

2017 REGIONAL TOURISM STAKEHOLDER SURVEY

OREGON COAST

This report summarizes findings from a February, 2017, 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. Findings are presented for respondents from the Oregon Coast Region with additional breakdowns by coastal sub-regions for context.

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SURVEY GOALS

The 2017 Oregon Tourism Stakeholder Survey was designed on behalf of Travel Oregon and regional tourism partners to elicit feedback from individuals and organizations linked to the tourism industry. The goal of the study was to obtain feedback and direction for Regional Destination Management Organizations (RDMOs). The survey built on a framework of past stakeholder surveys and was developed collaboratively by Driftline Consulting, Travel Oregon, and RDMOs.

METHODOLOGY

The survey was conducted online and was distributed in February, 2017, via emails and an open URL to Travel Oregon databases with additional distribution from RDMOs. A total of 1,007 valid responses were collected. Results presented in this report are segmented by the region in which the respondent indicated they live or work. That is, this report aggregates responses from the Oregon Coast Region to provide relevant insights to the Oregon Coast RDMO. In addition, questions were asked in a way (prioritization ratings) such that it is possible to compare across tactical opportunity categories. In the report the terms stakeholder and respondent are used interchangeably.

SIGNIFICANCE

Because this survey was not conducted from a random sample it is not appropriate to perform typical statistical tests on the data. Therefore, confidence bands are not presented. The survey results should be viewed as an aggregation of relevant and thoughtful feedback from constituents. 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.

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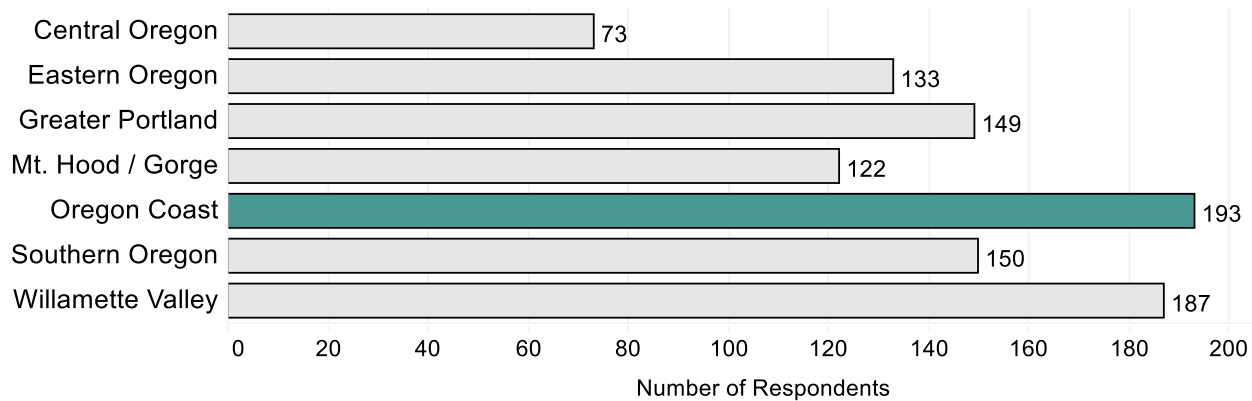
KEY FINDINGS

- **Positive Views on Tourism and the Direction of the Industry:** Stakeholders view the direction of tourism in the state and the region positively (55% and 70% agree that they are satisfied with the direction of the industry in the state and region respectively). While these are high numbers, it should be noted that they are lower than the norm for the state. Additionally, when looking at coastal sub-regions, Southern Coast respondents expressed more concern about their communities not understanding the value of tourism (page 4).
- **Tactics Identified by Over 2/3 of Respondents as High or Very High Priority:** There were a handful of tactics across all categories (Marketing, Development, Management, Capacity Building, Industry Services, Global Sales) that stood out for their importance to stakeholders. Listed below are these “standout” tactics and the percentages of respondents listing the tactic as a “high” or “very high” priority for the region to pursue. The bullets below are for the entire Coast, though breakouts by coastal sub-region are presented in the report.
 - Planning/Management: Increase visitation to the region during off-peak seasons (85%)
 - Marketing: Leveraging Marketing Opportunities with Travel Oregon and other tourism organizations (79%)
 - Marketing: Developing or enhancing current regional destination website (76%)
 - Marketing: Enhancing non-paid social media presence for regional social channels (69%)
 - Capacity: Improve quality and professionalism of customer service at tourism-related businesses (68%)
 - Marketing: Creation of more region-specific stories (68%)
 - PR: Targeted communications to publications and journalists for the region (66%)
 - Capacity: Increase skilled workforce in the tourism industry (66%)
- **South Coast Respondents Desire More:** Relative to the rest of the coast, respondents from the South Coast were more likely to rate individual tactics as a “high” or “very high” priority (excluding Global Sales tactics). This relatively higher prioritization of tactics suggests that there may be less capacity in the South Coast or that expectations of the RDMO may be unrealistically high, as an RDMO will certainly be constrained by budget and staffing (pages 13, 15, 17, 19, 21).
- **Custom Questions: Engagement and Satisfaction:** The Coast asked stakeholders to evaluate their engagement and satisfaction with their local DMO and with the Coast RDMO. Reported engagement levels were higher with the local DMOs but satisfaction (the percentages indicating “satisfied” and “very satisfied”) were very similar for local DMOs and the Coast RDMO (page 21).

RESPONDENT PROFILE

The figures below present the overall number of respondents as well as the industries in which respondents work. The question for Organization Type was a multiple response question, allowing respondents to select more than one industry or organization type. Thus, percentages will not sum to 100%. Relative to other regions, respondents from the Coast are more likely to be involved with lodging, education, or an attraction.

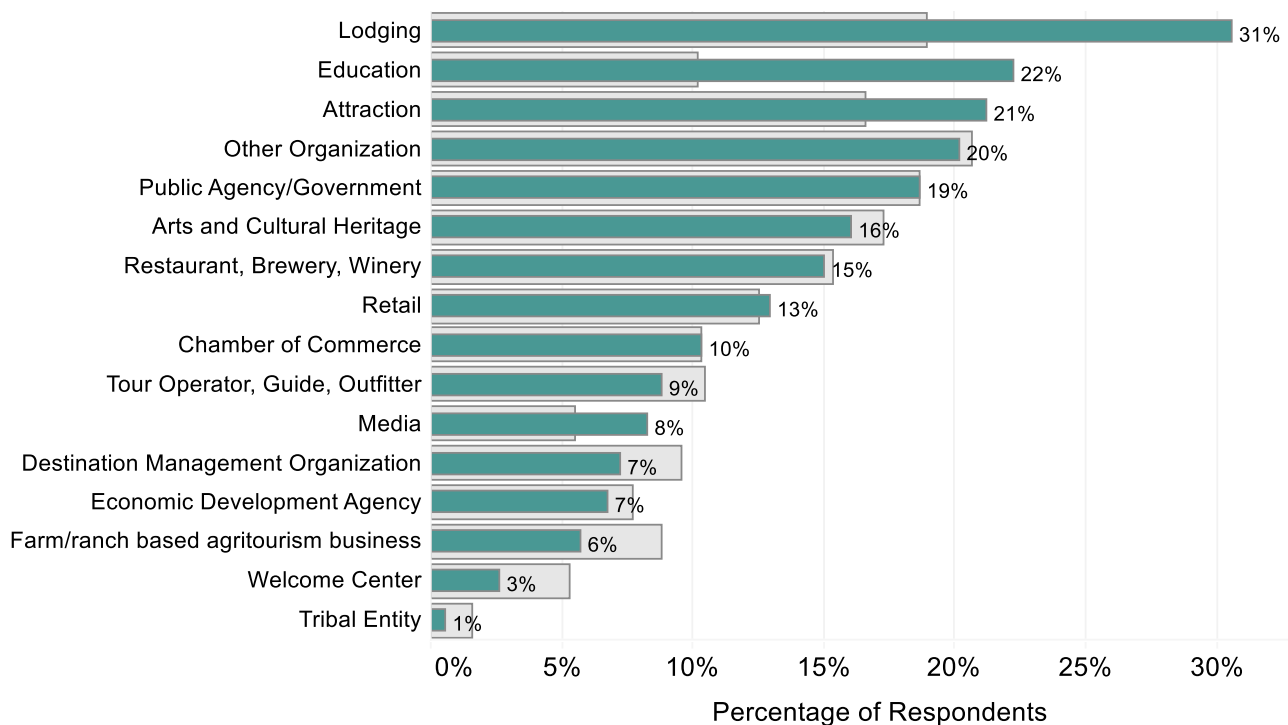
Number of Respondents



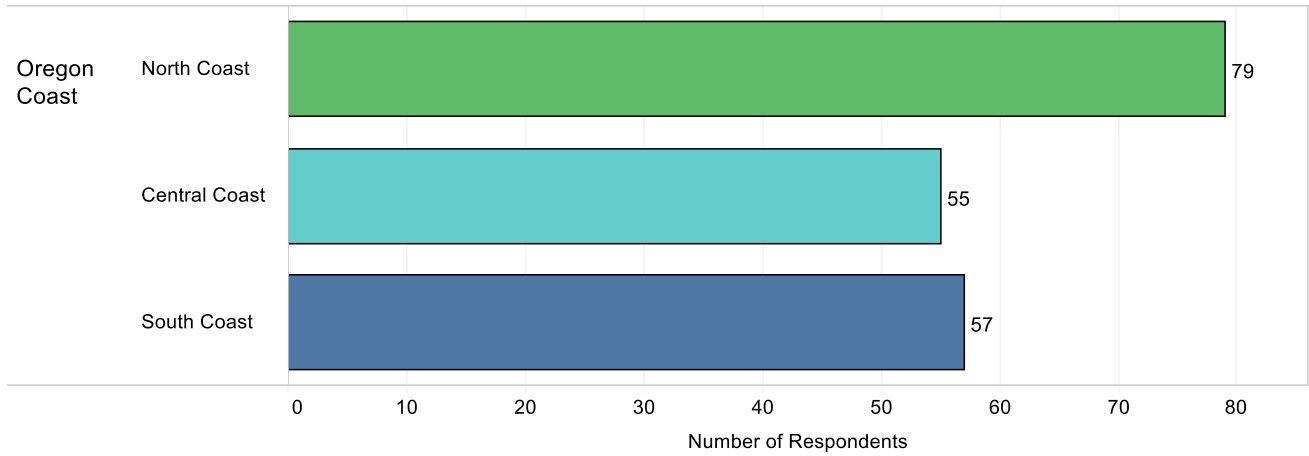
Organization Type of Respondents

■ Oregon Coast
■ All Other Regions Combined

Q. Your responses will be aggregated and analyzed by region, helping to inform strategies and investments for one specific region. In which region do you work or in which region is your business/organization/attraction located?

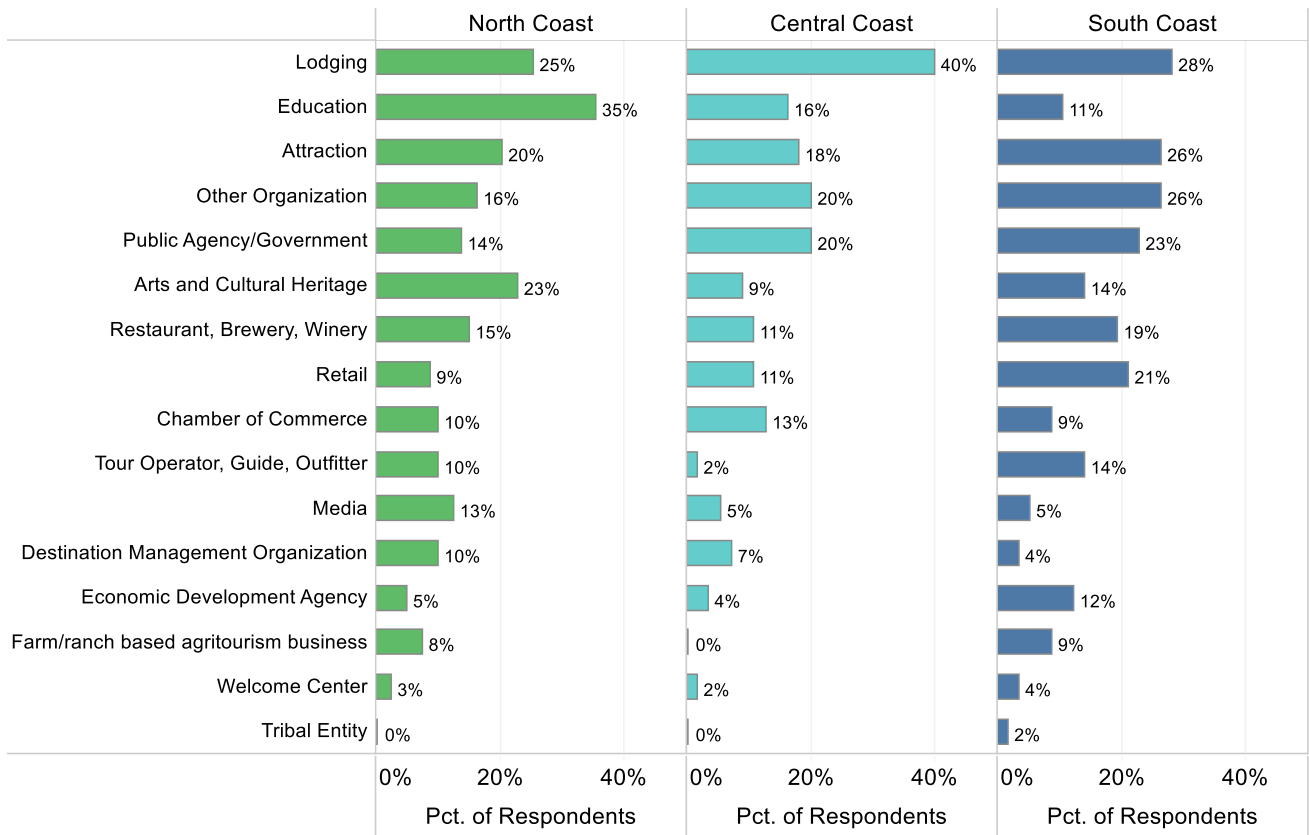


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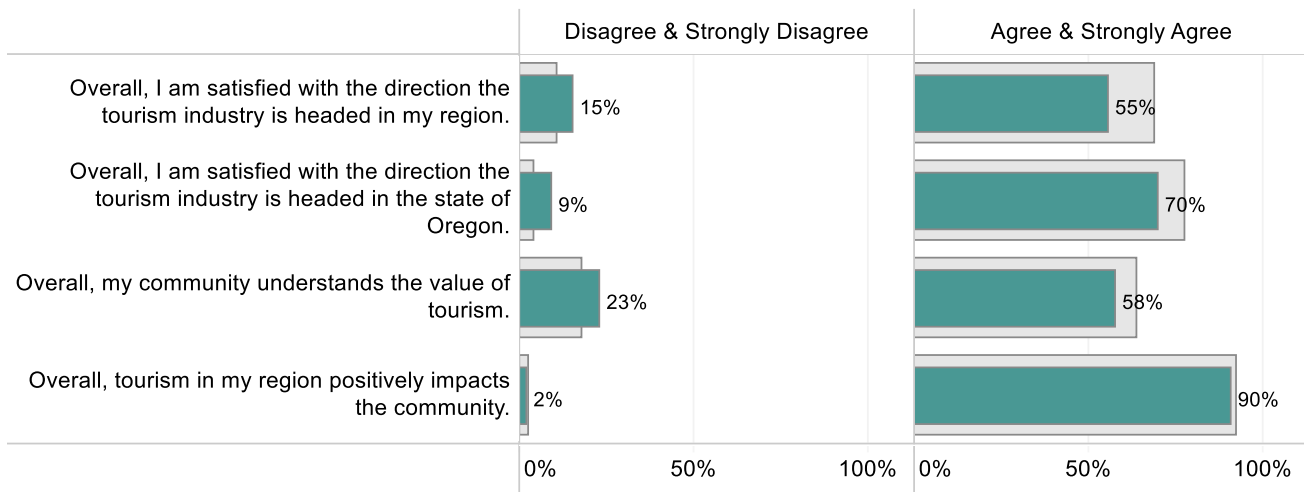
INDUSTRY HEALTH MEASURES

On measures of overall industry health, respondents from the Coast Region indicate high levels of satisfaction. However, smaller percentages of Coast respondents agree that the industry is headed in the right direction relative to statewide norms. It is also notable that high percentages of respondents from the South Coast disagree with the statement, “Overall, my community understands the value of tourism.”

Tourism Industry Health

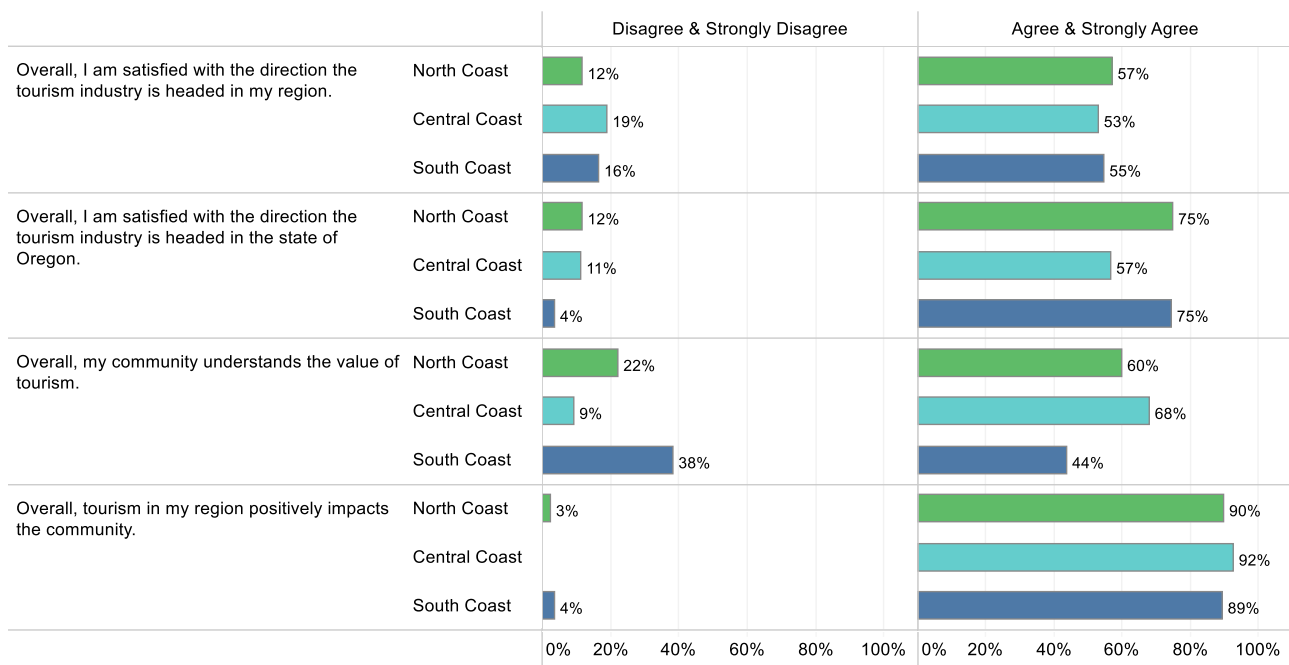
■ Oregon Coast
■ All Other Regions Combined

Q. Please indicate the level to which you agree or disagree with the following statements. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



Tourism Industry Health

Q. Please indicate the level to which you agree or disagree with the following statements. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



In addition to the structured question on the state of the tourism industry, respondents were asked an open-ended question about the overall health of the tourism industry. Those responses have been included on the following pages for the Coast Region along with the overall ratings for additional context. The responses are quite diverse in their scope with no one theme dominating.

	<i>Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.</i>	<i>My community understands the value of tourism.</i>	<i>Satisfied w/ direction of tourism industry in my region.</i>	<i>Satisfied w/ direction of tourism industry in Oregon.</i>	<i>Tourism in my region positively impacts the community.</i>
Central Coast	A need for more cohesion throughout the coastal communities would leverage resources and provide for better visitor experiences	Strongly Agree	Agree	Agree	Agree
	Avoiding overuse - like loving tide pools and trails to death with too many users revisiting the same sites, so that after a few months the experience is diminished.	Strongly Agree	Agree	Agree	Agree
	Eco and sustainability focus on preservation and protection of nature and natural resources must be a priority for Oregon Coast tourism.	Agree	Neutral	Neutral	Agree
	Growth in coastal tourism is having extremely strong economic returns for the private and public sector; however, stronger public investments in local infrastructure and natural resources need to be established as a result of increased pressures from tourism. This is particularly important given the limited existing resources and capacity of rural coastal communities and natural resource agencies.	Agree	Neutral	Disagree	Strongly Agree
	I am still new to the company and Oregon so am in evaluation and "paying attention" mode. I was very active in the travel industry in SoCal so understand the nature of how marketing funds are used and distributed.	Strongly Agree	Neutral	Neutral	Strongly Agree
	I believe it is very strong with excellent partnerships between the local businesses, DMO's and RDMO's.	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree
	I feel like Travel Oregon could do a lot more in support of the smaller lodging people, who do short term rentals and have micro-businesses.	Neutral	Disagree	Agree	Agree
	I want the Salmonberry Trail Project to get up and running! Virtually nothing could better benefit tourists and locals alike!	Disagree	Agree	Agree	Strongly Agree
	More mainstream advertising for Lincoln City. TV spots advertising the beach in Lincoln City. Seven miles of beach and lots of wave action ,especially during storm season!	Neutral	Disagree	Neutral	Strongly Agree
	Off-season tourism on the coast is struggling.	Strongly Agree	Agree	Agree	Strongly Agree
	Our TRT revenue trends show solid growth. We are currently being presented a tremendous opportunity to accelerate these trends.	Agree	Strongly Agree	Strongly Agree	Strongly Agree
	People are certainly coming in droves to the entire Oregon coast... there is serious need for investment in underlying infrastructure and natural resource protections to support a growing tourism industry. Specifically affordable housing for service industry workers to who work in local businesses and funding to help preserve and protect the places that people are coming to see. We are on the bring on a serious degradation of both... no one wants to come visit towns with shuttered businesses, increase drug usage/homelessness and trashed natural spaces.	Neutral	Neutral	Neutral	Agree
	Perhaps a bit more focus on the new things added each year rather than the same things that have been around for decades.	Agree	Agree	Agree	Strongly Agree
	The growth in coastal tourism over the past several years is marginal when compared to other regions. While we have some communities that seem to understand what they are doing for marketing the coast our current RDMO has shown little to no knowledge when it comes to destination marketing. The fact that they have been allowed to remain in charge after being quoted as saying they don't think increasing tourism on the Oregon Coast is a good thing is appalling.	Strongly Agree	Strongly Disagree	Agree	Strongly Agree
	The overall health is good, however we have a corrupt City Manager and Mayor.....so the Chamber is not receiving the tax money we are entitled to....	Agree	Strongly Disagree	Strongly Disagree	Strongly Agree
	Tourism is sort of double-edged sword here - while it brings dollars into the area, it takes away from available housing. In this area, it's nearly impossible for a new employee from outside the area to find a place to live - the bulk of past available housing has apparently been converted to vacation rental use.	Agree	Agree	Agree	Agree
	We are up against hundreds of new competitors via Air B&B. Last year was our worst revenue in our 11 years.	Strongly Agree	Strongly Disagree	Disagree	Strongly Agree
	We should not be promoting tourism in sensitive areas - there have a number of deaths this year.	Agree	Neutral	Neutral	Agree
	What I can see from my corner of OR, Travel Oregon is doing a great job promoting our state locally, regionally, nationally, and internationally.	Neutral	Strongly Agree	Strongly Agree	Strongly Agree
	While tourism is a valuable source of income, it is not a stable source of income year-round. Tourism needs to become a more well-rounded source of income for depressed areas of the state to gain a level of economic stability and it must partner with family wage jobs in order to enhance communities economic health.	Neutral	Disagree	Disagree	Agree

	<i>Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.</i>	My community understands the value of tourism.	Satisfied w/ direction of tourism industry in my region.	Satisfied w/ direction of tourism industry in Oregon.	Tourism in my region positively impacts the community.
North Coast	A monopoly exists in Astoria along with a conflict of interest	Strongly Agree	Neutral	Agree	Strongly Agree
	Although I selected neutral, I do think that tourism in our region is viewed as a necessary evil. In encouraging tourism, there needs to be adequate infrastructure in place to accommodate the population increase. That infrastructure does not exist in many places on the north coast.	Agree	Neutral	Neutral	Neutral
	I am actually fairly unaware of the large Oregon picture beyond attending the OGCT. I wish there was more information around the year.	Agree	Neutral	Agree	Strongly Agree
	I am concerned about the impact of the abrupt drop in international tourism and the economic impact to the region.	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree
	I see financial conflicts of interest quite frequently in the industry.	Strongly Disagree	Agree	Neutral	Neutral
	I think Travel Oregon has done a great job at highlighting natural resources and unique, farm and artisan based destinations.	Disagree	Neutral	Strongly Agree	Agree
	I would like to see tourism efforts support local infrastructure - especially as it relates to greenways, bike lanes and trails systems. (Salmonberry Rail-to-Trail can/should be a state priority)	Agree	Agree	Agree	Strongly Agree
	In my area, the farmers struggle to accept the benefits of the tourism, and tourism struggles with the benefits of farming	Disagree	Neutral	Agree	Agree
	In our area, we struggle to keep up with the demand of tourism: roads, lodging, services	Neutral	Neutral	Strongly Agree	Agree
	In some cases we are too healthy, and need to put more effort into Sustainable Travel	Agree	Strongly Agree	Strongly Agree	Strongly Agree
	It is difficult to promote tourism in our county as so many of the long-time residents do not want tourism and do not see the value in it for the community.	Disagree	Neutral	Neutral	Strongly Agree
	It requires ongoing education to help the community understand the value of tourism, especially if they feel it's impacting their way of life.	Neutral	Agree	Agree	Agree
	It's too focused on getting people in hotels when there are many second home owners.	Agree	Disagree	Disagree	Agree
	National Geographic's Geotourism. We are one of America's Best Art Towns & live in one of the most beautiful places in the world & best beaches (thanks National Geographic).	Strongly Disagree	Disagree	Disagree	Strongly Agree
	These are reasons why people travel.Why not promote them.				
	Oregon needs more exposure to a worldwide audience	Agree	Neutral	Neutral	Agree
	Sustainability and visitor disbursement throughout locations and seasons is becoming an essential component of what Travel Oregon must do..Concern for fragile ecosystems in all parts of Oregon with damage from too many visitors is a huge factor to consider. Livability for Oregonians is being impacted in Portland and in other communities where locals view tourism as being "out of control". Although tourism can be healthy economic development it is vital that Travel Oregon consider the negative impacts and unintended consequences of tourism and partner with the conservation community statewide and nationwide to ensure that our precious resources are protected for the future of all Oregonians and our visitors. Thank you!	Agree	Agree	Agree	Agree
	The biggest concern I have is increase traffic at too high of a rate. I recognize that many people are focused on sustainability - which is great. But as more people move to the state, more are also visiting. At what point do we reach an undesirable point of impact for too much volume?	Strongly Agree	Agree	Agree	Strongly Agree
	The Coast receives a significant number of visitors which impacts the coastal infrastructure, particularly traffic congestion. Attracting more visitors without resolving the traffic issues does a disservice to both Oregon's tourism industry and to local residents.	Agree	Agree	Agree	Agree
	the future of tourism looks very bright to me	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree
	There are interesting opportunities still out there to be utilized.	Agree	Agree	Agree	Agree
	There is not enough focus on driving shoulder and opportunity season business	Neutral	Neutral	Disagree	Strongly Agree
	There seems to be little in a combined effort for new business. We see a fair amount of return business both in group and transient markets But we do not see true outreach or programs for new business. Why?	Disagree	Disagree	Disagree	Strongly Agree
	Tourism is strong, Thanks to all the partners working together. Our membership and participation with the Oregon Coast Visitor Association (OCVA) has been extremely beneficial and profitable.	Strongly Disagree	Strongly Disagree	Strongly Disagree	Strongly Disagree
	Tourism is the main industry in our community	Strongly Agree	Neutral	Agree	Strongly Agree
	We are a new attraction, still feeling our way along the advertising and sustainability path.	Agree	Agree	Agree	Strongly Agree
	We are overwhelmed during the summer with day trip traffic that park their cars, unload the cooler and beach fare and head to the beach. End of the day they go home. Leaving very few dollars in our local economy, tying up parking and creating frustrating traffic problems. The rest of the year we are desperate for more business.	Neutral	Agree	Agree	Agree
	We are working to encourage visitor traffic in the off seasons.	Agree	Neutral	Agree	Agree
	We get a fresh start here in tillamook	Neutral	Agree	Agree	Strongly Agree
	We just participated in the Rural Studio for our area. It was great. Thank you for the guidance.	Neutral	Agree	Agree	Strongly Agree
	Without needed infrastructure repair and development there will be many additional problems associated with tourism. The state of our roads being of utmost importance for repair and development. Tourism will never reach its potential impact if our roads remain in such unstable states.	Agree	Agree	Agree	Agree

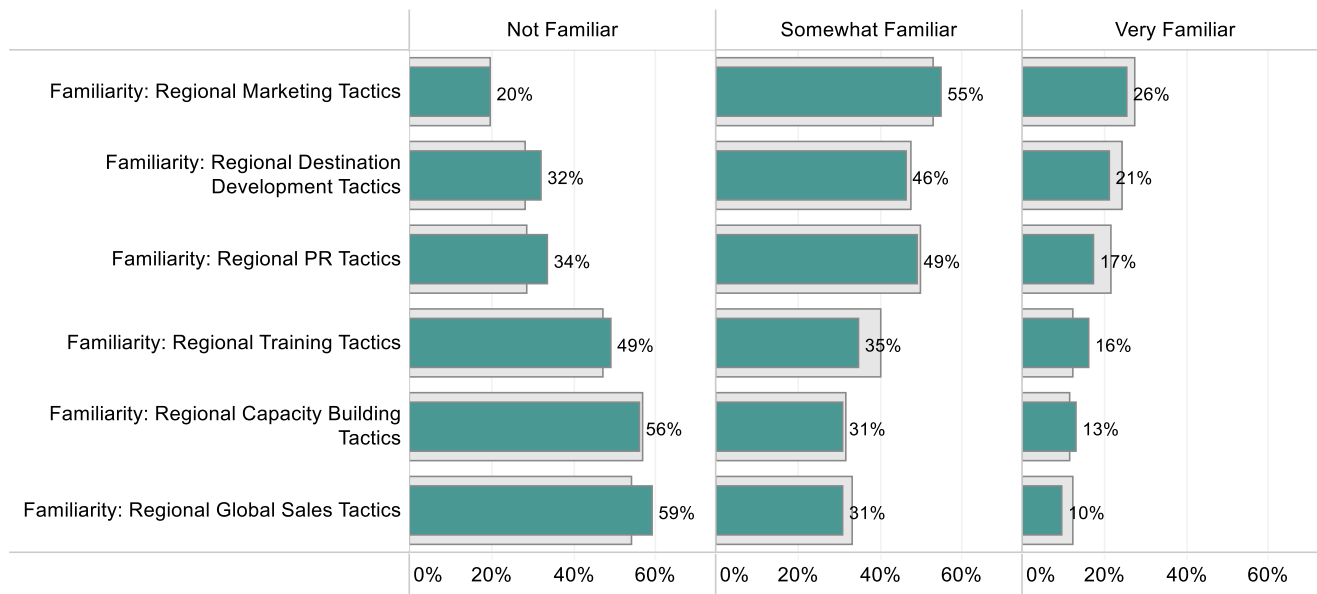
	<i>Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.</i>	My community understands the value of tourism.	Satisfied w/ direction of tourism industry in my region.	Satisfied w/ direction of tourism industry in Oregon.	Tourism in my region positively impacts the community.
South Coast	I am on several committees, working toward the Coquille Riverwalk, Coquille Carousel Project. etc	Agree	Strongly Agree	Strongly Agree	Strongly Agree
	As long as we continue to welcome visitors and make it pleasant to visit it will stay healthy. Coastal towns are very dependent on tourists, and need to create some boundaries for themselves to show respect for their own communities as well.	Strongly Agree	Strongly Agree	Strongly Agree	Strongly Agree
	By region i'm assuming you mean the oregon coast region.	Agree	Disagree	Strongly Agree	Neutral
	Everyone in my region is stuck on being the discount area. Instead of trying to put value on our area as the removed gem it is.	Disagree	Disagree	Agree	Strongly Agree
	Heads up, devices down!	Agree	Agree	Strongly Agree	Strongly Agree
	I think we need to better communicate the offerings of each small group within the larger groups. Apply the 3:3:Rest concept global to OR regional. And apply the rule of threes to all travel. Such as: Portland > Willamette Valley > Coos Bay.	Neutral	Disagree	Agree	Neutral
	It is great to see our region taking steps to improve our tourism development with the RTS and recently formed Coos county tourism workgroup.	Neutral	Neutral	Agree	Strongly Agree
	just moved to the area in April 2016, don't hear much about tourism efforts and don't know the tourism directives	Strongly Agree			Strongly Agree
	Local foundation work to set up tourism experiences is vital. Parking, education, Leave no trace, carrying capacity, guide services, shuttle services, etc. are all super important. We don't want to negatively impact our environment. The point is to bring \$\$ into our communities, not invite folks to come use our public lands for free or carelessly. Education will benefit both sides. Guided experiences are very important.	Neutral	Strongly Agree	Agree	Agree
	Overall Oregon's economy is reliant on tourism. I believe that The State of Oregon understands this, but some regions and individual communities are struggling with that same understanding.	Strongly Disagree	Neutral	Agree	Strongly Agree
	Reform logging regulations	Neutral	Neutral	Agree	Agree
	Seems limited to summer months. Can we capture more off season and shoulder season business?	Agree	Agree	Neutral	Strongly Agree
	Small businesses such as ours are what tourists like to visit and shop at while in our community. However, while the marketing of our region is doing well, the actual support of small businesses by the chambers of commerce in the county are struggling or nonexistent. Tourism and economic development work hand in hand. Our area is beautiful but the stewards of our environment need support.	Agree	Agree	Agree	Agree
	Spending tourism development dollars on "attractions" which provide few jobs and no manufacturing/return on investment helps no one but developers. By the same token, spending economic/tourism development dollars on marketing programs and "education" of business owners, in my opinion, helps no one but consultants. Overall, I'm embarrassed by the amount of money wasted on short term gains for developers and consultants who know nothing of the reality on the ground in southern Oregon. The poverty of our people and the ongoing problems it creates are one of the biggest challenges to increasing tourism. I literally have homeless and mentally ill people bothering my staff and customers and the county can do nothing for lack of resources and the state is trying to tell me how to develop a "tourism ecosystem." Really? Really?	Disagree	Strongly Disagree	Neutral	Neutral
	The economic state of Douglas county is truly sad. They are our most frequent visitor but the lack of leadership in Oregon to prioritize timber harvest in Douglas county is a complete disgrace. Instead of having a strong tourism base 70 miles away Oregon has to spend thousands attracting tourist from other countries. The fact that the majority of Oregonians struggle financially to recreate in their own state is pure testament to what the leadership in Oregon thinks of the average Oregonian	Neutral	Agree	Agree	Agree
	The health of Oregon tourism is good but can be better.	Disagree	Neutral	Disagree	Strongly Agree
	There seems to be a lot of focus on food and beverage, perhaps there could be more on local arts activities and activities for children/families		Neutral	Neutral	Agree
	TO work is impressive, local dmo tit tax use not being optimized ie not invested in tourism as it could be	Disagree	Neutral	Agree	Strongly Disagree
	Too many NIMBYists who don't understand the importance of visitation	Neutral	Agree	Strongly Agree	Strongly Agree
	We could use more public outreach on the value of tourism to our residents.	Disagree	Agree	Agree	Agree

Respondents were asked to indicate their familiarity with regional initiatives engaged in by the RDMO over the past 12 months. Coastal respondents were, overall, most familiar with marketing, destination development and PR tactics. Relative to other regions of Oregon, Coastal respondents had lower levels of familiarity with all tactics except training and capacity building.

Familiarity with Regional Initiatives

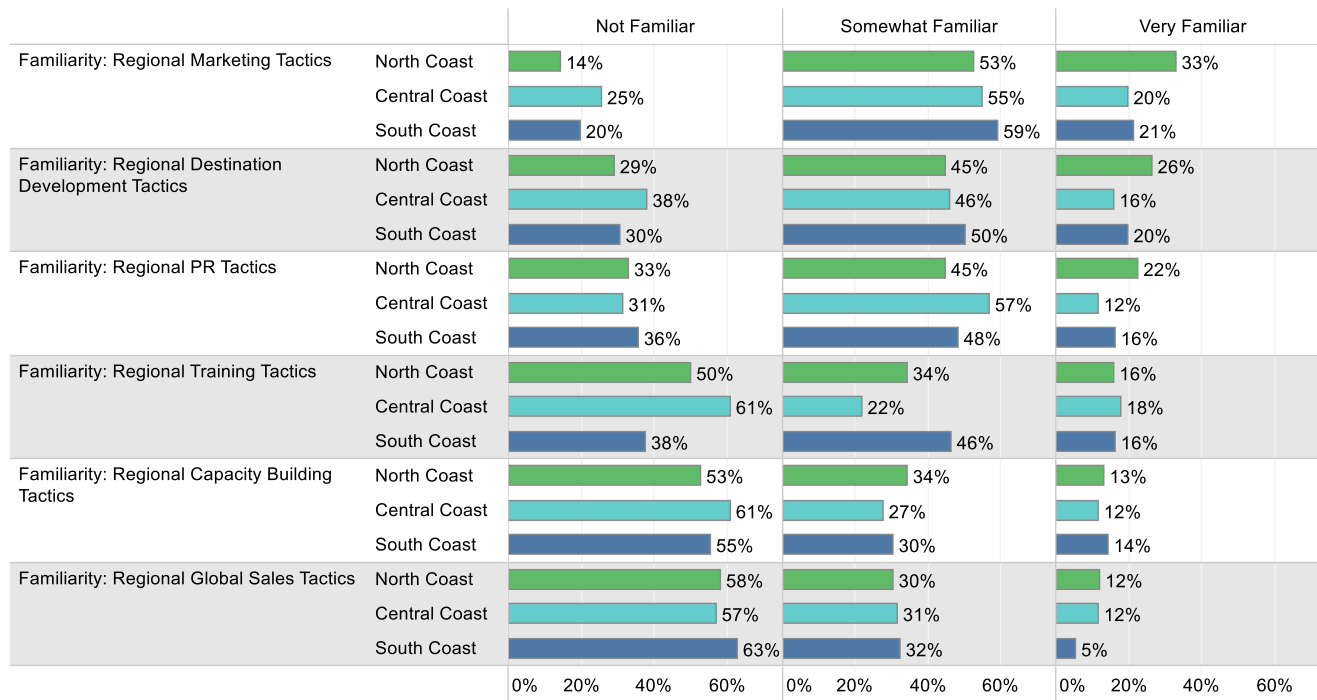
■ Oregon Coast
■ All Other Regions Combined

Q. Please indicate how familiar you are with the initiatives undertaken by your regional destination management organization in the following areas in the past 12 months:



Familiarity with Regional Initiatives

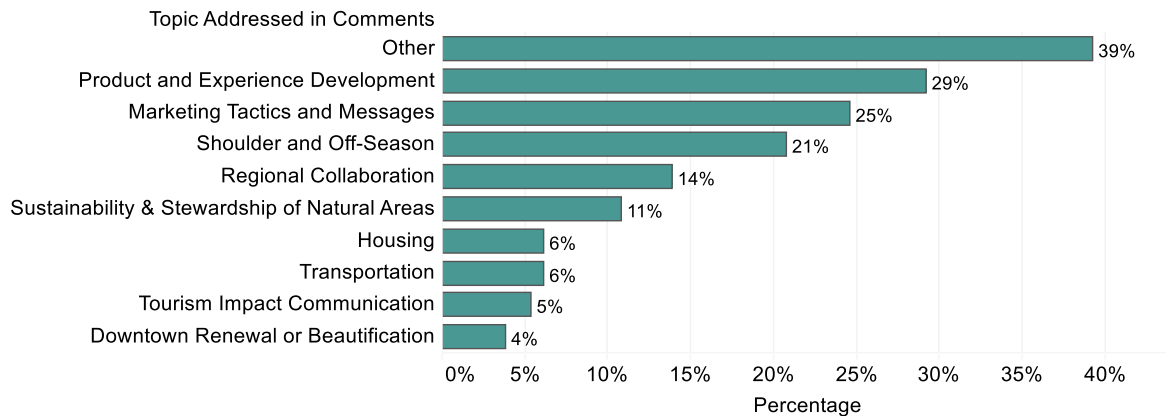
Q. Please indicate how familiar you are with the initiatives undertaken by your regional destination management organization in the following areas in the past 12 months:



Repondents were also asked in an open-ended question to describe a specific outcome they would like their region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of the destination. The table below summarizes the comments (presented in their entirety in the Appendix on page 26). The comments span a wide range, and vary significantly by sub-region, though the most common themes are around product development and specific marketing tactics or objectives which individuals would like the RDMO to pursue.

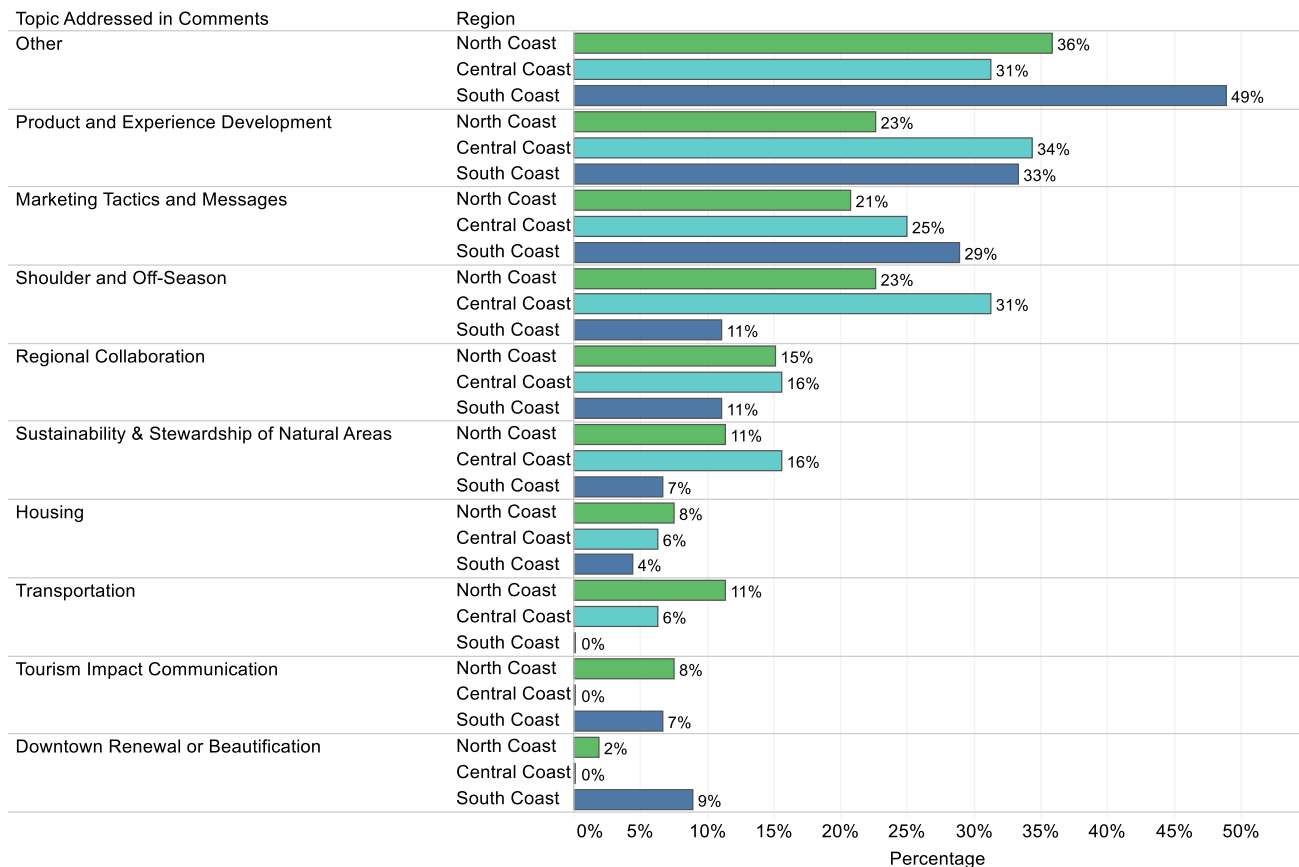
Open Ended Regional Goals: Comments Categorized for Analysis

In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.



Open Ended Regional Goals: Comments Categorized for Analysis

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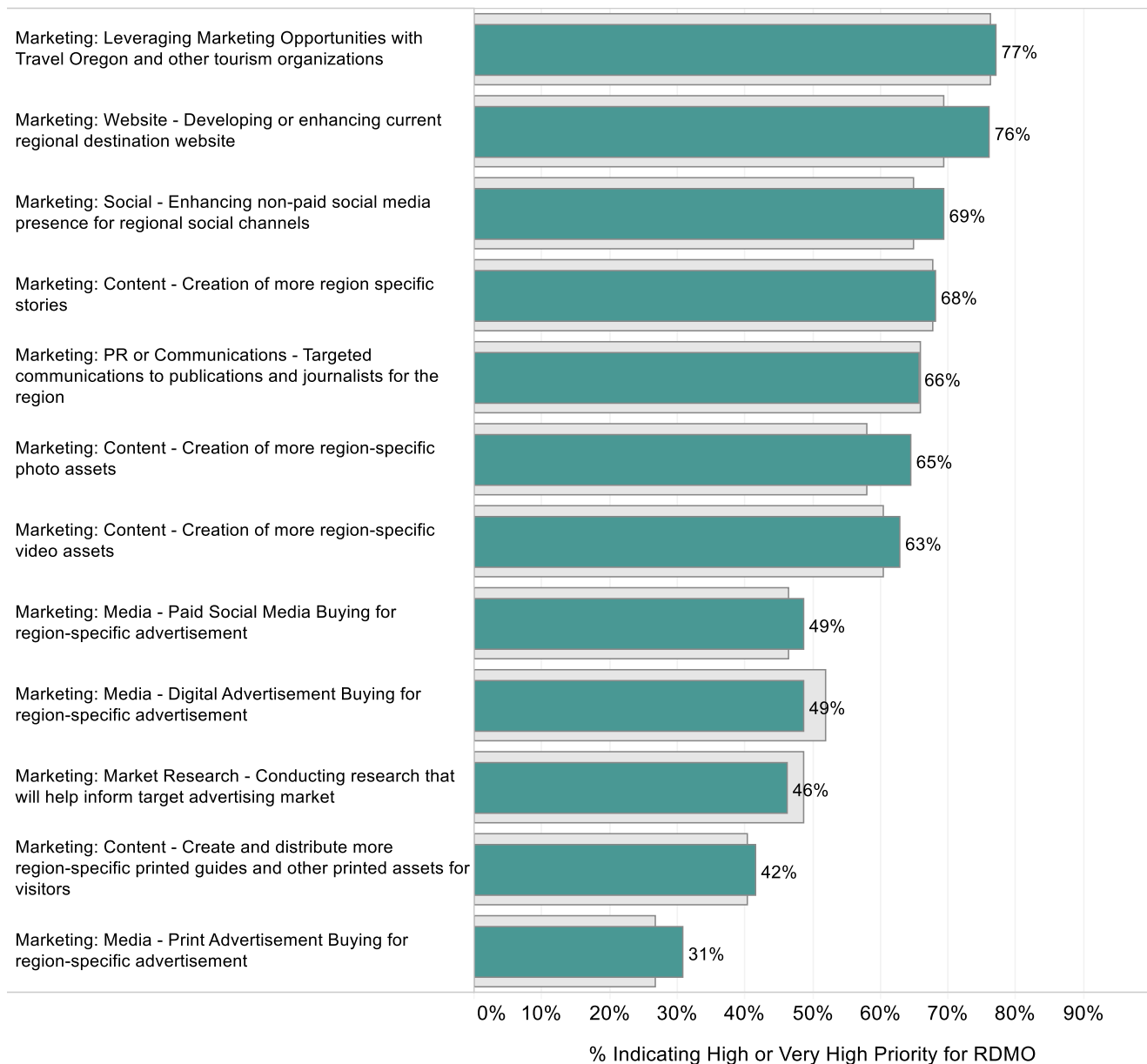
MARKETING AND PUBLIC RELATIONS

Respondents were asked to prioritize a variety of marketing tactics for their region. Stakeholders could select from a scale of responses, including: “not a priority,” “low priority,” “moderate priority,” “high priority,” and “very high priority.” The figure below reflects responses for the Coast Region followed by a graph segmenting responses by coastal sub-regions. There are five standout marketing priorities for the region as a whole (those with more than 66% of respondents indicating a high or very high priority).

Marketing Questions

■ Oregon Coast
■ All Other Regions Combined

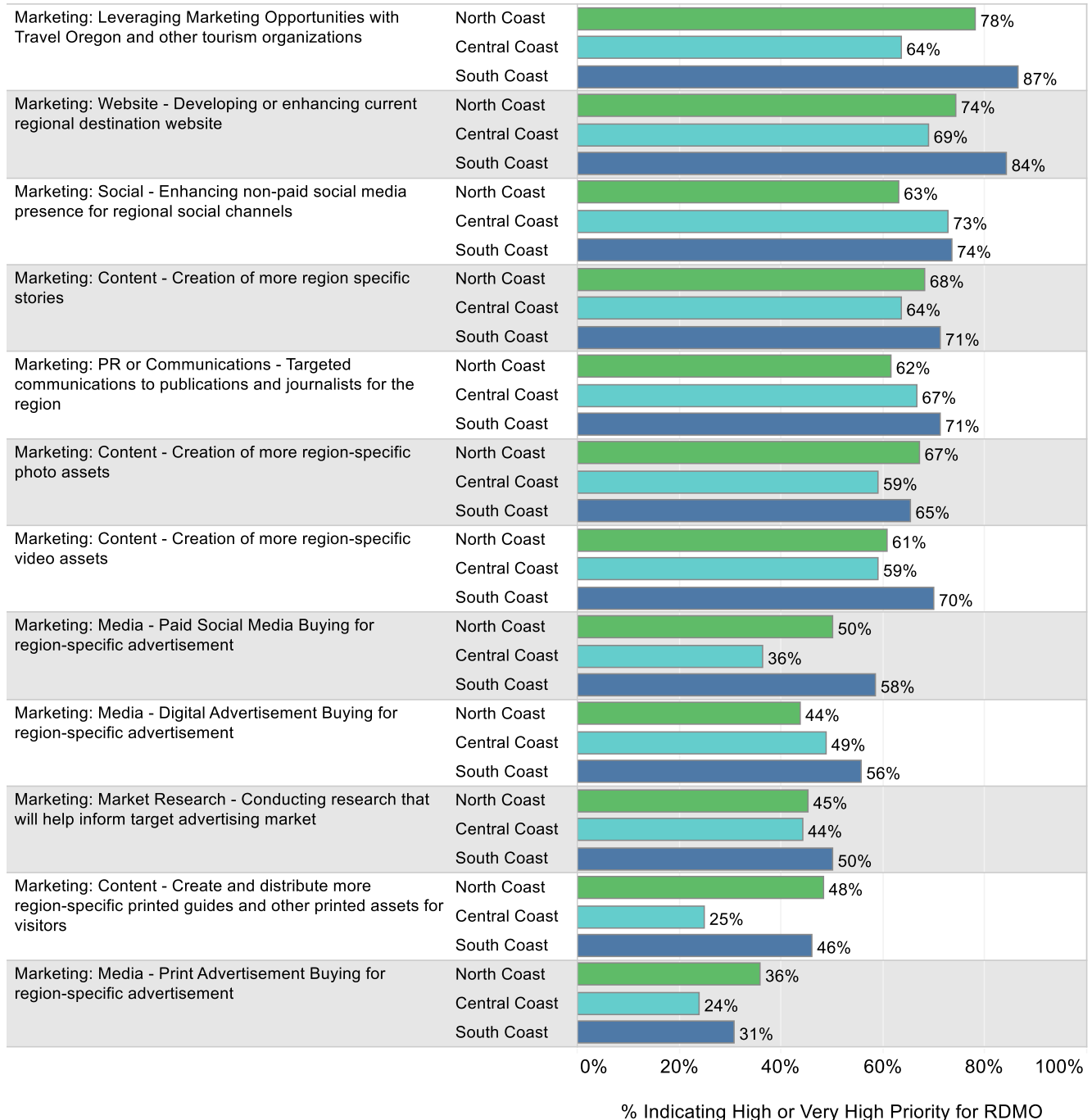
Q. Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years. With limited resources available not all items should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.



Marketing Questions

North Coast
Central Coast
South Coast

Q. Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years. With limited resources available not all items should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.



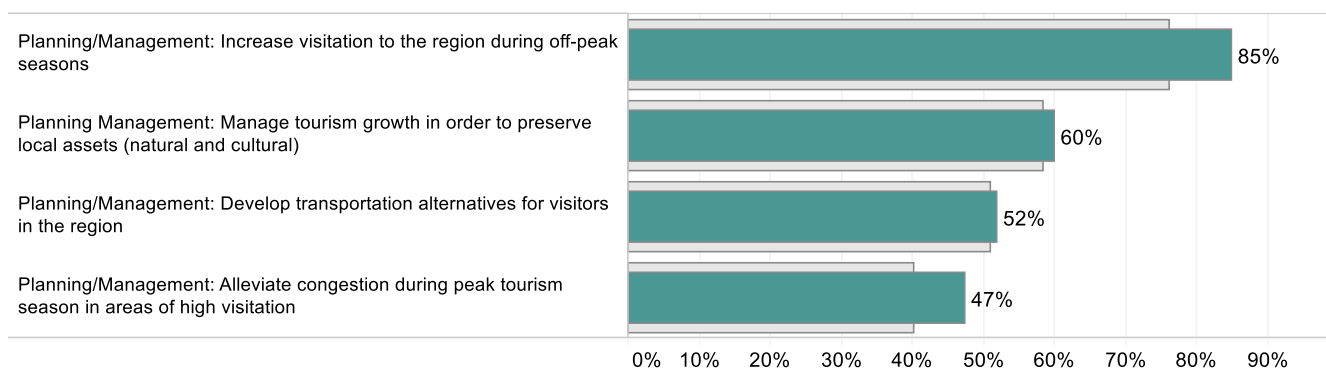
DESTINATION DEVELOPMENT AND MANAGEMENT

Stakeholders in the Oregon Coast Region were asked to prioritize destination development opportunities from an exhaustive list which included destination management, destination development and capacity building. Across those three categories, there are three tactics which more than two-thirds of respondents identified as a “very high priority” or a “high priority.” These three tactics are: “increase visitation to the region during off-peak seasons,” “improve quality and professionalism of customer service at tourism-related businesses,” and “increase skilled workforce in the tourism industry.”

Management - percentage indicating high or very high priority for RDMO

■ Oregon Coast
■ All Other Regions Combined

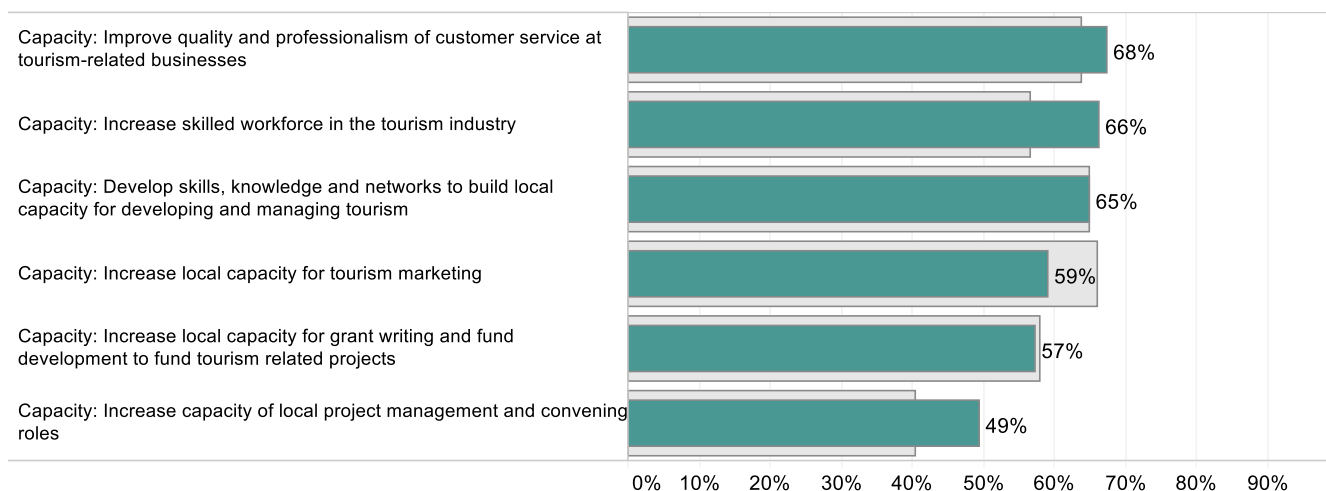
Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical PLANNING and MANAGEMENT OPPORTUNITIES to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.



Capacity - percentage indicating high or very high priority for RDMO

■ Oregon Coast
■ All Other Regions Combined

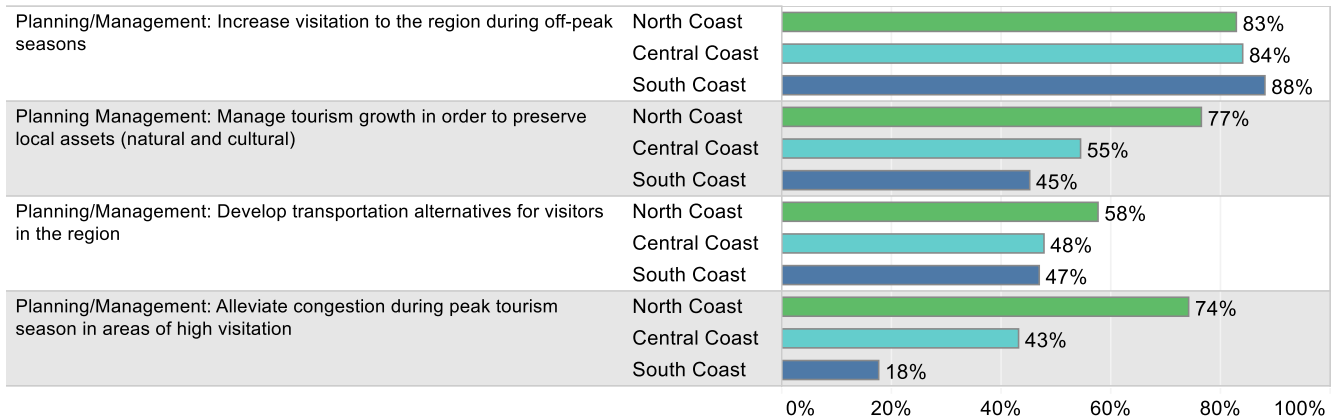
Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical TRAINING and CAPACITY BUILDING OPPORTUNITIES to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.



Management - percentage indicating high or very high priority for RDMO

North Coast
Central Coast
South Coast

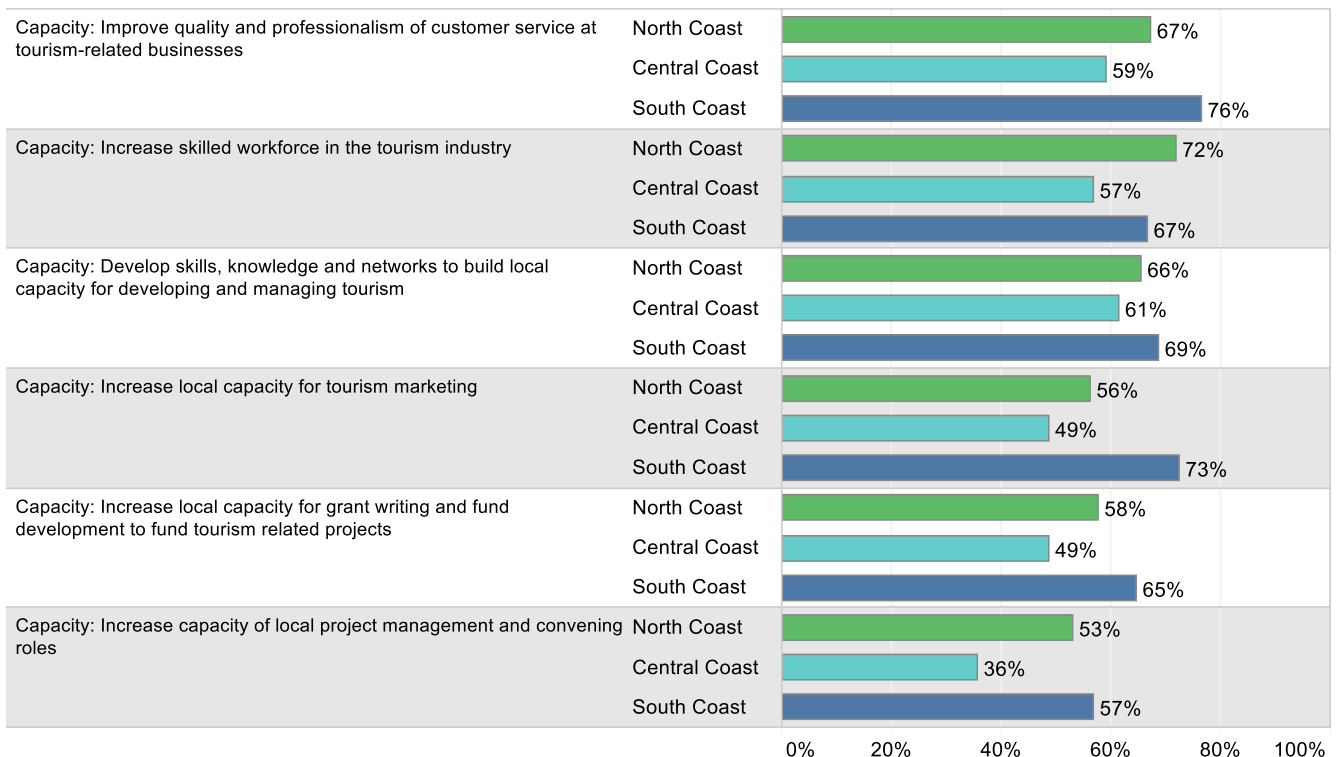
Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical PLANNING and MANAGEMENT OPPORTUNITIES to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.



Capacity - percentage indicating high or very high priority for RDMO

North Coast
Central Coast
South Coast

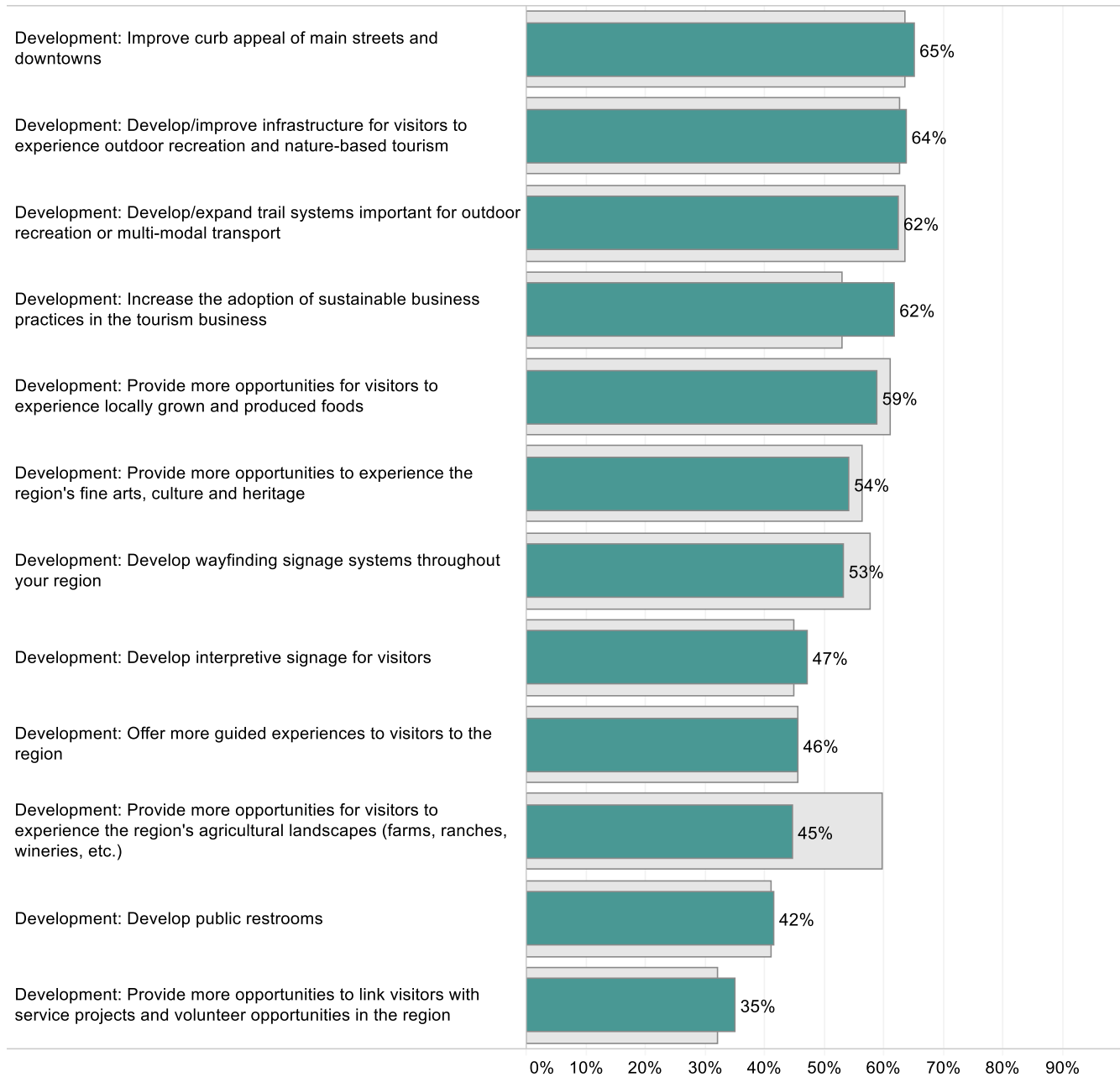
Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical TRAINING and CAPACITY BUILDING OPPORTUNITIES to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.



Development - percentage indicating high or very high priority for RDMO

■ Oregon Coast
■ All Other Regions Combined

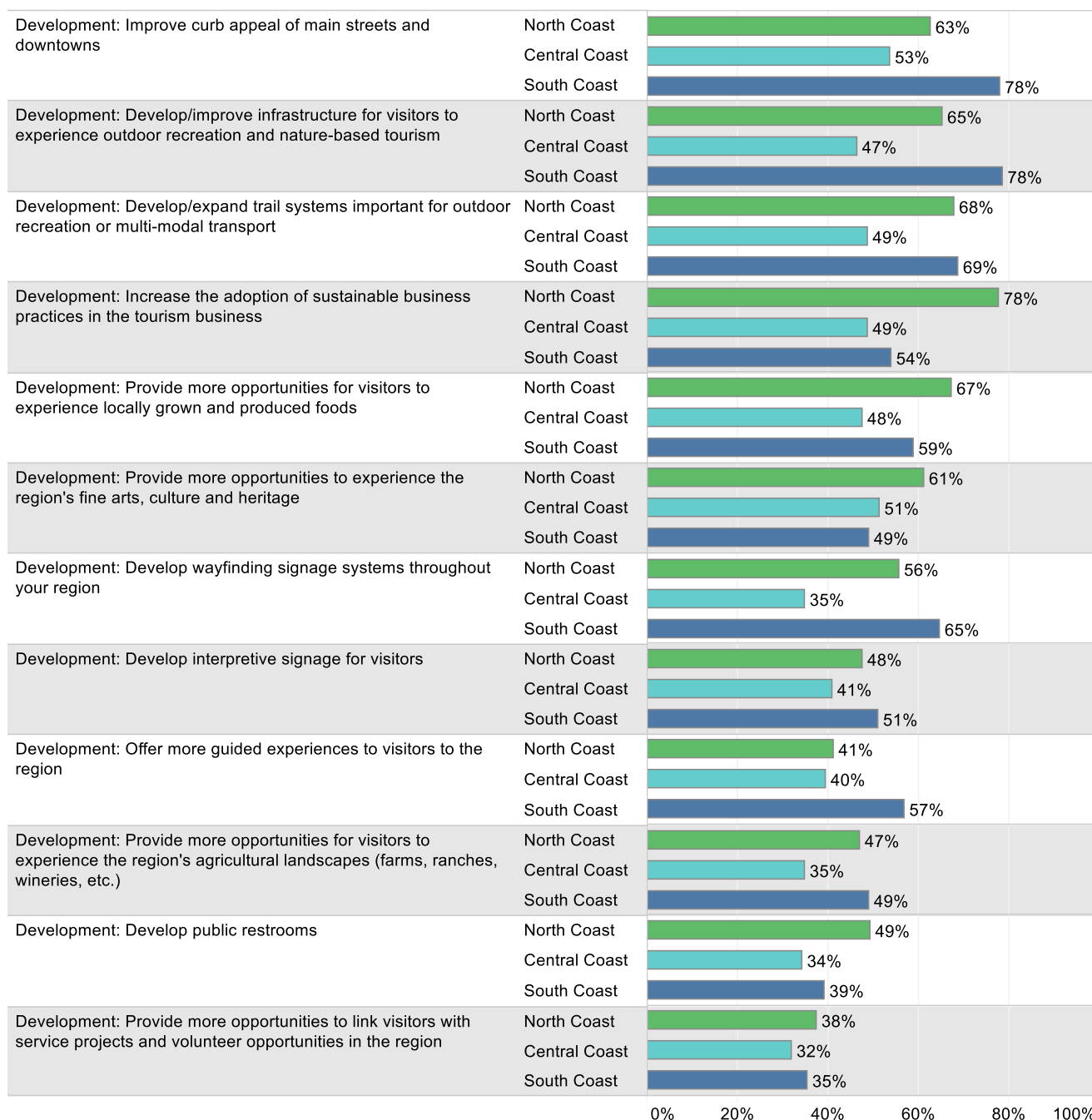
Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical **PRODUCT DEVELOPMENT OPPORTUNITIES** to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years. With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.



Development - percentage indicating high or very high priority for RDMO

North Coast
Central Coast
South Coast

Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical **PRODUCT DEVELOPMENT OPPORTUNITIES** to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.



INDUSTRY SERVICES

Stakeholders used the same rating system as in previous sections to prioritize specific industry and visitor services initiatives. Though no specific activities were considered to be a “very high priority” or a “high priority” by more than two-thirds of respondents (as in other sections), there are still clear initiatives which stakeholders have identified as relatively higher priority. Four of the six tactics evaluated were considered to be “very high” or “high” priorities by at least half of respondents.

Industry Services

■ Oregon Coast
■ All Other Regions Combined

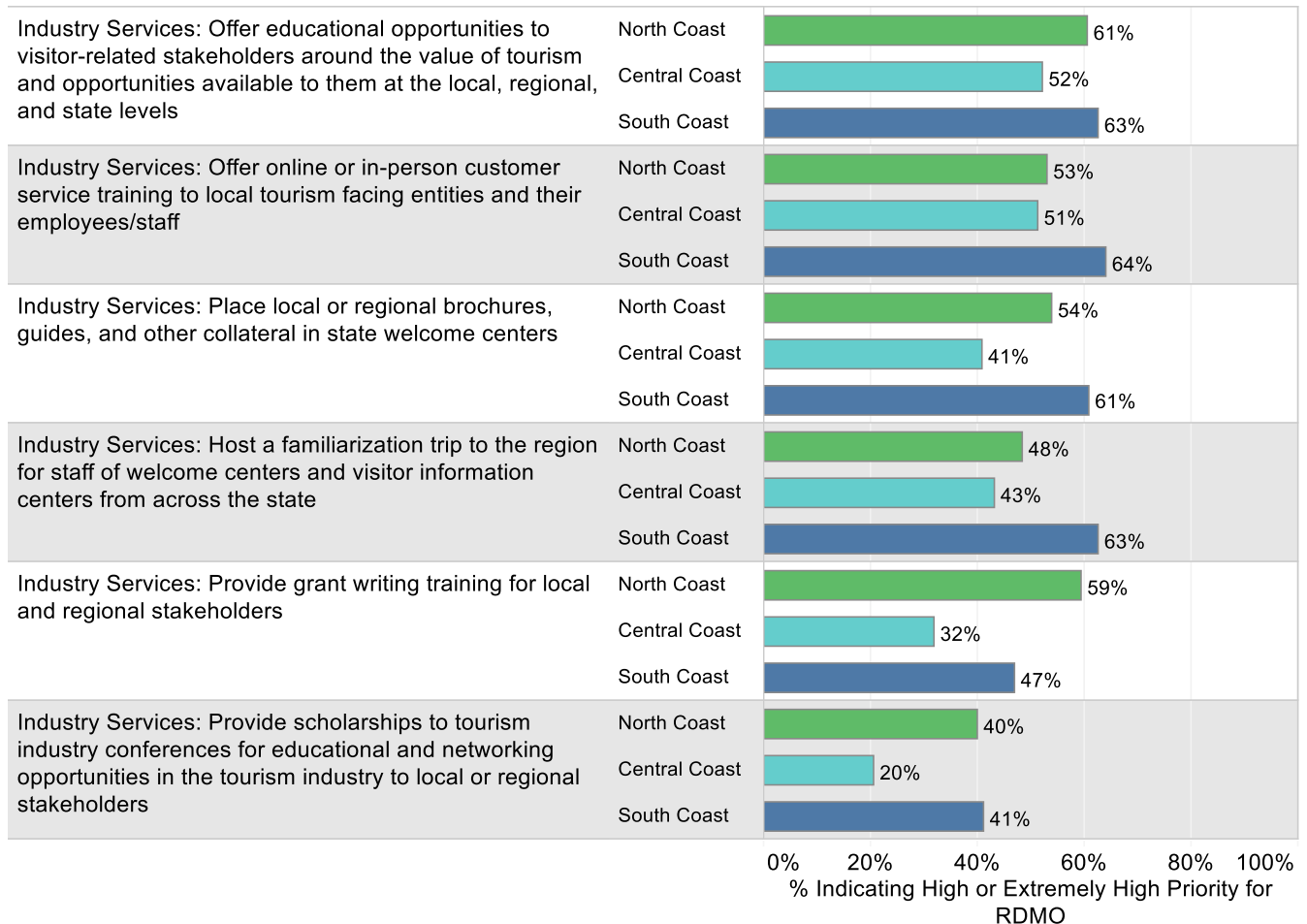
Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical INDUSTRY & VISITOR SERVICES to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.



Industry Services

■ North Coast
■ Central Coast
■ South Coast

Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical INDUSTRY & VISITOR SERVICES to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.



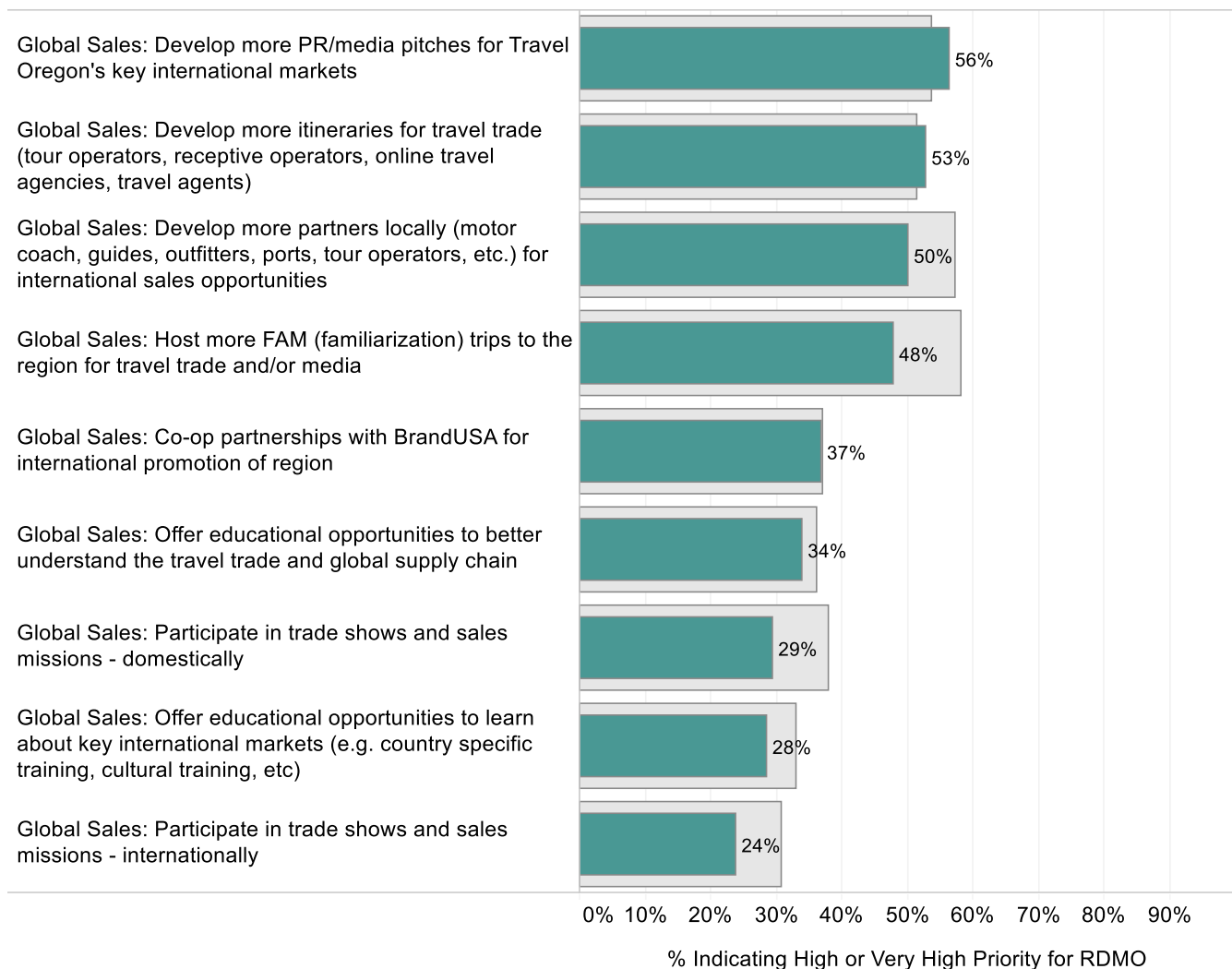
GLOBAL SALES

Using the same rating scale as in previous sections, Coastal stakeholders evaluated several tactics related to international sales, development of international markets, international public relations, international marketing and travel trade. The top global sales tactics were: “PR pitches for international markets” and “itineraries for travel trade.” Relatively low percentages of respondents identified attendance of international trade shows as a “high” or “very high” priority for the RDMO.

Global Sales

■ Oregon Coast
■ All Other Regions Combined

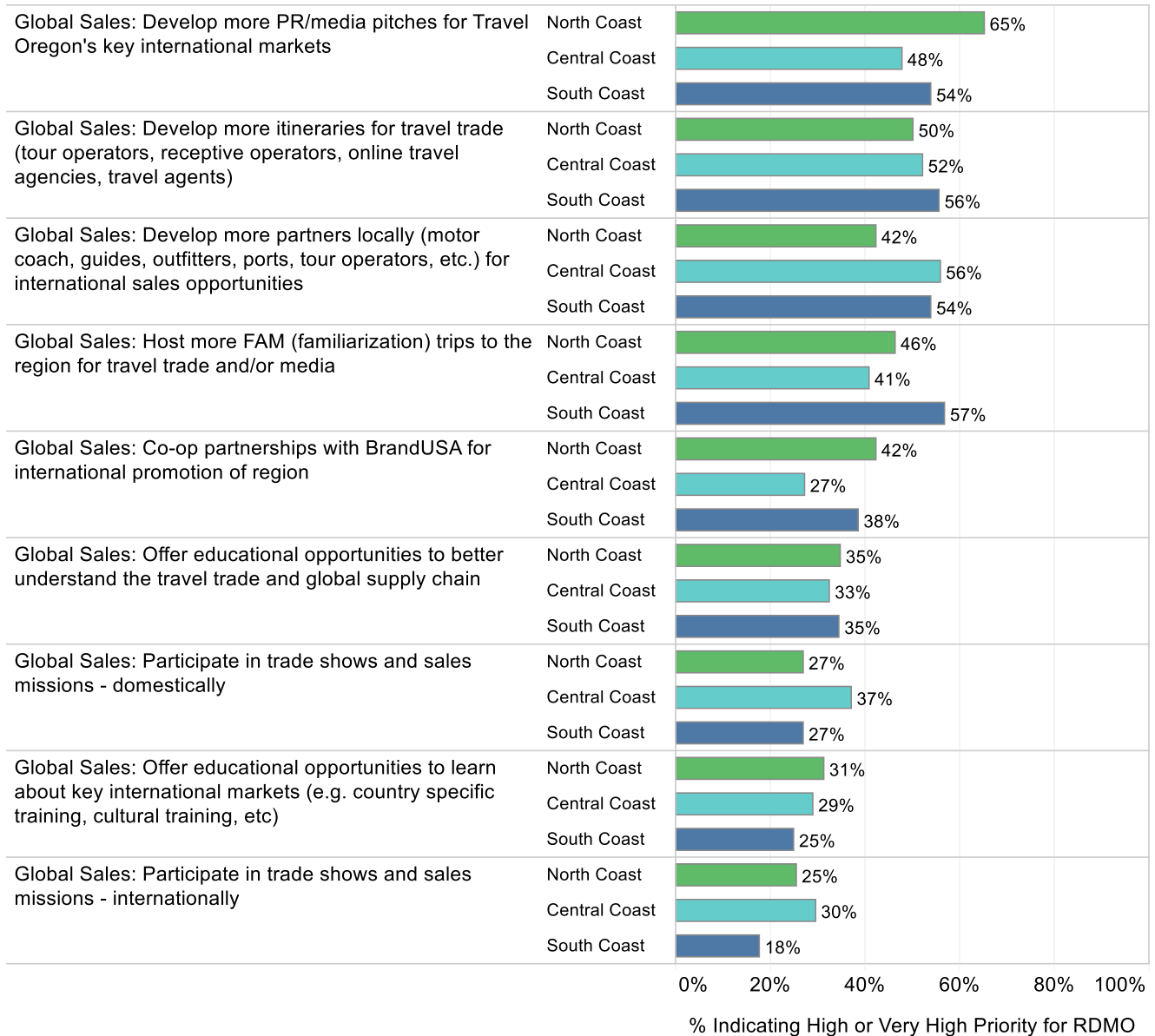
Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical INTERNATIONAL SALES, PR, MEDIA, & MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.



Global Sales

■ North Coast
■ Central Coast
■ South Coast

Thinking from the perspective of your regional tourism marketing/management organization, please indicate how you would prioritize the following tactical INTERNATIONAL SALES, PR, MEDIA, & MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years. With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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 for your region. The goal of your prioritization is to provide guidance to your regional destination marketing/management entity.

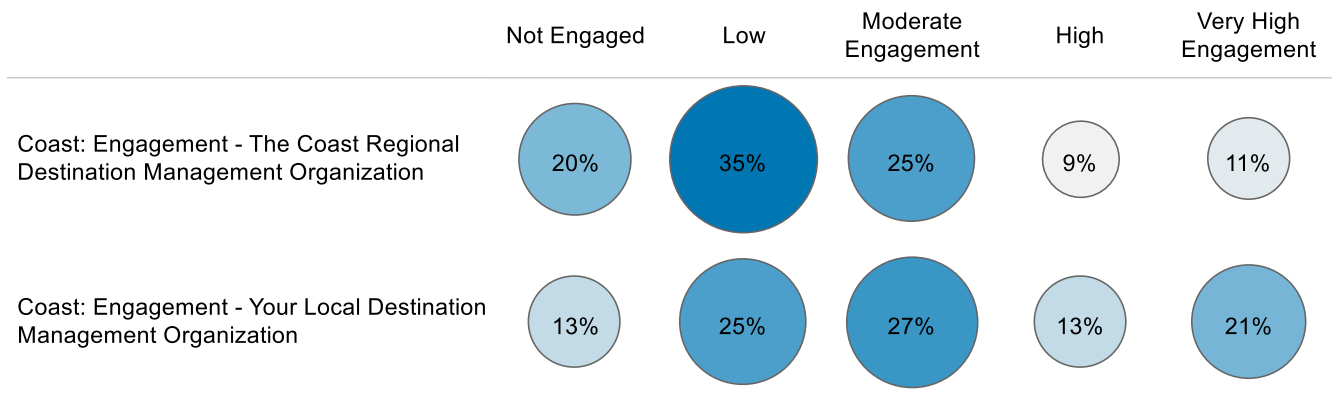


CUSTOM REGIONAL QUESTIONS

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. These questions were not required and may therefore have slightly lower respondent totals.

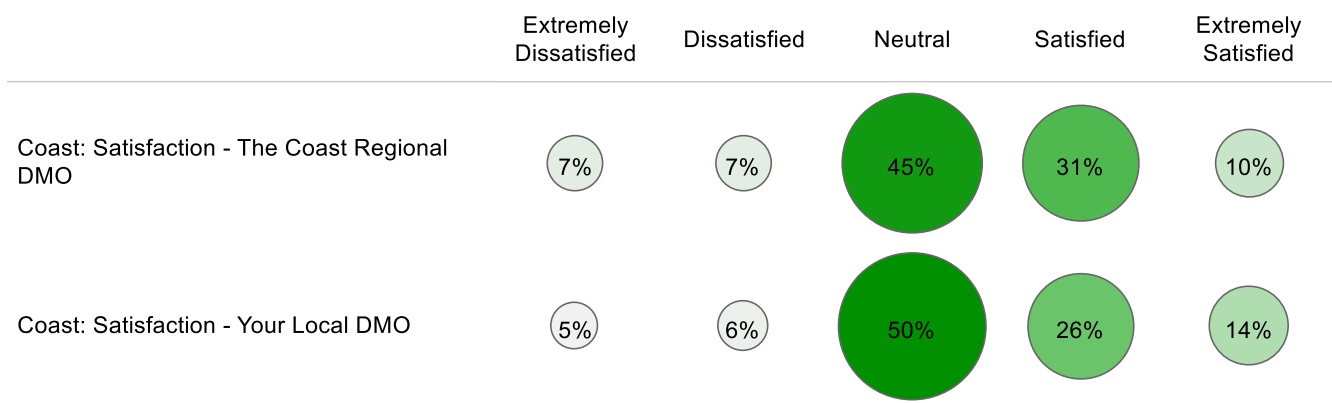
Coast DMO Engagement:

Please rank your engagement levels with the following Destination Management Organizations



Coast DMO Satisfaction:

Please rank your satisfaction levels with the services of the following Destination Management Organizations



Coast Engagement:

Please indicate your level of engagement with the following organizations

		Not Engaged	Low	Moderate Engagement	High	Very High Engagement
North Coast	Coast: Engagement - The Coast Regional Destination Management Organization	25%	31%	23%	8%	13%
	Coast: Engagement - Your Local Destination Management Organization	13%	20%	25%	20%	23%
Central Coast	Coast: Engagement - The Coast Regional Destination Management Organization	23%	31%	33%	5%	8%
	Coast: Engagement - Your Local Destination Management Organization	21%	23%	31%	10%	15%
South Coast	Coast: Engagement - The Coast Regional Destination Management Organization	12%	41%	22%	14%	10%
	Coast: Engagement - Your Local Destination Management Organization	8%	33%	29%	8%	22%

Coast Satisfaction:

Please rank your satisfaction levels with the services of the following Destination Management Organizations

		Extremely Dissatisfied	Dissatisfied	Neutral	Satisfied	Extremely Satisfied
North Coast	Coast: Satisfaction - The Coast Regional DMO	8%	7%	44%	27%	14%
	Coast: Satisfaction - Your Local DMO	3%	3%	48%	28%	17%
Central Coast	Coast: Satisfaction - The Coast Regional DMO	5%	14%	41%	35%	5%
	Coast: Satisfaction - Your Local DMO	6%	3%	58%	17%	17%
South Coast	Coast: Satisfaction - The Coast Regional DMO	7%	2%	48%	33%	11%
	Coast: Satisfaction - Your Local DMO	7%	11%	43%	30%	9%

	<i>Coast: If you would like, please explain your ratings for your engagement levels with your local and regional DMOs:</i>
Central Coast	<p>Capacity for DMO's have been limited. Great potential.</p> <p>Have been working on developing a partnership with OCVA (RDMO) for over a year. Due to their lack of organizational capacity, it's mostly been a series of false starts. They have good ideas but so far little success implementing them. Only work with the local for eclipse planning.</p> <p>I go to almost all Chamber meetings and many Travel Lane meetings. I've only been to a few OCVA meetings, just because of location.</p> <p>I have changed from management in a nonprofit to managing in a for profit organization. I was more in tune before, less so now.</p> <p>I have only attended one meeting</p> <p>I have seen impressive improvements in communications and opportunities with the RDMO over the past few years.</p> <p>I just began working with the city, and will work to be more engaged with our local DMO.</p> <p>I read all the information I can find online to keep up to date, but there is no cohesive organizational structure that fits my needs.</p> <p>I sit on my local destination marketing committee. Furthermore, I have hosted the only marketing meeting event that OCVA has held during their time in the lead position. We have been offered two opportunities to align on co-op marketing projects with OCVA during this time and we have done both. Unfortunately that is usually the only time we hear from them.</p> <p>I work as closely as I can with Travel Oregon, Travel Lane County, ORLA, Florence Chamber of Commerce, Florence Chamber of Florence Marketing Committee, the Florence Airport Advisory Committee and others.</p> <p>I work on establishment and promoting the network of Marine Reserves & Protected areas and organizations like Surfriders, Coast Watch and through their activities engage, not a removed org.</p> <p>I've been in business here for 11 years now, and have not heard of either one of them.</p> <p>Lincoln City has someone who is new in the last couple of years who has great ideas and reaches out to visitors, citizens, tourism industry and local business for ideas on how to increase tourism during slow seasons and better manage the huge swells that pack our beaches in the summer. I'm impressed with his efforts. I have participated in surveys and attended meetings.</p> <p>Local has not reached out to engage with land management agencies but the regional DMO has.</p> <p>Member of the Bicycle Connectivity group for Lane County.</p> <p>My business is very very small and my future goal is not in line with the mass outreach of tourism to the Oregon Coast. I do believe this tourism is necessary as a whole for our communities but I am looking towards targeting a few small very specific groups with a less generic outreach.</p> <p>Neither reach out, at least not to me, and I've not carved out time to reach out to them. Unless buying ads, there isn't much interest? which is hard for small communities.</p> <p>Not a clue where they are located or what they do to enhance Tillamook County.</p> <p>Our Chamber is small and we have very limited funds for things. Your organization has provided scholarships for some of our representatives, which is greatly appreciated.</p> <p>They have never even visited or have engaged the Embarcadero Resort - outside of having a personal lunch. Pretty bad.</p> <p>Work with various groups on education and outreach.</p>
North Coast	<p>The relationship is very poor, although we are one of the few visitors centers right on the Oregon coast and Highway 101 and a 60 year-old organization</p> <p>We work closely with the Cannon Beach Chamber and OCVA to promote Cannon Beach.</p> <p>Coast Regional Destinations focus on places such as Lincoln City, Cannon Beach, and Seaside, totally skipping over Tillamook as if we have nothing to offer.</p> <p>I am high on the future of OCVA IF GIVEN THE TOOLS TO SUCCEED</p> <p>I am not sure how to work with them or how to connect with what they offer</p> <p>I am the DMO for Tillamook. Nan Devlin is the DMO for the county and we work hand in hand weekly. OCVA frankly doesn't exist as a useful organization.</p> <p>I am the local DMO executive and on the Board of our current RDMO</p> <p>I have a great relationship with both Nan and Marcus. I have learned a lot from both and our relationships allow me to lean on them if need be. I am in debt to them,</p> <p>I know very little about our DMO, though I do provide many out of area as well as local groups with educational tour focused on our areas incredible natural resources.</p> <p>I manage an economic development district, and primarily work with our county tourism entities.</p> <p>I think our DMO does a good job of funneling information to and from our RDMO, thereby limiting the need for direct interaction between myself and the RDMO</p> <p>I used to be a big part of local tourism assn, but got too busy to participate, and a lot of what they did/wanted was "same old same old" so I felt it was not longer worth my time to be involved.</p> <p>Little to no contact from DMOs</p> <p>Looking to become more involved, just learning now!</p> <p>Not really sure who they are</p> <p>Nothing they've been working on seems relevant to my business.</p> <p>There is not really a forum for engagement until they reach out to us.</p> <p>They do a good job of engagement via email.</p> <p>We are active with our local Chamber (I am guessing that's the right translation of 'local destination management organization) and follow OCVA communications regularly.</p> <p>We are the DMO - and we are highly engaged in the community through marketing programs to tourism enhance businesses. Our RDMO is AWOL.</p> <p>We attend the events that they hold and are currently working on a collaborative project.</p> <p>Work closely in partnership toward common goals, provide content marketing services, serve on committees and boards as possible</p> <p>Work for the local. Assist the RDMO with callouts, but don't attend meetings or seek out more engagement myself.</p>

	<i>Coast: If you would like, please explain your ratings for your engagement levels with your local and regional DMOs:</i>
South Coast	<p>Bandon LDMO is engaged, but not much engagement in Curry County. Difficult to engage with and often unclear who to contact. Don't feel there has been much outreach to know who/ where to contact and become involved. engagement is high locally as the Coos Bay - North Bend VCB is a valued partner and we work very closely with them. Engagement is low with the RDMO because communication is lacking. For the most part we've lost touch with what it is that OCVA does.</p> <p>I am the director of the local DMO and with my limited time in the job (1 month as of this survey) I have not had a chance to really establish a relationship with the coastal regional DMO. I have been working away for the past year. Typically the answer to both would be very high. I have no idea what you are talking about here. I try to stay in tune but not distracted from the management of my own businesses I would rate it Low. I do stay very active with local stakeholders. I have not been contacted by my RDMO, I have reached out to them and now receive some emails. However, have never been contacted regarding membership or "buy-in" opportunities and benefits.</p> <p>I'm a non stop networker always forwarding my vision upon folks I meet. I'm aware of the Coast RDMO and have some dealings with the Local RDMO In the past our RDMO just didn't do much for our area (south coast) but this past year has seen much improvement & through Rural Tourism Studio I am becoming much more engaged in all aspects. It's getting better. We need full time staff for Internet based marketing. Largely unaware of their activities. They seem to have no focus on cultural tourism. My engagement with my local DMO is high, only because I reach out. If I do not, I do not receive any information. Our City Administrator is our DMO and solely makes all marketing decisions. City Ordinance requires a Promotions Committee, but Gold Beach has not had a committee to oversee or assist with management of funds or marketing/promotional decisions in years. The last time I tried to verbally engage with my RDMO director was a few years ago. I asked him what was new with OCVA? He kept his hands in his pockets and rolled his shoulders "shrugged" no verbal response. On the board of directors of Bandon Chamber of Commerce, heavily involved volunteer. Our Chamber of Commerce has no expertise, continuity nor focus on this. relatively new to the area, disappointed with local chambers in Coos Bay area, not sure how to get involved with other tourism agencies</p> <p>SCT is a paying partner with OCVA Time-permitting, I attend all the meetings held locally Time. We are involved with the chamber and community events. We are very interested in promoting collaboration and capacity building to increase regional visitation.</p>
	<i>Coast: If you would like, please explain your ratings for your satisfaction levels with your local and regional DMOs:</i>
Central Coast	<p>Again, not a clue where they are located or what they do to enhance Tillamook County. Basically N/A to me as I am not involved. Don't really know what they do? I do not interact with them in any real manner I feel we get good representation from our DMO's but we can always use more. I work with communities from Astoria to Brookings so can't make blanket statement for local DMO I'm assuming our DMO to be Newport Chamber, and there is no question that they do a fantastic job promoting Newport--and have huge resources to do so. Including the rest of the county, however, seems to be minimal. I haven't seen or heard from OCVA for several years other than the solicitation for buying ads or other things we don't have funding or resources to do. Lincoln City has seriously alienated many vacation rental owners. Neutral for local only because I have limited experience with them. Neutral for the RDMO because of what I said in previous comments. They struggle with organization and putting ideas into action. It's been a little frustrating.</p> <p>Never heard of them. No engagement. Not enough experience to rate. See great potential Not familiar with them Our city expects us to be engaged and actively marketing the city in a positive way. If we don't do that, they will find someone that can. I expect our RDMO to be engaged and working the entire coast. Unfortunately, the only thing I have seen our RDMO do is a single video campaign. I do see FAM tours organized and Newsletters come out but both of those activities are currently outsourced by our RDMO.</p> <p>See above answer The seminars have been very helpful...just wish more of our members would be able to attend. We have seen moderate success in the analytics from services provided by the local DMO and great success from opportunities we have utilized with our RDMO. Yuo are DMO's? Care enough in your survey to name your specific servivce NAME so I know who I'm rating</p>

	<i>Coast: If you would like, please explain your ratings for your satisfaction levels with your local and regional DMOs:</i>
North Coast	Always working toward 'satisfied' with our local Chamber! :)
	Both keep me well informed and I believe strongly have my businesses best interest at heart
	Communication needs to improve.
	have done so
	I do not think DMO's should work in a silo. They need to coordinate all efforts and funding in conjunction with local EDC and county government in order to maximize benefit to local needs with tourism-related investments.
	I don't believe I've ever seen the director in our visitor center, I would not be surprised if he's never visited.
	I feel like the area is being advertised as a place to come but the area isn't ready for the influx due to lack of funds to upgrade infrastructure.
	I feel like there is a good attempt to keep business owners engaged.
	I feel no value other than leads from OCVA and never hear from them. Even the leads have dropped 30% this year because of what I view as a neglected website.
	I think they do a good job. I wish I knew how to connect with them more and plan in advance instead of just reacting to things they send out
	I understand why my business is not a priority and farming / agriculture / local foods is.
	Lack of marketing experience of staff both locally and regionally. Not a fan of marketing efforts tied to paid membership. Organization management styles are limiting and community/industry partnership not a priority.
	Little to no contact from DMOs
	Local entities are including economic development issues in their planning activities.
	See above comments.
	The Cannon Beach Chamber has a weak visitor guide. The new Group sales person has done nothing measurable to merit his high salary. They do send us referrals from walk ins at the Visitor Center which we appreciate. We love OCVA! The weekly leads are great, the visitor guide is top notch and the website is outstanding!. We have an ad on the website that brings us a great return on our investment.. We get way more out of our OCVA membership than our Chamber membership.
	THE WHOLE COASTAL REGION AND ALL IT INCLUDES NEEDS TO BE IN THE HANDS OF OCVA. Please give it the tools to do the job.
	There is always room for improvement.
	We are the DMO, so satisfaction levels should come from other survey takers. I'm truly frustrated with our current RDMO. No value offered.
	We have more room to improve our local DMO, the RDMO is doing a fine job thus far!
	Who are they?
	With the OCVA's transition a couple years ago and brief management by TO, I feel like they are just getting back on their feet and ready to hit their stride - especially with the changes to the RDMO program coming online this year. I would like to see them have their own staff working fully for the organization, rather than shared with local DMO.
South Coast	Again, I have no idea what you are talking about here.
	As mentioned above, I believe by adding Dave Lacey's position, it has definitely improved the interaction with our RDMO.
	Bandon tends to focus on HWY 101, Coos Bay does use our brochures, as does the Coos History Museum
	Besides displaying the advertising that we produce, I don't know that they do anything for the Southern Oregon Kite Festival, the largest tourism event on the southern Oregon coast. They never show up at our meetings
	Difficult to engage with and often unclear who to contact.
	I am not sure who is our local DMO. We have our area VCB, and the regional marketing group that the County is organizing. I do not plug into all of the acronyms to separate out the organizations. It makes this survey a bit difficult.
	I don't know everything. Our City management is very good and respectable and we value them. The City has not developed a real plan that has been fully implemented and is working on that. I would like to be involved with it, it affects everyone who visits.
	I was thrilled with the previous VCB director Kat Hoppe. I have little to judge the current director by.
	I would like to have a greater voice in Coastal Marketing.
	In follow-up to my response to #2. Lack of communication is a big problem. I don't even know who the board members are for our RDMO or how I would easily find this information through the website. An idea is to offer more membership meetings and invite members to participate in workshops or committees. Possibly a "membership newsletter" would be a good resource for many members.
	In the past I tried to contact the volunteer and had no success.
	Locally we have regressed over the last two years while leadership was in flux. The rating is based on that. The coastal rating is due to my lack of personal experience to this point.
	Not much presence or coordination in Curry County. Bandon Chamber DMO has been quite supportive.
	Our local DMOs (Chamber, and County) are ineffective and could use continued help from ACVA and Travel Oregon.
	See above for the chamber. OCVA does a consistently solid job given its historical lack of funding. Though hopefully that will increase due to the change in relationship with state organization.
	They're a dedicated bunch- all of them.
	we ranked our satisfaction with the local DMO as neutral due to the challenges they've had in finding a director, they've recently resolved that problem so we have high hopes that the new director will greatly improve the VCB. We anticipate being able to say we are extremely satisfied in the near future.
	While communication and collaboration have improved greatly over the past three years, there is still much room for improvement.

APPENDIX – OPEN ENDED RESPONSES

		Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Areas	Downtown Renewal or Beautification	Tourism Impact Communication
	Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.										
Central Coast	A higher flow of traffic during the shoulder and winter seasons										
Central Coast	Address housing for service related business employees. Develop more "off season" traffic										
Central Coast	Be efficient and not increase staffing of CVBs, Travel Oregon etc instead of promoting tourism										
Central Coast	Better experience for both visitors and locals during peek sumer tourist season.										
Central Coast	Better quality attractions, better trained service providers, quality off-season attractions, and increased/improved infrastructure for visitors.										
Central Coast	Connectivity of bicycle routes/tourism and local foods and sustainability of resources.										
Central Coast	Create A Visitors Association for Newport Oregon to help develop a pre-core to the Fairgrounds conference center - slated to be funded and built with the next 2 years.										
Central Coast	Develop grant program to help with underlying infrastructure issues so that our coastal communities are strong and can focus on improving visitor experience. Develop a grant program to support natural resource and space conservation and improvement projects, to protect and improve the assets visitors are seeking to experience. The Oregon Coast is a facade of what it should be right now with some serious back-end issues that stand to deteriorate visitor experience substantially if not addressed. Harry - I'd love to come chat with you guys about this sometime. Staj and I touched on it a bit on our trip to Baja together.										
Central Coast	Development of "run down" coastal towns with more exposure of the gems and tourist opportunities they hold. We need a higher quality workforce and places to lodge then seasonally. Better yet improve winter tourism on the coast so we can keep employees year round!										
Central Coast	Help private businesses or communities find, preferably at their own leisure via website, the specific marketing they wish to use, support and/or be involved with to maximize their needs. And that site operations should have the knowledge and/or help to direct those entities in whatever direction they wish to move whether it is local, global, or target group specific.										
Central Coast	I don't care about the region 3 to 5 years from now. Another year of losses and I can't wait to put innkeeping behind me.										
Central Coast	I want the Salmonberry Trail Project to get up and running! Virtually nothing could better benefit tourists and locals alike!										
Central Coast	I would like to see a push for more off season Tourist. The Oregon coast has over all a very mild winter season and even though it can be wet we have a lot of fall winter attractions available to offer.										
Central Coast	I would like to see more visitors in the off season.										
Central Coast	improve educational and infrastructure in a significant number of sites to enhance experience as well as develop off seasonal opportunities										
Central Coast	Increase visitation during the shoulder and off seasons. and enhance collaboration within the region.										
Central Coast	Increased tourism, and increase QUALITY of tourists. Tourist education as well as host/small business owner education (hospitality). Education goes both ways and we can all learn to be better travelers and better hosts.										
Central Coast	leverage funds between businesses, DMO's, RDMO's and Travel Oregon to realize exceptional results from Marketing and to develop additional opportunities for exceptional guest experiences. These funds would be used to develop or enhance new opportunities for travelers (trails and interpretation) and to communicate those opportunities to potential guests.										
Central Coast	Leverage Oregon's cultural niche to focus on sustainable tourism, which highlights green infrastructure and transportation options, agritourism and farm to table dining, land stewardship ethic, outdoor recreation that is light on the land. By developing and incorporating Oregon Coast tourism in alignment with the perception people have of Oregon being green, outdoorsy, and maybe a little quirky, the region can create for itself a unique niche and also do good for the environment. People come to the coast for it's beauty, so the tourism market should help transform that into sustainable opportunities and action.										
Central Coast	mass transportation linking the valley and the coast and along HWY 101. Enforcement of reckless, speeding log and chip trucks. STOP CLEAR CUTTING the forest.										
Central Coast	More tourist traffic in the off-season.										
Central Coast	Much greater emphasis on educating visitors, including before they arrive, to increase their appreciation of the area's natural heritage and to encourage low-impact, sustainable approaches to touring the coast.										
Central Coast	Off-season tourism is key - not many business owners are savvy enough to make their summer earnings last through a virtually no-income winter - which is what we all face. Lincoln City seems to have done a good job of drawing people during the slow season with things like the floats on the beach. It obviously requires funding, though, and it would be nice to see someone outside of Lincoln City pursuing it.										
Central Coast	Our RDMO should be driving traffic to our region. There are many ways to track the success of this goal and the fact that for the past three years we have been operating with someone that is not a marketer at the controls is noticeable. The time for being held accountable is now. There have truly been two notable marketing pushes that have taken place which have been setup by OCVA. They simply are not doing what we need them to do.										
Central Coast	Progress towards sustainable year-round economy and more unified tourism product development throughout the region.										
Central Coast	Promoting a stewardship ethic of our magnificent resources. Promote tourism and new businesses toward this outcome. Direct grants towards infrastructure and services that meet strategic goals of the region.										
Central Coast	Provide a grant to help us with signage that we have been working on for two years!										
Central Coast	Some traditional forms of advertising (TV commercials). The beach is the focus. Rest the mind, renew the spirit. It's simple.										
Central Coast	Stronger and more unified coastal tourism leadership and marketing.										
Central Coast	The specific outcome I seek would require an enormous amount of time and energy, but I believe the ability to travel by bicycle should be made more safe for our visitors.										
Central Coast	to be wise.										
Central Coast	We need to have better roads and overall infrastructure support in order for tourists to want to travel the coast.										

	Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Areas	Downtown Renewal or Beautification	Tourism Impact Communication
North Coast	A living wage, affordable housing, better education for k12, more jobs, diversity.										
North Coast	a network of agri tourism and culinary industry professionals that are experience oriented and supported by collaborative branding and marketing efforts in an attempt to provide a culinary/agritourism "trail" of unique visitor experiences, supported by solid infrastructure and an overarching tourism management and marketing plan										
North Coast	Achieve a better balance of year-round tourism. Capitalize on our natural environment and farming industries while promoting education/respect at the same time. Increase tours - industry tours included.										
North Coast	An exhaustive linking of all tourism opportunities that is easy to access and leads more visitors to tourism opportunities.										
North Coast	An increase of off-season tourism as well as an increase in housing for our hospitality employees.										
North Coast	Be cognizant of the health and wellbeing while touring the coast. Highlight smoke free locations, family friendly venues, alcohol free locations and volunteer opportunities										
North Coast	Being international-ready, building tourism without negatively impacting the livability of residents, and expanding off-season events.										
North Coast	cherish the arts & environment . These are the reasons why people travel. Smart people travel for the environment. They are bird nerds, plant enthusiasts and appreciate authentic fine art . Smart people have money.										
North Coast	Connect downtown area with tourists - right now, they just drive right past. And enhance the visual appeal and safety of the downtown area to encourage tourists to stop.										
North Coast	Continue Clatsop County cooperation between communities.										
North Coast	Continued development of agritourism. Decrease in the practice of spending local money in the PDX/metro area for products and services that can be attained locally.										
North Coast	Cooperative efforts between like entities to improve the tourism experience in the region. currently we have formed the Tillamook Coast History Alliance to bring the Counties museums together. I think it is working for us.										
North Coast	Create more 'quiet season' events, to promote the coast. We would have appreciated more of an 'equal sharing' of the tax monies generated by the additional sales tax that is going to be used for the track event in Eugene.										
North Coast	Developing Global realization of Surfing in Oregon and specifically Nelscott Reef as a top 10 big wave surfing destination in the world through web and broadcasts.										
North Coast	Educate lawmakers and local officials about the value of tourism so they spend local money appropriately, aggressively market shoulder seasons to provide year-round jobs, and invest in sustainable tourism messaging and practices.										
North Coast	Education and community involved tourism										
North Coast	Establish key goals to find, attract, new business in our market segments. Establish a goal of increasing visitors to our area and work to that goal. We seem to be very sloppy in goal setting or achievement of stated goals. I do not see that we have, as a tourism community set goals, work to achieve those goals. Tourism has to grow to sustain the tax base Oregon depends on. Our business has to grow in order to continue to provide great experiences for our guests and long term jobs for our staff. I think we start at step one, set achievable goals, create a plan to get the job done, involve the tourism community so that we all pull together and finally measure our progress. We keep spending our lodging taxes on marketing, public relations, educating. If we don't produce an increase in visitor numbers and business we will ultimately lose our business to other states.										
North Coast	Finding a way to bridge the gap between agriculture and tourism, and finding a way for them to "play nice." Finding a way to repair roads and increase travel throughout the city to make it easier for tourists to visit.										
North Coast	Finding better ways to manage incoming commuter traffic and regional transportation. As people live further from their workplaces, getting to the job on time can be difficult when the hwy is at capacity.										
North Coast	Focus on marketing to the Seattle/Tacoma area and Vancouver, BC. We also need more promotion of the arts and visual arts to our target markets.										
North Coast	For people to learn more about our area and the opportunities we have to enjoy the environment here.										
North Coast	I think continuing the momentum that TO has forged is a great direction for regions to go in - following your lead in the types of marketing and program we pursue, but customizing as needed to our own assets and getting more specific to the fabric that makes the coast so special - natural beauty, residents, cuisine, history, etc. With so many small towns in our region, and such a long distance between us, the coastal RDMO is key in connecting efforts along the coast and helping us learn from one another and leverage our efforts as individuals into partnerships. If they hear about a project in one community that could be repeated in another and marketed together, let's do it! I think we all fight the visitor fatigue in our towns in the summer and feel some backlash from local residents about being overwhelmed by visitors so your points about educating the local residents and governmental agencies about the economic picture created through tourism is so important and not always the easiest story to tell to stubborn folks. :)										
North Coast	I would like my region to leverage the local products that we have into a trail or network of trails to promote these businesses allowing tourism dollars to stay local. I would like to work with planning departments on the regulations of what can and cannot happen on farms. For example, coastal farm weddings could be lovely, but aren't allowed.										
North Coast	I would like to enhance the network of Visitor Assoc and Chambers of Commerce on a project highlighting the motion pictures that have been filmed in their areas and promote it on the Oregon Film Musuem website										
North Coast	I would like to see growth in the opportunity season. I would. Also like to see our community college educated on the importance of having a culinary program as we try and build our tourism infrastructure.										
North Coast	I would like to see improved infrastructure and facilities that are capable of accommodating increased usage and a clear connection between the traveler and our local environment. The North Coast can get away with a lot of things like poor customer service because people are coming here for our natural resources (oceans, beaches, rivers, forests).										
North Coast	I would like to see more hiking opportunities along the coast range that is close in to the beach towns.										
North Coast	I would like to see the proper funding of OCVA to bring the whole coast together. OCVA will do the job well if given the tools by TO										
North Coast	I'm not convinced that "the coast" should be/can be marketed effectively together. I think the north coast is VERY different than the southern coast or even the middle coast.										
North Coast	Improve infrastructure that centers around tourism (parking, restrooms, roads, etc.)										
North Coast	Improved bicycle tourism marketing and infrastructure. Infrastructure is absolutely necessary before marketing. In particular Highway 101 and the Salmonberry Trail.										
North Coast	improved traffic flow during our peak summer months will make visiting Astoria more fun.										

		Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Areas	Downtown Renewal or Beautification	Tourism Impact Communication
	Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.										
North Coast	Include addressing workforce shortages and housing, and traffic congestion as foundational to a successful, resilient tourism industry.										
North Coast	Increase guided tours, lead by environmental interpreters and improve trail systems with improved access and signage.										
North Coast	Increase non-peak season travel. Product development of key outdoor recreational activities, most importantly access to views and day hiking.										
North Coast	It would be nice to see a longer tourist season for the coast - emphasis on off season opportunities would help stretch the income generating possibilities for all businesses.										
North Coast	Limit peak season capacity increase to protect our nature scape and the socio-economic conditions in our communities. Focus on building shoulder and opportunity season capacity through small meeting and convention facilities and expertise. This will improve our overall socio-economic conditions by expanding the "work year" of service industry workers.										
North Coast	Linkage and improved public transportation options from Portland and Seattle areas that are less weather sensitive especially during the off season. Traffic is a serious problem during the summer and public options could help improve the impact on coastal communities.										
North Coast	More collaborative partnerships for the RDMO. Perhaps an annual gathering for each section of the Coast in addition to one regional conference (or Coastal Summit such as OCVA organized last year). Flow of information from coastal constituents to RDMO representatives in their area. Wholistic approach to tourism considering visitor impacts and changes to a community because of tourism.										
North Coast	More farm based or small studio based hands on experiences, local food producers networked with local artisans, chefs, wellness practitioners. Seasonal coordinated events linking Astoria to Tillamook including chefs, artists, farms, musicians (focus on off season development), more eco-sustainable tourism focus and tours (biking, local farms, renewable energy, hiking). Educational and experienced based tourism- hands on classes, retreats. Stronger online presence, stronger storytelling focus, stronger focus on online maps, guides, phone apps so that people can follow driving or bicycling tour loops around the north coast. - include lodging, experiences, dining, gallery/studio spaces. Emphasize local, hand crafted, connection and stories, sustainability.										
North Coast	More marketing for off season travel.										
North Coast	More online and visual advertising.										
North Coast	More tour operators in Astoria										
North Coast	off-peak season visitors in greater numbers										
North Coast	Provide a safe environment for tourists throughout the region.										
North Coast	Provide continuity in our RDMO current efforts and the funding to stabilize our regional efforts for enough time to prove ourselves. I.E. Keep current RDMO										
North Coast	The RDMO needs to realize they must focus on developing stronger DMO relationships. They must bring a big picture view of the region and work with the DMOs to adapt it.										
North Coast	transportation										
North Coast	We aren't at a loss for talented, interesting, and sustainable projects and people! How can we showcase the best of our food, farm, art, and wellness communities in a way that supports the coastal regions year round? Cross-pollinating. Focus on providing platforms for these innovators to create together.										
North Coast	We need to alleviate traffic congestion										
North Coast	We would benefit by incorporating all of the aspects of our area into a tourism package, so the aspects that are not as tourist-dependent are not at the mercy of the tourism juggernaut. Attend regularly to the area's infrastructures that suffer from the extensive pressure of tourism, to help avoid the resentment of non-tourism dependent residents and visitors; that way the message to the public can be more clearly positive, rather than the less-welcoming responses that tourists sometimes get from locals when prime tourist times substantially disrupt local lifestyles.										
North Coast	We would like to see more tourism-related facilities that would encourage visitors to stay a night or two: hotels, inn, campgrounds, restaurants, restrooms.										
North Coast	We would love to see more traffic here in off season. We also would like to see some help with the traffic and litter issues that arise during high season. We need more people in the community that are not retired and willing to work in the industry. For that to happen, we need affordable housing for younger people and their families to staff the businesses										

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	Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.										
South Coast	A better representation for the Southern Oregon Coast on the Website and Social Media. Further education for stakeholders and frontline workers.										
South Coast	A regional activity guide/ tour similar to the farm tour that encompasses the arts.										
South Coast	A regional branding/marketing plan to highlight our area.										
South Coast	A strong focus on the fact that our particular region benefits from it's close proximity to the "California" redwoods, which is a very strong "draw" both internationally and domestically.										
South Coast	Bandon is a small town on the Southern Oregon coast. Since logging and fishing have been drastically reduced, and golf and tourism to the area (beach) have become the mainstays for our visitors - Our town is needing to learn how to better identify itself as a tourism destination.										
South Coast	Better promotion of outdoor activities that focus on fishing and Wildlife viewing. We are rich in natural resources and uncrowded beaches.										
South Coast	change our economic focus from natural resource extraction to cherishing our natural resources and building an economy based on sharing them with visitors										
South Coast	Continue working toward better looking communities. We have made great progress, keep the momentum going!										
South Coast	create a stronger marketing plan to promote the coast, involve partners and communicate opportunities that partners may leverage										
South Coast	Develop a year round destination tourism that is affordable both for the tourist and the workers that provide service for them.										
South Coast	Develop and promote a regional attitude for outbound marketing efforts with a target to increasing out-of-region visitation thus increasing the pie for all the individual tourism related interests in the region.										
South Coast	Develop its cultural tourism aspects. Market the local to more distant areas.										
South Coast	Develop sustainable jobs for the locals in the tourism industry										
South Coast	Enhance the experience on "in season" visitors through better training and education of front line contact employees. Enhance "what to do now that we are here" resources for visitors. (online / social media, print) Better communicate "reasons to visit" in shoulder and off seasons through social media and media buys.										
South Coast	Focus on building a stronger membership base. Find a more effective way to communicate with all members re: marketing.										
South Coast	Get more local people involved to understand how to grow businesses and assets for building tourism										
South Coast	Hopefully our region will become more engaged in developing enhanced tourism options and better able to communicate them to appropriate audiences.										
South Coast	I would like our area to take a more active role in promoting tourism. I believe that are area needs to be educated in the value of tourism.										
South Coast	I would like to see Boardman State Park named as a National Park. This would triple the number of visitors to the Southern Oregon Coast.										
South Coast	I would like to see the Brookings-Harbor region retain the Southern Oregon Kite Festival. Due to lack of local support, there is a definite possibility of the Festival moving across the border to California.										
South Coast	Increase in professional local tour operators/guides Increase in quality lodging for visitors and reasoable year around living space for employees and very import local reinvestment in tourism and street level aesthetics										
South Coast	Increase the number of sustainable tourism related businesses in our local area and show growth in their economic contribution to our community.										
South Coast	Increased visitation to the south coast.										
South Coast	Investment in infrastructure- marine landings, wider roads-bike paths- 1859 miles of connected bikes paths throughout the state.										
South Coast	It is necessary to create a regional brand that truly captures the unique assets of the South Coast. We must also invest in destination creation and management to ensure our region has the experiences tourists are seeking out in other parts of the state.										
South Coast	It would be great for our area if tourism money was not important. The tourism industry provides few family wage jobs and little economic security for the residents of the tourism region.										
South Coast	Make the local cities and surrounding areas more presentable to visitors. Train motel / hotel staff about offering information concerning things to do or see in the area.										
South Coast	More for tourists to do and see in shoulder seasons										
South Coast	More jobs/stores/services. More housing. The current business owners to have better customer service and manners.										
South Coast	More product development and education of frontline staff										
South Coast	More travelers to the area due to increased visibility of what our area has to offer in terms of tourism----										
South Coast	ODOT signage (like for a Farm Trail) that does not have a yearly fee and is unique to the agritourism experience, and not just a "tourist attraction." sign (like for viti-culture). Chambers & Visitors Centers need to be educated and on board with Regional tourism development.										
South Coast	Our famous Azalea Park has rare indigenous azaleas that are not healthy. This park has had expert advice on management, but difficulties with all that's involved. The park is a key element of this area and might be redeveloped to save the azaleas and facilitate tourism. It hosted the Wild Rogue Relay crowds in the last 2 years. It's a concert center all summer. It can become something amazing with a focus, some ideas, funding. A crown jewel for all ages of people.										
South Coast	Our primary focus right now is to increase tourism in the off-season (October - April)										
South Coast	Pass a Local lodging tax to help fund area beautification and tourism marketing.										
South Coast	Pride in our keep-n-it-real community and the ability to verbally communicate the local offerings when asked. Deploy verbal tours and springboard marketing concepts fully.										

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	Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.										
South Coast	Reach more visitors by increased number of skilled docents.										
South Coast	The coast as a "region" is not really a helpful designation. The north coast is close to urban centers and is connected by US 26. The South coast is connected to much smaller urban centers via much less convenient and smaller highways. The south Coast needs a good connector highway or rail line which the state would never allow. As it is, on the South Coast, in my area in particular, tourists development money has been wasted on a downtown core when tourists actually want to see the beaches and not thrift shops. That said, replacing derelict buildings and businesses along 101 and replacing them with actual tourist attractions would be most helpful IF they are going to continue to pretend beaches don't really matter. After all, we don't even have hotels at our beaches.										
South Coast	To make certain as we keep inviting more and more people that are natural resources are protected and that there is adequate parking restrooms. Bandon lacks this terribly. The chamber information center here DOES NOT EVEN OFFER A RESTROOM!										
South Coast	Transform highway 101 between Coos Bay and North bend from ran down vacant land to a vibrant bay facing water taxi serviced tourism experience. Recreate what existed in it's place 90 years ago.										
South Coast	Visibility and equal representation of the South Coast. In my opinion the South Coast is overlooked by the OCVA and SOVA.										
South Coast	Visitors know that the Oregon Coast is a great place to visit ANY time of year - NOT just in the summer.										
South Coast	We are looking to complete Riverwalk, River traffic, and the build started for Carousel (we have 28 hand-carved animals)										
South Coast	Work together, which generally isn't possible. Quite discouraging. Train more "shopkeepers" in the region of possible roles in leadership and visioning, rather than State personnel.										
South Coast	Would like to see more a more diverse group of small businesses thriving and working together to support each other in our communities.										

Global Sales Open-Ended Tactical Comments: Oregon Coast		
Q.	Please indicate any other areas of global sales and international travel trade and media which you believe should	
• Central Coast	Also educate the recipients of our traveling guests. For instance, if we have an increase in Asian guests, how do we approach our cultural differences? How do we even recognize what those differences might be?	
• Central Coast	Attracting international visitors to experience rural communities	
• Central Coast	Being on Hwy 101 on the coast, we get an awful lot of people from outside the country traveling between Seattle and San Francisco. Has there been any coordination with travel groups in those cities?	
• Central Coast	Facebook and social media have changed everything - the traditional outlets are obsolete	
• Central Coast	I understand the need for the international marketing as a whole for the State However my answers are based on my particular needs not as the general tourism as a whole. My business as operated is not in any way dependent upon this.	
• Central Coast	I want the Salmonberry Trail Project to get up and running! Virtually nothing could better benefit tourists and locals alike!	
• Central Coast	Lincoln City needs to better develop its core markets of Portland the the Willamette Valley before resources are put against international business. Like it or not, we don't have an airport, railroad, port or highway to bring international visitors to town. This segment is not as attractive as nearby domestic visitors to us.	
• Central Coast	market old growth forest, Coast Dunes, whale watching, and uncrowded beaches, clean air, elements most places in the world and USA do not have.	
• Central Coast	off-seasonal options should be developed	
• Central Coast	The international visitors are important, but they are not a huge proportion of the coastal visitor population.	
• North Coast	Again, I think this is being done already.	
• North Coast	Any global sales and international travel trade development and training would be helpful. OCVA does not provide that.	
• North Coast	I think that we are not capable of expanding our marketing at the international level until we get some infrastructure in place.	
• North Coast	More outreach to Canadians from the BC area.	
• North Coast	Nelscott Reef Big Wave Surfing Attraction	
• North Coast	Not sure we know enough about the tourism advertising opportunities to be able to take them globally yet. Currently we use personal contacts and social media in an attempt to reach as many people as possible within our small niche market.	
• North Coast	Our problem in Tillamook County is not just getting them here it is also about having the infrastructures in place to take care of them while they're here - roads - water and sewer - transient lodging....etc	
• North Coast	people travel for hiking, birding, art viewing, biking, beach walking , study of plants , ... art workshops !!!!! art galleries, farmers markets, music, theater, pristine environments	
• North Coast	Primary interest in international travel promotion as it relates to promotion of the Tillamook Cheese brand and its Visitor's Center.	
• North Coast	Send more representatives to SeaTrade Global and Cruise Shipping Miami, not just one man	
• North Coast	We don't seem to hear or be aware of any efforts in the domestic and international tour, travel market, there is no cultural training.	
• North Coast	We have never recieved anything from OCVA or TO other than "we have a lot of _____ visitors and you should make sure you are accomodating them" How exactly do we do that or teach our businesses to do that. That to me is the role of our RDMO	
• South Coast	A more balanced exposure/promotion of entire region. Better communication with RDMO members regarding marketing in general.	
• South Coast	Educate public on economic value of international tourism specific to their area.	
• South Coast	I believe the regional destination organization should better familiarize themselves with what what our areas have to offer. again communication would greatly assist with this	
• South Coast	I feel that we have a lot of growth domestically ahead of us before we invest in international marketing.	
• South Coast	I keep thinking of a tie-in between East Asian tourism and the Southern Oregon Kite Festival. Kites are a far larger part of Asian culture than they are American culture.	
• South Coast	International tourism is admittedly way over my pay grade	
• South Coast	Market directly to hubs of higher learning along the eastern seaboard and Midwest. Cap the development of places to park an RV- not the tourists we want.	
• South Coast	None	
• South Coast	Public Relations is the most effective means to communicate messaging internationally.	
• South Coast	We are too remotely located and have too little infrastructure connecting us the urban centers for much of this to be applicable or reasonable..if I am understanding this correctly.	
• South Coast	We are too small to benefit from much of the above	
• South Coast	We hope to be ready in the 3-5 year period	

<i>Marketing Open-Ended Tactical Comments: Oregon Coast</i>	
Q. Please indicate any other areas of marketing which you believe should be an extremely high priority for your regional	
• Central Coast	"Spreading" seasonal destination marketing to improve off-season visitation,
• Central Coast	Again.....make the City give us the \$\$ they are required to give...Our programs for tourism used to be very successful until current administration started withholding funds to do their own for-profit projects...
• Central Coast	Beware of big promises from advertising and pr companies. Big promises usually = big expenditures. They don't have "the magic bullet".
• Central Coast	Collaborate with short term rental groups. Recognize these people as ambassadors of their area and empower them.
• Central Coast	Content developed that enhances the visitor experience!
• Central Coast	For smaller rural cities, that do not have a dedicated VA, develop creative and increment levels of media campaigns that enable attractions, restaurants, lodging facilities, etc., to piggy back on the State's Travel Oregon Campaigns. AND, to access and use the buying power of Travel Oregon. This would help to expose those with small budgets, and give them a better probability for growth.
• Central Coast	I think the direction of advertising should move intensely towards the social media. This seems to be the future of advertising and can reach specific targeted audiences.
• Central Coast	I want the Salmonberry Trail Project to get up and running! Virtually nothing could better benefit tourists and locals alike!
• Central Coast	Media opportunities and usage are in flux and will continue to be so for the foreseeable future. Help and guidance on opportunities and the shifting importance of media choices will be appreciated.
• Central Coast	Media that will meet the various audiences - for the things they are interested in . . not everyone just goes to TripAdvisor to plan a weekend.
• Central Coast	my "regional management organization" might coach lodging owner/operators how to work social media in the new world.
• Central Coast	off seasonal promotions
• Central Coast	Please do not create advertising that only benefits businesses that advertise on magazines etc. It must benefit the industry and not a tool for some entity to sell advertising
• Central Coast	Television commercials specific to Florence
• Central Coast	We need quick and easy access to images and video royalty free to post and incorporate on a daily basis for social media.
• Central Coast	What would be more useful than printed information is development of a regional visitor app, that helps visitors quickly and easily find accurate information about recreation opportunities and current conditions. Should be developed in partnership with agencies that manage recreation resources.
• North Coast	Compelling and entertaining educational components about how visitors can interact safely and respectfully with our natural resources.
• North Coast	development of networks, tours, artist studio open houses. on farm experiences, connecting people with place focus on arts, handcrafts, local food, wellness and recreation
• North Coast	Focus on the shoulder and off season. We don't need even 1 more tourist in July or August.
• North Coast	I believe we should try and become flyerless and 100% digital in our marketing. Yesterday!
• North Coast	I don't believe folks in charge of DMO should be advertising their own businesses with the DMO
• North Coast	I dont see Marketing as being the main purpose for the coastal rdmo. A solid website (our leads have dropped almost 30% this year) and social media presence is all I see that level needing.
• North Coast	Our organization does lots of PR/media/content development. What the RDMO can do is perhaps use our content to promote the coast. Market research would be very helpful. Have never seen this from the RDMO.
• North Coast	Port of Astoria needs to be marketed globally. Our Marketing Director also represents the Port of Humboldt Bay
• North Coast	promote & protect your gifts (environment & the Arts). Chamber web sites. Travel Oregon... where is the Art ?
• North Coast	Social media seems to be the way to increase visitation in our area of the North Oregon Coast.
• North Coast	The biggest draw to our area is our natural resources. Marketing needs to manage understanding of the resources as well as impact. As for printed guides, we have a glut of guides for our small area and some coordination would be much appreciated.
• North Coast	The history of movie making in Oregon.
• North Coast	the regional (OCVA) website is really good already
• North Coast	Use of social media assets to improve the reach of our local advertising. Somehow we need to coordinate and determine the effectiveness of our advertising. We have, in the Tillamook County area, at least 3 annual publications stating that they speak to the tourists in our area. 2 sponsored by the newspaper, the Headlight Herald and one from the Tillamook Chamber of Commerce. There is also Oregon Coast magazine. Each wanting money to be carried in their publication. We are fortunate to be assisted by the publicity grants from Visit Tillamook County, a part of the TRT tax structure.
• South Coast	Assistance to local communities both financial and educational as to how to and where to market.
• South Coast	Better explanation of the various high quality activities our area has to offer.
• South Coast	I would like to see more collaboration between us -
• South Coast	More generic, not specific businesses. Many close, out of business, change of ownership, impacts trust of story
• South Coast	People who reside in flyover states have broad misconceptions about the west coast. They're scared. Market to their sensibilities and reassure them it's safe.
• South Coast	Place more emphasis on economic benefit of tourism for smaller rural communities.
• South Coast	Until basic needs are met, it seems foolhardy, at least on the impoverished coast, to spend money on advertising and pr although that seems to be the intent of much of the dollars the state spends. IF these videos and marketing tools were created, the dollars would not even be spent locally. The last "opportunity" I was given to be included on a tourist map, via our own Chamber of Commerce, would not even be printed in this state!
• South Coast	We are doing some of the media/video

<i>Industry Services Open-Ended Tactical Comments: Oregon Coast</i>	
Q. Please indicate any other areas of industry services which you believe should be an extremely high priority for your regional	
• Central Coast	Ability to have feedback on services received by visitors and experience with how to respond to these.
• Central Coast	as far as any kind of training, being a fair distance from the larger cities makes the thought of online access for any programs desirable
• Central Coast	Be efficient and use internet for promotion and not the old dying or dead means such as brochures.
• Central Coast	Educate local governments of the intent of the room tax they are supposed to share!!!!
• Central Coast	Having scholarships to the tourism conferences would enable the small business owner to attend. I have wanted to for years, but couldn't justify the cost.
• Central Coast	I believe there should be an on line website for our Oregon Coast's private and community concerns interested in finding specific market groups that each individual or group wishes to target for their specific needs. IE. If I wish to promote my business to two specific groups and would love to find out where I can reach those groups most affectively.
• Central Coast	Marketing to outside but close area's such as Washington, Oregon, Colorado, Utah, Idaho, & California.
• Central Coast	We benefited from Qcare. Bring it back please!
• Central Coast	workshop on the off-seasonal promotion strategies - there are enough folks here during the summer season
• North Coast	Customer service is marginal in many cases and some training AND follow-up is critical.
• North Coast	Get a new Marketing Director at the Port of Astoria. The Marketing Director owns Sundial, Sundial has exclusive contracts with the cruise lines. He wants me to sign a 6 page contract dictating what I can and cannot do with my tour business.
• North Coast	Offer training on meeting and conference operation and sales.
• North Coast	Our community needs customer service training. Not necessarily tied just to tourism. We are unique in that people are coming here with little need for marketing. What we do with them once they are here is our challenge.
• North Coast	promote the arts in Oregon. support public art. can you pick up the NY Times and not read about a destination that did not mention art?? HELLO OREGON
• North Coast	Provide educational opportunities to youth to learn about tourism in Oregon through hands on programs.
• North Coast	This is already happening.
• North Coast	We do training and grant writing instruction with our local businesses, and we have strong brochure distribution system in place.
• North Coast	What is a "tourism facing entity"? We do customer service training as it pertains to our museum and the community in general. As an attraction, that does not sell anything other than the experience, sustainability of funding becomes a priority.
• North Coast	Why the limited resources notation Our lodging taxes just went up in July 2016, an additional 1.8%??? How limited are our resources, if these goals are not achievable why are we reviewing them? Have we looked into partnering to make our resources go further?
• South Coast	Communication with stake holders and members. For the most part we have no idea what projects OCVA is working on.
• South Coast	Consensus building workshops. That way we can move forward with a goal for the area.
• South Coast	Convincing local officials to support a transient occupancy tax. Convincing local businesses & governments benefitting from tourism of the necessity of financially supporting nonprofit organizations which attract tourist.
• South Coast	Customer service training should be on-line training or train-the-trainer programs.
• South Coast	Digital screens at visitors centers full of local experiences and outfitters. Interactive touch screens.
• South Coast	Emphasis towards educating local communities, particularly individual cities and/or counties on what is important relating to tourism development, marketing and growth. Some counties and cities have lost their "focus" on the importance of tourism and how to market effectively, they also need to know the "definition" of tourism promotion as the State understands it and has determined it in ORS statutes.
• South Coast	Grant opportunities to help develop & expand Tourism experiences. Cost of signage, brochures, on-line collateral, and maintenance of trails etc.
• South Coast	Identify year round activities
• South Coast	Leverage osu extension tourism training and com dev support
• South Coast	RDMO could be more active in working with local Chambers, Main Street, and other organizations in promoting tourism.
• South Coast	The longer the activities punch list the South coast can offer the longer we can capture tourist and the more dollars they will spend. Building general itineraries to pass out to local service industry workers so they are more informed on what a tourist can do in the area would see a big ROI I feel.
• South Coast	These are all good efforts. Taking people from the region, spotlighting what's here, was especially impressive at Ford family Foundation Leadership gatherings. Curry County is becoming notable at some levels.
• South Coast	To many TSO (typical stoner operations)around here. There is a void in the understanding what level of professionalism is needed to be successful.

<i>Destination Development Open-Ended Tactical Comments: Oregon Coast</i>	
<i>Q. Please indicate any other areas of planning, management, development, training, or capacity building which you believe should</i>	
• Central Coast	Again, force local government to share the money that the City gets!!!!!!
• Central Coast	concept of stewardship and eco-volunteerism to protect the assets and promote sustainable tourism.
• Central Coast	Creating joint ventures in the region that create a path for tourists to follow and spend their money in our locales. For example when quilt shops in several towns/counties do "Shop Hops" that cover multiple shops over several days.
• Central Coast	Do not create bureaucracies and payroll expenses that use up tourism dollars
• Central Coast	Educate local hotels and restaurants about cultural preferences. For example offering tea pots vs. coffee in rooms, availability of menu's in different languages, etc.
• Central Coast	Encouraging and facilitating cooperation and program sharing among RDMO's, DMO's, Visitors' Bureaus, chambers, etc.
• Central Coast	Hospitality training and culinary skills training.
• Central Coast	I want the Salmonberry Trail Project to get up and running! Virtually nothing could better benefit tourists and locals alike!
• Central Coast	My RDMO needs help. I don't know if it's a lack of manpower or lack of organizational skill in who they've got, but they have great ideas and little or disorganized follow through. I look to them as a really great potential partner, but for now my expectations are really low.
• Central Coast	support local educational projects to enhance visitor's experiences
• Central Coast	Training focused on how to think long-term about protecting and improving the resources individuals are coming to visit.
• Central Coast	Two things: It's hard to argue that tourism volume could be increased at all during the busy season - even with the extensive re-design of hwy 101 in Lincoln City, for instance, tourism volume more than maxes out during the busy season. I see very little in here about any kind of mass transportation. And again, it's very difficult to bring in any kind of skilled workforce to enhance tourism anyway if there's no available housing for them.
• Central Coast	Would LOVE to see programs teaching Spanish as we see a continued increase of Spanish speaking tourists.
• North Coast	A lot of this is currently happening already as OCVA has forged partnerships and ORLA is providing more industry training opportunities.
• North Coast	aim high. This is where trickle down really works. READ National Graphics GEOTOURISM . SAVE OUR NW CULTURE
• North Coast	Convention and meeting planning, operation and sales.
• North Coast	I think pushing Devils Lake as a recreational destination should increase and also Nelscott Reef as the 8th Wonder of Oregon for big wave surfing
• North Coast	I think some of the infrastructure items, such as signage, campsites and anything that requires construction, should be the responsibility of the community of another state entity.
• North Coast	I think the public needs to have a say in grant funds, if they're for attracting tourism or developing the facade to increase tourism/appeal. The town I live in spent \$20,000 on a decorative cow gate to an alley to nowhere, that very few people even see. There are so many more effective ways that money could have been used to increase tourism or the appeal of the downtown area. I think the tourism direction needs to change in my area. Having a cow as your mascot doesn't drive tourism, we have a great slogan, but it's not represented well.
• North Coast	Just help increase capacity. The development can be done at the DMO stage since they often hold the relationships with front line businesses.
• North Coast	Lack of affordable workforce housing is a causing a shortage of workers.
• North Coast	We have started a county wide wayfinding program, a multi-year project.
• North Coast	we need more skilled workforce BUT those people need affordable housing. It's become a real problem, plenty of vacation rentals and hotel rooms but nowhere for the workforce and their families to live. It's a very real problem
• North Coast	We need public indoor tennis/pickleball courts on the north coast! Lots of people play tennis and as we all know, it rains a lot. We need more choices for indoor activities.
• North Coast	We only use volunteers at this point, but one of the largest concerns I hear from local merchants is their being unable to find reliable employees.
• North Coast	would like to see more cross pollination events between restaurants, lodging, experiences- creation of better outreach and marketing
• South Coast	All customer service training efforts should be "train the trainers" initiatives.
• South Coast	Carousel has just hired a new grant writer, so looking good, also Riverwalk is again submitting to OSParks
• South Coast	Guide and tour operator training and support very important to higher quality visitor experience and visitor management for local benefits Employee/Staff housing very important issue and liability insurance info and options are important
• South Coast	Keeping areas of recreation open for recreation should be a number 1 priority.
• South Coast	Less non profit more for profit - Fund development including grant access for for-profit enterprises because it strengthens all parts when new business develops, is successful and adds tax revenue.
• South Coast	Locals should be aware of the benefits of destination tourism.
• South Coast	Regional awareness of ALL and VARIED types of activities and attractions among chamber members and among local business owners and employees could improve. Visitors seem to enjoy and seek information from all types of locations, about all types of other local locations. Developing a unified presentation/ community assets package that is conveyed to tourists through all types of individuals, i.e., chambers, hotels, attractions, restaurants, and shop employees, will keep people moving throughout an area, for an extended period. Unfortunately, many who live/work/own businesses locally have very little opportunity or funding to participate in exploring the stores, restaurants, and attractions.
• South Coast	Sharing the last section with my general manager, she remarked "we already have all chiefs and no Indians." I will add we are up to our ears in marketing and training consultants and committees but no one can keep transients from accosting my customers or help me to move an already existing business with a half million dollar annual payroll to a more tourist friendly location. (I will note that the South Coast Development Council WAS able to find themselves a prime new location though.) Really?
• South Coast	Since our Chamber disbanded, it is an opportunity to build a conscientious and tourist-centric economic plan that embraces the tourism dependent aspect, with some progressive planning and management training development/capacity building
• South Coast	Trails, trails, trails
• South Coast	We need more economic growth with jobs, in order to offer more products/services to tourism. the arts is fantastic though it seems it's advertised much more than the other many benefits our area has to offer, such as hiking, sport fishing, edible food picking in the wild, stargazing, etc.
• South Coast	Work needs to be done in our Chamber of Commerce area. And Visitor Centers.