due to decrease in travel demand were of the greatest concerns with a quarter of more of respondents identifying them among their two greatest concerns. The Oregon Coast was most concerned with overburdened public resources. Negative resident sentiment towards visitors, which was the third highest ranked category statewide, was of greater concern to Oregon Coast respondents. Concerns are sorted in descending order by the percent in Oregon Coast responding greatest/second-greatest concern.
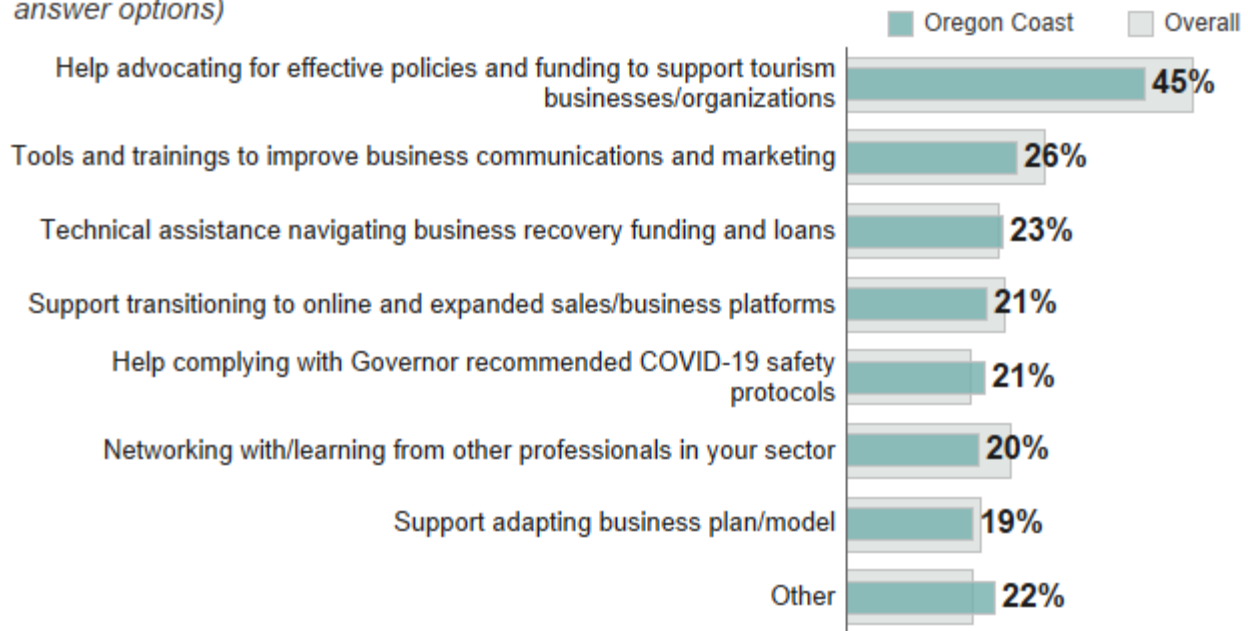
Q: *From the list above, please identify your top two concerns related to welcoming visitors to your community.*

	Greatest concern	Second-greatest concern	Oregon Coast	Overall
Overburdened public resources (bathrooms, parking, parks/open spaces)			35%	21%
Negative resident sentiment towards visitors (due to fear of COVID-19 transmissions from visitors to residents)			34%	21%
Diminished visitor experience of your destination (due to facility/amenity closures, fewer frontline workers, etc.)			20%	30%
Overburdened local healthcare system			16%	11%
Heightened political tensions			15%	17%
Safety of staff and visitors to restaurants			14%	16%
Lack of COVID-19 testing capacity			14%	11%
Safety of staff and visitors to lodging properties			11%	11%
Lack of visitation due to decrease in travel demand			10%	25%
Safety of staff and visitors to recreational or leisure experiences			10%	15%
Negative visitor sentiment towards residents (due to fear of COVID-19 transmissions from residents to visitors)			6%	5%
Limited supply of PPE's (face coverings, hand sanitizers, cleaning products, etc.) to travel-related businesses and organizations at your destination			4%	3%
Heightened racial tensions			2%	4%
Other			9%	10%

The survey asked respondents to identify the resources or programs that would best assist their business/organization, and best assist their community in resiliency, recovery, and reopening. For businesses, by a large margin, help advocating for effective policies and funding to support tourism businesses/organizations was the most favored resource/program, followed by tools and trainings to improve business communications and marketing. Oregon Coast respondents were less likely to identify "help advocating for effective policies and funding to support tourism businesses/organizations" although it was still the top resource by a significant margin.

Buisness/Organization Assistance

Q: Which of the following resources or programs would best assist your BUSINESS/ORGANIZATION in resiliency, recovery, and reopening? (Select up to three answer options)
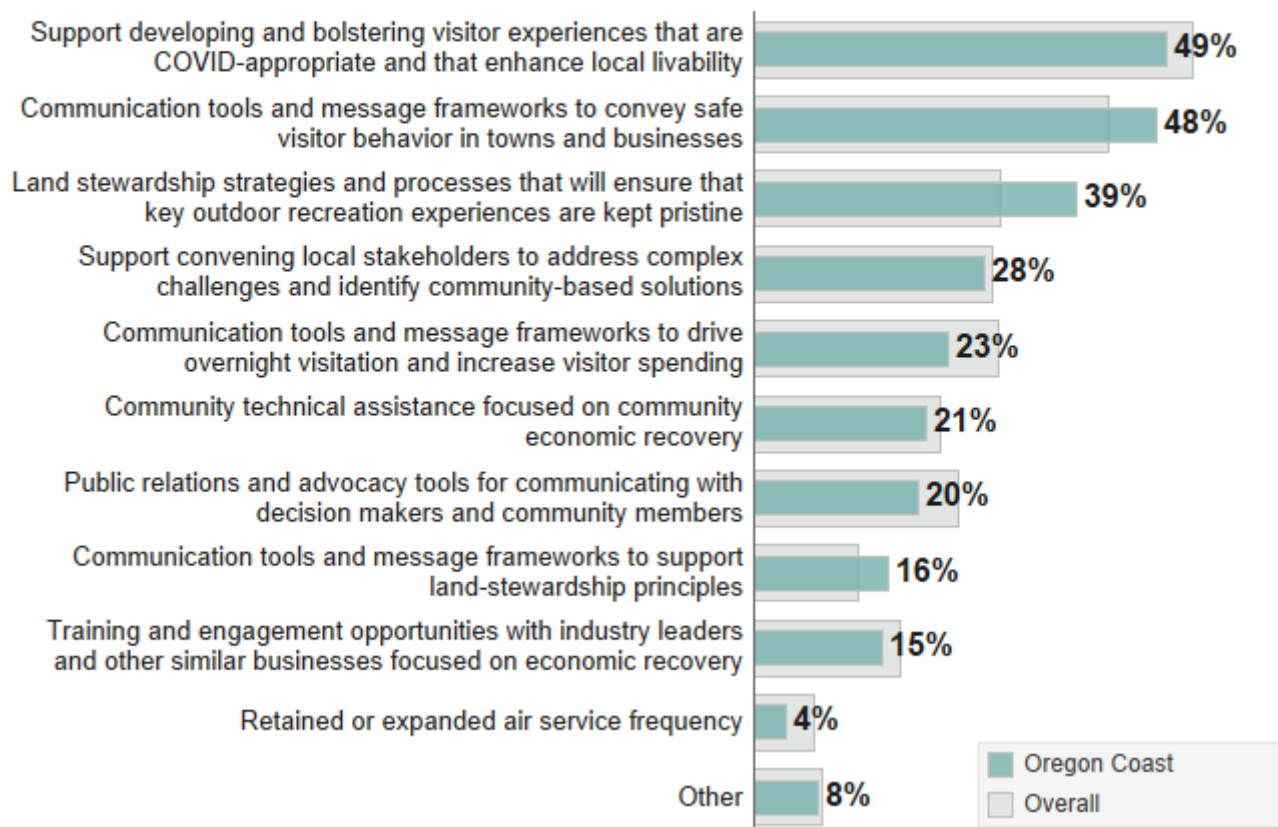
Legend: ■ Oregon Coast □ Overall

Resource/Program	Oregon Coast
Help advocating for effective policies and funding to support tourism businesses/organizations	45%
Tools and trainings to improve business communications and marketing	26%
Technical assistance navigating business recovery funding and loans	23%
Support transitioning to online and expanded sales/business platforms	21%
Help complying with Governor recommended COVID-19 safety protocols	21%
Networking with/learning from other professionals in your sector	20%
Support adapting business plan/model	19%
Other	22%

From the perspective of their community, overall results favored two programs/resources: support developing and bolstering visitor experiences that are COVID-appropriate and that enhance local livability (53%), and communication tools and message frameworks to convey safe visitor behavior in towns and businesses (43%). The rank order of priorities among Oregon Coast respondents was similar to the statewide results, however, Coast respondents were more likely cite "communication tools and message frameworks to convey safe visitor behavior in towns and businesses," and "land stewardship strategies and processes that will ensure that key outdoor recreation experiences are kept pristine."

Community Assistance

Q: Which of the following resources or programs would best assist your COMMUNITY in resiliency, recovery, and reopening? (Select up to three answer options)
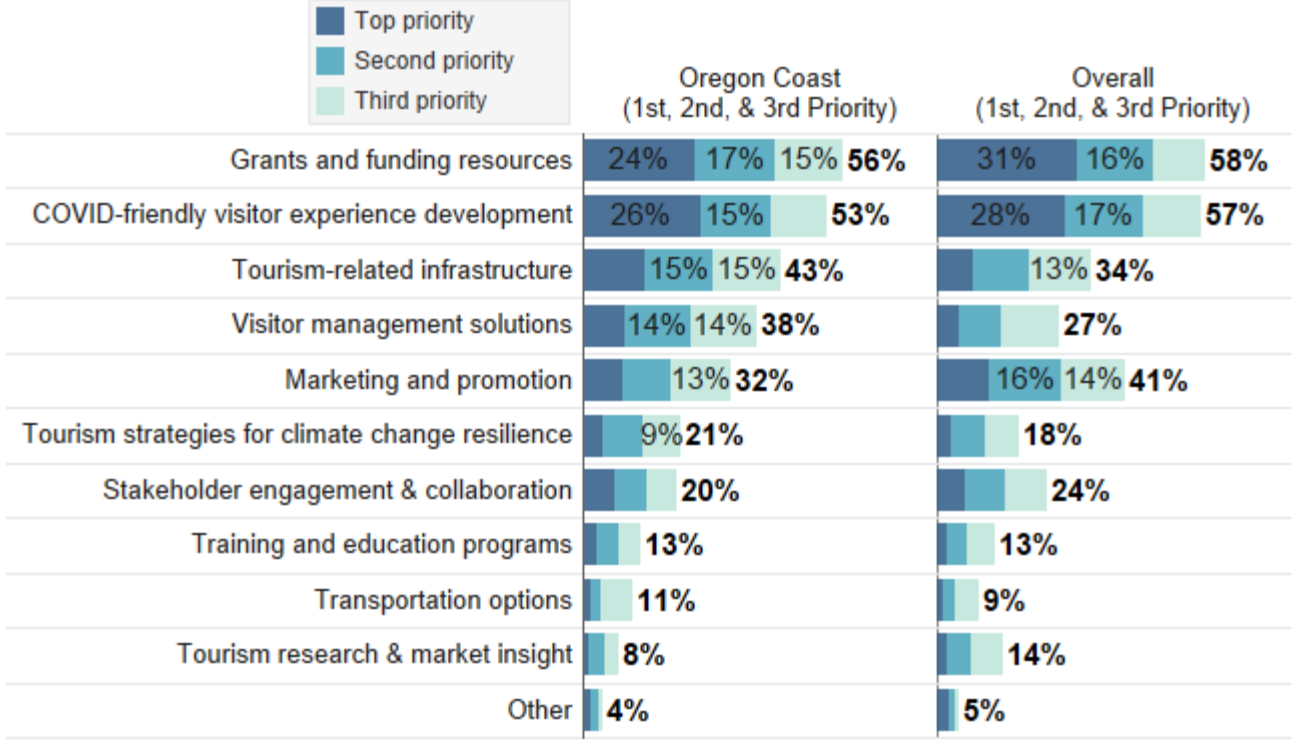
Resource or Program	Oregon Coast
Support developing and bolstering visitor experiences that are COVID-appropriate and that enhance local livability	49%
Communication tools and message frameworks to convey safe visitor behavior in towns and businesses	48%
Land stewardship strategies and processes that will ensure that key outdoor recreation experiences are kept pristine	39%
Support convening local stakeholders to address complex challenges and identify community-based solutions	28%
Communication tools and message frameworks to drive overnight visitation and increase visitor spending	23%
Community technical assistance focused on community economic recovery	21%
Public relations and advocacy tools for communicating with decision makers and community members	20%
Communication tools and message frameworks to support land-stewardship principles	16%
Training and engagement opportunities with industry leaders and other similar businesses focused on economic recovery	15%
Retained or expanded air service frequency	4%
Other	8%

Legend: ■ Oregon Coast □ Overall

PLANNING AND MANAGEMENT

Respondents were asked to identify the three areas that should be emphasized for immediate (6-12 month) recovery from COVID-19, wildfires, and related economic conditions. They were then asked to prioritize the same focus areas for longer-term tourism planning over the next 2-5 years. In the short-term, grants and funding resources emerged as the top priority among all respondents, with 31% of respondents identifying it as their top priority and 58% identifying it among their top-three highest priorities. COVID-friendly visitor experience development was a the second most-identified priority (57% among their top three), by a small margin. These top-two focus areas overall were also favored among Oregon Coast respondents. Coast respondents were more likely than the overall to identify tourism-related infrastructure as a top short-term priority and less likely to identify marketing and promotion.

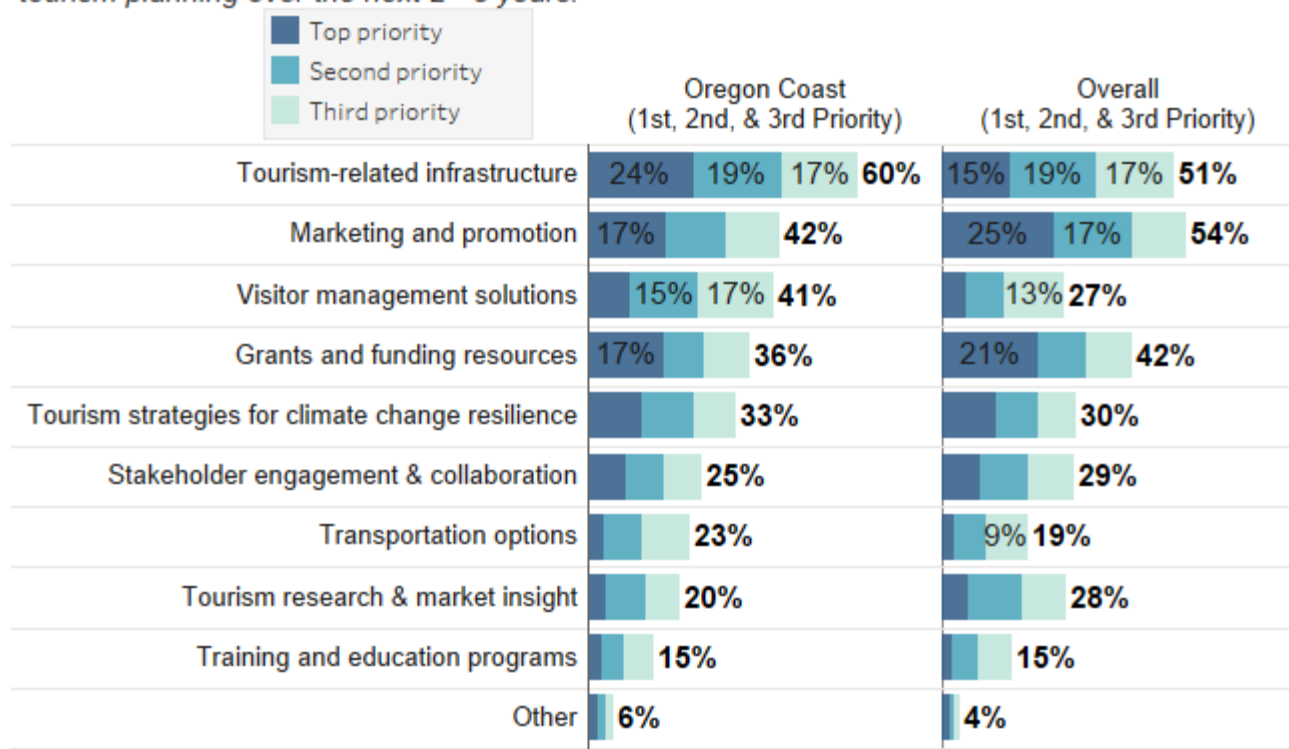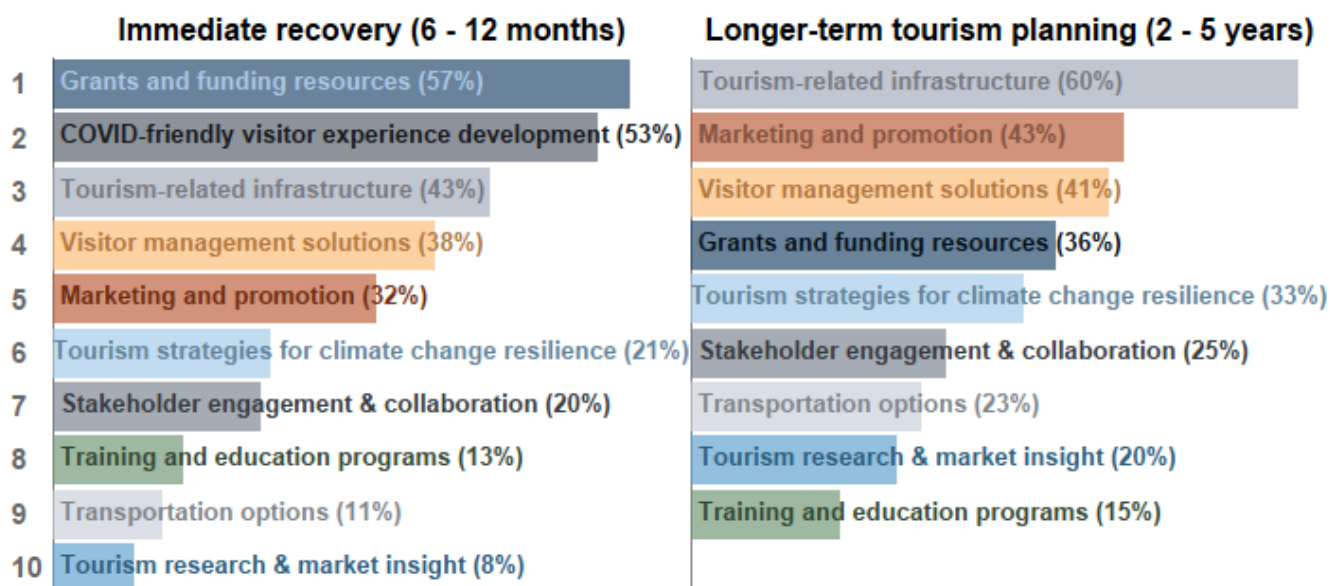## Short-Term Tourism Priorities & Focus Areas

Q: Please identify the three areas that you believe should be emphasized for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions:

Legend:
- Top priority
- Second priority
- Third priority

	Oregon Coast (1st, 2nd, & 3rd Priority)	Overall (1st, 2nd, & 3rd Priority)
Grants and funding resources	24% 17% 15% 56%	31% 16% 58%
COVID-friendly visitor experience development	26% 15% 53%	28% 17% 57%
Tourism-related infrastructure	15% 15% 43%	13% 34%
Visitor management solutions	14% 14% 38%	27%
Marketing and promotion	13% 32%	16% 14% 41%
Tourism strategies for climate change resilience	9% 21%	18%
Stakeholder engagement & collaboration	20%	24%
Training and education programs	13%	13%
Transportation options	11%	9%
Tourism research & market insight	8%	14%
Other	4%	5%

Over the long term, grants and funding resources fell to the third-highest priority behind marketing and promotion and tourism-related infrastructure. On the Oregon Coast, tourism-related infrastructure was the most-identified long-term priority, with 24% of respondents identifying it as their top priority and 60% identifying it among their top three priorities.

Longer-Term Tourism Priorities & Focus Areas

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years:

Legend:
- ■ Top priority
- ■ Second priority
- ■ Third priority

	Oregon Coast (1st, 2nd, & 3rd Priority)	Overall (1st, 2nd, & 3rd Priority)
Tourism-related infrastructure	24% 19% 17% **60%**	15% 19% 17% **51%**
Marketing and promotion	17% **42%**	25% 17% **54%**
Visitor management solutions	15% 17% **41%**	13% **27%**
Grants and funding resources	17% **36%**	21% **42%**
Tourism strategies for climate change resilience	**33%**	**30%**
Stakeholder engagement & collaboration	**25%**	**29%**
Transportation options	**23%**	9% **19%**
Tourism research & market insight	**20%**	**28%**
Training and education programs	**15%**	**15%**
Other	**6%**	**4%**

The following figure compares the rank order of short vs. long-term priorities among Oregon Coast respondents, with categories colored to more easily identify changes in rank order. Tourism related infrastructure climbs from third to first in the list of longer-term priorities. Grants and funding resources, the top priority in the short term, falls to fourth.

Short vs. Long-Term Priorities: *Oregon Coast

	Immediate recovery (6 - 12 months)	Longer-term tourism planning (2 - 5 years)
1	Grants and funding resources (57%)	Tourism-related infrastructure (60%)
2	COVID-friendly visitor experience development (53%)	Marketing and promotion (43%)
3	Tourism-related infrastructure (43%)	Visitor management solutions (41%)
4	Visitor management solutions (38%)	Grants and funding resources (36%)
5	Marketing and promotion (32%)	Tourism strategies for climate change resilience (33%)
6	Tourism strategies for climate change resilience (21%)	Stakeholder engagement & collaboration (25%)
7	Stakeholder engagement & collaboration (20%)	Transportation options (23%)
8	Training and education programs (13%)	Tourism research & market insight (20%)
9	Transportation options (11%)	Training and education programs (15%)
10	Tourism research & market insight (8%)	

Respondents were asked to rate on a 1-5 scale (with "1" being "not a priority" and "5" being "high priority") various tactical planning and management opportunities. Among all respondents statewide, "identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery," and "managing tourism impacts in order to preserve local assets (natural and cultural) and livability" were the two highest priority tactics, while "increasing visitation to less-visited destinations" was a low priority. There were six tactics that received ratings of 3.7-3.8, indicating a broad range of competing priorities. On the Oregon Coast, "managing tourism impacts in order to preserve local assets and livability" was the highest rated priority, especially relative to the statewide overall results. "Identifying and fostering partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact" was the second highest rating opportunity.

Planning and Management

Q: Please indicate how you would prioritize the following tactical planning and management opportunities to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available, not all tactics should be considered extremely high priorities, and some may not be feasible given budget realities. Please differentiate between tactics which you believe deserve new/continued investment and those areas which you believe to be less important. (1 = Not a priority, 5 = High priority)

Legend: ■ Oregon Coast   □ Overall   Average Rating

Tactic	Rating
Managing tourism impacts in order to preserve local assets (natural and cultural) and livability	4.2
Identifying and fostering partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact	3.9
Identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery	3.9
Increasing the adoption of sustainable business practices in tourism	3.9
Creating positive interaction between visitors and residents	3.8
Dispersing visitation across seasons (from peak tourism season to shoulder seasons) in areas of high visitation	3.7
Building a diverse, equitable, and inclusive tourism economy	3.7
Educating community leaders and policymakers (local, county, state, tribal) on the value of tourism and its viability as a long-term career	3.5
Increasing visitation to less-visited destinations.	3.1

This rating question formed the basis for a follow-up question that asked respondents to select their top-two highest priorities. The nature of this follow-up question helps to differentiate between tactics that, while important, may not be among the top-two highest priorities. Statewide, the top three priorities

were managing tourism impacts in order to preserve local assets (natural and cultural) and livability (31%), identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery (29%), and building a diverse, equitable, and inclusive tourism economy (27%). On the Oregon Coast, managing tourism impacts was the top priority by a significant margin. A quarter of respondents identified it as their top priority, and nearly half identified it among their two highest priorities.

Q: From the list above, please identify your top two priorities:

	Oregon Coast (1st & 2nd Priority)	Overall (1st & 2nd Priority)
Legend: ■ Top priority ■ Second priority		
Managing tourism impacts in order to preserve local assets (natural and cultural) and livability	25% / 21% **46%**	16% / 15% **31%**
Dispersing visitation across seasons (from peak tourism season to shoulder seasons) in areas of high visitation	12% / 13% **25%**	12% / 13% **25%**
Creating positive interaction between visitors and residents	11% / 14% **25%**	8% / 12% **21%**
Identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery	13% / 11% **24%**	16% / 13% **29%**
Identifying and fostering partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact	13% **23%**	10% **17%**
Building a diverse, equitable, and inclusive tourism economy	11% / 8% **18%**	16% / 11% **27%**
Increasing the adoption of sustainable business practices in tourism	8% / 8% **16%**	8% **14%**
Educating community leaders and policymakers (local, county, state, tribal) on value of tourism and its viability as a long-term career	8% **15%**	13% **24%**
Increasing visitation to less-visited destinations	**8%**	7% **12%**

DIVERSITY, EQUITY AND INCLUSION

With the national spotlight on inequities faced by Black, Indigenous, and people of color sparking a global movement against racial injustice, a handful of questions aimed to better understand the Oregon tourism industry's attitudes towards this movement and preparedness to address these inequities.

Statewide, 54% of respondents feel the Oregon tourism industry should play a role in advancing social and racial justice, 22% do not think the industry should play a role, and 23% are unsure. Younger respondents, those under 34 years of age, were more likely to respond "yes" (80%) than older respondents. Further, support for the industry playing a role tends to increase with education level (41% among those with high school or less and 62% among those with a graduate degree or more). Respondents from Oregon Coast were slightly more likely to feel the industry should play a role in

advancing social and racial justice (55% responding "yes").

Q: Do you think the Oregon tourism industry should play a role in advancing social and racial justice?
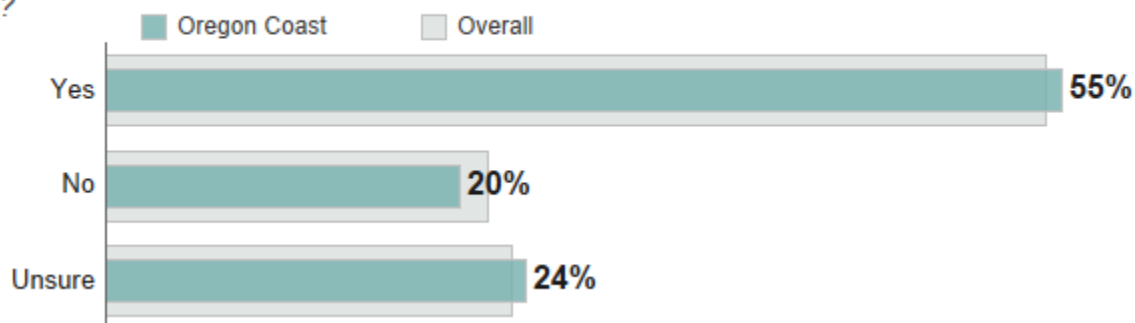
Respondents that indicated that the Oregon tourism industry should play a role in advancing social and racial justice were asked: "How do you see Oregon's tourism industry playing a role in advancing social and racial justice?" Those that replied "no" or "unsure" were asked: "Do you have any comments on your response to the previous question regarding the Oregon tourism industry's role in advancing social and racial justice?" A selection of responses to both questions from Oregon Coast respondents follows:

[If Yes] How do you see Oregon's tourism industry playing a role in advancing social and racial justice?

Advocating for acceptance of diversity of local population as well as visitors. Support for diversity training and racial bias training for law enforcement and all local employees

Anti-racism is Important, especially as our reputation here on the coast will drive what Kind of people come to visit. We will either see increased diversity, or increased segregation, based on our reputation. By putting forward anti-racist messaging and creating inclusive programming, the tourism industry can make sure that our visitors in the future will be More diverse and from More people and places, rather than focusing on a certain type of person.

By acknowledging and talking about the way that Oregon was formed. By honoring those Who lived here before it was called Oregon. By focusing resources and services acutely toward BIPOC businesses and business owners. And by takings it's cues from those folks as to how best to bring to light their stories

By offering training to all people in the industry, whether you are a marketing manager or the clerk at a front desk of a hotel. You can't make it mandatory, but you can offer certifications for those who choose to avail themselves of it. I can't believe that I still live in a world filled with social and racial injustices. Things need to change. Now.

The tourism industry can engage in conversation with BIPOC folks to determine what would be most helpful, and then support action to implement recommendations. Connecting BIPOC groups with outdoor recreation experiences that may not feel accessible, etc.

[If No/Unsure] Do you have any comments on your response to the previous question regarding the Oregon tourism industry's role in advancing social and racial justice?

Advancing social and racial justice cannot easily be regulated. It has to come from within for each individual and embraced by choice through lifestyle example.

I don't feel the tourism industry has a place in political issues. We simply address people without any interest in their sex or race; these simply have no place in our efforts. They don't relate to what we are trying to accomplish. Neither is any of our business.

Oregon's tourism industry is as diverse as the racial and social issues out there. A top down approach will only cause the local areas to resent whatever you tell them to accept. The only solution is exposure to other

Both statewide and on the Oregon Coast, respondents indicated high levels of preparedness to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds. Nearly nine in ten respondents indicated that they felt somewhat or very prepared. Just 6% of all respondents (7% on the Oregon Coast) indicated that they were somewhat unprepared or not at all prepared.

Q: How prepared do you feel to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds?

Sample	Avg.	Percent Responding:		
		Not prepared (1 & 2)	3	Prepared (4 & 5)
Oregon Coast	4.3	7%	8%	30% 55% 85%
Overall	4.3	6%	6%	36% 52% 87%

1 - Not at all prepared
2 - Somewhat unprepared
3 - Neither prepared nor unprepared
4 - Somewhat prepared
5 - Very prepared
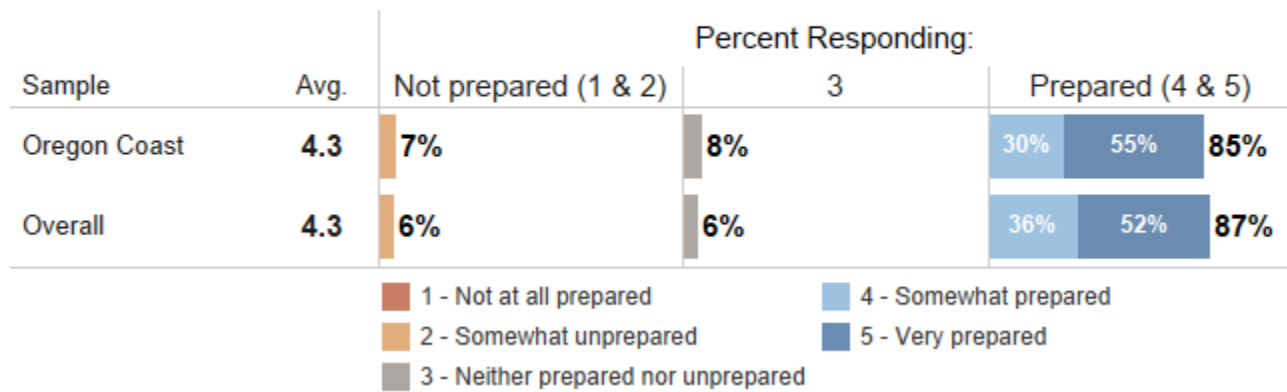
Statewide, three in five respondents indicated that they have participated in training related to cultural awareness, anti-racism, implicit bias, or other diversity, equity, and inclusivity training. Slightly more than half of all respondents (54%) would be interested in participating in such a training. Oregon Coast respondents were slightly less likely to have participated in training, and slightly less likely to indicate interest in future trainings.

Q: Have you participated in trainings related to any of the following? (Check all that apply)

Legend: ■ Oregon Coast □ Overall

- No, I have not received any cultural awareness, anti-racism, or implicit bias training — **47%**
- Yes, cultural awareness — **39%**
- Yes, anti-racism — **34%**
- Yes, implicit bias — **32%**
- Yes, other diversity, equity & inclusivity related training — **25%**
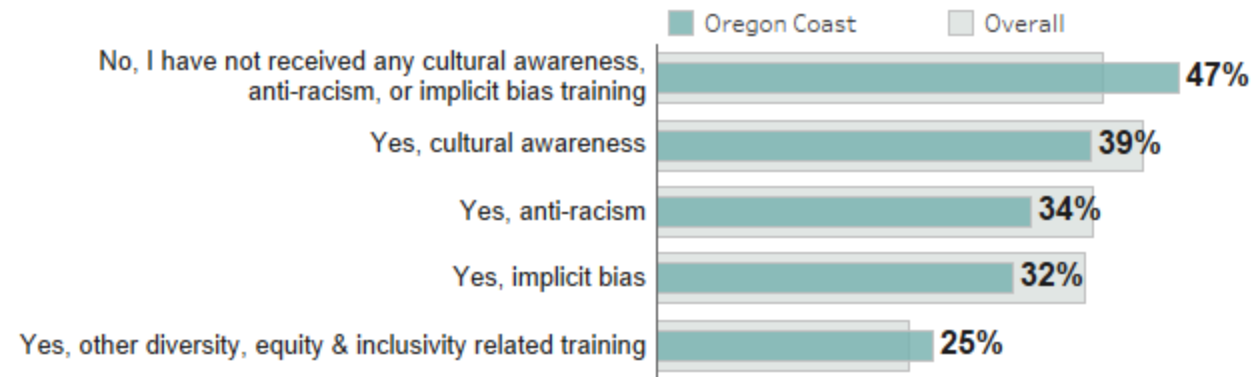
Q: Would you be interested in participating in trainings related to any of the following? (Check all that apply)

- No, I feel I have the training I need — **49%**
- Yes, cultural awareness — **39%**
- Yes, anti-racism — **35%**
- Yes, implicit bias — **40%**
- Yes, other — **9%**
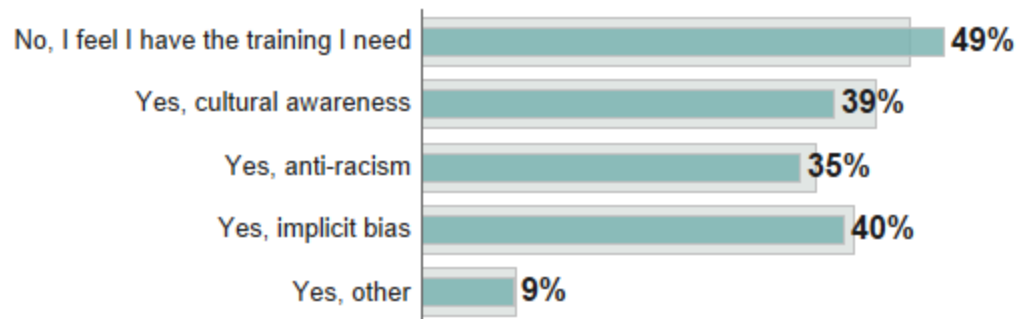
INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Statewide, respondents indicate high levels of satisfaction working with Travel Oregon and their RDMO, and high levels of engagement and understanding of how their RMDO and Travel Oregon work together. On a 1-5 scale of agreement, the overall average rating of all statements ranged between 3.6 and 3.7. Oregon Coast respondents on average were less likely to agree with each of the statements, indicating slightly lower levels of satisfaction, engagement, and understanding.

Industry Engagement

Q: Please indicate the level to which you agree or disagree with the following statements: (1 = Strongly disagree, 5 = Strongly agree)

Legend: ■ Oregon Coast □ Overall

Average Rating

Statement	Rating
I am satisfied with my experience(s) working with my Regional Destination Management Organization.	3.6
I am satisfied with my experience(s) working with Travel Oregon.	3.6
I am engaged with Travel Oregon and/or my Regional Destination Management Organization.	3.4
I understand how my Regional Destination Management Organization and Travel Oregon work together.	3.4

Seventy-six percent of all respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter, followed by website (41%). Just 3% of all respondents currently receive information via YouTube. By a large margin, e-newsletters are considered the best way for Oregon Coast respondents to receive information.

Communications

Q: How do you currently receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization? (Check all that apply)

Category	Oregon Coast
E-Newsletter	64%
Website	43%
Webinars	17%
Conference	14%
Basecamp	13%
YouTube	2%
Other	27%

Legend: ■ Oregon Coast   □ Overall
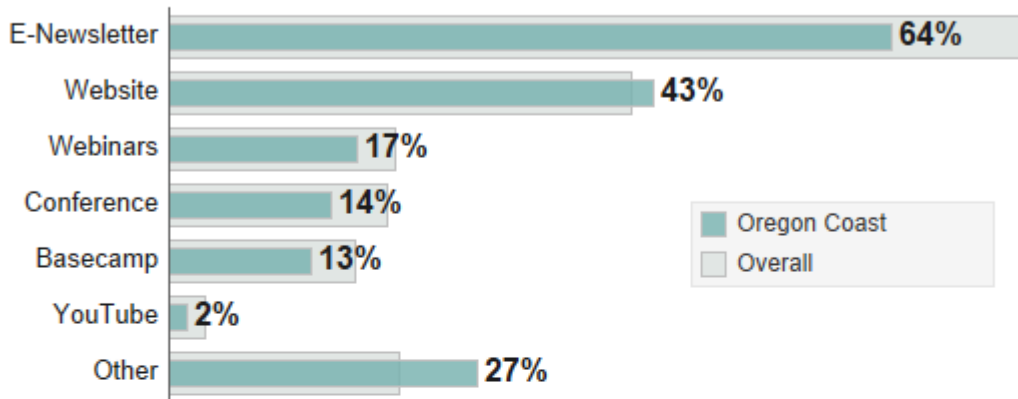
Q: What is the best way for you to receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization?

Category	Oregon Coast
E-Newsletter	66%
Website	13%
Webinars	7%
Conference	5%
YouTube	1%
Basecamp	1%
Other	6%
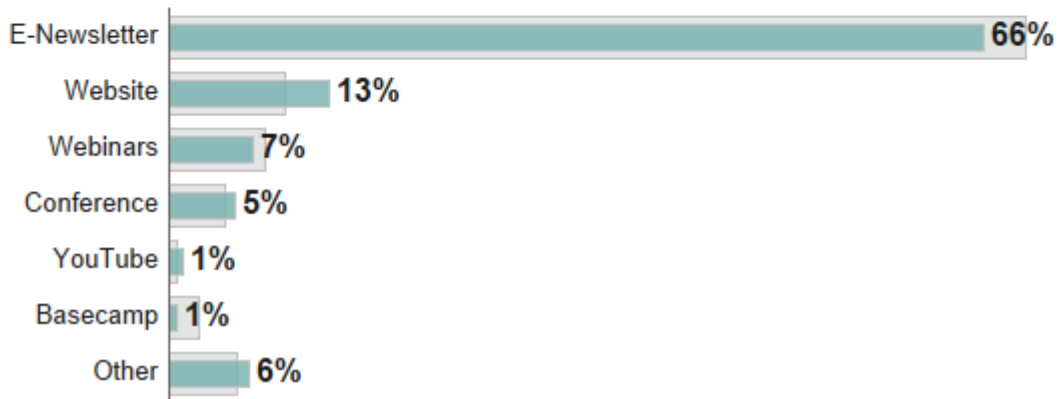
Respondents were asked to provide up to three destinations or attractions in Oregon that they believe would benefit from increased tourism development once it is considered safe to travel. The following word cloud and bar chart summarize these open-ended suggestions from Oregon Coast respondents. The values of the bar chart and size of words represent the percent of Oregon Coast respondents that used a particular word. Commonly used words, including "Oregon" and region names, have been omitted.

Q: Once it is considered safe to travel, are there destinations or attractions in Oregon that you believe would benefit from increased tourism development? (Provide up to three)

south	13%
county	10%
city	7%
coastal	7%
lincoln	6%
tillamook	6%
north	6%
curry	5%
hiking	5%
area	4%
beach	4%
communities	4%
coos	4%
parks	4%
small	4%

OREGON COAST QUESTIONS

Each region had the opportunity to ask a series of custom questions of specific interest to their stakeholders, challenges, and opportunities. Findings from these custom questions are presented below. Custom questions that contained open-ended comments appear in the open-ended comment appendix.

Q: Please indicate your level of engagement with the following organizations: (1 = Not engaged, 5 = Very high engagement)

Rating Category	Avg.	1 & 2	3	4 & 5
Your local Destination Marketing/Management Organization	2.6	30% 20% 50%	22%	28%
The Coast Regional Destination Management Organization	2.3	36% 23% 59%	22%	18%

Legend:
- 5 - Very high engagement
- 4 - High
- 3 - Moderate engagement
- 2 - Low
- 1 - Not engaged

Q: Please rank your satisfaction levels with the services of the following Destination Management Organizations: (1 = Extremely dissatisfied, 5 = Extremely satisfied)

Rating Category	Avg.	1 & 2	3	4 & 5
The Oregon Coast Visitors Association	3.5	11%	41%	34% 14% 48%
Your local DMO	3.4	13%	44%	29% 14% 43%

Legend:
- 5 - Extremely satisfied
- 4 - Satisfied
- 3 - Neutral
- 2 - Dissatisfied
- 1 - Extremely dissatisfied

OPEN-ENDED COMMENTS

The survey resulted in an extensive number of open-ended responses. A selection of responses to the most relevant open-ended questions are presented below in the respondents' own words with no editing, spelling, or punctuation changes. The opinions expressed are the respondents' own and do not reflect the opinions of Travel Oregon. All open-ended responses are viewable in an online dashboard

format with accompanying word clouds and bar charts. Included are responses to the following questions from Oregon Coast respondents:

- Q: Do you have any additional comments regarding welcoming visitors to your community?
- Q: Do you have any comments on your priorities for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions?
- Q: Do you have any comments on your priorities for longer-term tourism planning over the next 2-5 years?
- Q: What topics or resources would be most beneficial when it comes to racial equity, diversity, and inclusion trainings?
- Q: In a few words, what, if anything, needs to change for your community to feel like a destination where ALL who travel can enjoy their journey and feel welcome?
- Q: If you would like, please explain your ratings for your engagement levels with your local and regional DMOs. (*Asked of Oregon Coast respondents only, includes all responses).
- Q: If you would like, please explain any of your ratings for your satisfaction with your local or regional DMOs. (*Asked of Oregon Coast respondents only, includes all responses).
- Q: Is there anything else you would like to share about the topics discussed in this survey?

Q18: Do you have any additional comments regarding welcoming visitors to your community?

A small, but very vocal and visible percent of visitors refuse to wear face coverings. This has been very hard on staff and volunteers who try to enforce it with disrespectful people. And it elicits fear in other guests.

Although our healthcare system isn't currently overburdened, if we were to have a spike of cases it could become overburdened quickly.   And we have had to turn people away because our new limited capacity in our small space and social distancing. Or people get impatient waiting for a space to open up.

I fully understand why so many folks, second home owners and visitors from further afield, want to come here especially right now. We see license plates from many more states than normal. Many of course from CA. but also Texas, Alaska, AZ, Iowa, all over. If I lived in an apartment in a city I would much rather be someplace like here with a big beach to walk, with enough space to not need to wear a mask to walk, with hiking trails and water access. I just don't think we need to advertise for more. It has meant that we personally do not access much of our town, other than the necessary grocery shopping and the bookstore. With all these tourists, many from hot spots, we are not willing to risk going to a restaurant or to the spa as we would have frequently in the past. We try to avoid walking through town at all.

I understand that the beach is a draw and a right to visitors to the coast. And i understand that businesses have cropped up to accommodate those visitors. That said, we who live here year round have had to organize around those businesses and the folks that they cater to. This does not define our local community and, as the tourist industry has grown and been promoted, thanks to the TLT funding, it as become a huge problem as regards to livability. The TLT funds have promoted tourism without any regard to the impact that the huge influx of visitors has had on the capacity of our local infrastructures to deal with it. The tourists seem to expect that their needs will be accommodated and, if they are inconvenienced, seem to feel entitled to break the rules/protocols with no repercussions. Without adequate resources and funding, the local coastal communities are powerless to enforce infringements with regard to parking, litter, and pollution. Thus we are left with the responsibility of undertaking weekly clean-ups on the beaches and roads after the tourists have had their "vacations" and left their garbage for others to deal with.

In Curry County we had the opportunity to build an esprit de corps in our Community to focus on how to come together and work with this -- mask making, phasing in restaurant openings and park and beach use to focus initially on the quality of life of locals. In one fell swoop, and be County Commissioner ignored the input of the community (including a survey) to ram through a vote with little discussion about reopening transient lodging to non-essential visitors. The decision was immediate with no phase in. It was made with a focus on business vs biology. This whole thing is a result of a total failure on the part of the federal government to step up and manage this -- to get factories to make PPE so it can be made available to everyone; to get companies to rally to make ventilators and accurate tests so they could be made available to everyone; to rationalize and set up financial aid programs for individuals and companies so that they can hang in there without losing their home, their rental and their source of income. Instead we pressured the citizenry to take risks, the consequences of which we are still not fully aware. We had just started our modest lodging offering and were 50% booked in Jan Feb and March and on track to be 80% booked by September. There is clearly demand to visit our beautiful area. We would like to re-engage and hope that Travel OR take our comments seriously and use its influence to push hard to secure testing, contact tracing, PPE and ultimately therapeutics and a vaccine. Thank you for doing this survey. I shall share it with others.

It doesn't feel like tourists have any concerns for our town and it's health and well being. People are constantly asking for a deal when we are barely holding on.

It was sad to see "go home" spray painted on the roadway when entering the city a few months ago. Some residents are telling people on facebook to stay away. These residents must not be employed in the hospitality industry, or they would not feel this way. Our employees want to work!

Keep COVID at bay by not spreading it - - keep it at home.

Lack of compliance with local regulations. Intimidating local residents when asked to comply by local staff/employees/residents.

Limited parking and trash containment are big concerns. General disrespect between locals and visitors is quite a concern.

Lodging tax needs to be able to be used on facilities. Here at the coast we don't have enough bathrooms, garbage, etc. Our parks are under funded and need those dollars.

Manzanita has handled most of the covid related issues of visitors to our community. Visitors are flocking to the Oregon coast because they can't travel outside the us so road trips are up and the coast is the destination. But of the 5 bars and restaurants in town 3 are closed and it looks like closed permanently that's a problem for visitors and residents and if it stays that way it will have a permanent impact on our community

Most of the above questions are not a concern at all. The idea that we can shut down a whole industry for a hypothetical threat is insane. The only thing that I am worried about is the over running of public resources because of over zealous shut downs. The state parks for example being closed did NOT limit the number of visitors. All it did was push those people into private businesses. It also gave a lack o restrooms and hand washing facilities. Yeah, that's what helps.

My biggest concern is Oregon residents from the big cities flooding to rural areas, parks, trails, etc. and not wearing masks, maintaining distance, etc.

My two biggest concerns (not shown above) are customers bringing COVID to our small town and customers not wearing masks.

Our community is skilling up the local workforce with a Lane Community College offering titled: 'Environmental Services Aide (Non-Healthcare)'. We are protecting our front line workers with knowledge and PPE which in turn offers a safe environment for visitors to our area. Safety first, last, and always.

Please continue to open our state. We need to work. We need to live. We need to be able pay bills, feed kids, go to school, etc. without some kind of crutch from the government to be able to do so.

Taking their trash home or disposing properly needs to be REINFORCED

The covid situation brings up the question do visitors have a right to come to our community ? do the visitors have a right to ignore local wishes like masking, because they don't live here.?   how do we begin to focus on tourists respecting that they are guests in our home community . don't take up police time don't trespass, leave a nice tip for our efforts to keep the beaches clean and local business thriving.

the inconsistent messaging around testing in rural areas, based on types of tests available (rapid 15-30min tests vs 5-7 day tests) and the related efficacy around them is a problem. Sometimes the message is testing is available to all that want it (costs still a question) and sometimes the message is tests are only available to those with symptoms. That combined with the results not being available for most tests before 5 days makes the results virtually useless. This makes messaging to welcome visitors hard to embrace, when the sources of infection would be hard to trace and limit.

The negative tensions and attitudes between some residents and visitors is definitely alarming. But not everyone is acting that way. I think there are bright spots like Manzanita's pilot trash pick up program...where we invite people to help us "be kind to the coast" and participate in loving and taking care of this place and its residents. We probably need to hear more about the good things happening in the news, to inspire the kind of attitudes we want to see more of.

The negativity and mockery surrounding COVID is very hard on our front line workers. There is a very slim margin between compliance and anger over things related to COVID. There is also very little support to enforce safety.

The politicization of mask wearing is an ongoing concern, as is the possibility of a major outbreak or contact tracing defining our destination as a transmission site. We have been fortunate in that occupancy levels post-May have approximated our normal visitation levels, but this will only continue of both guests and residents are responsible. Our messaging has shifted to local-only and responsible visitation only.

There is already A LOT of contention between residents and visitors. Truthfully, there always has been. It isn't just Covid related, that has just fueled an already burning fire. The trash and human waste has increased, the fear has increased. A lot of people would rather have no visitors at all. (I am NOT one of those people!)   We NEED our visitors. Without them a small business would have a very difficult time succeeding.   It is just a tough time to want extra people here. Our Hospital is very small. We have been lucky to not currently have cases but if that were to change we would be in a very rough spot healthcare system-wise. Right now people need to feel safe. Everyone is on edge. I think it is best that we make a the message to visitors, "We love you, we want you here, just not right now! If you are going to come wear your mask and be kind!"

There is an overwhelming concern that visitors from hotspots are coming to our community because it is not a hotspot, and failing to abide by protocols that they accept in their normal place of residence.   This year has also seen an increase in the number of people with 2nd homes here staying in those homes, or coming more regularly and for longer periods of time. While these people were previously seem similar to tourists, now they consider themselves similar to locals, and fail to understand why there is resistance to their arrivals and stays.

There must be a limit on the number of vacation rentals. They are ruining the character of our town, and staff have nowhere to live.

These are difficult and trying times. I have to work, I own my building and housing, but I have had open-heart surgery and I am 67 years old, and that makes me doubly high-risk. But I work, I am around the tourists, and I will not have anyone in my shop that does not have a mask and is wearing it properly. My life depends upon it. I never thought I would fear my guests, but the people coming through now are the ones who should most stay home. I don't want covid-19, and I don't want my neighbors to get it because some tourist came through my place and was not compliant.

This year was much worse than previous years, and it seemed as though visitors were less considerate of local concerns. Tension between locals and visitors was therefore higher.

Too many motor vehicles, cycling & pedestrian infrastructure (to make it easier for people to get around w/out using their motor vehicles constantly) & mass transit are grossly inadequate.

Trading business for the well being of fire evacuees is hard to compare but I believe that they rank higher at this time.

Unbelievably, this was one of our busiest summers in the past 5 years! Our property doesn't have any common gathering areas, elevators or hallways. We were able to social distance guests in our garden area. Our very loyal guests KNOW the cleanliness of our property and really didn't have concerns. The majority of our guests were local; Oregon, Idaho and Washington. Many NEW guests, too!

Under normal circumstances, we want visitors and welcome them, but COVID is very serious and our community has a high number of elderly, vulnerable residents and with tourists coming with little heed to precautions, not wearing mask or distancing, it is frightening. We could stop this if ONLY people would agree to follow CDC guidelines religiously for a couple of weeks. . .

Visitation is essential for locals and out of state visitors for mental health during this COVID time. When people take breaks/trips and visits, I believe they do better. The tourism industry should be held accountable to be a constant stakeholder of local community development work, not by running it, but by listening. There is a major disconnect between the human service work of Oregon and Tourism, and the communities are sacrificed. We are only as good as our weakest link and Oregon must find a way to close the gap between local human services and tourism, the gap is embarrassing.

Q22: Do you have any comments on your priorities for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions?

Again, the realities of balancing work and family are impossible particularly for small business owners. We have less income and we're working with at least one if not two hands tied behind our backs. I personally am finding myself daily having to choose between work and educating my son. I struggle to maintain what's already in place much less develop more business.

An example would be investing in expanding or repairing aging/historic outdoor rec infrastructure to make experiences more Covid friendly. In our community there has been an increase in use of facilities such as pier's end at the Historic US Coast Guard boathouse in Garibaldi. This is a narrow public crabbing/fishing pier and wildlife viewing platform at a popular clamming site. Improvements to the pier, boathouse, restrooms, parking area and trail to the Port/ Barview would be helpful - the pier has seen a huge increase in use over the summer but there are no funds slated for improvements or expansions to make it easier to navigate or protect visitors when they visit.

By tourism-related infrastructure I mean, more restrooms, more garbage receptacles, more enforcement and control of dangerous parking on Hwy 101, more support to law enforcement, and fire and rescue personnel. Our small towns on the North Oregon Coast (Manzanita to Wheeler) have been very negatively impacted and overrun by tourists.

Covid-19 may not be the last health related issue we'll have to deal with in the near future. I believe that, in order the weather the coming months we need to drive people to want to travel, to believe there are safe ways to vacation. That is, in my opinion, the way to sustain growth in our industry. Moving forward, supporting struggling businesses to help keep them afloat is also important.

Develop "Covid-Safe" itineraries - day trips, weekend trips featuring information on tourist activities AND MOST IMPORTANTLY, giving up-to-date operating hours and restrictions of when businesses that serve out of towners, are open and operating!

Essentially, our state and health leadership have no plan to exit the Covid-19 restrictions except to wait for someone to invent a vaccine. That is not a plan. Because of that, it's difficult to develop a strategy based on nothing but hopefulness. If we can move beyond, Covid, I believe our economy will recover fairly quickly. But people's priorities may change. The Wildfires may also change attitudes about how often and how far they want to travel from home. Managing our Visitors will take a collaboration effort.

Government leaders need to be convinced that shutting down the economy is detrimental to the long term survival of local business. Additional funds need to be made available to help businesses continue to pay employees and operating expenses adverse effects of the COVID crisis and previous shutdown, while at the same time providing an incentive for those unemployed to work in jobs where there is work available. Needs to be more communication from local governmental officials seeking what is needed by local business owners as currently, there is relatively no interaction between local leaders and those actually trying to operate a business and keep people employed.

Housing for the community workforce has always been lacking, and needs to be a priority, but especially after the devastation of the fires, it should be something that the city takes on in some way.

How about recovery that focuses on local sustainability and resiliency. Not things that depend on tourism.

I have no idea if or how I will be able to keep both of my employees working and how they can make enough to pay rent. Smaller businesses like mine have been very underserved, even though we are well known & were voted best clothing store in Lincoln County.

I have one simple priority- keep the hell going, outlast all of this, and survive regardless of what is going on out there. I am already one of the older fine art galleries on the coast (17th year) and plan to be around until I decide to quit.

I hope over the next 6-12 months is to find ways to support our local businesses to survive the winter months in a pandemic world.

I live and work in a rural area with limited public transportation options (both within county and linking to other counties). You pretty much have to have a car to get here and get around while here. If there is an emergency (e.g. wildfire) or accident on one of the major roads (hwy 101, 20, 18, 22, I-5) this can have major consequences for people's employment, "escape" (wildfires), and access to health care.

I miss the contact with visitors from all over! I miss giving guided walks through the natural wonders or answering questions about what people saw. I even miss the never ending question "where is Thor's well?" I will work on picking up weeding and cleaning, unpaid, so that when they come back it will be a good experience

I think there's a huge need for assistance in replacing affordable housing that was destroyed by wildfires and to build a transportation infrastructure that does NOT require owning a motor vehicle but that makes it possible for people to SAFELY walk or bicycle to work & take care of their other needs (food & clothing shopping, getting medical care, etc) without owning a motor vehicle.   Also making it relatively "safe" to take mass transit and improving mass transit. For example a 100+ units of affordable housing were built in my town, along w/a bus shelter BUT local bus service to that part of town was cut 5 or 6 years ago so it's impossible for anyone working a 9 to 5 job (or doing shift work) to USE the bus to go to/from work.   There needs to be recognition that people that work don't all drive.   It costs between $5,000 to $10,000/year to own a motor vehicle, assuming the vehicle is registered, insured & maintained (new tires purchased when needed, etc) --that amount of money can make the difference between being homeless or having a home, feeding oneself & children properly, etc.   IF people didn't have to own a motor vehicle.   Yet even in a town of 11,000 (full year residents) people have been pushed out of the 'walkable' areas--by hotels, condos, and use of residential housing as short term vacation rentals, as well as increasing rents.   Other areas have no sidewalks, no bike lanes, no bus system that someone could use if he/she worked shifts or even a 9 to 5 pm job.   Want workers to work low wage tourist industry jobs?   Which is most tourist jobs, then make it possible for them to live inexpensively and for EVERYONE, residents, tourists, to be able to walk or cycle locally safely & enjoyable instead of focusing almost exclusively on road infrastructure.

I'm so saddened over all of the terrible things that have occurred in Portland and I truly hope that things can return to a more peaceful state. With that said, the rest of our state is going to need some serious marketing to recover our image. I see comments often that say things like "so sad that it's too unsafe to visit Oregon now" or "so sad to see what your state has become". I also see questions like "is it safe to visit now?" in relation to the riots in Portland but referencing the south coast. People are convinced that all of Oregon is up in arms.

It has been quite a year, and we have survived because of the rapid response from the philanthropic community

Our community is bouncing back rather quickly now that businesses are able to be open. The wildfires had little effect on us outside of putting us on a level one county wide evacuation order for a few weeks. Many of our businesses are concerned about the upcoming winter months, especially if the governor imposes stricter regulations.

Remind visitors that they need to be considerate of fellow travelers and staff/employees/business owners as we try to recover from all these disasters.

Safety related to Covid-19 first. We have stripped down and gotten lean on every expense that we could. We have taken over some staff hours to reduce costs out of necessity. We have reduced our ours of business and closed one day per week. The economic impact has been huge. Hopefully that will be enough.

Small business is struggling if not dying. We don't know when this new abnormal will go back to normal. So do we just pack up now? Or is there going to be more help? Small business are hanging on by a thread. We put on a happy face to try & make another sale & keep going another day but it hurts, we are hurting.

SO much emphasis seems to be on Covid when really it needs to be on bringing people in to tourist areas. The government has already set rules to help with covid on a state level. As long as those things are adhered to then the local government needs to work on its own problems.

State parks continually say they are underfunded to maintain their facilities. The tourist experience is worsening and the demand is high. We need to defer the lodging tax to help take care of these things.

Stop all promotions for tourism for 18 months. Transfer funds you have for promotions to the State Parks and County Parks Department.

Support improvements to Beach Accesses so going to the beach from State Wayside is safe and convenient.

The Lincoln City hotel industry is recovering fairly well from COVID and the wildfires, but other businesses in the community are still struggling.

Update a community plan for resiliency and disaster preparedness for natural disasters

We have been at this with COVID for 7.5 months and no one has acknowledged that we are now in a recession because of the stipulations put on all of our businesses, not just tourism, every industry has been affected.

We in the service industry should have been better supported within the town. We were left to do ALL the policing of the Governors mandates and dealt with the negative angry customers. We also dealt with the over burden of tourists who were peeing in our natural wetlands, leaving garbage we are taxed to clean up while we are constantly being promoted as a destination to visit when locals can not even buy supplies for themselves. It would be wonderful to support our local community in recovering financially and to have those in charge actually keep us safe.

We realize that we have not seen the full economic impact of COVID. Because our community survives off Tourism dollars, it is yet to be seen which businesses will not survive thru the winter. As a small community this is a serious economic concern for our town. We as a community need a lot more support to define who we are, what our strengths are, and how to market and attract both residents and tourists to our community.

Why so much about land use and climate resiliency? This has nothing to do with COVID or recent lockdowns. If you want to do something for land use, better manage our forests to prevent the easy spread of fires as we have seen recently. Climate change is a separate issue.

Without significant financial support to business and/or assistance with marketing, many business will not be able to reopen fully, if at all.

Yes. Fund infrastructure. Road, bridges, waste management, recycling, roadside clean up, beach clean up, parking enforcement, limitations on day tripping, shutting down of forests and parks during fire seasons, stop clearcutting of coastal forests for starters

Q24: Do you have any comments on your priorities for longer-term tourism planning over the next 2-5 years?

A fantasy, being able to plan with the variables happening now. the old tried and true has worked well on the coast, the basic strengths of beauty and wildness with a plethora of things to do has drawn people regularly, and there is no need to imagine that the basics will irrevocably change, the changes are factors that do not have their origin locally. The OTI cannot change national/world dynamics. When things settle down, why not just try to rebuild the infrastructure that draw people here in the first place

As we strive to focus on Main Street, and it's esthetics, we understand that towns needs an inviting 'face-front' attract both residents and tourists.   Our Gold Beach mile long stretch does not have the appeal that must small towns now have. The unappealing appearance our mile long stretch of Main Street, does not encourage anyone to stop, or even understand that the Pacific Ocean and Rogue River are minutes off Main Street.   We understand that these esthetics combined with quality health care and good education will attract new local residents, businesses, and industry. For us to thrive, we are constantly working to improve all three.   The organization, Gold Beach Main Street has been apart of our community for 4 years, and is gathering a large following of local residents who really see our organization as the leaders of change, hope, and growth for our community.   As we are just now beginning to make a difference in our town, and are gathering momentum . Presently we are in the middle of installing 13 additional artistic benches along Main Street , and are designing and installing banners thru town.   Our town is at a great place to get 'buy in' from businesses. Bringing in Consultants that can help our community develop a 5 year master plan for our town, is exactly what our town is ready to support !   We would really appreciate the chance to talk about our beginnings, our history, and future.   ANY support in these areas is greatly needed and would be very well received, both as an organization, and a community !

Better outdoor recreation infrastructure. This will increase COVID friendly options, decrease visitor impacts at the same time.

COVID distracted us from the perils of climate change. incorporating environmental stewardship into tourism messaging will be important to changing behaviors that impact our ocean.

Develop more beach access points, hold more beach festivals and cultural events to draw people here to stay longer.

develop more things like the farm tours, garden tours, guided outdoor experiences, clamming and fishing lessons, have transportation included.

Funds coming from taxation or Lottery should should be withheld until 2022 and used for production of medical PPE, medications for Covid patients, and testing.

How will visitor sentiment direct the hospitality industry into the future. When we can determine this we can begin to make adjustment in how we operate and plan for the future.

i fear without stakeholder engagement, our coastal communities will continue to be divided about tourism

Increased population in the NW, and specifically in the greater Portland area will continue to mean more and more visitors to the OR Coast. We need better management of parks and natural areas so they are not abused, better infrastructure (parking, restrooms, etc), and lots more funding to emergency response (our tiny, volunteer only medical and fire responders are dangerously over burdened) our tiny police forces are likewise worked way beyond capacity. All are based on tiny populations-- not the thousands and thousands more people here as visitors who they are serving constantly. It leaves our actual citizens in jeopardy.

It is projected that the hospitality industry will have at least 5 years of lower revenues than the pre-COVID levels. Therefore, we believe long-term and short-term needs are identical. Additionally, government continues to suck money from the travel business without any money returning to increase business. Very little money provided through the TLT was spent this year on advertising, with our city and Chamber of Commerce shutting down all marketing shortly after the start of the pandemic.

Let's attract foodies, outdoorspeople, folks interested in buying bespoke clothes/tools/furniture/boats sold by locals.

Local stakeholder collaboration is difficult to organize and promote in small communities where funding is not available to hire a professional to oversee and run the collaboration.

More biking, hiking and outdoor sport promotion and development. Bike trails on central coast. Building out the old wagon trail from Heceta to Florence for bikers and hikers.

New builds of neighborhoods should contain multi-unit affordable sections. Between now & then, perhaps limit the # of vacation rentals per address. I grew up in a resort area...they did 13 rentals per year...Most landlords did weekly rentals June-August or July-Sept & then #13 would be a 9 month rental. If we did that now, it would help some of the fire victims.

Our main priority after covid is to develop the farm to open to the public. We strongly believe that everyone need to see and experience agriculture to better understand the importance of it.

Our natural resources are among the big asset, and we need to protect and enhance the opportunity to learn and enjoy them

Parking solutions and more fines and towing for those illegally parked. It was ridiculous and dangerous on the coast this summer.

Please take good long look at infrastructure and how the tourist industry should be responsible for the impact of tourism on the local communities. How might the planning address the ability of the locals to conduct a normal daily life when the roads are so congested that we cannot access food, heath care, and emergencies.

Relocation that begins with visiting is increasing. Real estate professionals, farmers, land use planning are crucial. Emphasis on regional and local small manufacturing, farming, and reclamation/recycling offer additional areas for tourism. Stakeholders in tourism include all small businesses within a bioengineering. To become innovative in climate crisis resiliency is the challenge for all of us. Successful marketing should include focus on well managed, accessible examples of thriving green businesses from manufacturing to Oregon-made retail.

Same as previous question. Our communities have already done years of extensive community engagement/outreach - now we need help securing/implementing funds to address the priorities expressed though all this prior research. Technical assistance for helping create/maintain/market these assets once they come online and TA help applying for larger federal/state funds or grants would be extremely helpful. Our rural communities are stretched very thin in capacity and so we keep missing large grant deadlines due to emergency crisis or limited staff/volunteer availability. Also prioritizing projects that hit two or more tourism related categories - I.e. outdoor rec, culinary tourism, and historic/cultural heritage preservation. A lot of our projects here intersect with helping improve our local food system and also building greater appreciation for our local culture and heritage. There are a lot of projects in need of funding that have many layers of long-term benefits if planned properly.

Small towns need support for overwelmed facilities and trash collection. Our village rented restrooms and dumpsters and the County ended up paying us for these services. We can take some actions with our Community Association funds but more state services and employees are needed to keep up with the number of people coming to our town in the summer.

The national and international travel plans of couples up and down the West Coast have been disrupted by the unprecedented collapse of air transport due to the pandemic. In a sane world, they would be equally disrupted by the toll that air travel (as we currently know it) takes on the climate. We want Travel Oregon to work not only to re-orient these vacationers to plan for travel within Oregon, but to advocate for the most energy-efficient modes of transportation: electric buses, an expanded train network, and the emerging breed of electric air taxis. Since these latter include eVTOLs, they will be capable of landing in small communities which lack airports.

The Southern Oregon Kite Festival, a large summer financial boost to the community, will either quit after July 2021 or move to Crescent City because the only suitable venue, the Kite Field in the Port of Brookings-Harbor, will be converted into high-end RV camping by the Port.

Tourism infrastructure. The impact of tourists, especially on things like fire department and police, beach cleaning, roads that need repair more frequently, is huge. The lodging taxes they pay should go towards those kinds of things at a higher percentage than towards marketing for more tourists. Our emergency preparedness here is all volunteer run but would have to take care of tourists in an emergency situation, which could easily overrun our capabilities.

Tourism on the coast needs to be focused on millenials and their preferences as they have different priorites than boomers.

We are desperate for affordable housing in the coast. Those of us in the working class are being run out of affordable housing due in part to a sudden influx of people moving here. It's not a sustainable situation.

We are going to continue to work towards developing and assisting business owners in our downtown area for as long as we can.

With all the unknowns about Covid-19 and how long it may affect our communities and the real climate change problems we face, I think that all of our planning, promotion, funding, etc., should focus on health, climate change (fires, smoke, potential mud slides, food supply including river & ocean fishing) and engaging all the players in reasonable and responsible plans.

Q27: What topics or resources would be most beneficial when it comes to racial equity, diversity, and inclusion trainings?

Anything DEI related...resources for women, tribal, LatinX, and BIPOC training about how to engage others in the conversation to change the culture at the Coast

Anything that fosters awareness, especially of unconscious beliefs that cause bias towards others.

Asynchronous, online resources would be most likely to be used (because of scheduling).

Book discussions coordinated with our library and bookstore. With books provided and a trained facilitator.

Bring the community resources in these areas into regional planning in the tourism sectors. Make training in these areas a permanent mandated part of local schools and community college curricula, and attendance at community-wide readily available training a part of a desirable resume in hiring for every position in tourism.

City and County officials, legislators, local police, and other entities of authority need this training the most.

Clear & concise definitions of each of these topics for a start - once understanding is achieved, then resources can be discovered to move forward. I think that most of us have varying ideas about what these concepts mean - having mutual understanding and commitment towards a shared goal is critical.

Compassion Education of real history, un-white-washed or male-biased Strategies for equity and a positive future for all

Concrete tools for creating a welcoming tourist experience for BIPOC folks in rural western Oregon.

Conflict resolution and communication training for everyone especially during this heightened political times.

connecting with visitors from other cultures

cultural awareness spanish language skills coastal climate awareness

De-escalating conflicts (e.g., what to do if a customer/visitor "won't" wear a mask), how to listen, how to identify one's own feelings and needs.

Entering rural contexts of white supremacy as an outsider to a community

equality for all without regard to race, creed, sex, and sexual orientation.... all the above

Equity and Inclusion

Equity and inclusion and the practice of elevating diverse voices

Helping our community understand things from the perspectives of those who have different lived experiences and to generate more compassion and curiosity toward differences and diversity

How a community can help affect change in combating racial, ethnic and cultural ideas, when the community itself is not very diverse? How to create unity rather than division when addressing race, ethnicity and cultural issues.

How to communicate with and be more inclusive to diverse audiences Funding sources who can help make structural/institutional improvements needed to meet the above

How to deal with alt-right locals who regularly threaten people of color. This includes getting local businesses involved as spokespeople.

How to engage in the conversation with stakeholders that think there is not a problem.

How to integrate this into the community.

How to modify my unconscious behavior. I am older and was raised in the rural west. I am trying to be aware and welcoming, but I know that these learned subtle behaviors can be hard to detect and correct. I can see it in my coworkers. Not overt, but a difference in the connection between the visitor center staff and visitors who look like them and those that don't. Warmth vs service. I think it would be great to have someone come work with us at our jobs and then give feedback.

I had the privilege of working with members of the African-American community on the East Coast, as well as with members of the LGBTQ community. However, the move to Oregon presented a need to learn about communities I did not encounter on the other side of the country. I would like the opportunity to learn more about Native Americans, Pacific Islanders, and religious groups with whom I have not had the privilege to interact prior to moving to Oregon.

If more individuals and businesses/organizations understood the issues around equity, diversity, and inclusion, they would be part of the solution. Unfortunately, many outspoken members of the community deny the issues, and hinder open understanding and engagement.

Implicit Bias training would be eye opening for most people who take it. It would be a wake up call to most. We need to move beyond this and yet we haven't.

In the future linking valley folks to the coastal experience

Indigenous peoples concerns and cultural awareness would be great.

Interpretive centers. Celebration, promotion and acknowledgement of culture in a historic capacity.

Learning to recognize our own bias and how to combat it.

Less experience with specific cultural backgrounds, rather than definitions.Same with race and diversity. How about some loaded questions/actions from those who feel they have been unwelcome or treated differently or have extensive experience with the same to judge how well a business or individual is inclusive to all?

Local data on what we can do in Our community based on the specific challenges that exist locally.

Marketing for diversity.

Non violent communication that teaches and encourages effective listening and speaking skills that diffuse tension and conflict between people.

Online workshops for all stakeholders to partake in

Our area is very undiverse and needs guidance in understanding other races, cultures, and why they feel the way they do. So many of our long-time residents have no desire to travel or learn about other people and places.

Professional ethics, workplace appropriateness, effective and calm communication about differences of opinion, etc.

Training which includes firsthand experiences, role playing and scenarios to understand other points of view.

Ways to be open and welcoming to all, and helping to mitigate for issues that might occur.

Ways to fund tourism in addition to room tax

We need ways to bring the community together for common good. How can we work together to break down all the division and support one another across political, racial, cultural, and ideological lines.

Q29: In a few words, what, if anything, needs to change for your community to feel like a destination where ALL who travel can enjoy their journey and feel welcome?

"We Welcome" signs at tourist destinations (like the ones Oregon Food Bank uses).

A change in administration nationally and seeing that filter to the grassroots level.

A federal administration that prioritizes people over business interests, that encourages calm, rational thought, that supports the enfranchisement of all citizens. Once the change happens at the top, the populations of communities will no longer act out in racist/prejudiced ways.

A focus on diversity in tourism. People of all races and ethnicities enjoy visiting here...the only comment I hear from them is how much of a minority they are, more so than many other parts of the country.

A more welcoming appearance - Public Art, refurbished buildings, more landscaping

All are welcome in Lincoln City and aside from a single incident that was handled quickly and precisely, This survey has put more emphasis on race relations in my community more than anything else I have seen. Perhaps we should stop putting an emphasis on gender, race, and religion, and just treat people like people.

Anti tourism attitudes of residents. And visitors need to be more considerate and respectful of our community and natural beauty of our environment. Be safe be respectful don't litter be kind to each other

As a society we should be encouraged to stay closer to home in order to enrich our local communities, know and care for our neighbors, and live more sustainable lives (that do not involve frequent flights, long drives, over consumption, disposables, plastics, etc).

Besides eliminating the ridiculous political division and misinformation, infrastructure improvements are badly needed if we're going to grow. A community performing arts/events center would greatly benefit this area, boost tourism, and improve the economy. It would also serve as a community resource and should be designed to enhance and preserve the local culture .

Confederate flags need to come down.

Education & experiences outside the area Too many that didn't even graduate high school and have never been anywhere else.

Every man, woman and child is human. There is NO color or physical orientation. Human is human and each deserves respect, kindness and to be treated as you would like be treated, no exception.

Explicit invitations that encourage diverse groups to our area, including offering multi cultural events...when we can gather in large groups again.

Exposure to other races, cultures and points of view

Greater and more wide-spread respect for and celebration of diversity in the community.

Historical perspectives shared with community and visitors

How about "where residents can enjoy their homes and feel welcome and safe."

How do you change embedded bias?

I agree...especially Yachats and Lincoln County government...education in compassion, diversity, and power dynamics in sex, gender, race, age, alter ability, etc.

I am a privileged, older, middle-class, white guy. Ask this question of local people of color and the LBGT community.

I believe it is already fairly welcoming

I believe my community issues are not necessarily ethnic/racial/culturally based. It's more about lifestyle differences/preferences and choices. How to share our backyard with others and recognize the value each can bring to the neighborhoods.

I believe our community is very welcoming.

I believe we are reasonable about visitors as long as the greater number of visitors is behaving thoughtfully. Facilities for hygiene and trash pickup need to be maintained more aggressively so that the increased number of people have the opportunity to relieve themselves and dispose of their trash.

I believe we need to represent different races and cultures more in marketing materials. Oregon has a harsh history and it will take a lot of work to make ALL feel welcome, safe and comfortable so they can enjoy our natural areas.

I feel like it already is and would need help understanding if and why that's not the case.

I feel like we have a very open minded and welcoming community in Manzanita

I have a friend of color who visits me here every year and he feels comfortable in yachats but not in waldport. I want to point out that I don't always feel comfortable in waldport, but the problem is that the coast is not one uniform place. The political divisions mean there are places that might look the same to a visitor leave a very different feeling for visitors. It's almost like we need a color coded map saying liberal place - LBGQT, people of color, environmentalists, and people who don't speak English welcome. And conservative place - you will be more comfy if you want a different experience.

I have always felt that our communities along the coast are welcoming. Only one time have I heard of people not being welcomed.

I think our community is prepared

I think our community is quite welcoming as a whole. There are those bad apples - the racist community members - but I'm not sure how to change them. They live here and don't seem to want to change or have their eyes opened. Possibly more Oregon marketing that includes more minority races would help open their eyes to seeing that many types of people can co-exist.

I'm not particularly interested in the town making racists/bigots/anti-Semites & misogynists feel "welcomed" into this town, although from what I've seen during the years I've lived here, clearly some bigots do feel quite comfortable living in the community & visiting it.   In the town north of here, some visitors felt it was JUST FINE to harass a visiting black family on the beach.   The police seem to have handled it well, I don't know how successful the DA will be in prosecuting, assuming the DA even chooses too. There is deep seated racism, anti-Native American, anti-Semitism & misogyny (and probably, if what went on in the 1980's in PDX metro & on the coast, people who strongly dislike homosexuals/are afraid of them), I'm not sure how to get rid of it/persuade people to adopt more open attitudes & beliefs.   Better education perhaps.

I'm not sure it's anything Travel Oregon can directly do, but maybe continue to be a partner in advocacy - policy change on the federal level - the arrest of the killers of Breonna Taylor

Inclusion of diversity.

Increased support for multi-lingual signage to show that we acknowledge and support other cultures.

Institutional change and removing the influence of big money in the political process.

It is hard for us to find personnel in this community to create the staff that reflects the visitors we would like to welcome.

More 1-1 conversations to help those less exposed to racial diversity understand the issues at hand and hopefully peel back their biases.

More employees or volunteers who speak Spanish.

More openness and willingness from people to accept our differences.

More organized options. If feels too much like the wild-west. Visitors dont' know where/how to fish, or crab, or hike, or bike, or get to the beach sometimes.

More understanding, education, exposure to other ideas, etc.

Not possible, like getting ride of all the confederate flags.   Best you can do is research and vet businesses, create specific itineraries and communicate them as 'respectful' establishments to visit.

Note: I only speak English so if the other person doesn't speak English, it is very hard (LOL). I am not prepared for that!   De-emphasis on drinking alcohol. It seems that most of the problems we have involve people who are too high or drunk to calmly negotiate and navigate social interactions or safety rules. More inclusive images in advertising.

Our community is generally very supportive of diversity in terms of ethnic/racial/cultural terms, as well as other protected groups, and we don't believe presents any difficulties for those traveling to our area, however, the community itself isn't very diverse in terms of race, ethnicity, and cultural, which some may see as a drawback.

Our community is very divided. I think we need to try to have more collaborative discussions and try to come up with ways to make everyone feel welcome-visitors and residents alike.

Our community is very respectful and is already a very welcoming international destination.

Our community needs to have more options for visitors who are not wealthy. Economic justice matters, too!

Our long-time residents need to get out and about more or just go to the library and read about other people and places. They are way too insular. They are generally friendly to strangers as long as they feel they are just passing through.

People to be respectful too all and to quit looking for things to be offered by

Providing direction, signage etc in formats other than English has to be included as a necessity not an after thought or "if we have enough time or money" consideration. Using less words and more diagrams or images would go a long way to making signage understandable to more people.

Reduce cultural barriers to entry. Create/present a welcoming culture. Bring that presentation to diverse, disconnected communities.

Reeducate or mitigate impact of the few extremists, bigots and rednecks who reside in our county.

Respect and protect the locals

Signage in different languages, programs in different languages, a diversity of restaurants, events and activities.

Simply treat all persons as human beings. Stop putting everyone in a "class". Treat visitors as guests to the region. Period.

Social responsibility from visitors, caring for those who live here, smaller footprint regarding what is brought and what is left behind, less reliance on local resources.

State parks need to get back open along with online reservations for all destinations.

Stop attempting to pack anyone in so tight. Over crowding of humans produces anxiety. Some in our community don't think we have a racial inequity issue, not true. Ignorance does not excuse racism.

The north coast was SOOOO busy all summer. Covid didn't seem to concern people from visiting, at all.

Tillamook County is challenged when it comes to racial dicersity. The Chamber has not put out a statement on inclusivity because "The members don't agree" with what's happening in the State. There are several hate groups and Tillamook County has the highest active membership per % of population in the KKK.   We need help engaging our community

Too many close minded locals. Need to break down that way of thinking.

Training/education, awareness of locals - most common "It doesn't happen here." because I haven't seen it, experienced it. It happens here - A LOT!! All types of discrimination ...

Ugh, that is a tough one. Some people are just jerks and there's nothing anyone can do or say that will change their mindset. That being said, advertising which shows inclusion may help by acclimating them to see people who do not look like them more frequently.

Unfortunately, I've heard of instances of racial slurs being yelled at people in our community and I don't think it's welcoming. The political climate certainly isn't helping, as people's political views are on display through the signage around town. There have been Trump truck parades during several weekends, displays of confederate flags, and other indications that people of color are not welcome or safe. As a member of the LGBTQ+ community, I am fearful sometimes, even as a local.

Visitors should have respect for our communities and our environment and behave accordingly.

We are a fairly popular tourist spot, but some locals don't seem to think we need tourism for our community to flourish.

We are a largely homogeneous, white, and aging population. Supporting and emphasizing diversity in our hiring and marketing practices, and outwardly displaying support for issues important to BIPOC folks will help make it more welcoming to BIPOC residents and visitors alike.

We need a more welcoming attitude toward visitors

We need marketing collateral (ie professional photos) that showcases diversity within the framework of our destination to better reflect that everyone is welcome here. Historically, we haven't had that & it shows in our owned assets.

We need to change the us versus them mentality.

We need to educate our community!

We need to teach our residents to accept that tourism is a big business that supports local businesses.

Well for one thing quit acting like they're entitled to everything because very few of them actually spend any money here. The cyclists come on the trails and run horses and pedestrians off of the trails like they owned them, you can't carry anything home on a bike so they don't do any shopping. While motorcyclists do you stop at restaurants and eat once they get into town they drive an excessive speeds and dangerously pass people on Highway 47 like it's the Indy 500. So I really don't see that tourists bring any positive benefits to the community. And I purposely only see locals and refer tourists to seek services elsewhere.

After pointing out that the head of the organization is using the website to promote his own business instead of our small cities. Our small chamber was cut out of being offered resources

Although I work closely with our local DMO and she accomplished good work, I have found she is not always the most inclusive in her planning processes, which can lead to duplication of efforts and frustrations among local partners on the ground. However our RDMO is extremely willing to make time and space for community dialogues and conversations on the front end of and throughout project development and very supportive of collaborative efforts. We are so thankful for the efforts of our RDMO.

As a public transportation organization our only contact with tourism is bring people in and out of the area

County tourism is great

Covid-19

did not get welcoming responses did not recieve promised sign or information for signing up for the farm list. since I did not pay for the farm listing again have had no interaction

Did not recognize the org had something to solve the tourism   issues I observe.

Don't know anything about these organizations.

Don't know what they do. Don't know if I should.

Don't really hear about things until they are past...Also, as a small business owner, I can't really get away mid-day for meetings.

Excellent staff

great discussions and hopefully we will be able to develop a few project within our communities

I am engaged with them, but not to the extent that we have a strong working relationship. Interaction with members of EC&C is higher than OCVA, and every time I have interacted with either organization it has been a positive and useful interaction and experience. I'm fairly new to the area and my position. With the new role and outbreak of COVID, it has been more difficult to interact than I probably would have otherwise. A possible suggestion would be to have more targeted virtual meetings with specific purposes.

I am focused on climate crisis response, and have begun to connect with organizations that are integral to success. Tourism organizations are vitally important, as humans love to come here and a balance must be reached between local needs and the needs of the industry.

I am not in a travel & tourism industry (though that is my professional background until a career change 7 years ago). Thus, the low engagement is a practical matter, not a measure of the DMO's lack of activity.

I am on a committee working with OCVA and Travel Oregon on the Central Coast Food Trail Map and I am on a committee working on a tourism plan with my local visitors center on a strategic plan for Yachats.

I am the chair of their board

I am too busy running my business and can not spread myself out any more.

I am too busy with the flood of tourists that have hit the coast this summer/fall. It has been and still is like 4th of July weekend here at Wheeler on the Bay Lodge.

I believe local DMO to be Explore Lincoln City. I have no clue who the organizations are.

I believe the Chamber is our link to Tourism Oregon on the Central Coast; there is very little information passed along from the Newport Chamber, however the Lincoln City Chamber does a wonderful job. These two neighboring towns are very different with the tourism experience.

I didn't even know there was a regional DMO.

I do not know why.

I do not want to engage with tourism or any associated organizations. I want a good, affordable community in which to live and raise a family- to which the tourism industry does more harm than good.

I don't know who the dmo is

I don't know who these organizations are? Are they our chamber?

I have a small service and not that engaged.

I have enormous admiration for the creativity of Explore Lincoln City, but it has done zero specifically for our struggling guesthouse.

I have found our regional group to be very clickish and not very helpful. I tried several times to get involved at a board level and was told I was not needed.

I have frequent communication with the destination development manager. Would like to receive updates from the director

I have not heard much from anyone lately.

I know and interact with our LDMO and RDMO frequently and collaborate on issues

I live in the southern Willamette Valley (Lane County DMO). My photography workshops so far have concentrated on the southern Oregon Coast. I post photos on social media from all regions of Oregon and tag the representative DMO. Only occasionally do I see an acknowledgment, Like, Comment, or Share from any of those DMOs.

I need to learn more.

I no longer own a business but when I did several years ago, the regional DMO's seemed more interested in working with the large businesses than the smaller ones. I maintain membership in our local Chamber of Commerce so as to still have influence and stay engaged in the changing community.

I seek involvement and work with many local government committees and other non-profits. OCVA has been difficult to work with. Tillamook Coast is a bit easier but feels overshadowed and busy with larger businesses here.

I very engaged with the local DMO through their director and meetings with the director.   Not to engaged with the Coastal DMO. It is hard to get them to keep are area informed and participate with our area.

I was involved several years ago with the rural tourism group. In the end, it was a disappointment as everything was dictated from the Portland area.

I work for our local DMO.

I work for the local DMO and am regularly involved in ongoing projects with OCVA

I work in land use management as a volunteer and as a member of our community association so we do what we can locally to make things better for our few businesses and services industry.

I work with OCVA in Destination Development/ Management

I'm satisfied

I'd like to know more on what resources are available on the Oregon coast. We were well positioned for covid grant funding, but were not selected.

I'm a long term resident of the central coast, I'm a volunteer member of a city bicycle & pedestrian committee, thus I'm interested in building & promoting the use of much much much better pedestrian & cycling infrastructure on the coast both for locals and tourists.   There are only one or two businesses or organizations that have shown any interest in those goals.

I'm just not aware of these groups.

I'm not sure how to engage.

In my opinion the region, Oregon coast needs to be split into two-- north coast and south coast. Nothing we do is similiar to the entire coast. South coast has an entirely different climate to begin with, and can offer year round tourism that isn't reliant on short day trips from Portland residents. Nor is the South Coast supported by any real infrastucture, we have one highway in, and out-- thats it, until you get to Coos Bay. We rely heavily on over night visitors. My assumptions about the lack of exposure we get would be because no one at T.O. regulary visits the South Coast, so how would you know what it is we have to offer.

In my role, I have no interaction with these, but would like to

It is not that I dont want to. We are a very samll company and my times is spread very thin.

I've been told in the past that some of my ideas don't conform to the status quo. With a closed archaic mind set by these so called officials what is the use. Wrong!!!!!!!!!!

Just reflects natural frequency of interactions and realization that larger organizations are inherently less on the ground and personally interactive.

Just started engaging. Have loved every minute of it AND learned soooo much.

lack of knowledge of these org.

Local isn't very advanced in their efforts. Coastal dmo seems to know what they are doing.

Low ratings.   Information is not shared

My impression is the destination marketing organization has over-promoted visitation with no concern for impacts on the natural beauty/resources, and now we're "paying" for it with over-use, inadequate facilities (e.g. restrooms) and trash collection. Visitors act like they're slumming at the coast with no regard for their destructive behaviors and attitudes. We live here for calm, beauty, and NOT THE MONEY! Refusing to wear masks, bringing Covid to our small communities, generally being arrogant. Tillamook Hospital has only 24 beds! Think about a spike here...how could people be cared for?

Nan Devlin and her team have been great to work with when we have questions or concerns!

Nan Devlin's team is incredible. Moreover, by "team" I include not only those employed by VTC, but also all the stakeholders and partner organizations who are an integral part of VTC's success.

No one has asked.

no time

Oregon Coast Visitor's Association should be more engaged in decision making and strategy development and implementation on the South Coast. We have extremely high engagement in destination development but little to none on the marketing and strategic development.

Other than occasional newsletters and surveys, I have little interaction with DMOs.

Our local DMO (the Chamber) is very ineffective and has been for several years now.

Our RDMO doesn't appear to be doing anything to aid tourism here. We are one of the most active entities in our area involving tourism and our RDMO doesn't even communicate with us.

Retired

retired resident

Some of the dmos on the south coast are not active, OCVA is always doing things.

The Chamber of Commerce would get new leadership and start having meetings. Then, they'd stop. I've seen this several times in the decade I've been here. Of course, during the pandemic communication has almost exclusively been emails about grants and loans, nothing else. Oh, except we found out a much abbreviated version of a festival was going to happen about two weeks ahead of time.

The local DMO is inactive.   I am very engaged with OCVA.

There are no effective local DMO's in Curry County right now. The City of Brookings is understaffed; the City of Gold Beach has closed their visitor center during Covid (note: they were open during the summer); and I don't know who in Port Orford is supposed to be acting as the DMO. The County just implemented a TLT and has a tourism advisory council, but I don't think they have the capacity to act as a county DMO yet.   Coos County, however, is much better, and I do interact with both the Coos Bay/North Bend Visitor's Bureau regularly.

There are numerous coast promoting organizations. I think some have merged but it's been very confusing to try & keep them all straight.

They haven't been very open to listening to input from the community.

Time constraints.

To be honest, I am relatively new to my current organization and I am not aware of how much work we do with DMOs, but certainly haven't heard much of anything from other staff members about it.

Very cooperative

Very engaged in helping us promote our capital campaign to make improvements to enhance the visitor experience

Visit Tillamook Coast is an "exclusive" organization and the director only works with "chosen" businesses/organizations. As a local media, we have been eliminated from receiving press releases and have little to no contact. In addition, as a representative for several local businesses, I participated in the North Coast Food Trail development and other programs and have been "deleted" from those mailings. The director's unprofessional communications have been repeatedly reported and nothing has been done to correct the problem. VTC needs new leadership. VTC does not utilize local resources for marketing, writing, video, etc.   OCVA has much better leadership, but both organizations have too many meetings and all they do is talk about solutions, but no programs ever get launched.

We are a community college, so the linkage with tourism isn't clear. However, thee are links with workforce education, so from that perspective we could probably benefit from at least some touch points.

We are the DMO for our city. We have board representation on OCVA.

We do all we can in Florence to draw from around the state, especially from Portland metro. We need help from TO & OCVA to push visitors our way in harmony with our efforts to pull them. If travelers could wake up to the entirely different experience of uncrowded beaches, dunes, and lakes--and a less commercial vibe of Florence as compared to everything north of us--we think more people would be likely to drive the little extra to come spend their money here. We'd also appreciate TO & OCVA's inclusion of our "Oregon's Coastal Playground" positioning. Thank you.

We have a good partnership with our local Chamber of Commerce and Visitors Bureau. I'm also often in touch with Jesse Dolin at Oregon Coast Visitors Association and know he's someone I can reach out to for coastal tourism-related support.

We have been unable to volunteer

We have excellent relationship with Travel Lane County and OCVA's Central Coast representative Jesse Dolin. Not so great with the other OCVA executives and staff.

We have great assets here with Adventure Coast team and all their enthusiasm

While our organization is not directly a tourism based social service provider we are often left to address needs of visitors who experience violence while on vacation in our county. We are a public safety provider and during the summer we have a bump in our services related to visitors from outside our county that we provide services for after a domestic violence incident or sexual assault.

Who are they? At one time, one or the other was somebody on the City of Brookings' payroll but the City of Brookings wants nothing to do with the Southern Oregon Kite Festival despite the money it bring to the city's businesses each summer.

Work for the local DMO and am on the RDMO board

Q58: If you would like, please explain any of your ratings for your satisfaction with your local or regional DMOs:

Again, I need to learn more.

Again, who are they? I'm familiar, from a decade of listening to presentations from TO, with what OCVA is as an organization but in reality, I've never had a personal interaction with OCVA outside of those presentations.

Don't have much interaction with OCVA but would like to see more opportunities.

Don't know anything about these organizations.

Don't see a lot of communication between the regional DMO in our market. It may be that Lincoln City, given its robust and professional VCB (Explore LC), seems fine on its own. Leads to some lack of communication, though, and a general feeling that Lincoln County doesn't factor strongly into the OCVA plan. That said, there are some shining points - Jesse Dolin is one example of a rock star who is engaged on behalf of coastal businesses on multiple fronts.

Everyone is knowledgable and generous with networking and cooperation!

Excellent staff, well marketed, I wish I could work with them all the time (but I know how busy they are so I try to limit how much I bother them)

Feeling neglected. We are the one best travel location for Oregon's second-largest media market and a desperately underappreciated asset to Oregon's lists of best places to go. With the next installment of the "Dune" movie franchise, we should be getting a big push of support do draw/push fans to the place that inspired the books and movies. But that's just one idea. I don't even like sci-fi, but I see tremendous potential. It seems anytime there is a marketed movie reference it is for Goonies and Kindergarten Cop, but there is a valuable segment with sci-fi fans.

good advertising opportunities

have had zero interaction

I do not want to engage with tourism or any associated organizations. I want a good, affordable community in which to live and raise a family- to which the tourism industry does more harm than good. I have a small food business that works to feed the local, year round population. The tourism industry is the cause of most of the problems that affect my small business.

I don't know how to engage with them as I do not directly manage my business.

I get information from my local chamber and the Oregon Coast Visitors Association.

I have enormous admiration for the creativity of Explore Lincoln City, but it has done zero specifically for our struggling guesthouse. I have not paid much attention to the OCVA but I have been impressed with their website.

I have not heard much from anyone lately.

I have personally not been involved.

I know the regions were initially identified as seven but there has been conversations over the past few years in adding a few more regions. Although the regions may be determined by population or the overall draw in tourism experience, what works for the North Coast is not what works for the rural South Coast. I feel this applies to the Eastern Oregon region as well. I don't know if more regions would dilute impact but pooling our DMO's in more collaboration would be advantageous.

I like the Travel Oregon social media presence but I have not felt anymore engaged than a tourist would be. Would like to incorporate our business into some of the posts.

In Newport, there isn't enough marketing to create a strong presence, this leaves the residents out of the tourism loop creating a lack of information and support. In contrast, there is a great deal of positive support and communication concerning DMO in Lincoln City.

Like ease in linking ads

Local DMO is tightly guarded by single individual with no outside input. Regional DMO is only interested in furthering its own employees endeavors

No connectors to these groups.

not aware

Not aware of how I can partner with these entities

Not dissatisfied, but I think they could take better advantage of the many social media posts by Oregon professional photographers. This is true for not just my local DMO, but statewide.

Not engaged at this time so no opinion.

not really involved

OCVA has been really supportive of us during the series of crises we've been navigating this year!

Other than occasional newsletters and surveys, I have little interaction with DMOs.

Our local DMO and OCVA do a great job marketing our region, providing communication and training resources.

Our small chamber has been completely cut off from being offered any resources. If you visit the website you will see the head of the organization's business promoted rather than a photo of Twin Rocks or the little red caboose in Rockaway.

said it all w/ question 31

Same comment as #37 above.

Satisfied because of the amazing destination development work.

See above, lack of interest in goals that matter to me & others living in the community, walkability/safe & enjoyable walking in all of the town (and other coastal towns) and creation/maintenance of cycling infrastructure for locals and to welcome and encourage long distance cyclists following the Oregon Coast Bike route.

See explanation above ... VTC should not be funded until they are inclusive to all. OCVA should be the local DMO.

the Local Yachats DMO is inactive. OCVA is very active in my local area and in the region.

The state tourism is only money for nothing

They are extremely responsive and talented.

They seem to do a good job. We have been overwhelmed by visitors

Truly impressed with the work being done by TO and OCVA

We are thevDMO

We are working closely with OCVA on the Central Coast Food Trail, plus economic development/attraction recruiting.

We don't engage directly enough at this point to have an informed opinion on OCVA.

we need some success to build on - lots of ideas that will hopefully come to fruition

While our organization is not directly a tourism based social service provider we are often left to address needs of visitors who experience violence while on vacation in our county. We are a public safety provider and during the summer we have a bump in our services related to visitors from outside our county that we provide services for after a domestic violence incident or sexual assault.

Q66: Is there anything else you would like to share about the topics discussed in this survey?

Continue to do what you currently do and do quite well. Don't broaden your mission simply for the sake of current fads or political correctness. You simply cannot be all things to all people at the same time. This business and our society is complicated...don't compromise Travel Oregon's hard won credibility by taking on too much and trying to solve all the world's problems.

Fear and misinformation is creating a great divide that is bolstered through politics, shameful. Neither side is free from blame, although, it's far more likely to see a Trump sign vandalized that a Biden sign - who's supporters are doing the vandalizing and most harm?

I certainly appreciate the opportunity to share my perspective. Travel Oregon has always had our communities and businesses best interest in mind. I hope economic recovery brings TO back to full staff soon.

I would like to see more outreach from Travel Oregon. Thank you

I'm happy To talk more if there are more in-depth interviews or follow ups going on. I couldn't check all of the boxes of different tourism related businesses I currently work for and interact with. I filled this survey out on my phone because I was stuck behind an accident on 101, so I did my best to be thorough with my phone limitations. - Leslie Palotas, Vision Program Coordinator, Newport Oregon l.palotas@newportoregon.gov

In my opinion, the hierarchy of travel organizations under TO's umbrella is an excellent idea but it doesn't seem to reach into the hinterlands. I suppose Newport does quite well and gets whatever services it needs, being a big money-generating operation, but when you get down into the far South Coast, we seem to be left alone to sink or swim.

It is a critical balance promoting the coast while minimizing the transmission of COVID.   Local residents need to be comfortable in the protective protocols and PPE's being used to protect our staff, guests and prevent the transmission of the virus to residents in the local community. Local businesses must continue to follow the identified/mandated protocols and use of PPE's and communicate this to the community.

Lets look forward and plan for tomorrow. We have had a tough year, but lets move forward stronger and more resilient than before.

Local coastal ports that charge fishing guides hundreds of dollars to launch at their facilities that are available to the public for nominal daily parking or launch fees doesn't make sense to me. Many if not all of these facilities have been funded and exist because of my tax dollars and the support of the Oregon Marine Board who I pay annual licensing fee to. Why deter guides from bringing clients from all over the state, country and world from bringing tourism dollars to the communities we guide in? Winchester Bay, Alsea Bay, Port of Florence, Newport, Depoe Bay all charge guides fees to launch above that of the general public. These communities and facilities should be welcoming us as opposed to charging us. The money our clients spend in the communities that these facilities are located is substantial. The money we as guides spend is also substantial. I feel as a guide that is licensed and insured unwelcome in these communities based on the fees we are required to pay. I guide 200 days a year. I bring 2-6 clients to a fishing community 200 days a year. I spend money as do my clients. I feel this "guide fee to utilize facilities " needs to stop.

My responses to this survey are based on my 30+ years of living in Oregon, as the author of an award-winning guidebook "Photographing Oregon", and as a leader of photography workshops. My workshops have primarily focused (pun intended) on the southern Oregon coast, but I would like to expand the offerings to include several other regions in the state. Some factors in that effort include the permitting process and costs for state parks, USFS districts, and BLM regions.

No, but thank you for caring and reaching out with opportunities like this!

Please improve on engaging small business owners...when iIve attended meetings, it's been a lot of 'preaching to the choir' of large businesses, non-profits & semi governmental agencies.

Probably, but I'm out of gas at the moment.

Questions 6-9 left out the options of delaying hiring existing positions (with retirements, there have been decisions to delay hiring due to revenue impacts) and with the economic trend of impacts and recovering or worsening...our trends are seasonal so this is not an easy response. I think we have had impacts that are significant and recovering for summer/fall but worsening again winter and don't know what the trends will be going forward at all. Lack of certainty is the toughest challenge, that's why I rated market research as a priority. Thanks for your survey and work!

reach out more to local residents and support their concerns about threats from visitors and those who market their properties from remote locations...too much victimization of locals

Reflecting on these questions, I would like to say that many people dream and put a lot of thought into opening businesses that will be of service to tourists and locals. Usually the role of the locals is underestimated. Something with statistics for potential business startups as well as existing owners (a guide) would be interesting and maybe helpful. For example, what % of buiseness is from tourism, do you want to increase that number, what other businesses would help your business,

The state room tax needs to be at 1.8% again. So we can continue to get funding to promote our regional area. Also, get more dollars to Travel Oregon to help promote our state. I think