

# **2018 OREGON TOURISM ENGAGEMENT SURVEY**

## **OREGON COAST**

This report summarizes findings from a 2018 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 Oregon Coast with additional statewide results for context.

# 2018 OREGON TOURISM ENGAGEMENT SURVEY

## OREGON COAST

### SURVEY GOALS

The 2018 Oregon Tourism Engagement 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 September and October 2018 via emails and an open URL to Travel Oregon databases with additional distribution from RDMOs. A total of 1,512 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 Oregon Coast to provide relevant insights to the Oregon Coast RDMO. Where applicable, regional results are compared to an average of Oregon's seven regions. In addition, questions were asked in a way (prioritization ratings) that enables comparisons across tactical opportunity categories. The terms respondent and stakeholder 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.

## REPORT CONTENTS

Key Findings	2
Respondent Profile	3
Tourism Engagement and Overall Health	5
Travel Oregon Performance	7
Marketing	16
Global Sales, Promotions, PR, Media, & Marketing	20
Destination Development	24
Global Strategic Partnerships	35
Public Affairs and Communications	37
Custom Questions	41
Open Comments Appendix	43

## KEY FINDINGS

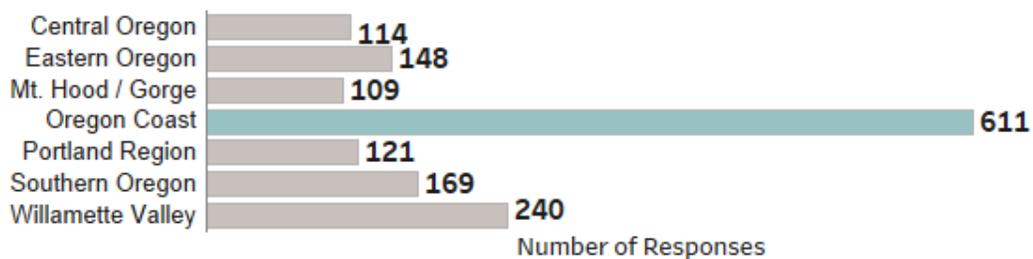
- **High levels of engagement with the Oregon Tourism industry:** Though to a lesser degree than the statewide average, a significantly greater share of Oregon Coast stakeholders indicated that they agree or strongly agree with the statement, “I am engaged with the Oregon tourism industry” than disagree with it. A smaller share expressed agreement with the statement, “I understand the Oregon tourism partnering structure.” These relatively low ratings may be in part explained by a lack of familiarity with RDMO initiatives in the Oregon Coast Region (page 13).
- **Positive Views on Tourism and the Direction of the Industry:** Stakeholders view the direction of tourism in the state and the region positively. Of respondents from the Oregon Coast, 60% and 55% agree that they are satisfied with the direction of the industry in the state and region respectively (relative to 55% and 70% in 2017). While these are high numbers, it should be noted that they are lower than the average of all other regions combined. As in 2017, 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 three categories (planning and management, product development, and PR & communications) 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.
  - Destination Development – Planning and Management: Increase visitation to the region during off-peak seasons (74%).
  - Destination Development – Planning and Management: Manage tourism growth in order to preserve local assets (natural and cultural) (72%).
  - Destination Development – Planning and Management: Create positive interaction between tourists and residents (69%)
  - Destination Development – Planning and Management: Identify and foster partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact (68%).
  - Destination Development – Product Development: Develop/improve infrastructure for visitors to experience outdoor recreation and nature-based tourism (71%).
  - Destination Development – Product Development: Develop/expand trail systems important for outdoor recreation or multi-modal transport (66%).
  - Public Affairs & Communications - Increase engagement with local and regional policymakers to ensure the value of tourism is clearly communicated (66%).
- **South Coast Respondents Desire More:** As in 2017, 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. 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.

- 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 higher for the Coast RDMO than the local DMOS (page 21).

## RESPONDENT PROFILE

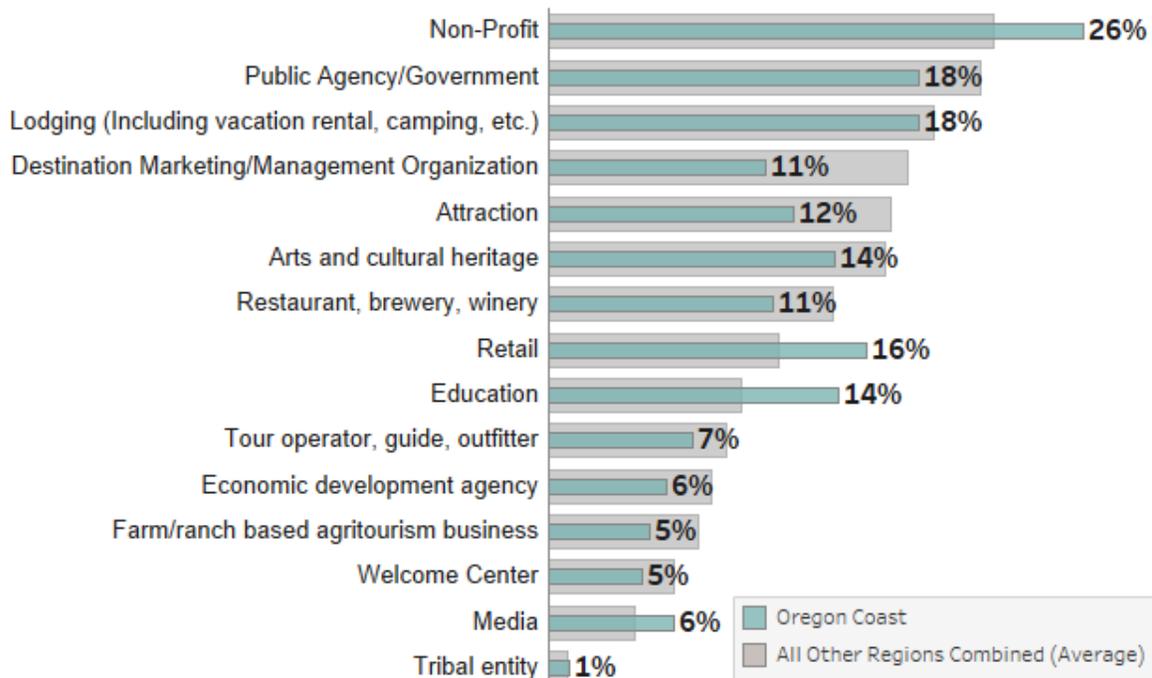
The figures below present the overall number of respondents as well as the industries in which respondents work. The question for Organization Type was a multiple response question, allowing respondents to select more than one industry or organization type. Thus, percentages will not sum to 100%. Relative to other regions, respondents from the Oregon Coast were more likely to be work in education (+5%), and less likely to be at a “Destination Marketing/Management Organization” (-7%) or work at an attraction (-5%). Additional details can be found in the figures below.

### Number of Respondents



### Organization Type

*Q: Please indicate the sector of the tourism industry in which you work by checking all that apply:*



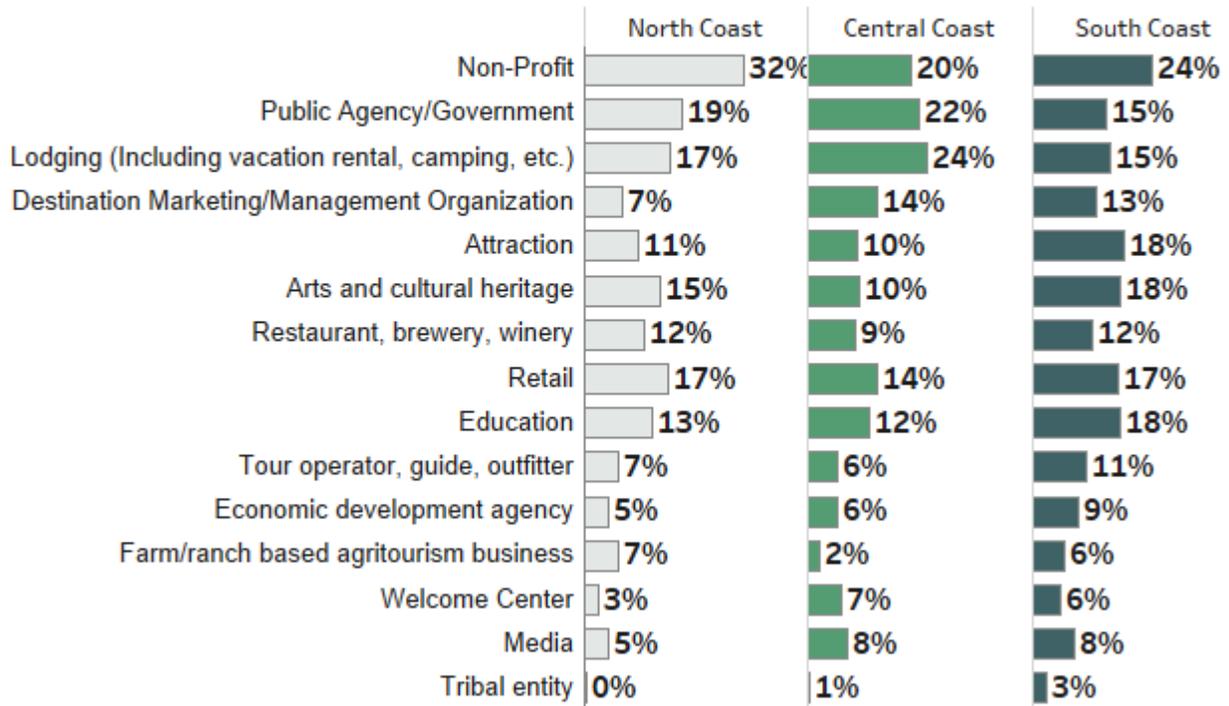
Where possible throughout this report, results have been broken down by coastal sub region.

## Distribution of Oregon Coast Respondents by Sub-Region



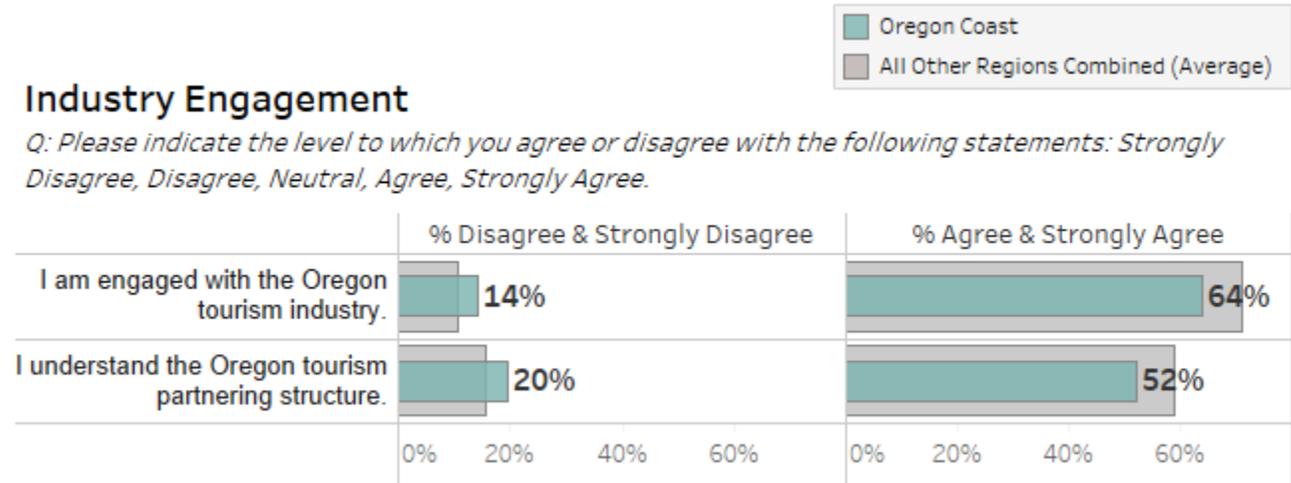
## Organization Type by Sub-Region

Q: Please indicate the sector of the tourism industry in which you work by checking all that apply:



# TOURISM INDUSTRY ENGAGEMENT AND OVERALL HEALTH

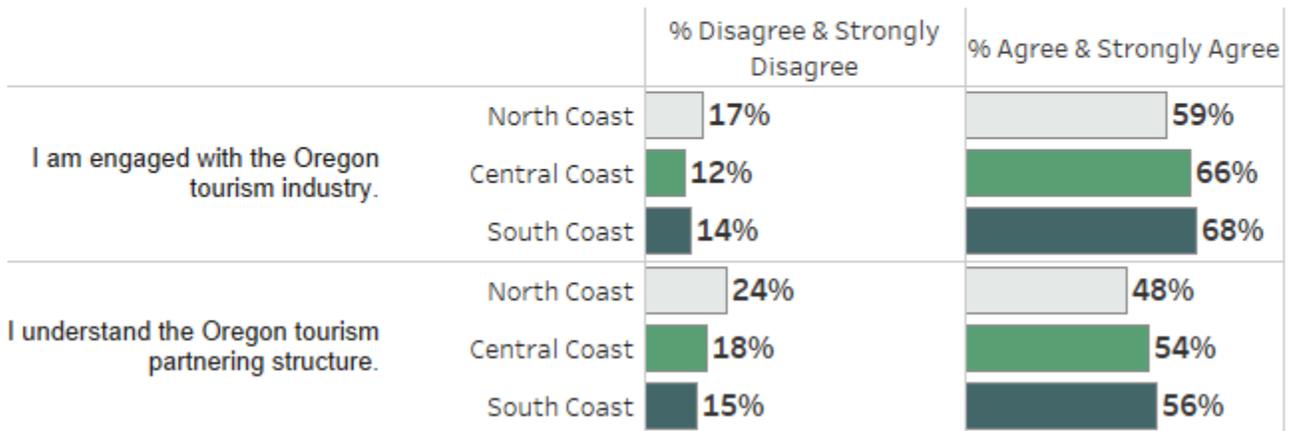
Respondents from Oregon Coast indicate high levels of industry engagement. Relative to the rest of the state, however, respondents are less engaged with the industry (-7% agree or strongly agree) and less likely to understand the Oregon tourism partnering structure (-7% agree or strongly agree).



Both engagement with the industry and understanding of its partnering structure were highest in the South Coast.

## Industry Engagement by Sub-Region

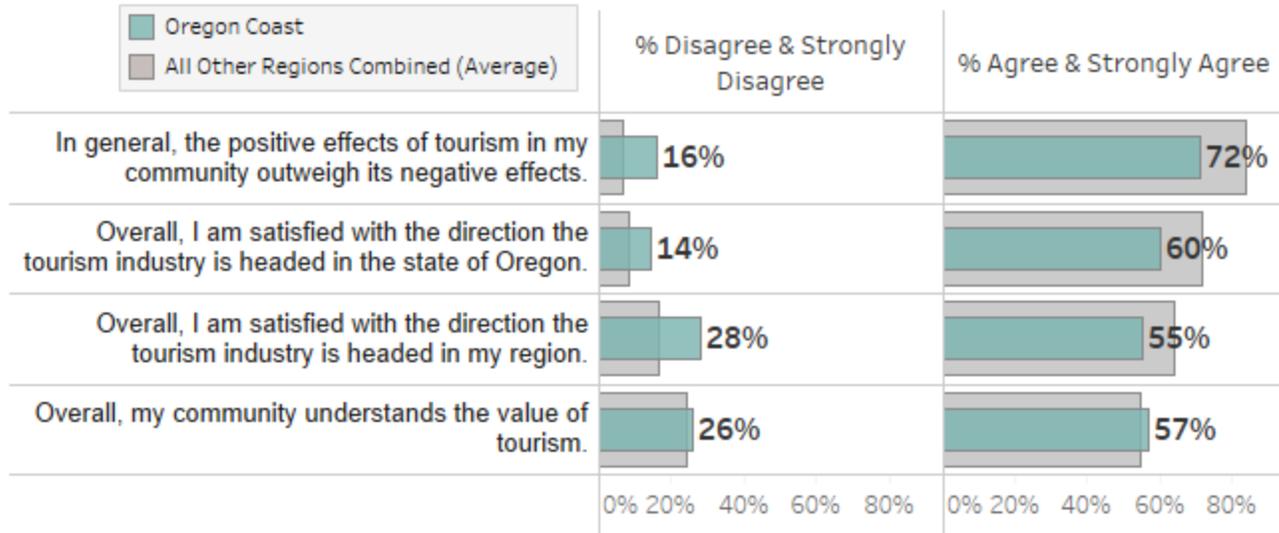
*Q: Please indicate the level to which you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.*



On measures of overall industry health, respondents from Oregon Coast indicate high levels of satisfaction. Relative to the rest of the state, however, they are slightly more negative about the overall health of the tourism industry, with a higher percentage of respondents indicating “Disagree” or “Strongly Disagree” in each category. As in the rest of the state, respondents are most in agreement that the positive effects of tourism outweigh its negative effects, and they are least in agreement that their community understands the value of tourism.

## Overall Health of the Tourism Industry

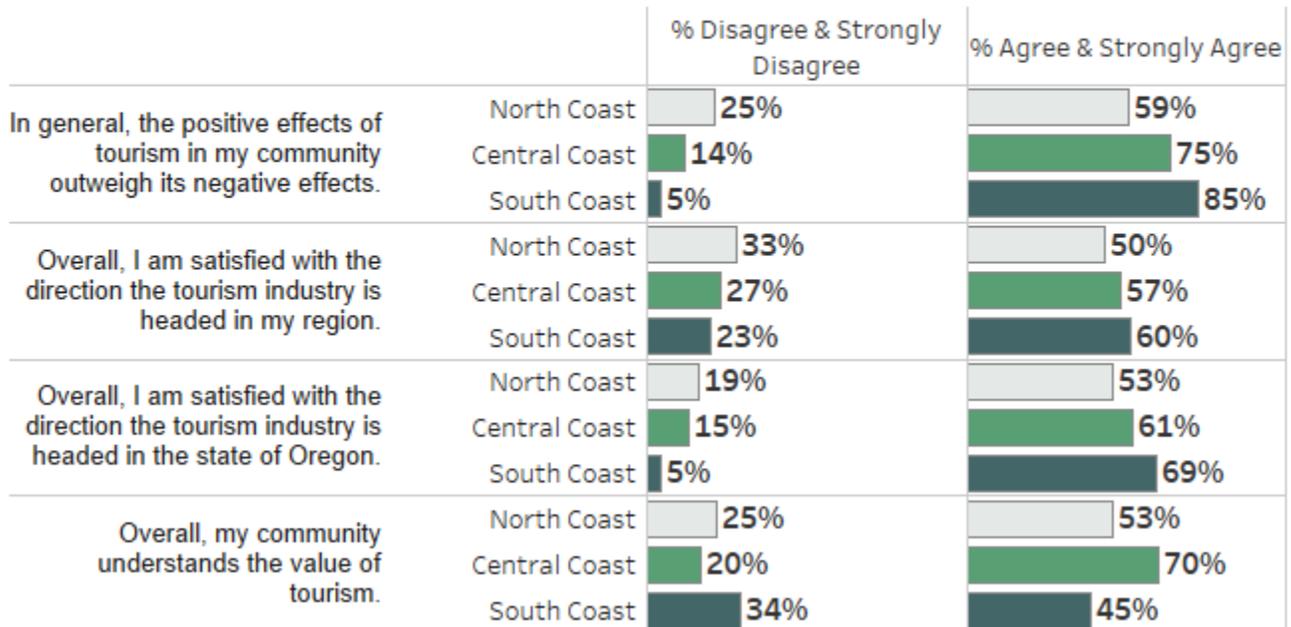
Q: Please indicate the level to which you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



The South Coast has the highest levels of agreement for each statement with the exception of, “Overall, my community understands the value of tourism,” where it drops to third.

## Overall Health of the Tourism Industry by Sub-Region

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

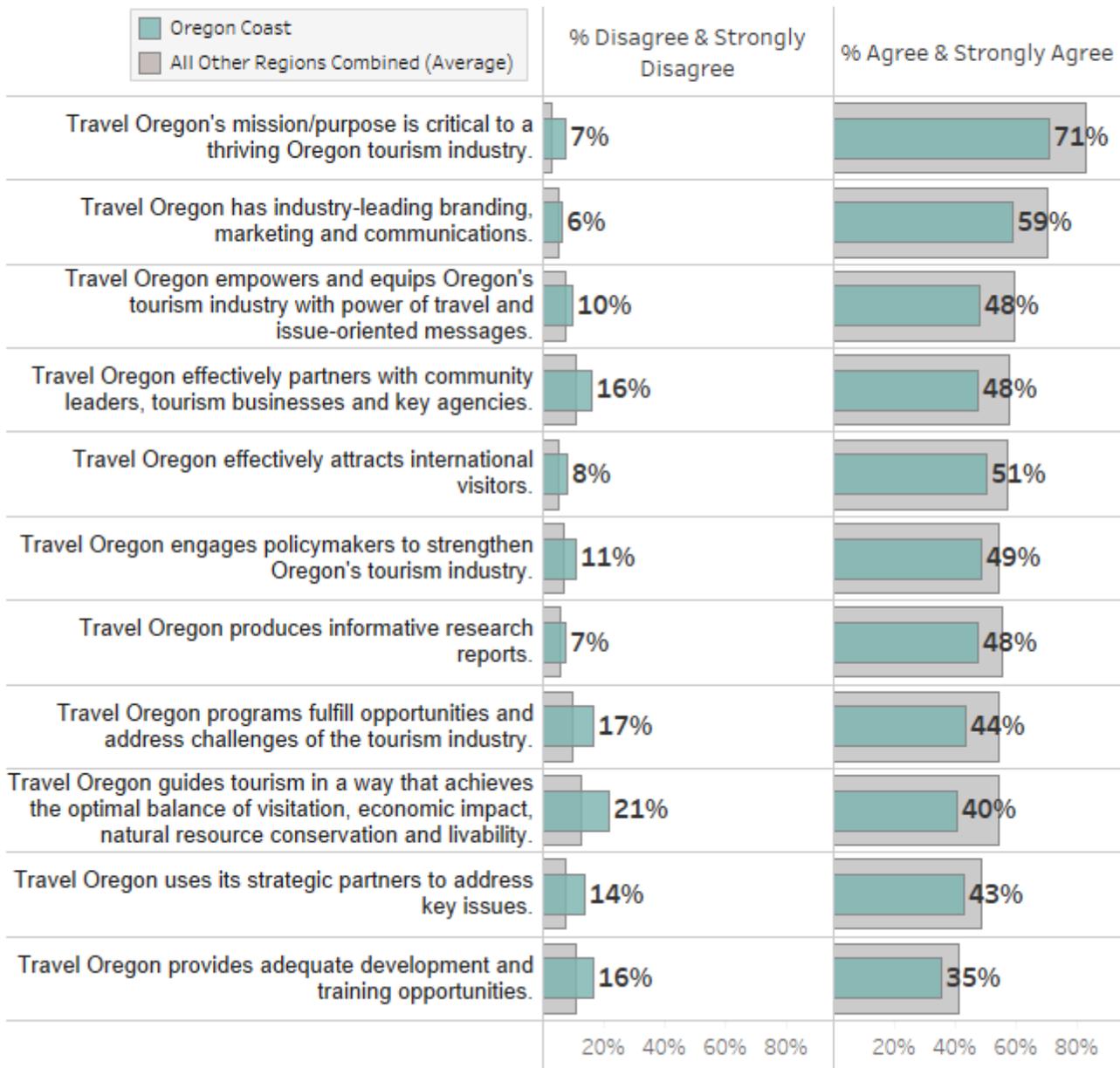


## TRAVEL OREGON PERFORMANCE

On measures of Travel Oregon performance, there is broad consensus that Travel Oregon’s mission/purpose is critical to a thriving Oregon tourism industry, and that Travel Oregon has industry-leading branding, marketing and communications. There is least amount of agreement about whether Travel Oregon provides adequate development and training opportunities. For each statement, respondents from Oregon Coast were less likely to agree or strongly agree.

### Travel Oregon Performance

Q: To what extent do you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



## Travel Oregon Performance by Sub-Region

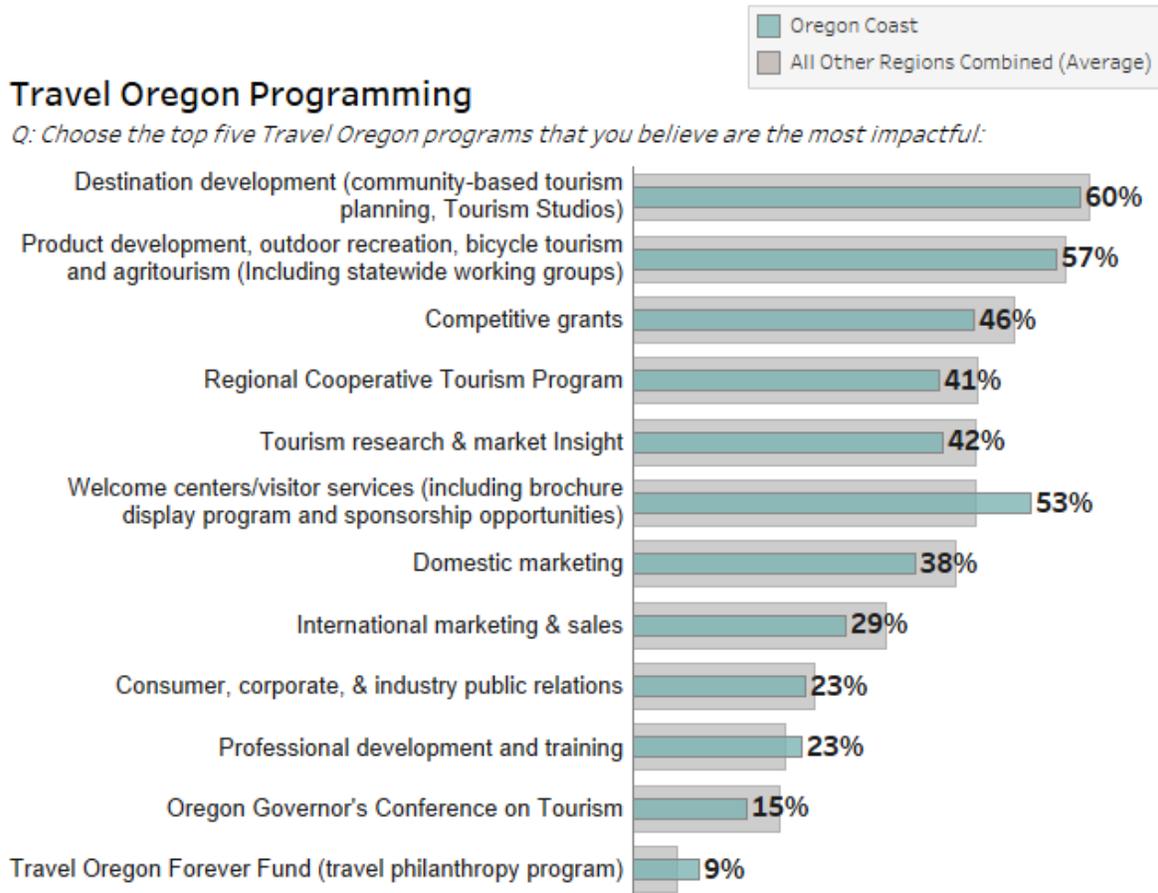
Q: To what extent do you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.

		% Disagree & Strongly Disagree	% Agree & Strongly Agree
Travel Oregon's mission/purpose is critical to a thriving Oregon tourism industry.	Central Coast	8%	73%
	South Coast	5%	75%
	North Coast	8%	66%
Travel Oregon has industry-leading branding, marketing and communications.	Central Coast	5%	61%
	South Coast	7%	62%
	North Coast	6%	56%
Travel Oregon empowers and equips Oregon's tourism industry with power of travel and issue-oriented messages.	Central Coast	9%	48%
	South Coast	8%	51%
	North Coast	12%	46%
Travel Oregon effectively partners with community leaders, tourism businesses and key agencies.	Central Coast	15%	47%
	South Coast	13%	52%
	North Coast	19%	46%
Travel Oregon effectively attracts international visitors.	Central Coast	8%	55%
	South Coast	11%	47%
	North Coast	5%	49%
Travel Oregon engages policymakers to strengthen Oregon's tourism industry.	Central Coast	9%	51%
	South Coast	8%	50%
	North Coast	14%	46%
Travel Oregon guides tourism in a way that achieves the optimal balance of visitation, economic impact, natural resource conservation ..	Central Coast	19%	42%
	South Coast	11%	45%
	North Coast	31%	35%
Travel Oregon produces informative research reports.	Central Coast	8%	42%
	South Coast	5%	61%
	North Coast	7%	43%
Travel Oregon programs fulfill opportunities and address challenges of the tourism industry.	Central Coast	16%	43%
	South Coast	11%	51%
	North Coast	22%	38%
Travel Oregon provides adequate development and training opportunities.	Central Coast	14%	34%
	South Coast	14%	41%
	North Coast	19%	32%
Travel Oregon uses its strategic partners to address key issues.	Central Coast	12%	39%
	South Coast	7%	54%
	North Coast	19%	38%

Overall, “Destination Development” was most cited among the top-five most impactful Travel Oregon programs, followed by “Product development, outdoor recreation, bicycle tourism and agritourism.” Respondents from Oregon Coast were more likely to cite the “Welcome centers/visitor services (including brochure display program and sponsorship opportunities)” (+7%) and less likely to cite “Competitive grants” (-6%) and “International marketing & sales” (-6%).

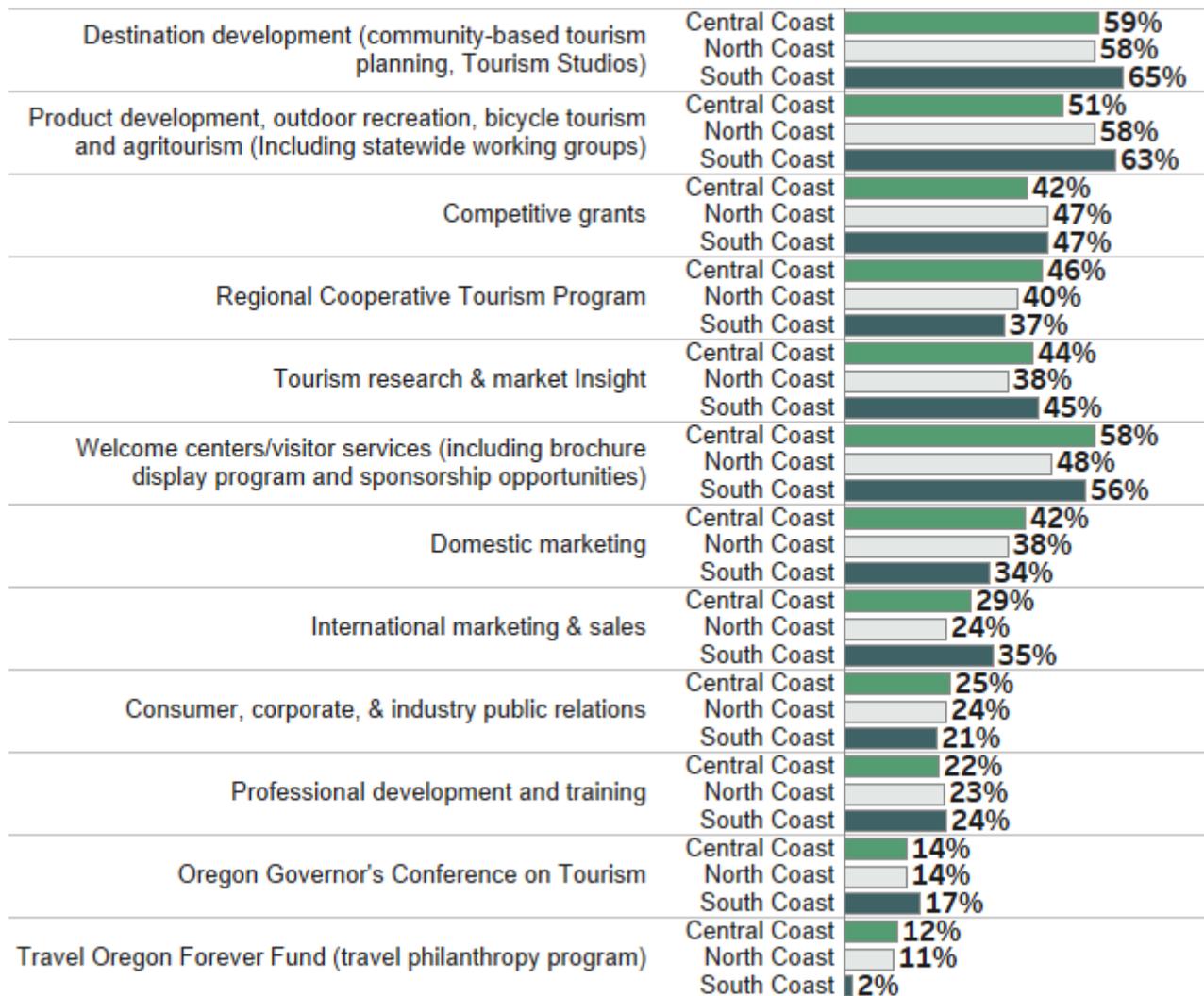
## Travel Oregon Programming

Q: Choose the top five Travel Oregon programs that you believe are the most impactful:



## Travel Oregon Programming by Sub-Region

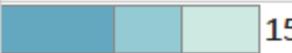
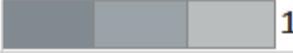
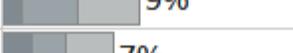
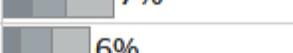
Q: Choose the top five Travel Oregon programs that you believe are the most impactful:



Looking ahead to 2019-2021 planning, 16% of Oregon Coast respondents indicated Infrastructure & Transportation as their first, second, or third highest priority. This is driven primarily by the North Coast, as can be seen in the sub-regional breakdown figure below. Slightly fewer respondents chose Destination Development & Management among their three highest priorities. The rank order of priorities for the Oregon Coast differs somewhat from the statewide average, including more demand for the “Workforce & Training” priority area.

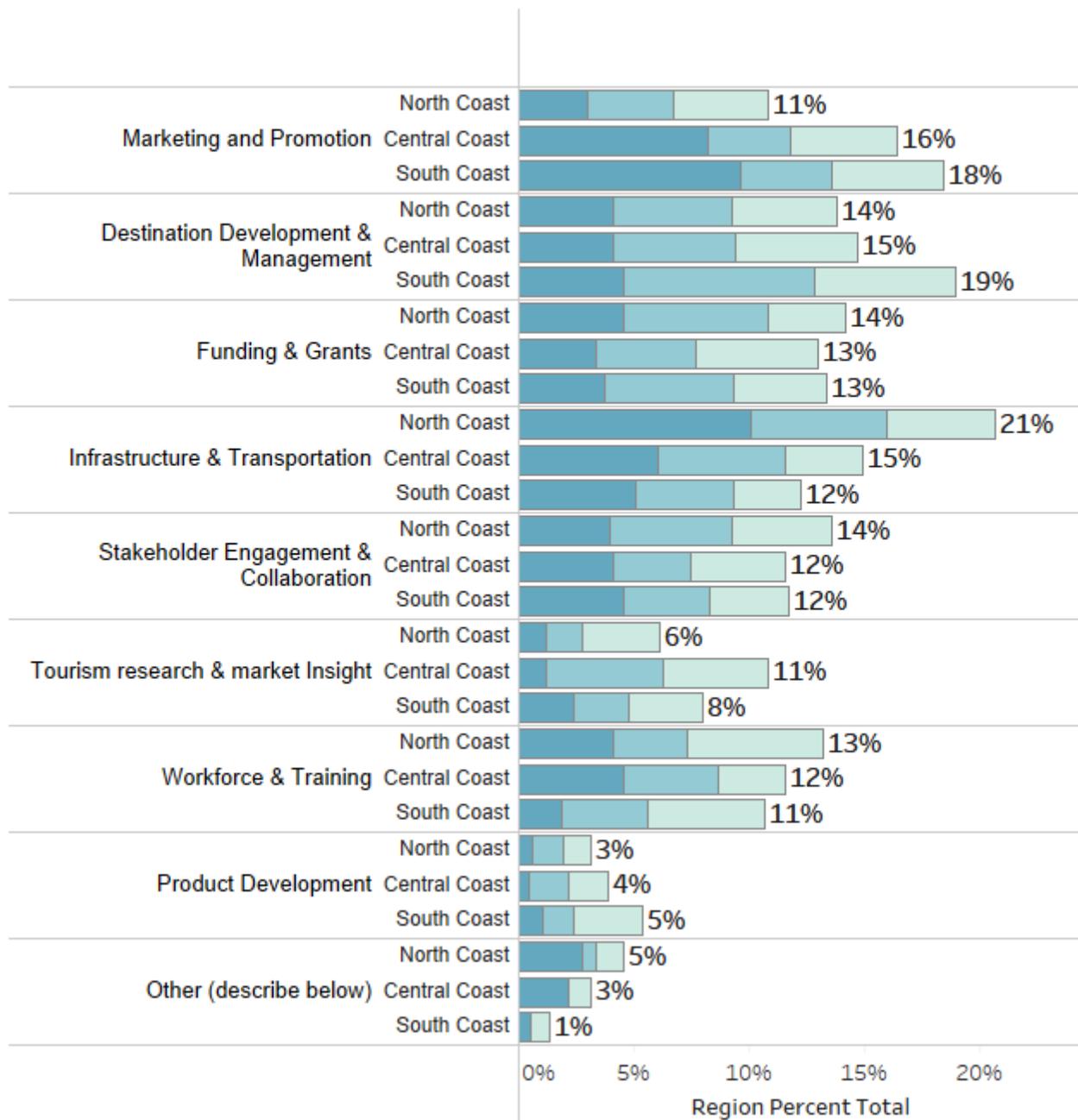
## Statewide Desired Tourism Priorities & Focus Areas

*Q: Given limited resources, what three priority areas do you believe are most important for 2019-2021 tourism planning?*

	All Other Regions Combined (First, Second, Third Priority)	Region (First, Second, Third Priority)
Marketing and Promotion	 19%	 15%
Destination Development & Management	 18%	 16%
Funding & Grants	 14%	 14%
Infrastructure & Transportation	 13%	 16%
Stakeholder Engagement & Collaboration	 12%	 12%
Tourism research & market Insight	 9%	 8%
Workforce & Training	 7%	 12%
Product Development	 6%	 4%
Other (describe below)	 2%	 3%

## Statewide Desired Tourism Priorities & Focus Areas by Sub-Region

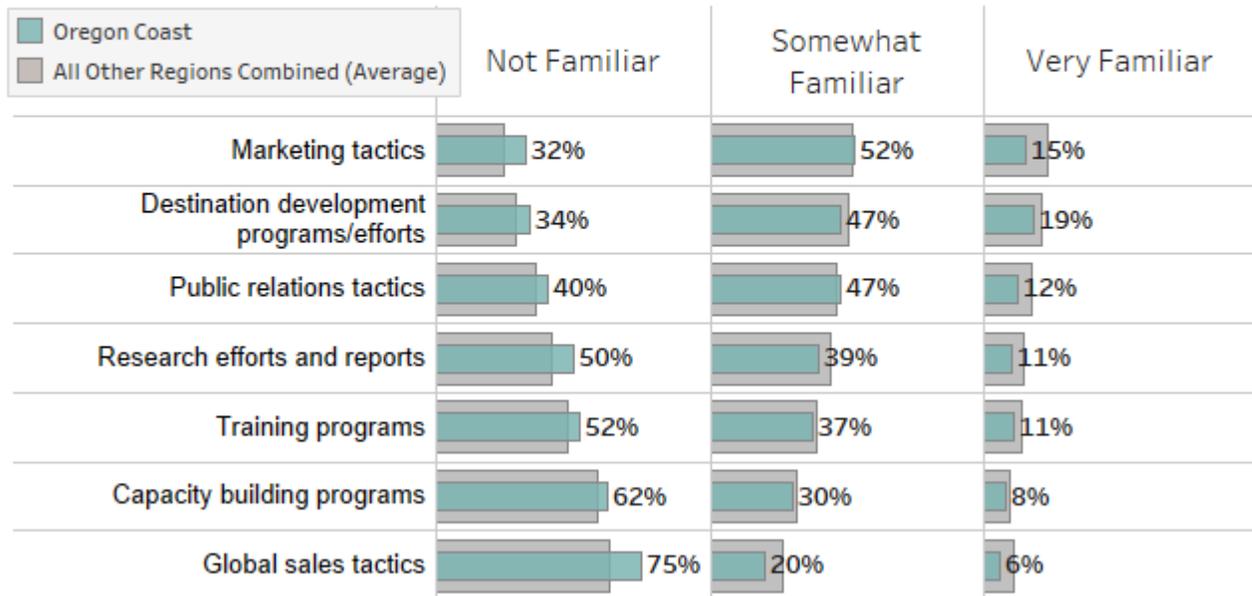
*Q: Given limited resources, what three priority areas do you believe are most important for 2019-2021 tourism planning?*



Respondents were asked to indicate their familiarity with regional initiatives engaged in by the RDMO over the past 12 months. Respondents, both overall and in Oregon Coast, were most familiar with the marketing tactics of the RDMO. This result may be a reflection of the priorities of the RDMO or it may reflect the priorities of the constituents. Additionally, future investments in training programs, capacity building, and global sales are likely to need additional communication and outreach efforts in order to be better recognized and understood by stakeholders, especially in the Oregon Coast region. These categories receive notably lower ratings of familiarity than other initiatives that were rated.

## Familiarity with 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:*



## Familiarity with Initiatives by Sub-Region

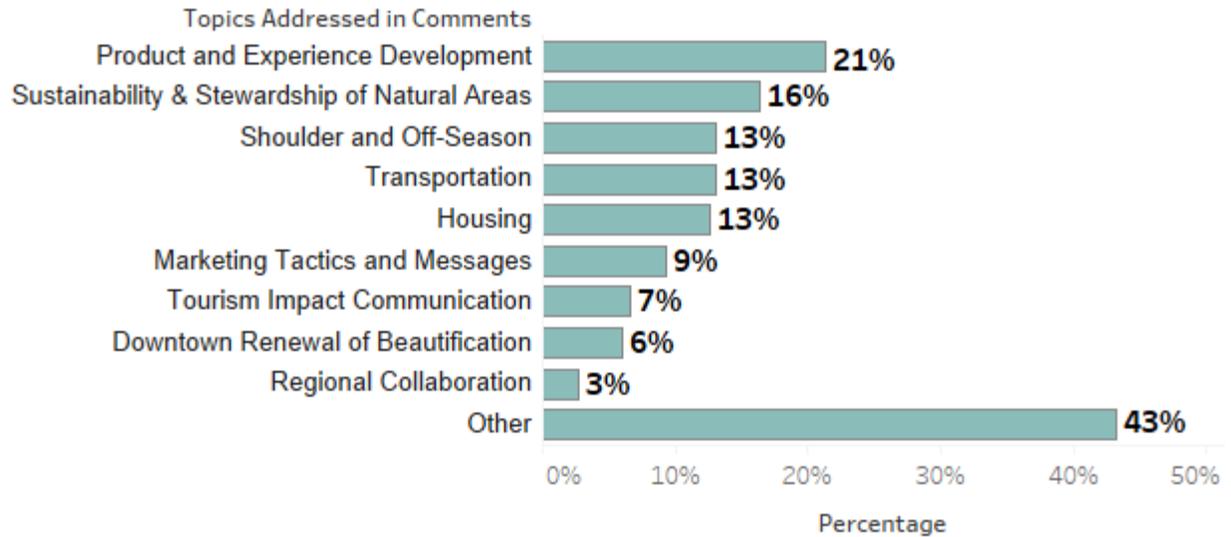
Q: Please indicate how familiar you are with the initiatives undertaken by your regional destination management organization in the following areas in the past 12 months:

		Not Familiar	Somewhat Familiar	Very Familiar
Marketing tactics	North Coast	36%	44%	20%
	Central Coast	32%	55%	13%
	South Coast	28%	60%	11%
Destination development programs/efforts	North Coast	36%	46%	18%
	Central Coast	35%	50%	15%
	South Coast	31%	47%	22%
Public relations tactics	North Coast	41%	46%	13%
	Central Coast	39%	45%	15%
	South Coast	40%	52%	7%
Research efforts and reports	North Coast	52%	37%	11%
	Central Coast	53%	37%	11%
	South Coast	45%	44%	10%
Training programs	North Coast	58%	32%	10%
	Central Coast	56%	33%	11%
	South Coast	39%	49%	12%
Capacity building programs	North Coast	62%	30%	8%
	Central Coast	67%	26%	7%
	South Coast	58%	34%	8%
Global sales tactics	North Coast	74%	19%	7%
	Central Coast	74%	21%	5%
	South Coast	77%	19%	4%

Repondents were also asked to describe a specific outcome that 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). The comments span a wide range though the most common themes are around product development and specific marketing tactics or objectives which individuals would like the RDMO to pursue. Other concerns were related to the sustainability and stewardship of natural areas, transportation, and the availability and affordability of workforce housing.

## Open-Ended Regional Goals: Comments Categorized for Analysis

*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.*

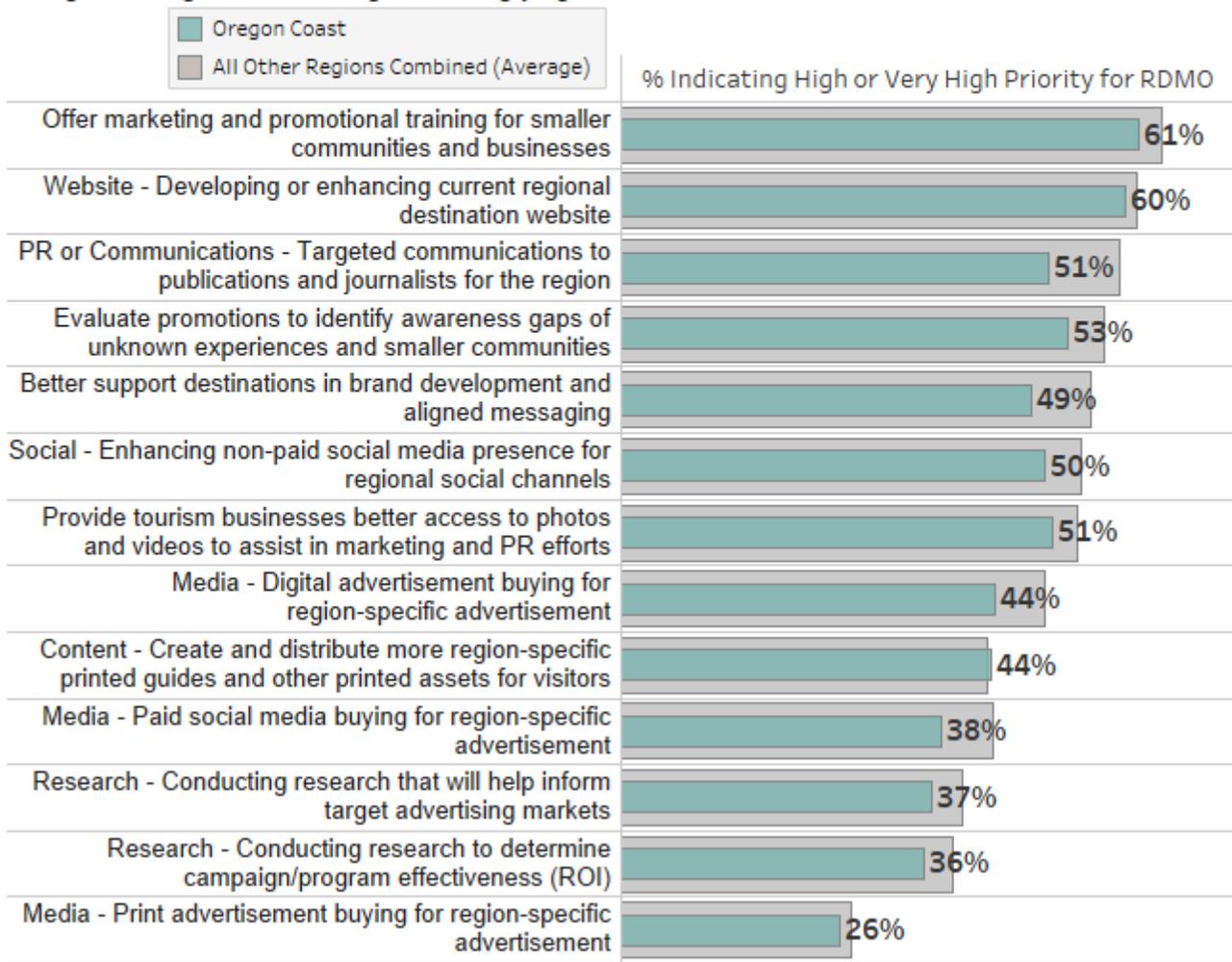


## MARKETING

Respondents were asked to prioritize a variety of marketing tactics for their region. Respondents 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 Oregon Coast. The standout priority in the Oregon Coast is “Offer marketing and promotional training for smaller communities and businesses.” This demand exists in roughly equal proportion in the three coastal sub-regions. Relative to the rest of the state, respondents from the Oregon Coast were less likely to indicate, “PR or Communications - Targeted communications to publications and journalists for the region” as a high priority.

### Tactical Opportunities - Marketing

*Q: Please indicate how you would prioritize the following tactical MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. 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. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.*



Respondents from the South Coast expressed considerably more desire for “Developing or enhancing current regional destination website,” especially relative to those from the North Coast.

## Tactical Opportunities - Marketing by Sub-Region

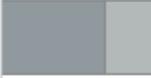
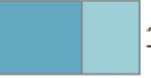
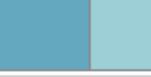
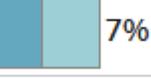
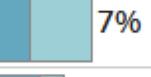
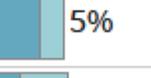
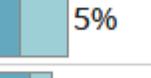
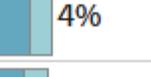
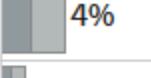
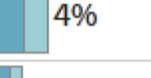
*Q: Please indicate how you would prioritize the following tactical MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available not all items should be considered to be an extremely high priority and some may not even 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. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.*

		% Indicating High or Very High Priority for RDMO
Offer marketing and promotional training for smaller communities and businesses	North Coast	60%
	Central Coast	63%
	South Coast	60%
Website - Developing or enhancing current regional destination website	North Coast	49%
	Central Coast	59%
	South Coast	76%
PR or Communications - Targeted communications to publications and journalists for the region	North Coast	41%
	Central Coast	56%
	South Coast	60%
Evaluate promotions to identify awareness gaps of unknown experiences and smaller communities	North Coast	49%
	Central Coast	56%
	South Coast	56%
Better support destinations in brand development and aligned messaging	North Coast	36%
	Central Coast	61%
	South Coast	53%
Social - Enhancing non-paid social media presence for regional social channels	North Coast	40%
	Central Coast	51%
	South Coast	63%
Provide tourism businesses better access to photos and videos to assist in marketing and PR efforts	North Coast	39%
	Central Coast	55%
	South Coast	64%
Media - Digital advertisement buying for region-specific advertisement	North Coast	33%
	Central Coast	48%
	South Coast	57%
Content - Create and distribute more region-specific printed guides and other printed assets for visitors	North Coast	40%
	Central Coast	41%
	South Coast	52%
Media - Paid social media buying for region-specific advertisement	North Coast	29%
	Central Coast	40%
	South Coast	49%
Research - Conducting research that will help inform target advertising markets	North Coast	32%
	Central Coast	42%
	South Coast	38%
Research - Conducting research to determine campaign/program effectiveness (ROI)	North Coast	33%
	Central Coast	39%
	South Coast	36%
Media - Print advertisement buying for region-specific advertisement	North Coast	20%
	Central Coast	25%
	South Coast	36%

As a follow-up to rating marketing tactics, respondents were asked to identify their top two marketing opportunities. Offering marketing and promotional training for smaller communities and business was the clear top priority, with 19% of Oregon Coast respondents choosing it among their top two priorities. Developing or enhancing the current regional destination website was the second most chosen priority.

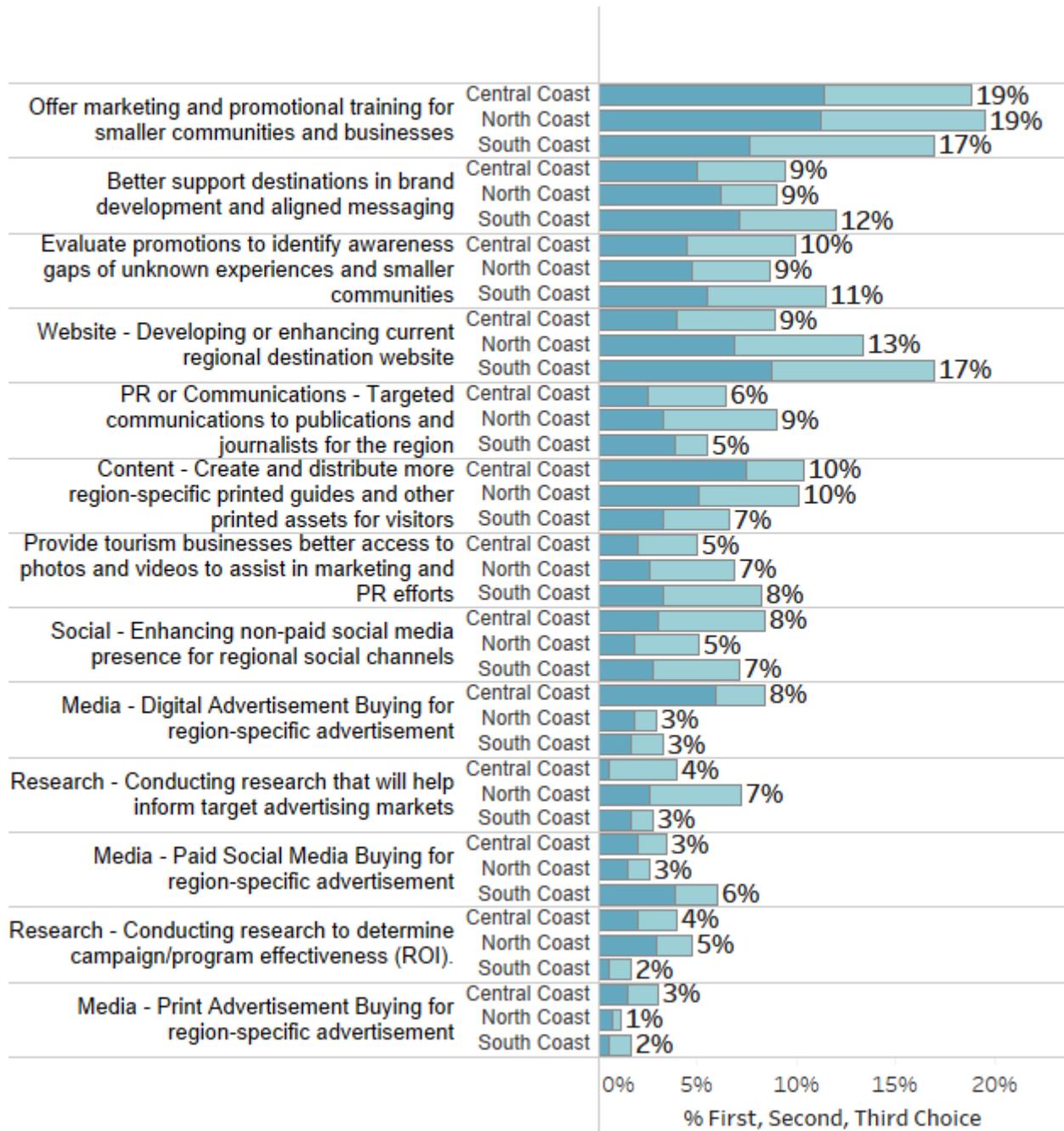
## Tactical Opportunities - Marketing

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

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Offer marketing and promotional training for smaller communities and businesses	 16%	 19%
Better support destinations in brand development and aligned messaging	 11%	 10%
Evaluate promotions to identify awareness gaps of unknown experiences and smaller communities	 11%	 10%
Website - Developing or enhancing current regional destination website	 10%	 13%
PR or Communications - Targeted communications to publications and journalists for the region	 9%	 7%
Content - Create and distribute more region-specific printed guides and other printed assets for visitors	 9%	 9%
Provide tourism businesses better access to photos and videos to assist in marketing and PR efforts	 8%	 7%
Social - Enhancing non-paid social media presence for regional social channels	 6%	 7%
Media - Digital Advertisement Buying for region-specific advertisement	 6%	 5%
Research - Conducting research that will help inform target advertising markets	 5%	 5%
Media - Paid Social Media Buying for region-specific advertisement	 5%	 4%
Research - Conducting research to determine campaign/program effectiveness (ROI).	 4%	 4%
Media - Print Advertisement Buying for region-specific advertisement	 1%	 2%

## Tactical Opportunities - Marketing by Sub-Region

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

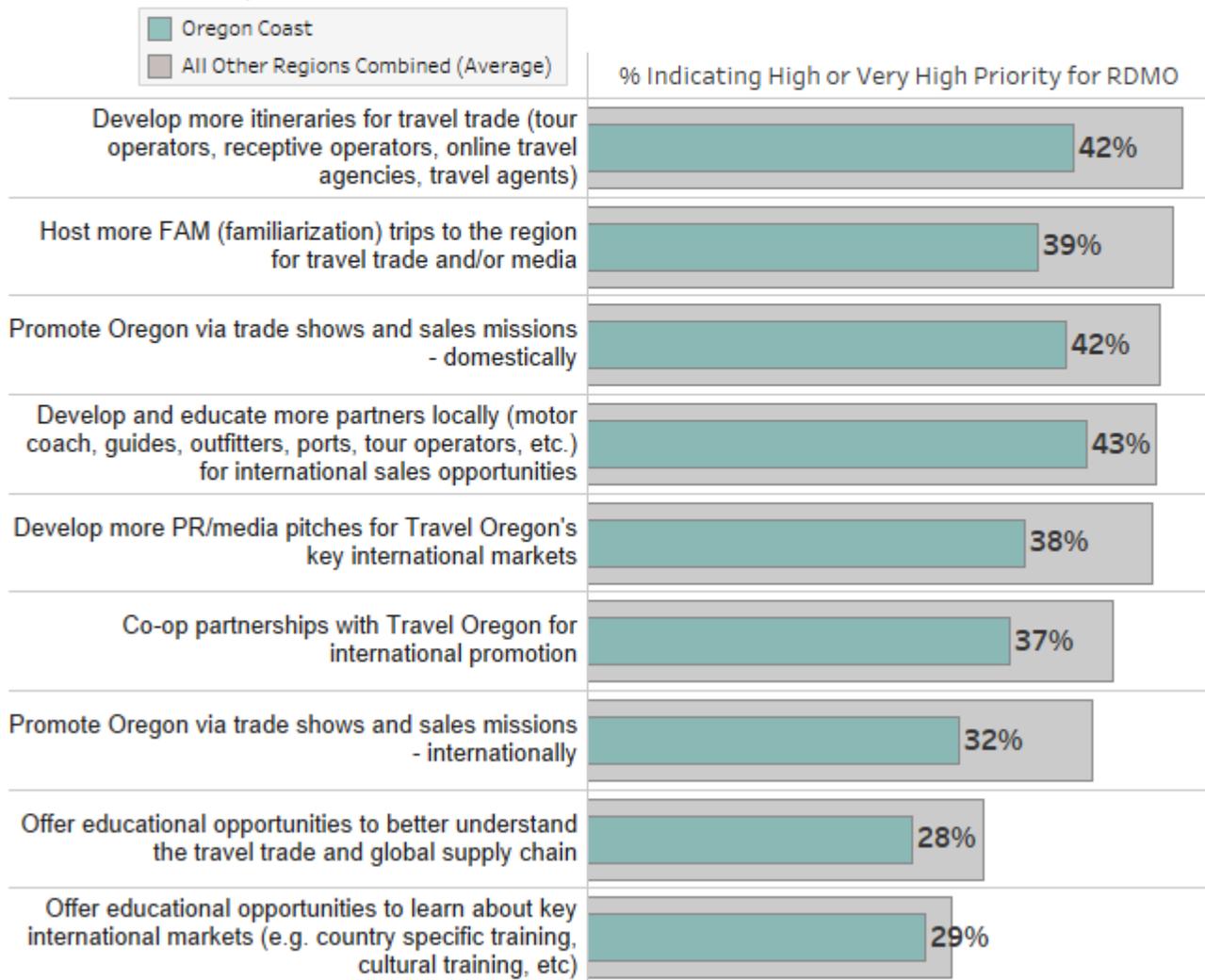


## GLOBAL SALES, PROMOTIONS, PR, MEDIA, & MARKETING

Using the same prioritization scale, respondents were asked to prioritize global sales, promotions, PR, media, and marketing tactics. For each tactic, respondents from the Oregon Coast were less likely to indicate a high or very high priority. “Develop and educate more partners locals for international sales opportunities” was their highest priority. There is considerably less demand for FAM trips in the Oregon Coast region relative to the rest of the state.

### Tactical Opportunities - Global Sales, Promotions, PR, Media, & Marketing

*Q: Please indicate how you would prioritize the following tactical GLOBAL SALES, PROMOTIONS, PR, MEDIA, & MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: 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.*



## Tactical Opportunities - Global Sales, Promotions, PR, Media, & Marketing by Sub-Region

*Q: Please indicate how you would prioritize the following tactical GLOBAL SALES, PROMOTIONS, PR, MEDIA, & MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: 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. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.*

		% Indicating High or Very High Priority for RDMO
Develop and educate more partners locally (motor coach, guides, outfitters, ports, tour operators, etc.) for international sales opportunities	North Coast	35%
	Central Coast	46%
	South Coast	52%
Develop more itineraries for travel trade (tour operators, receptive operators, online travel agencies, travel agents)	North Coast	28%
	Central Coast	43%
	South Coast	63%
Promote Oregon via trade shows and sales missions - domestically	North Coast	32%
	Central Coast	46%
	South Coast	51%
Host more FAM (familiarization) trips to the region for travel trade and/or media	North Coast	30%
	Central Coast	43%
	South Coast	50%
Develop more PR/media pitches for Travel Oregon's key international markets	North Coast	32%
	Central Coast	43%
	South Coast	41%
Co-op partnerships with Travel Oregon for international promotion	North Coast	26%
	Central Coast	46%
	South Coast	43%
Promote Oregon via trade shows and sales missions - internationally	North Coast	24%
	Central Coast	43%
	South Coast	33%
Offer educational opportunities to learn about key international markets (e.g. country specific training, cultural training, etc)	North Coast	26%
	Central Coast	28%
	South Coast	36%
Offer educational opportunities to better understand the travel trade and global supply chain	North Coast	24%
	Central Coast	28%
	South Coast	34%

When asked to identify their top two global sales, promotions, PR, media, and marketing opportunities, the rank order of results was similar to the ratings and to the statewide results. Twenty percent of respondents (22% in the North Coast) chose to “develop and educate more partners locally for international sales opportunities” among their top two highest priorities.

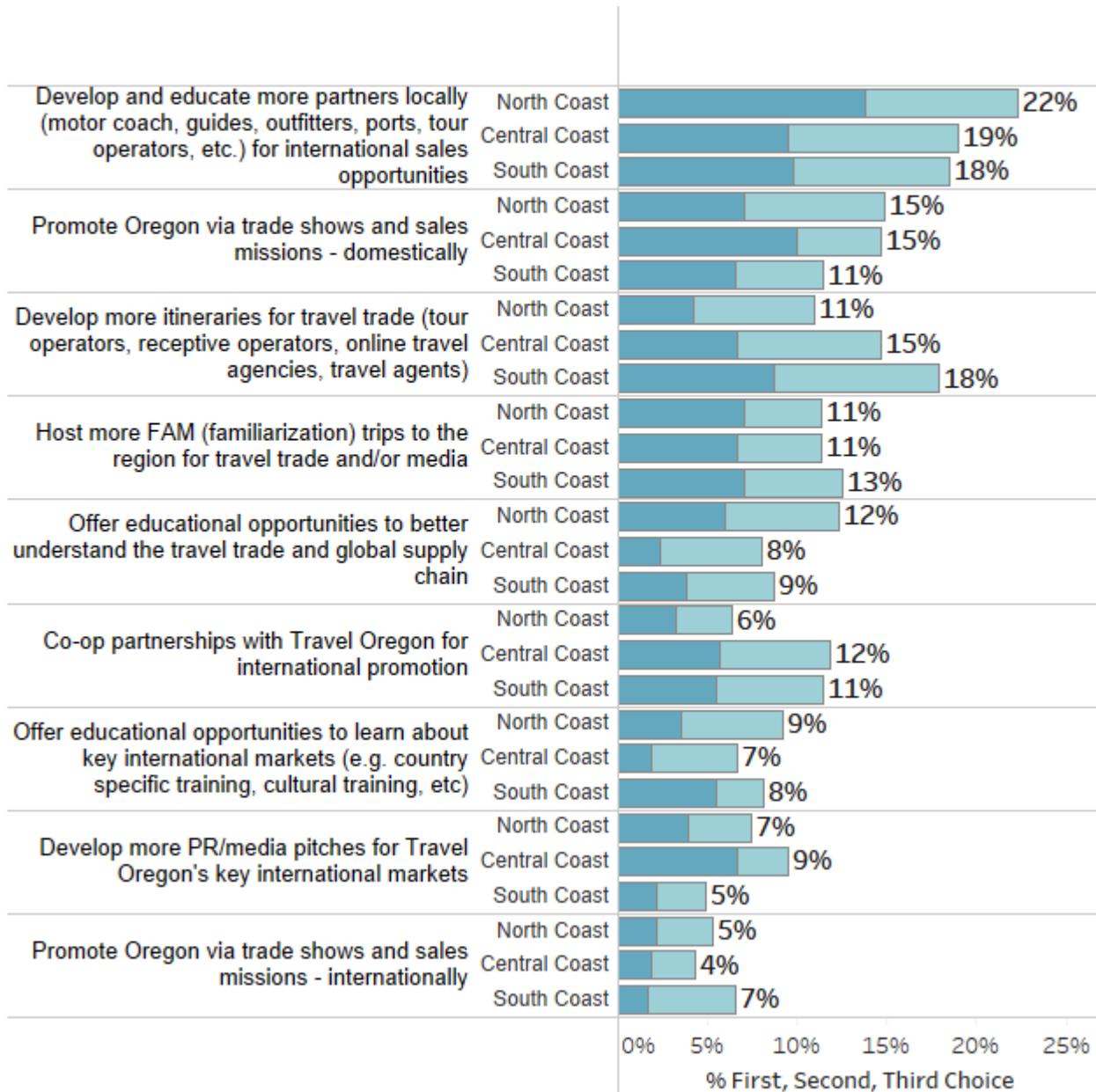
## Tactical Opportunities - Global Sales, Promotions, PR, Media, & Marketing

*Q: From the list above, please identify your top two opportunities for global promotions, sales, PR, media, & marketing:*

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Develop and educate more partners locally (motor coach, guides, outfitters, ports, tour operators, etc.) for international sales opportunities	16%	20%
Develop more itineraries for travel trade (tour operators, receptive operators, online travel agencies, travel agents)	14%	14%
Host more FAM (familiarization) trips to the region for travel trade and/or media	14%	12%
Promote Oregon via trade shows and sales missions - domestically	13%	14%
Co-op partnerships with Travel Oregon for international promotion	11%	9%
Develop more PR/media pitches for Travel Oregon's key international markets	10%	7%
Promote Oregon via trade shows and sales missions - internationally	7%	5%
Offer educational opportunities to better understand the travel trade and global supply chain	7%	10%
Offer educational opportunities to learn about key international markets (e.g. country specific training, cultural training, etc)	6%	8%

## Tactical Opportunities - Global Sales, Promotions, PR, Media, & Marketing by Sub-Region

Q: From the list above, please identify your top two opportunities for global promotions, sales, PR, media, & marketing:

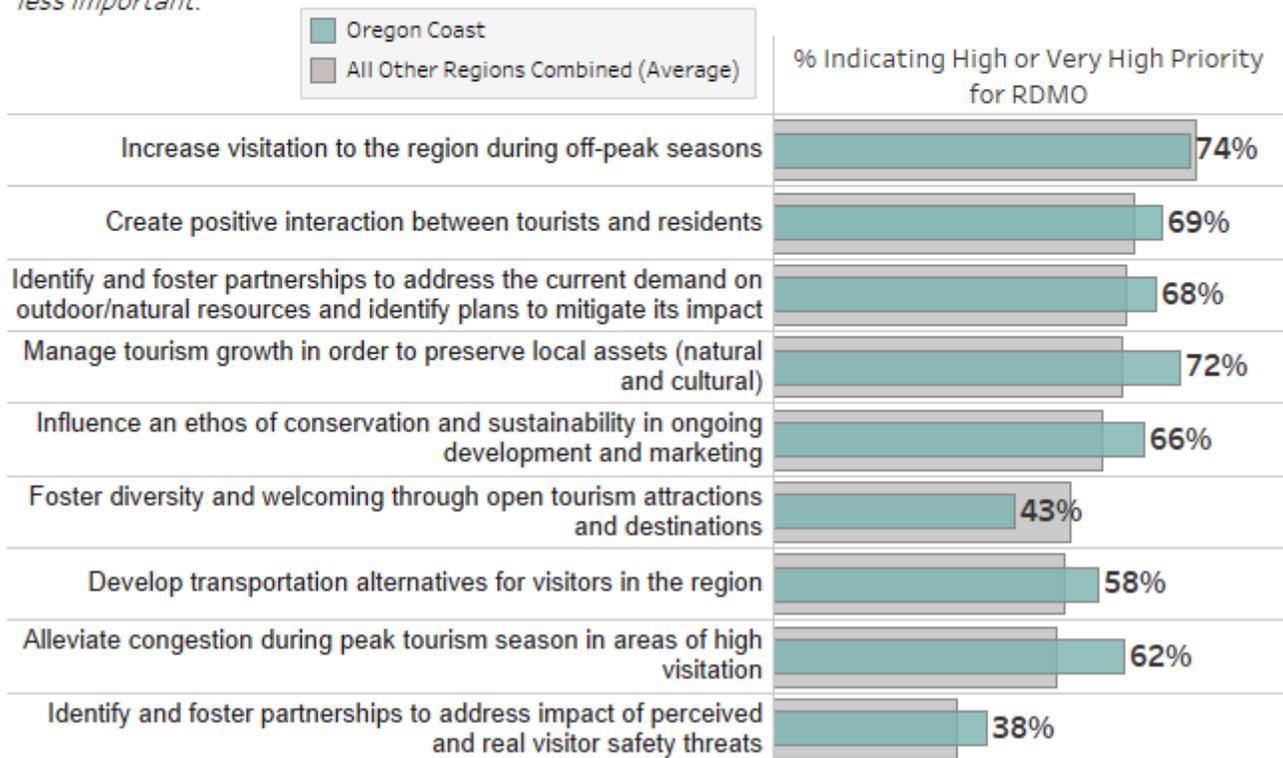


## DESTINATION DEVELOPMENT

Stakeholders in the Oregon Coast region were asked to prioritize destination development opportunities across three categories: Planning and Management, Product Development, and Training and Capacity Building. Across all the tactical opportunity sections (Marketing, Global Sales, etc.), respondents from the Oregon Coast show the greatest demand for Destination Development. Across the three destination development macro-categories (management, development, and capacity), there are seven priorities that more than two-thirds of respondents identified as a “very high priority” or a “high priority,” four of which are in the Planning and Management figure below:

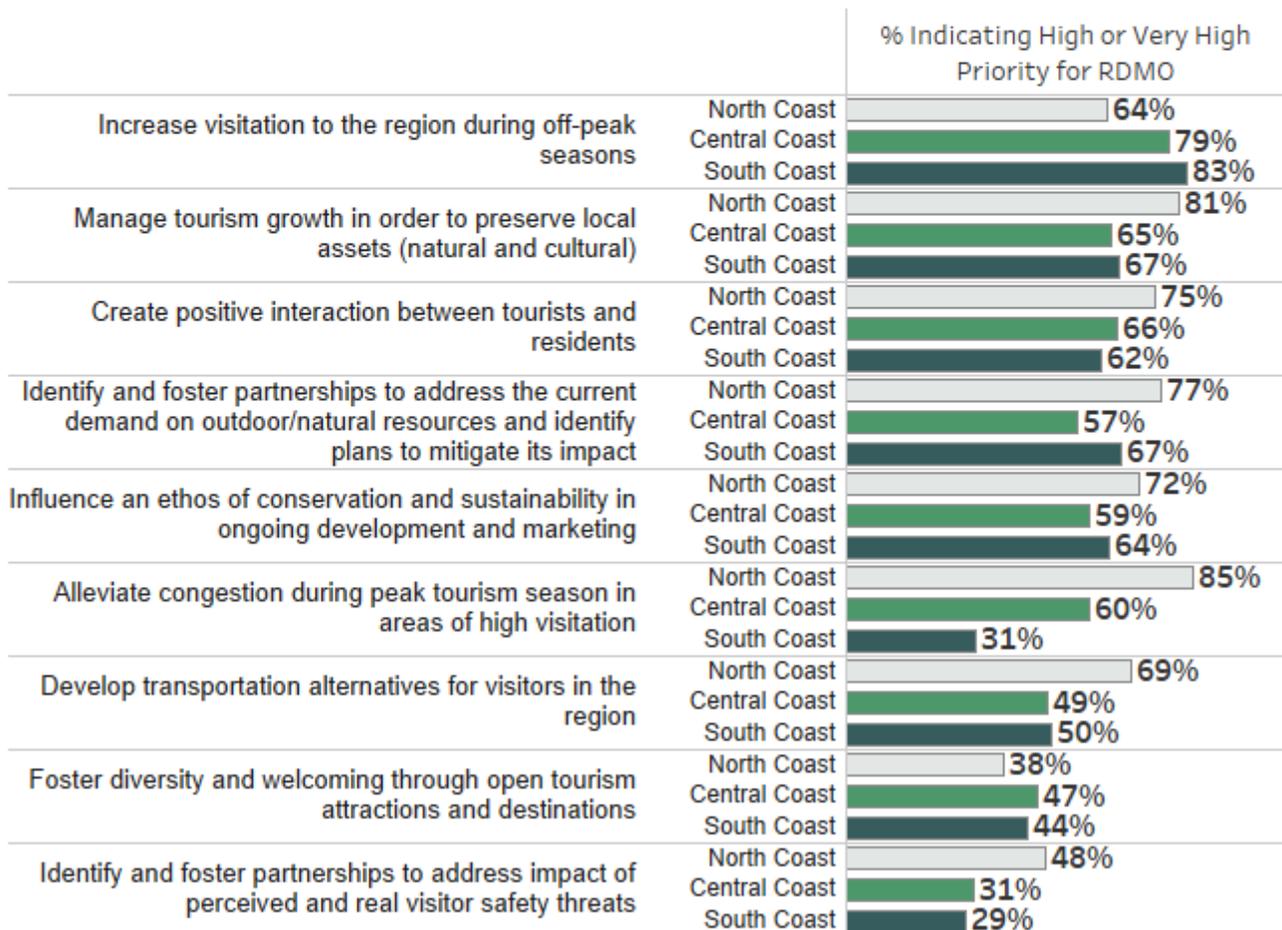
### Tactical Opportunities - Destination Development: Planning and Management

*Q: Please indicate how you would prioritize the following tactical PLANNING and MANAGEMENT OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all 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.*



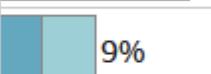
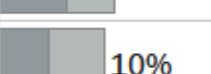
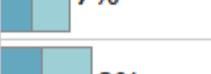
## Tactical Opportunities - Destination Development Planning and Management by Sub-Region

*Q: Please indicate how you would prioritize the following tactical PLANNING and MANAGEMENT OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all 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. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.*



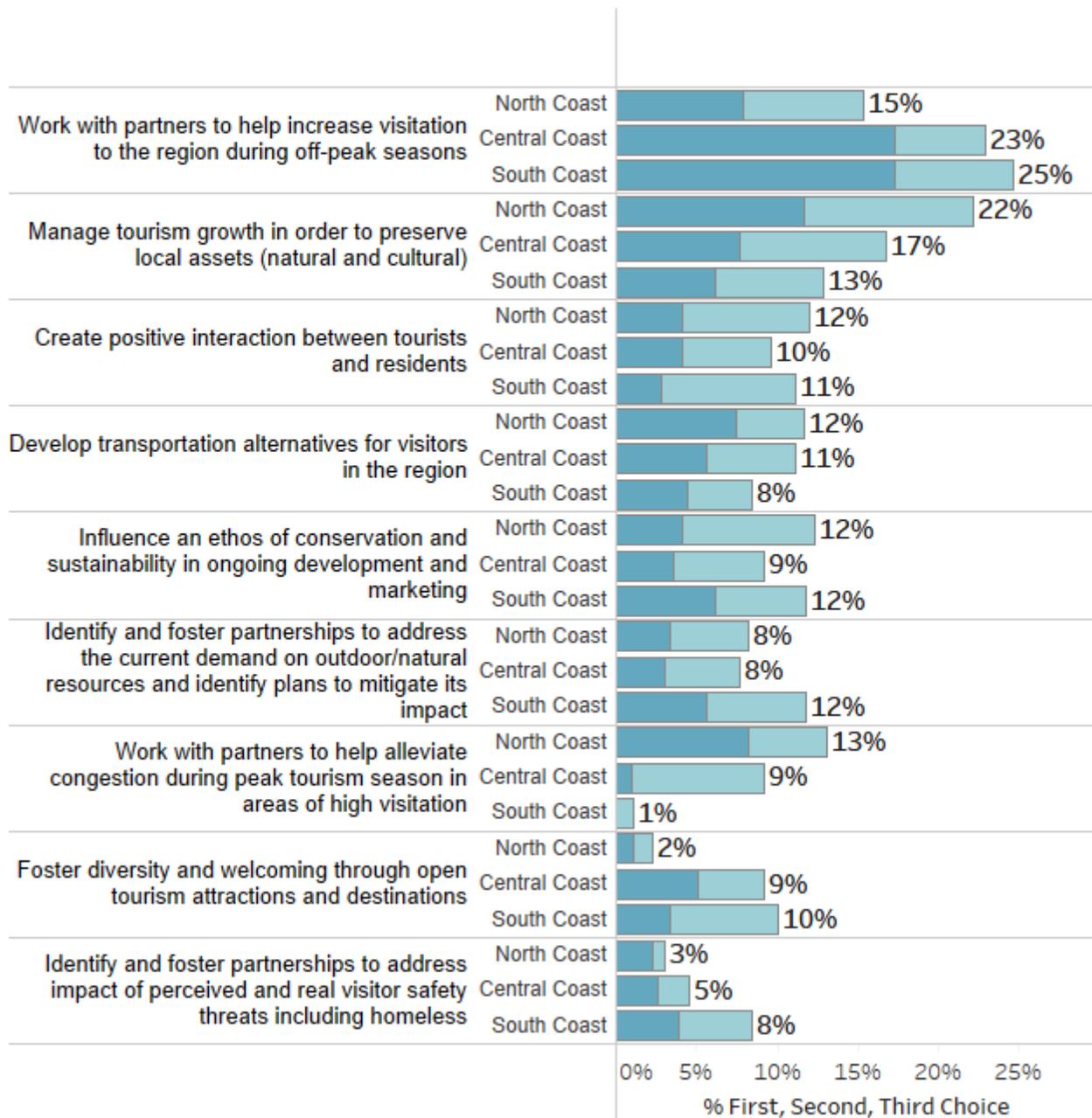
## Tactical Opportunities - Destination Development: Planning and Management

Q: From the list above, please identify your top two planning and management opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Work with partners to help increase visitation to the region during off-peak seasons	 21%	 20%
Manage tourism growth in order to preserve local assets (natural and cultural)	 14%	 18%
Identify and foster partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact	 12%	 9%
Develop transportation alternatives for visitors in the region	 11%	 11%
Create positive interaction between tourists and residents	 10%	 11%
Influence an ethos of conservation and sustainability in ongoing development and marketing	 10%	 11%
Foster diversity and welcoming through open tourism attractions and destinations	 9%	 7%
Work with partners to help alleviate congestion during peak tourism season in areas of high visitation	 8%	 9%
Identify and foster partnerships to address impact of perceived and real visitor safety threats including homeless	 5%	 5%

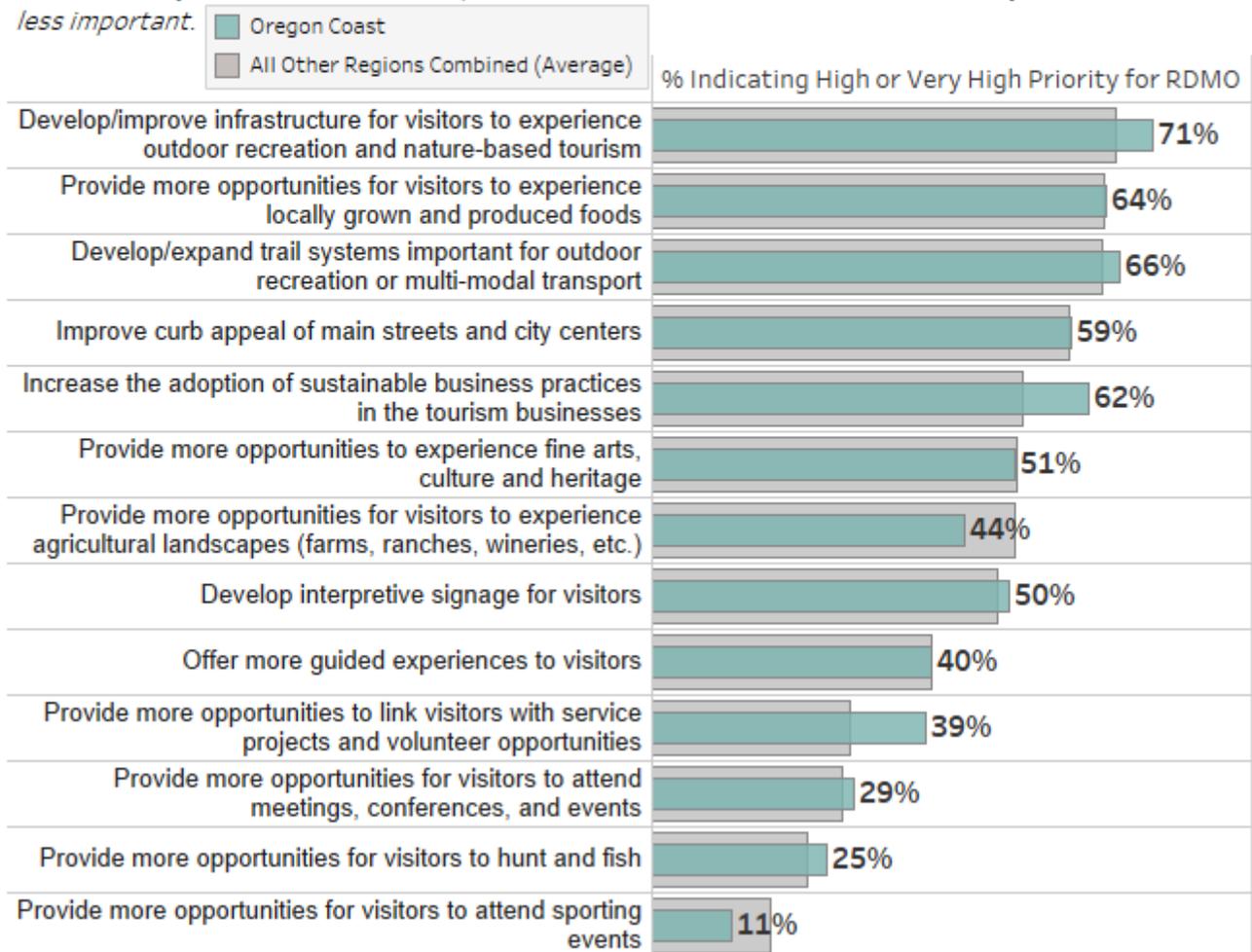
## Tactical Opportunities - Destination Development: Planning and Management by Sub-Region

Q: From the list above, please identify your top two planning and management opportunities:



## Tactical Opportunities - Destination Development: Product Development

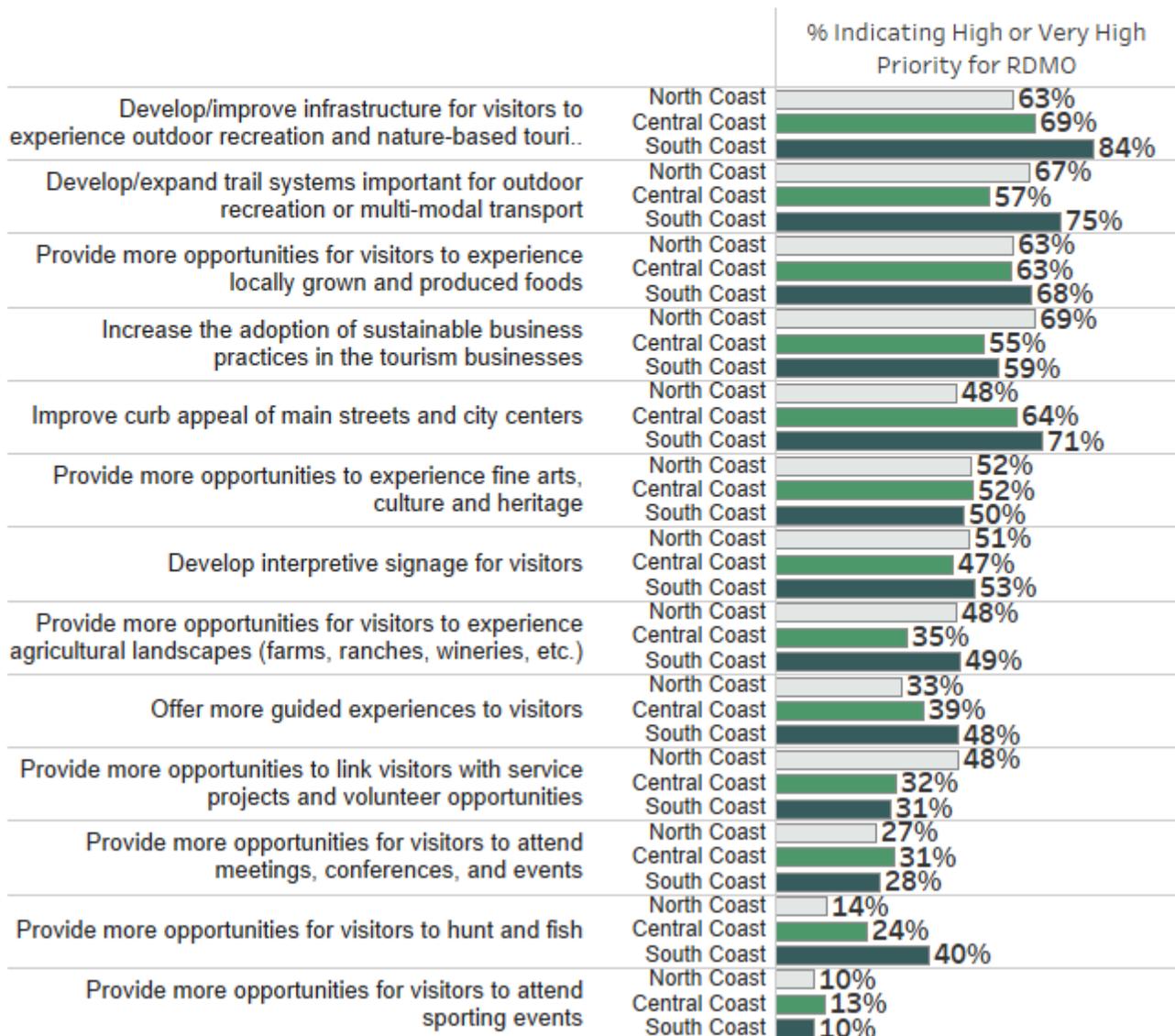
*Q: Please indicate how you would prioritize the following tactical PRODUCT DEVELOPMENT OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may 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.*



## Tactical Opportunities - Destination Development Product

### Development by Sub-Region

*Q: Please indicate how you would prioritize the following tactical PRODUCT DEVELOPMENT OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: 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. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.*



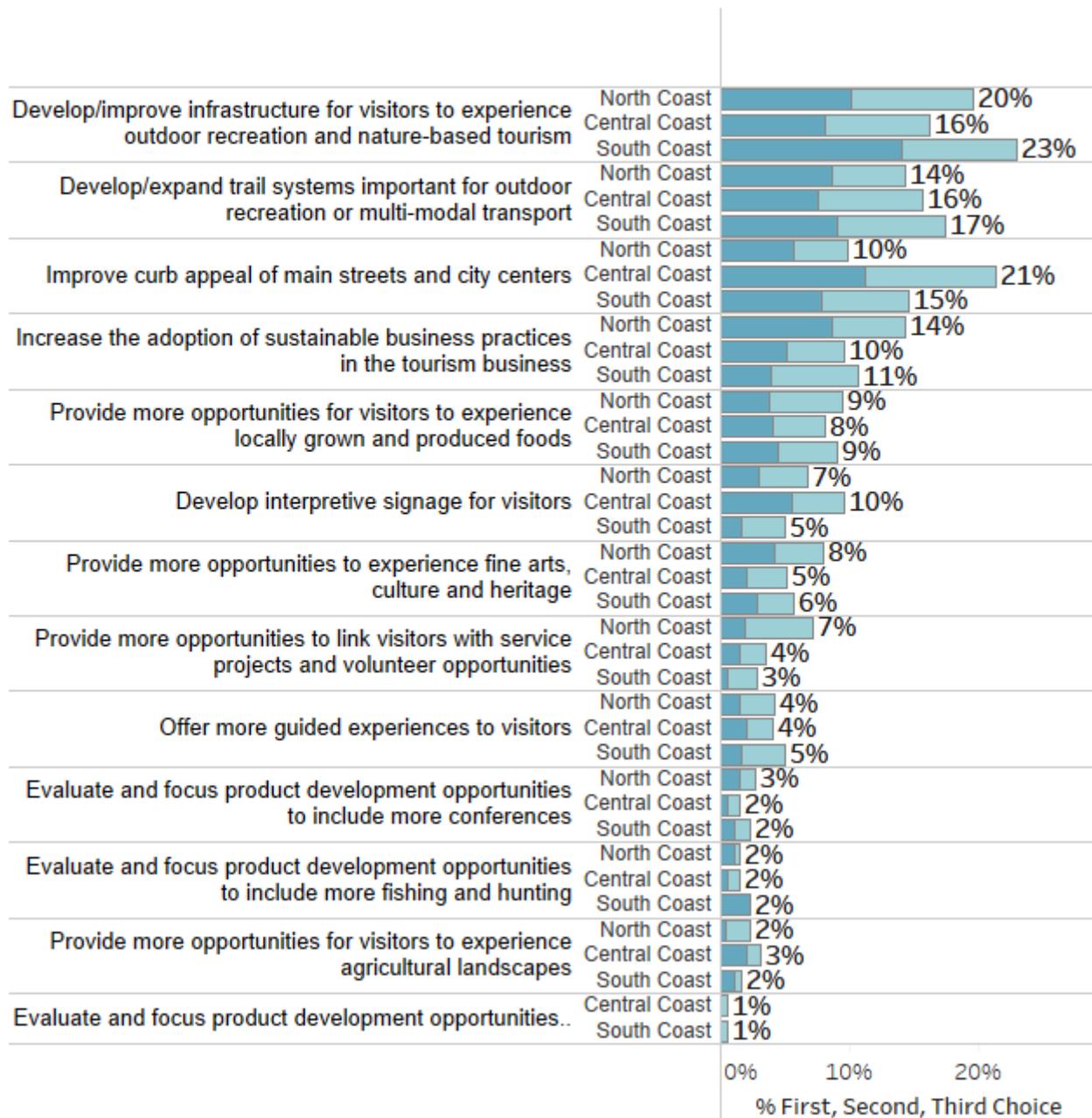
## Tactical Opportunities - Destination Development: Product Development

Q: From the list above, please identify your top two product development opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Develop/improve infrastructure for visitors to experience outdoor recreation and nature-based tourism	18%	19%
Improve curb appeal of main streets and city centers	16%	15%
Develop/expand trail systems important for outdoor recreation or multi-modal transport	14%	16%
Increase the adoption of sustainable business practices in the tourism business	9%	12%
Provide more opportunities for visitors to experience locally grown and produced foods	8%	9%
Provide more opportunities to experience fine arts, culture and heritage	7%	6%
Develop interpretive signage for visitors	7%	7%
Provide more opportunities for visitors to experience agricultural landscapes	6%	2%
Offer more guided experiences to visitors	4%	4%
Evaluate and focus product development opportunities to include more conferences	3%	2%
Provide more opportunities to link visitors with service projects and volunteer opportunities	3%	5%
Evaluate and focus product development opportunities to include more fishing and hunting	2%	2%
Evaluate and focus product development opportunities to include more sporting events	1%	0%

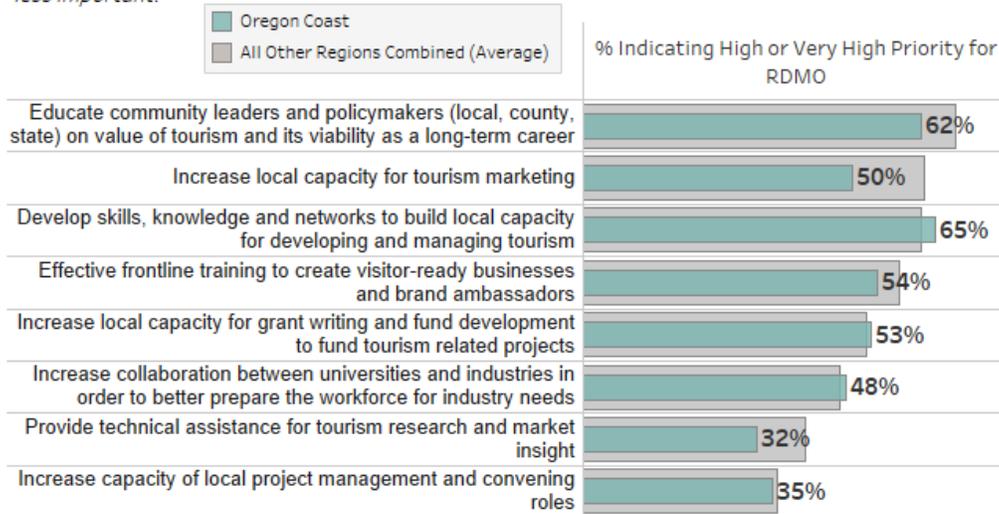
## Tactical Opportunities - Destination Development: Product Development by Sub-Region

Q: From the list above, please identify your top two product development opportunities:



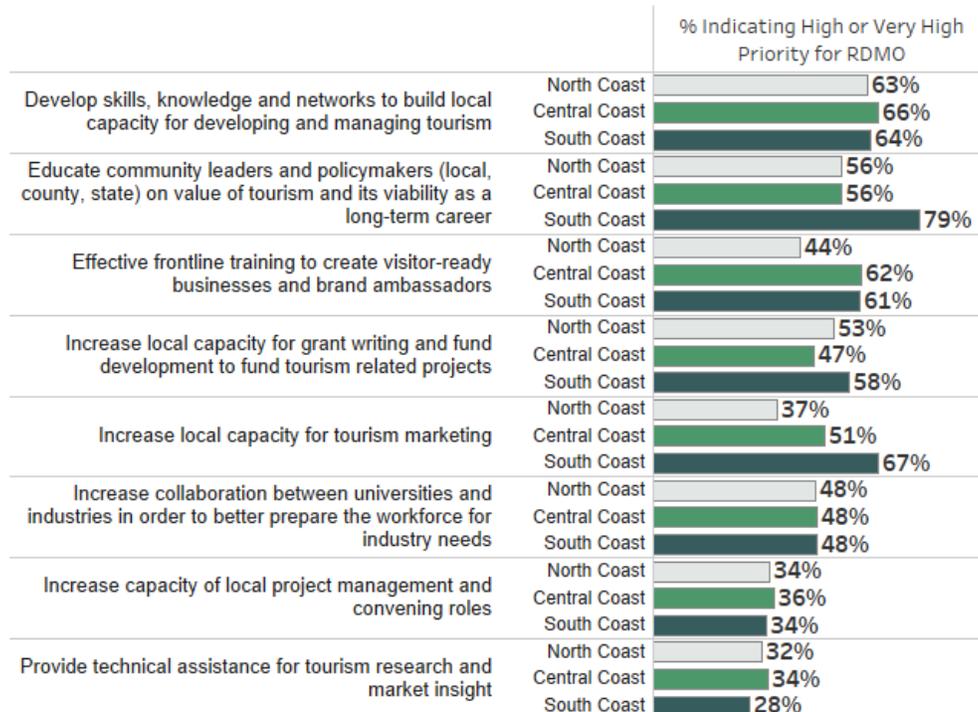
## Tactical Opportunities - Destination Development: Training and Capacity Building

Q: Please indicate how you would prioritize the following tactical TRAINING and CAPACITY BUILDING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: 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.



## Tactical Opportunities - Destination Development Training and Capacity Building: by Sub-Region

Q: Please indicate how you would prioritize the following tactical TRAINING and CAPACITY BUILDING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: 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. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



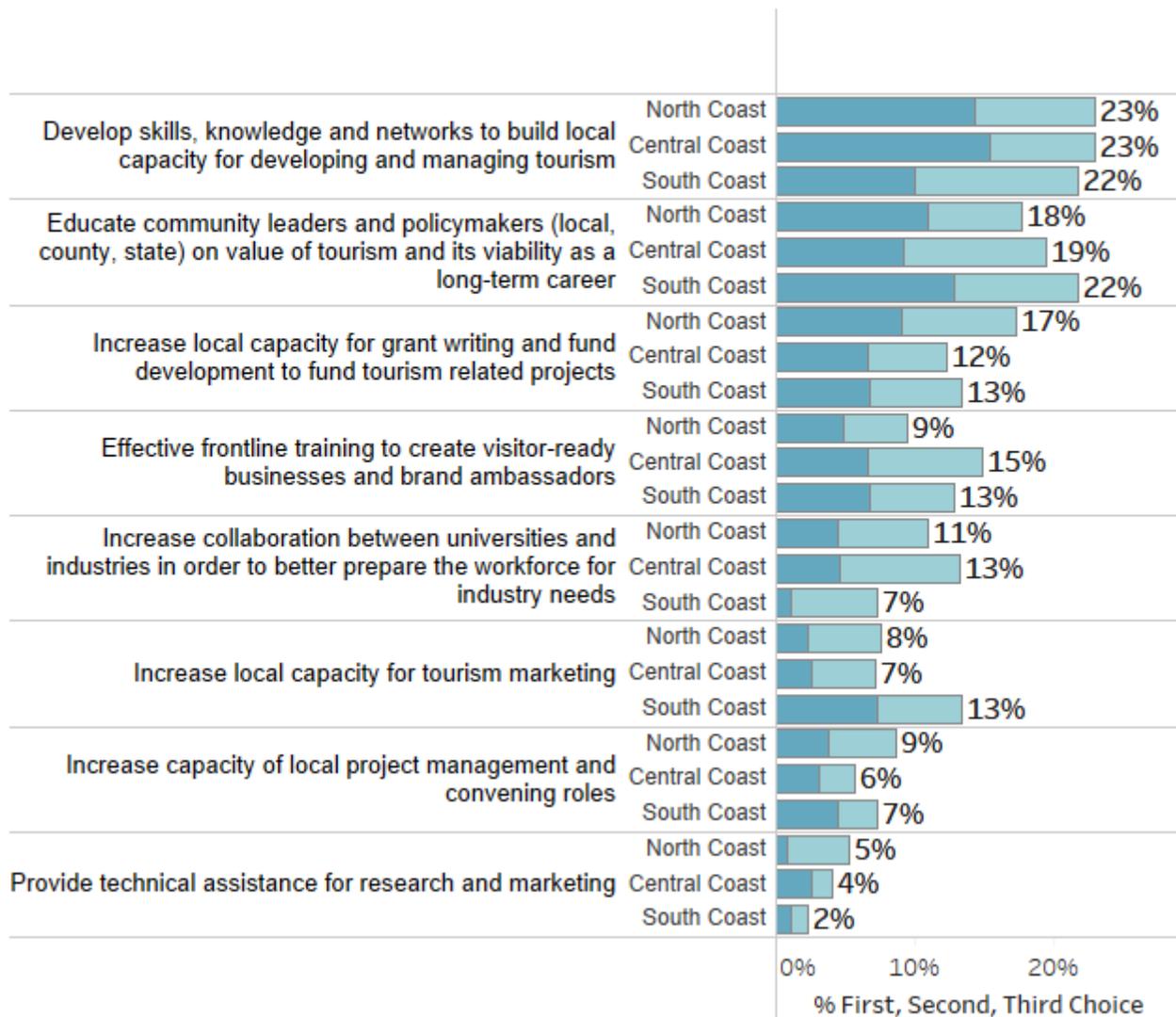
## Tactical Opportunities - Destination Development: Training and Capacity Building

Q: From the list above, please identify your top two training and capacity building opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Educate community leaders and policymakers (local, county, state) on value of tourism and its viability as a long-term career	21%	20%
Develop skills, knowledge and networks to build local capacity for developing and managing tourism	19%	23%
Increase local capacity for tourism marketing	15%	9%
Effective frontline training to create visitor-ready businesses and brand ambassadors	13%	12%
Increase local capacity for grant writing and fund development to fund tourism related projects	11%	15%
Increase collaboration between universities and industries in order to better prepare the workforce for industry needs	10%	11%
Provide technical assistance for research and marketing	7%	4%
Increase capacity of local project management and convening roles	5%	7%

## Tactical Opportunities - Destination Development: Training and Capacity Building by Sub-Region

Q: From the list above, please identify your top two training and capacity building opportunities:

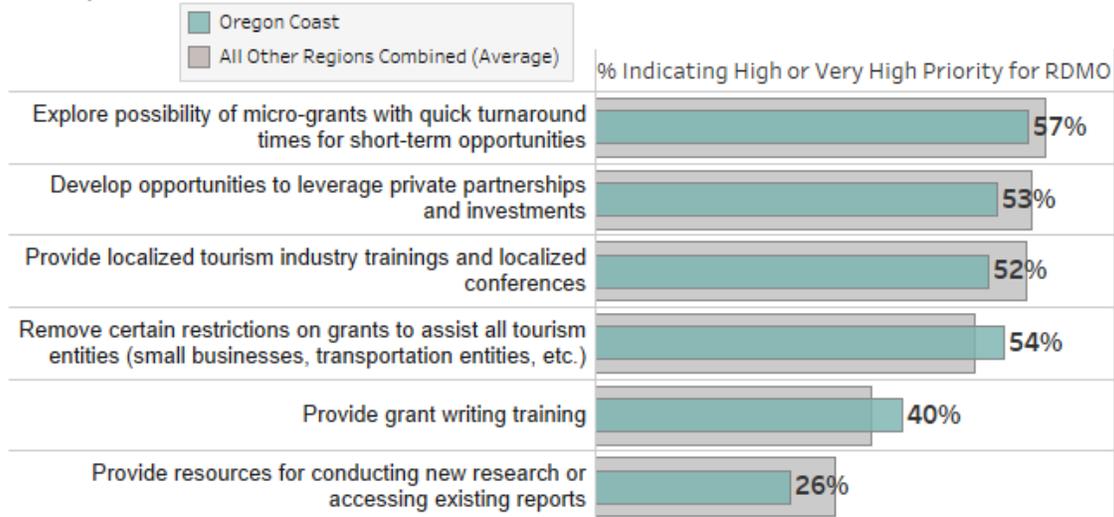


## GLOBAL STRATEGIC PARTNERSHIPS

Stakeholders used the same rating system as in previous sections to prioritize specific global strategic partnership initiatives. Though no specific activities were a “very high priority” or a “high priority” by more than two-thirds of respondents (as in other sections), there are still initiatives that stakeholders have identified as relatively higher priorities. Exploring the possibility of micro-grants and developing opportunities to leverage private partnerships and investments was the most highly rated tactic, both statewide and in the Oregon Coast region. Removing certain restrictions on grants to assist all tourism entities was also highly prioritized.

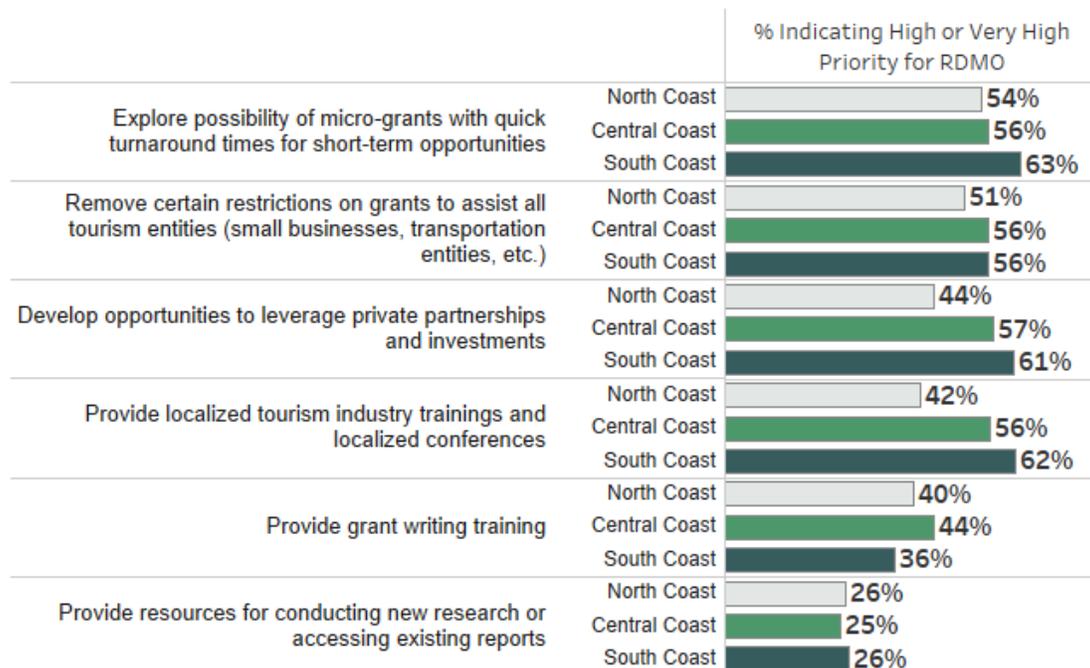
## Tactical Opportunities - Global Strategic Partnerships

Q: Please indicate how you would prioritize the following tactical STRATEGIC PARTNERSHIP OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: 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.



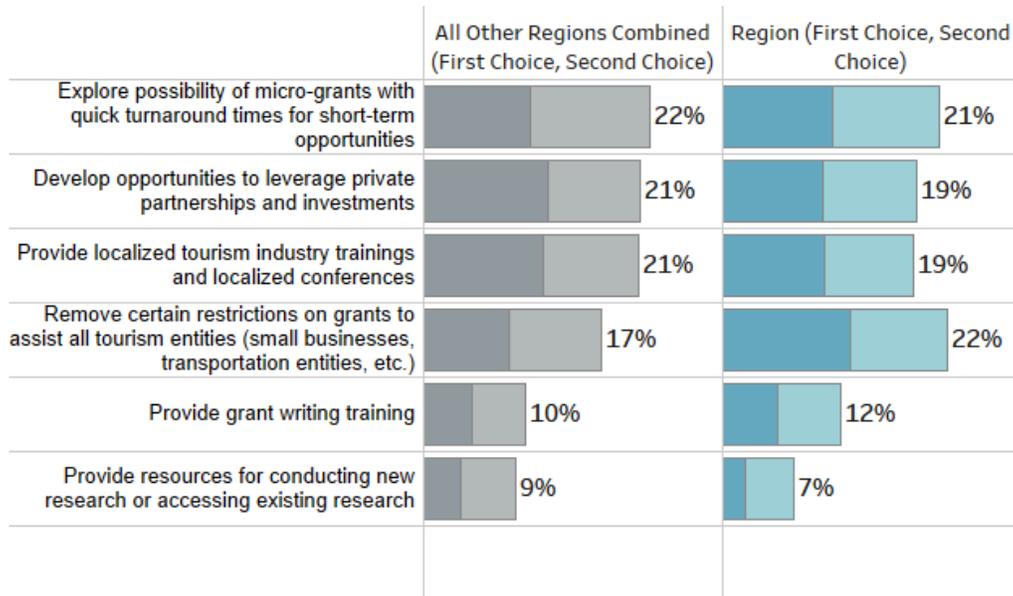
## Tactical Opportunities - Global Strategic Partnerships by Sub-Region

Q: Please indicate how you would prioritize the following tactical STRATEGIC PARTNERSHIP OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: 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. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



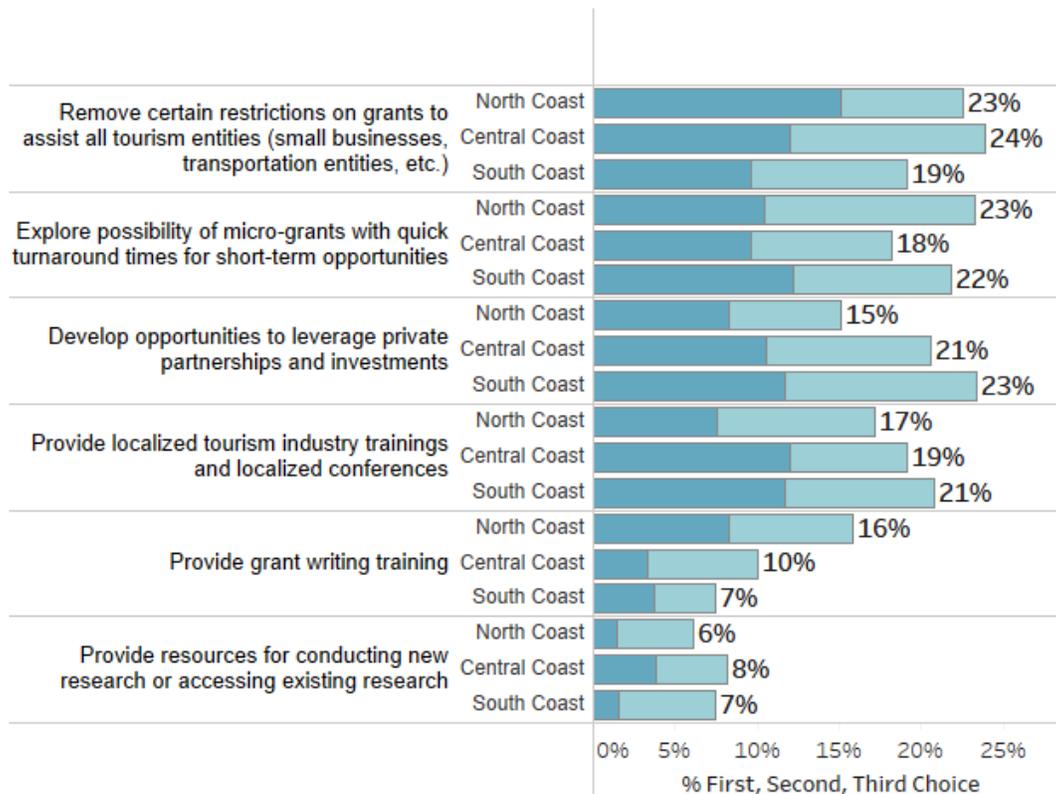
## Tactical Opportunities - Global Strategic Partnerships

Q: From the list above, please identify your top two strategic partnership opportunities:



## Tactical Opportunities - Global Strategic Partnerships by Sub-Region

Q: From the list above, please identify your top two strategic partnership opportunities:

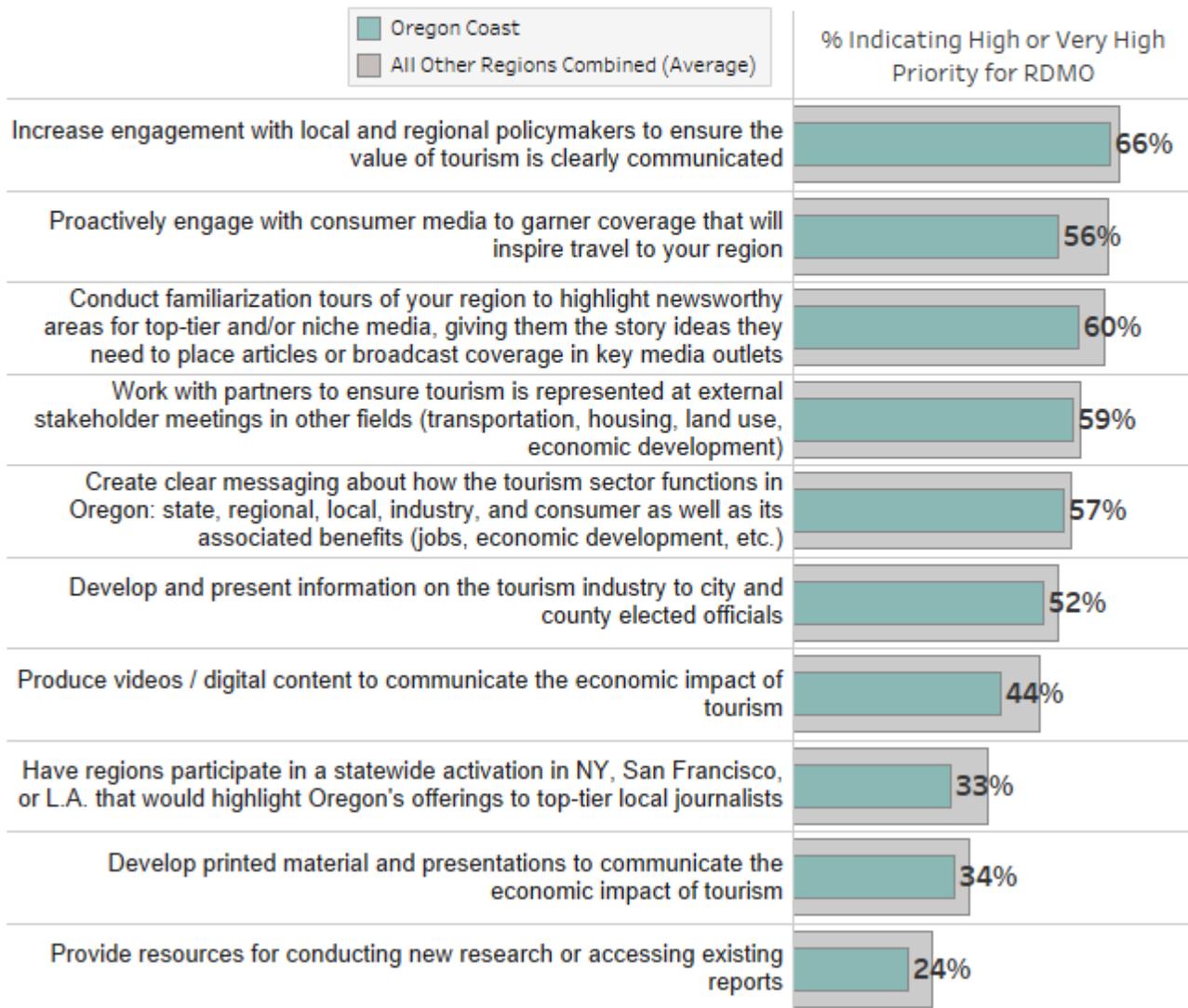


## PUBLIC AFFAIRS AND COMMUNICATIONS

Using the same rating scale as in previous sections, Oregon Coast stakeholders evaluated several tactics related to public affairs and communications. Both statewide and in Oregon Coast, respondents prioritized increasing engagement with local and regional policymakers to ensure the value of tourism is clearly communicated highest. Respondents for the Oregon Coast were less likely to prioritize, “Proactively engage with consumer media to garner coverage that will inspire travel to your region” relative to the rest of the state.

### Tactical Opportunities - Public Affairs and Communications

*Q: Thinking from the perspective of tourism marketing and management, please indicate how you would prioritize the following tactical PUBLIC AFFAIRS AND COMMUNICATION OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. 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.*



## Tactical Opportunities - Public Affairs and Communications by Sub-Region

*Q: Thinking from the perspective of tourism marketing and management, please indicate how you would prioritize the following tactical PUBLIC AFFAIRS AND COMMUNICATION OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. 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. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.*

		% Indicating High or Very High Priority for RDMO
Increase engagement with local and regional policymakers to ensure the value of tourism is clearly communicated	North Coast	56%
	Central Coast	69%
	South Coast	79%
Conduct familiarization tours of your region to highlight newsworthy areas for top-tier and/or niche media, giving them the story ideas they need to place articles or broadcast coverage in key media outlets	North Coast	50%
	Central Coast	65%
	South Coast	67%
Work with partners to ensure tourism is represented at external stakeholder meetings in other fields (transportation, housing, land use, economic development)	North Coast	51%
	Central Coast	62%
	South Coast	66%
Create clear messaging about how the tourism sector functions in Oregon: state, regional, local, industry, and consumer as well as its associated benefits (jobs, economic development, etc.)	North Coast	53%
	Central Coast	56%
	South Coast	62%
Proactively engage with consumer media to garner coverage that will inspire travel to your region	North Coast	41%
	Central Coast	61%
	South Coast	70%
Develop and present information on the tourism industry to city and county elected officials	North Coast	50%
	Central Coast	47%
	South Coast	62%
Produce videos / digital content to communicate the economic impact of tourism	North Coast	37%
	Central Coast	48%
	South Coast	48%
Develop printed material and presentations to communicate the economic impact of tourism	North Coast	33%
	Central Coast	33%
	South Coast	35%
Have regions participate in a statewide activation in NY, San Francisco, or L.A. that would highlight Oregon's offerings to top-tier local journalists	North Coast	23%
	Central Coast	40%
	South Coast	40%
Provide resources for conducting new research or accessing existing reports	North Coast	23%
	Central Coast	27%
	South Coast	21%

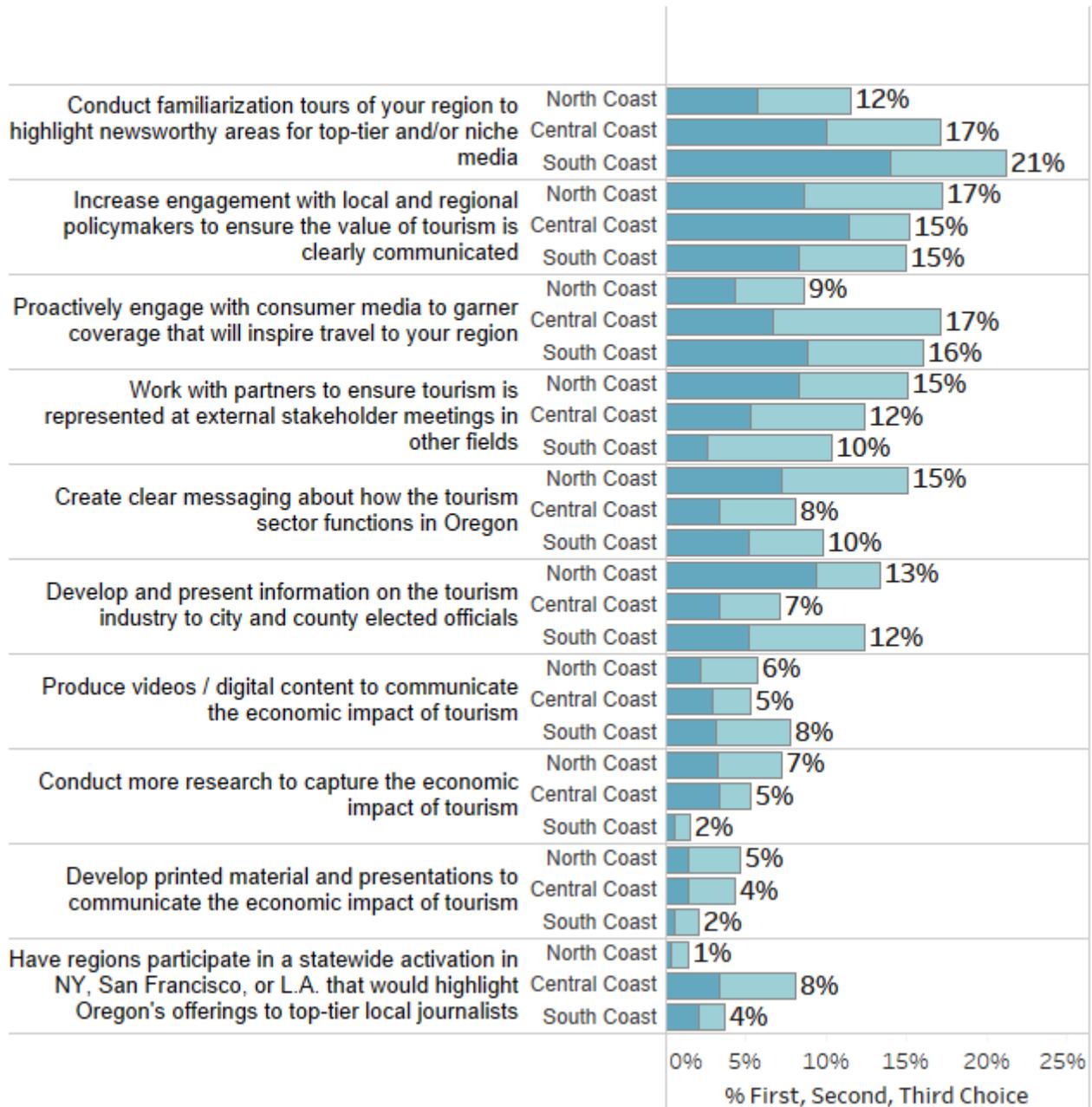
## Tactical Opportunities - Public Affairs and Communications

Q: From the list above, please identify your top two public affairs and communications opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Conduct familiarization tours of your region to highlight newsworthy areas for top-tier and/or niche media	17%	16%
Proactively engage with consumer media to garner coverage that will inspire travel to your region	16%	13%
Increase engagement with local and regional policymakers to ensure the value of tourism is clearly communicated	14%	16%
Work with partners to ensure tourism is represented at external stakeholder meetings in other fields	11%	13%
Create clear messaging about how the tourism sector functions in Oregon	11%	11%
Develop and present information on the tourism industry to city and county elected officials	10%	11%
Produce videos / digital content to communicate the economic impact of tourism	7%	6%
Have regions participate in a statewide activation in NY, San Francisco, or L.A. that would highlight Oregon's offerings to top-tier local journalists	6%	4%
Conduct more research to capture the economic impact of tourism	4%	5%
Develop printed material and presentations to communicate the economic impact of tourism	4%	4%

## Tactical Opportunities - Public Affairs and Communications by Sub-Region

Q: From the list above, please identify your top two public affairs and communications opportunities:

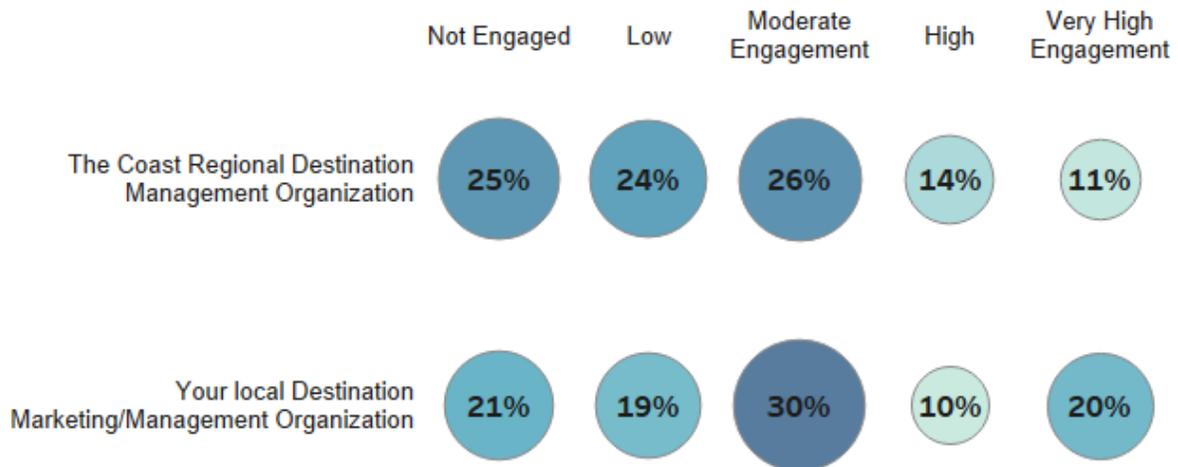


## CUSTOM REGIONAL QUESTIONS

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. Custom questions that contained open-ended comments appear in the open-ended comment appendix.

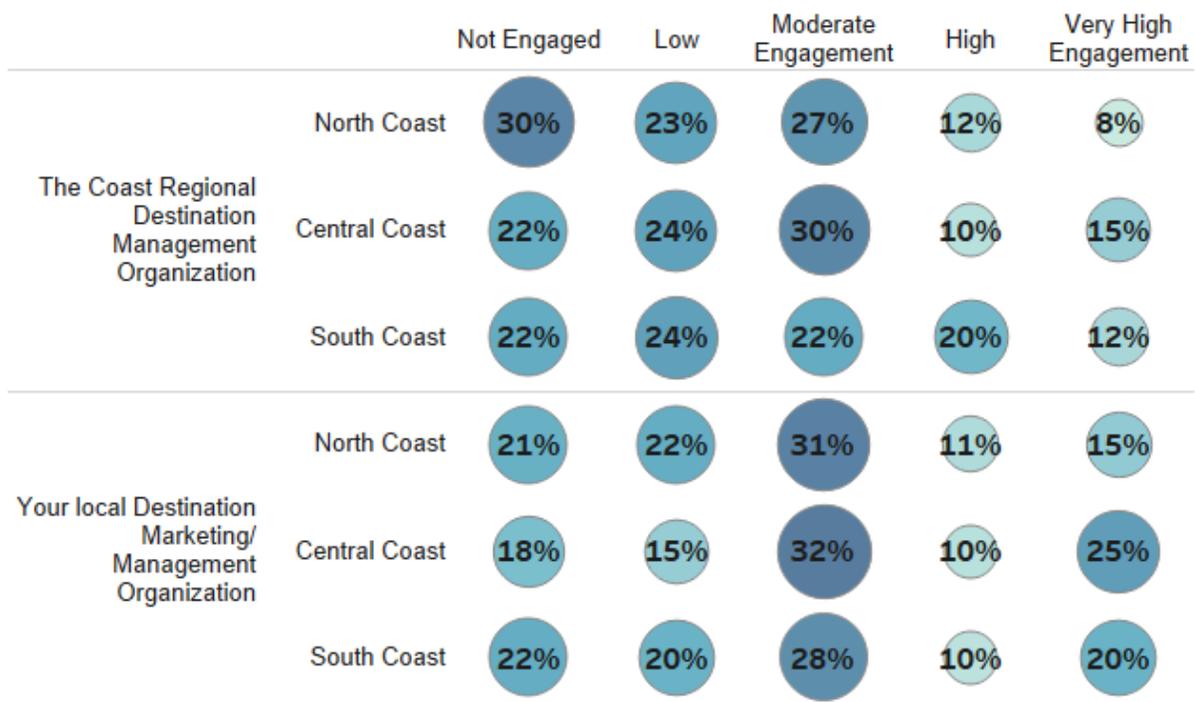
### Familiarity with Organizations

*Q: Please indicate your level of engagement with the following organizations*



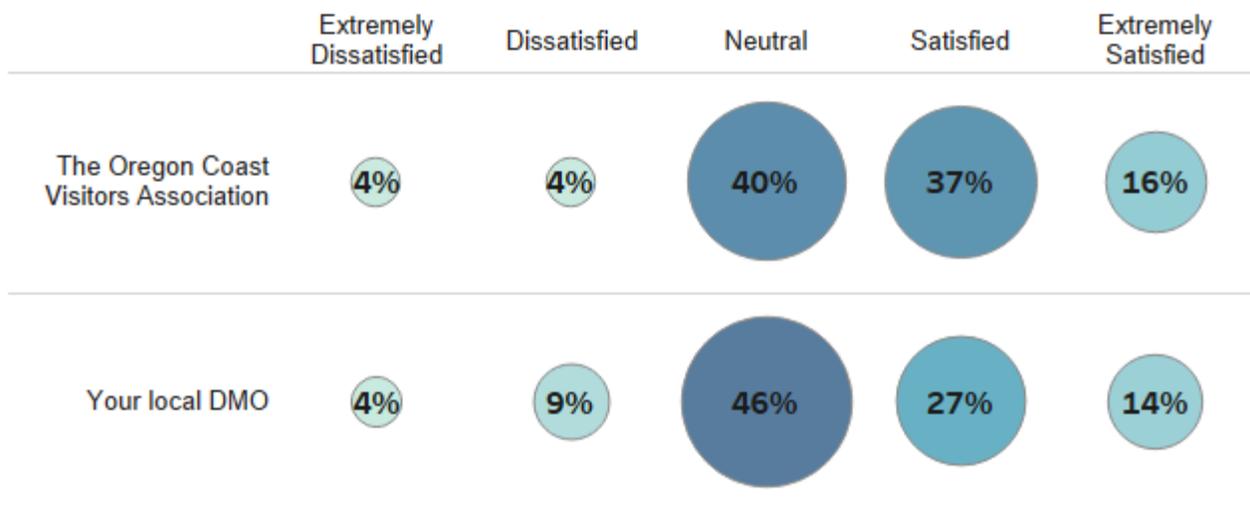
### Familiarity with Organizations by Sub-Region

*Q: Please indicate your level of engagement with the following organizations*



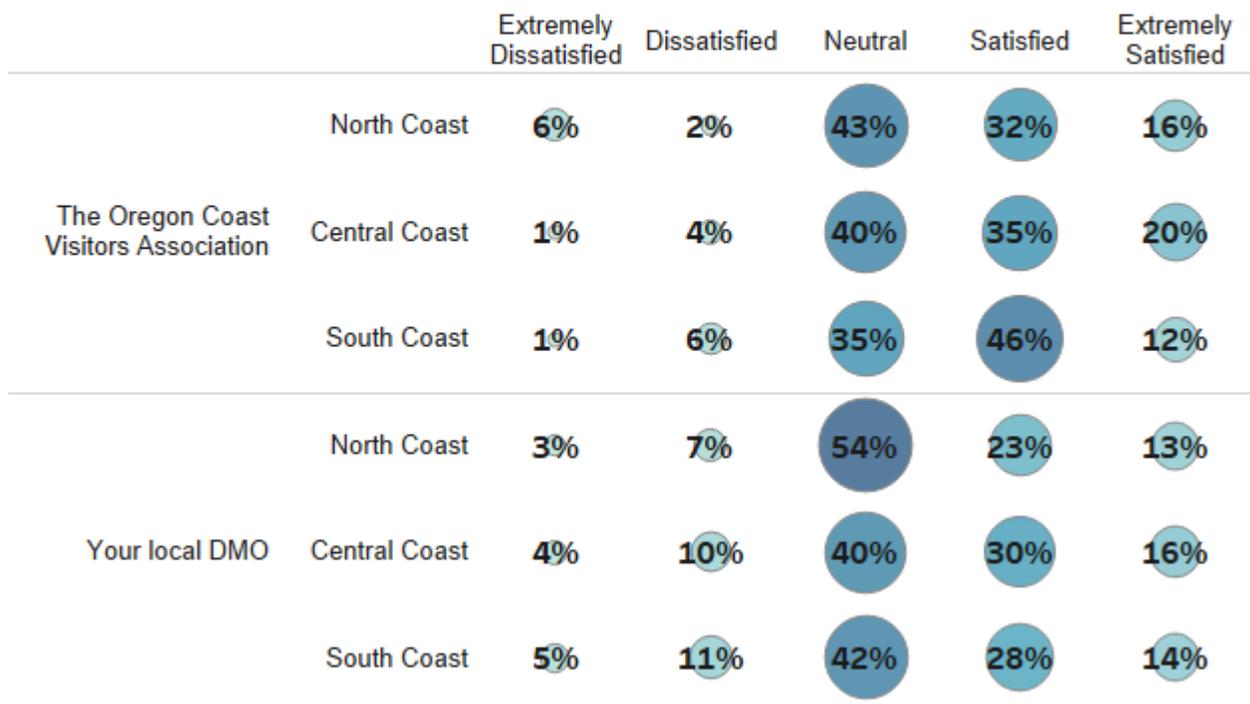
## Satisfaction with Organizations

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



## Satisfaction with Organizations by Sub-Region

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



**Appendix – Coded Open-Ended Responses**

<p><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></p>	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Assets	Downtown Renewal of Beautification	Tourism Impact Communication
<b>Oregon Coast</b>										
• I would like to see the City of Cannon Beach City Council show support of tourism to the people who live in Cannon Beach and to improve their relationship with the Chamber of Commerce and local businesses.										
• More off season tourism										
• Too long of a survey Policy wise work with State to develop a revenue solution that allows us to charge visitors so we can pay to upkeep our infrastructure that is impacted by significant use by visitors.										
• We would like more visitors.										
• bring the tourism industry, local communities and tourists into the same 'sustainability' philosophy for visiting OR and enjoying its asset.										
• Identify fragile natural areas, even "protected areas" and be sure that they will not be negatively impacted by tourism.										
• Retail										
• Inform and educate visitors to other parking and local sites of interest other than everyone stopping at Cape Kiwanda and parking along roadsides blocking local residents from their own driveways.										
• Improve local infrastructure										
• Have community leaders embrace visitation and not downplay it's importance.										
• Spread out the visitors by increasing the options available for outdoor activities which are growing trends like MTB trails and hikes and Pickleball.										
• Maintain safety and traffic flow due to congestion. Bring more destination tourists that stay for a week.										
• Bring back the fishing fleet.										
• Complete the gaps in the Oregon Coast Trail and provide the needed infrastructure for public transport, secure parking, and backpacker-only campsites in designated areas of day-use state parks.										
• I'd like to see a decrease in the overwhelming hordes of tourists which plague our small towns and coastal areas. The amount of trash and waste tourists generate is disgusting. The infrastructure on the Oregon Coast was not built to handle the sheer number of tourists we receive. Tourism reduces the quality of life for many locals.										
• Stop trying to bring MoZrRE people. Stabilize and clean up current visitation aspects so that residents do not need to defend themselves and our natural resources against the uneducated users that make up far too many of the visiting public										
• Clean up the towns, increase workforce housing opportunities through relaxing the zoning regulations										
• Better management of existing and new tourism to minimize negative impact on residents and community while focusing on growing tourism during shoulder and off-seasons.										
• develop sustainable, diverse recreation opportunities like mountain biking trails, that draw tourism and create new recreation opportunity for the local community.										
• Develop more off-season visitation to the region by highlighting the seasonality of activities on the southern Oregon coast.										
• Stronger partnership between all tourism industry stakeholders, especially including and strengthening the smaller players.										

<p><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></p>	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Assets	Downtown Renewal of Beautification	Tourism Impact Communication
<b>Oregon Coast</b>										
• Get tourism issues on the table at the annual Coastal Caucus meetings. The absence of Tourism folks at this year's meeting was noteworthy										
• Infrastructure capacity that equals tourism growth										
• Continued development of all trail types. Scenic beauty is our natural resource, trails are the pipeline.										
• We need workforce housing. It's THE #1 reason good employees leave our area. We also need daycare. These and other infrastructure needs prevent real growth, both in keeping our local residents stable and vital and in creating a group of employees who feel stable enough to really care about their jobs.										
• Turn focus to lowering impact of crowds- be mindful of living Oregon to death!!										
• No additional tourists, just better ones.										
• Promote trails, marine reserves and cultural preservation.										
• I would like to see OCVA achieve stability and sustainability as the official destination management organization for the coast region.										
• more transportation options from Portland and along I5 corridor to the Coast Increased social media presence										
• Develop a theme for the downtown corridor and clean up existing eyesores coming into town										
• Retain natural beauty and assure visitors respect and value our fragile ecosystem										
• Get rid of the cruise ships. Stop promoting the area. Too many people already!!										
• As Hwy 101 is the main street through Rockaway Beach (30 MPH), our major challenge is to stop them long enough to have them see the attractions and then stop to partake of the venues. Available attractions include beaches, railroad rides, museum shopping and food. But first you have to get them to stop.										
• To make our place a Destination that is sustainable we need to provide specific infrastructure to our local roads and highways. Traffic makes arriving to these destinations very difficult because of the specific bottlenecks on highway 26 and 30. Provide good signage and let local trail groups maintain with the assistance in guidance of state workers										
• Transfer money from marketing to address local transportation and workforce housing needs.										
• Please support completion of the Oregon Coast Trail. This trail will attract active retired people (and others) from all over the world. They will spend money on food and lodging without adding more cars to the Highway!										
• Increase the amount of mountain biking opportunities in our area										
• Travel Oregon needs to scale back promoting coastal destinations and put those dollars into supporting infrastructure, medical/emergency providers, and land managers to preserve local resources and maintain the visitor experience.										
• Our state really needs to address the roads and critical infrastructures to withstand the long term impacts of the growing market.										
• Increased shoulder season tourism										
• Looking forward to having legal mountain bike trails on the north coast that is a legitimate trail system										
• educate community regarding economic impact and sustainability goals										
• Provide traffic congestion relief during peak season.										
• Air service from PDX to OTH										

<p><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></p>	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Assets	Downtown Renewal of Beautification	Tourism Impact Communication
<b>Oregon Coast</b>										
<ul style="list-style-type: none"> <li>Provide living wages and affordable housing for the tourism workforce. Expand and enhance the park systems. Control the ballooning growth in short term tourist rentals in residential zones.</li> </ul>										
<ul style="list-style-type: none"> <li>Affordable Housing for workforce</li> </ul>										
<ul style="list-style-type: none"> <li>Specifically address alternative beach accesses and parking and in-town parking for Pacific City.</li> </ul>										
<ul style="list-style-type: none"> <li>Work on our infrastructures, fix them and put \$ from tourist taxes into that rather than attracting even more tourists</li> </ul>										
<ul style="list-style-type: none"> <li>Develop sustainable workforce housing to serve growing number of visitors. Increase "voluntourism"</li> </ul>										
<ul style="list-style-type: none"> <li>We don't need more tourism marketing for the high season on the coast. More off season marketing would be helpful. Tourists should be educated about their impacts on small towns.</li> </ul>										
<ul style="list-style-type: none"> <li>Without affordable worker housing there will be no one to fill the service jobs. We have restaurants closing dining rooms due to inability to hire staff. Short-term rentals have problems hiring cleaners. The lack of affordable housing is a negative for tourism and communities.</li> </ul>										
<ul style="list-style-type: none"> <li>Increase off season travel/business. Have more affordable housing and qualified candidates.</li> </ul>										
<ul style="list-style-type: none"> <li>Increase the labor force by offering competitive wages and affordable housing. If we increase tourism but we don't have enough employees to provide services, we won't be providing a good experience for travelers.</li> </ul>										
<ul style="list-style-type: none"> <li>Further promote, develop and train (and help us train) workforce to staff our operations and promote off-season travel to the coast. Also, enhance the visitor experience by providing signage or digital/Internet/mobile available interpretation at destinations.</li> </ul>										
<ul style="list-style-type: none"> <li>Get a city government that has a clue about tourism and the value of PEOPLE in the small town tourism equation. I.e. people who have a place to live, child care, transportation to work, and affordable groceries.</li> </ul>										
<ul style="list-style-type: none"> <li>I would like the ENTIRE Hwy 101 corridor to be visually welcoming, no empty -unkept buildings. Have streets clean, plants and flowers on view and happy educated local faces to greet visitors.</li> </ul>										
<ul style="list-style-type: none"> <li>Skill training to fill positions that require high emotional intelligence and can represent tourism product. Improve digital marketing.</li> </ul>										
<ul style="list-style-type: none"> <li>Develop a dedicated decently paid workforce to support the increase in tourists.</li> </ul>										
<ul style="list-style-type: none"> <li>Expand the diversity of activities offered, Right now it SEEMS the only thing we have to offer is the beach. Create a tourism environment that is eco-friendly and good for local business.</li> </ul>										
<ul style="list-style-type: none"> <li>Lincoln City survives through tourism and it impacts everyone. I would like to see a better balance of workforce housing and vacation rentals.</li> </ul>										
<ul style="list-style-type: none"> <li>Increased visitations from November thru February</li> </ul>										
<ul style="list-style-type: none"> <li>Promote more local events and museums.</li> </ul>										
<ul style="list-style-type: none"> <li>Outcomes should be defined as six months 12 months 18 months years longer than two are obsolete. Economic impact of tourism equals economics of the city or region. Also this survey should've been broken down into three parts or a continue later part and around question 20 there was an error before question 25 I don't remember... no priority box or comment box. Thank you.</li> </ul>										
<ul style="list-style-type: none"> <li>educate the tourism on how to use social media to increase off-season tourism</li> </ul>										

<p><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></p>	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Assets	Downtown Renewal of Beautification	Tourism Impact Communication
<b>Oregon Coast</b>										
<ul style="list-style-type: none"> <li>Enough growth to keep Coos Bay a livable locality. Tourist attractions that don't trash shores, beaches, parks and public lands. Variety enough for everyone, protection of special places. We don't need flashing lights, paved trails, and signs pointing to every recondite beach on the coast. We don't need bumper to bumper traffic, but we do need enough traffic to keep businesses in Charleston open all year, and high enough wages that people work in tourism can afford to live in Charleston, or anywhere else for that matter, too. Thanks for taking time to do this survey. Good luck!</li> </ul>										
<ul style="list-style-type: none"> <li>Build a more stable year round economy to support small business growth and sustainability which would provide more reliable jobs to support residents and communities</li> </ul>										
<ul style="list-style-type: none"> <li>I would like to see Curry County develop into a sustainable world-class community with appropriate tourism facilities,</li> </ul>										
<ul style="list-style-type: none"> <li>I would like to see regional and state legislation to better protect the view sheds and working lands of the Wild Rivers Coast of SW Oregon. If they go the way of developers you can kiss the long-term benefits of tourism goodbye. This is a multi generational effort so trying to get a stake in the ground in the next three to five years will maintain what we have and provide future generations with a viable income if we are the only place in America with tall trees and clean waters... The effort begins today.</li> </ul>										
<ul style="list-style-type: none"> <li>The South Coast would be an attraction to tourists for culinary adventure tourism, and have the infrastructure/accommodations to handle an influx of visitors in that regard.</li> </ul>										
<ul style="list-style-type: none"> <li>Develop better infrastructure at trailheads: i.e. toilets, bike repair/cleaning stations, signage, adequate and well planned parking areas. Better support and promote local business that provide tourism activities that compete with international companies.</li> </ul>										
<ul style="list-style-type: none"> <li>Start from the bottom up. Look at the economic make up of the area. Actively involve and inform local businesses/owners letting them know that their profit/loss is important and that they are important in driving tourism to their area. When folks come to an area, they find a place to stay. They find places to eat. They don't always know what to do next. In our area, lodging facilities often share very little with guests. There could be a guide showing EVERYTHING there is to do!</li> </ul>										
<ul style="list-style-type: none"> <li>enhanced recreational opportunities, especially improved hiking trails, better signage, better trail maintenance</li> </ul>										
<ul style="list-style-type: none"> <li>I would like to see more destination development efforts, specifically in the Central Oregon Coast area. We are in need of region-wide beautification and unified branding.</li> </ul>										
<ul style="list-style-type: none"> <li>Get ODOT to improve safety and capacity on state highways.</li> </ul>										
<ul style="list-style-type: none"> <li>Increase the livability standards for year-round residents which will help promote a positive Ness of the area</li> </ul>										
<ul style="list-style-type: none"> <li>I would like to see the Central Coast have a stronger year-round visitation campaign, not relying solely on the summer travel season--attract more storm watchers, etc.</li> </ul>										
<ul style="list-style-type: none"> <li>Provide more transportation options to get from inland city centers (Eugene, Portland) to the Oregon Coast.</li> </ul>										
<ul style="list-style-type: none"> <li>Enhance and promote the Oregon Coast Trail</li> </ul>										

<p><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></p>	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Areas	Downtown Renewal of Beautification	Tourism Impact Communication
<b>Oregon Coast</b>	■	■	■	■	■	■	■	■	■	■
• Less motorized traffic to tourist destinations; more public transit, expansion of trails (rails to trails, e.g.).				■			■			
• I would like to REDUCE tourism until the region can take care of its citizens - the full-time ones. Kids cannot afford to live here and work in the already-existing hotels and restaurants. This place is too tiny to handle any more summer people and tourists. This past summer was proof of this.	■									
• Support the infrastructure.	■			■						
• Improvement of roads, transportation to Coastal regions							■			
• Our biggest issue is lack of local activity/focus on tourism development. The Chamber disbanded and the city has not made an alternative organization viable - which would require an ordinance change which mandates the Chamber as the appropriate organization.	■									
• Working with a healthy environment to increase our enjoyment of a productive life.	■									
• Improved infrastructure for supporting camping and natural areas.				■						
• A cleaned up bayfront									■	
• Improve traffic flow.							■			
• Focus on beautification and improving the town									■	
• I want to see the central Oregon Coast revel in the fact that it is an amazing tourist destination and organically achieve its potential through education and funding. I want this place to genuinely know how cool it is and work toward showing that outwardly to visitors.	■				■					
• Conservation of natural resources that will allow for continued, sustainable tourism in the state.								■		
• Improve the rural communities curb appeal and ability to supply restrooms and services to tourists and their own community members.				■					■	
• Increased availability of free media options.					■					
• I would like the Oregon Coast to be known as a leader for SUSTAINABLE and respectful tourism which offers visitors a real experience while enhancing the liveability of the locals AND protecting Oregon's fragile ecosystems and environment AND keeping some hidden gems and favorite spots safe from exploitation and over development and over interpretation.								■		
• As a tax payer and Registered Voter, I find it disturbing BLM is only managing to remove the Public from Public Land ...These are Our Wild Horses on Our Public Land being sold for slaughter in Mexico and Canada. Horse Meat is proven to be toxic and not safe for human consumption. Our Public Land is overgrazed by Cattle and Sheep and natural predators that controlled the population of wild horses are removed because they are also predators of Cattle and Sheep. Our ecosystem is suffering from overgrazing and the best wild fire prevention we have is wild horses. There is not a Wild Horse problem, the problem is Entitlement and Greed for profit from Removing the Public from Public Land and giving Ranchers and Mining Companies more involved than the Public	■							■		
• Development of Coos Bay Boardwalk, and coastal development by the Holloring PICe				■						
• Mass Transportaion shuttles, tour buses, public accessibility							■			
• Get the public and elected officials buy-in. Explain the value of tourism jobs and economic impact.										■

<p><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></p>	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Assets	Downtown Renewal of Beautification	Tourism Impact Communication
<b>Oregon Coast</b>										
<ul style="list-style-type: none"> <li>Sustainable balance between residents and tourist that understands the value of both</li> </ul>										
<ul style="list-style-type: none"> <li>Tourism is not a sufficient goal for the local people. This goal does not provide the people already living here with an adequate quality of life, although the tourism goal may greatly benefit stakeholders who already have significant financial resources.</li> </ul>										
<ul style="list-style-type: none"> <li>I would like Florence area to develop a plan to sustain year-round tourism so citizens don't have to leave and come back each year, thus stabilizing their lives, their children's education, and our community.</li> </ul>										
<ul style="list-style-type: none"> <li>Create the infrastructure to support the tourism before pushing the tourism. Oregon is beautiful. Let's keep it that way!</li> </ul>										
<ul style="list-style-type: none"> <li>Better traffic control</li> </ul>										
<ul style="list-style-type: none"> <li>Focus on region wide solutions for workforce housing and congestion on HWY 101 (seaside needs to fix their bottleneck)</li> </ul>										
<ul style="list-style-type: none"> <li>Providing training for local business owners and employees to provide excellent customer service is a must!</li> </ul>										
<ul style="list-style-type: none"> <li>25% of visitors use alternative transportation at least once during their visit (bus, bike). 10% of visitors arrive by bus. All hotels and vacations rentals provide recycling and information to guests about bus routes and how to reduce negative impacts. All local cities have plastic bag bans. No more promoting the north and central Oregon coast from May to September. Travel Oregon gives money to the local bus systems to provide better service, or allows room tax to go towards it (from the 70%). No more publication/distribution of photos of illegal or unsafe activities (cars off roads, people standing on cliffs, or outside fences/boundaries).</li> </ul>										
<ul style="list-style-type: none"> <li>Improve the curb appeal, increase transportation modes (allow Uber, have more walkable streets, provide a tour bus or train through the main areas of town) Encourage small, tourism based businesses (breweries, shops, recreation outfitters, etc.)</li> </ul>										
<ul style="list-style-type: none"> <li>Educate Visitor Centers &amp; Chambers about marketing tiers from TO/RDMO/DMO's so they spend their money locally &amp; wisely. Engage our youth in developing skills that will benefit tourism - skills for employment in restaurants, outdoor guides, etc. Small business incentives to start visitor experience businesses - local food, guided outdoor or other experiences, etc.</li> </ul>										
<ul style="list-style-type: none"> <li>One need only look around to see the incredible numbers of people visiting the north coast each year. I believe we're at or even above saturation during the main travel season. I also believe that encouraging nature-based tourism during the winter stormy season badly damages our precious resources and does not allow them to rest and rejuvenate. Let's identify those areas that are at capacity or threatened by aggressive over-tourism. We can then focus on providing other sustainable destination opportunities while emphasizing the reasons we must prioritize conservation and resident quality of life.</li> </ul>										
<ul style="list-style-type: none"> <li>Help me with cruise ship marketing into Astoria. Lor's Tours!</li> </ul>										
<ul style="list-style-type: none"> <li>Public parking in every town, Yachats has none. Work on no moritoriums for vacation rentals</li> </ul>										

<p><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></p>	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Assets	Downtown Renewal of Beautification	Tourism Impact Communication
<b>Oregon Coast</b>										
<ul style="list-style-type: none"> <li>The Oregon coast is increasing in visitation each year. The current aging infrastructure, housing needs of seasonal staff, and poverty level wages of (mostly seasonal) jobs created by the tourism industry need to be addressed. More advertising without addressing the deeper poverty issues will only destroy and degrade our resources further. Ensuring that businesses behave in not only environmentally sustainable ways, but also provide basic livable wages and benefits is essential.</li> </ul>										
<ul style="list-style-type: none"> <li>Coordinated regional branding and customer facing promotional activities that will generate increased year-round visitation from out-of-region travelers.</li> </ul>										
<ul style="list-style-type: none"> <li>Make the entrances to or community more appealing. Have a list of people who speak another language, it would be helpful in retail, especially in and emergency,</li> </ul>										
<ul style="list-style-type: none"> <li>Reduction of search &amp; rescue incidents, accidents</li> </ul>										
<ul style="list-style-type: none"> <li>We are overwhelmed, have inadequate transportation and infrastructure to deal with the hordes of visitors. Their experiences and our livability are at risk. We need a sales tax to generate revenue for transportation and public safety concerns, and housing for our work force. Tourists don't pay their way. We need to advertise less.</li> </ul>										
<ul style="list-style-type: none"> <li>Tolerance between all parties - locals, businesses, tourists.</li> </ul>										
<ul style="list-style-type: none"> <li>More communication between stakeholders and local organizations from the Regional Manager on Tourism opportunities available. Currently there is little to no information about upcoming training or grant opportunities available. Current communication is disorganized and lacking.</li> </ul>										
<ul style="list-style-type: none"> <li>Local ownership/buy-in of tourism is key. Equitable accessibility that's targeted first to Oregonians and uplift will create sustainability and value in the long run. More swarms of single occupancy automobiles, motor-homes, and parking lots will not.</li> </ul>										
<ul style="list-style-type: none"> <li>I would like to see infrastructure to support sustainable tourism and protect Oregon's natural heritage.</li> </ul>										
<ul style="list-style-type: none"> <li>Allow tourism dollars to be spent on safety entities, ie, law enforcement, fire departments</li> </ul>										
<ul style="list-style-type: none"> <li>More sustainable tourism that does not ebb and flow with the seasons and more positive interaction opportunities for locals and visitors.</li> </ul>										
<ul style="list-style-type: none"> <li>I would like to business stabilize in the area and more opportunity for Tourism business growth.</li> </ul>										
<ul style="list-style-type: none"> <li>Promote the "sustainable" in Oregon Commercial Fishing to visitors who desire to taste Oregon Ocean Fishes.</li> </ul>										
<ul style="list-style-type: none"> <li>Adequate infrastructure to support local jobs and ALL residents.</li> </ul>										
<ul style="list-style-type: none"> <li>Understand that more visitors is not necessarily better, either for the visitor or for those who live and work in the place being visited. Focus on helping communities maintain their economic and ecological health by developing tourism opportunities that are appropriate for their local culture, respectful of their environment and limit the negative economic impact that tourism can have on a region (low service industry wages, reduced local housing due to Air B&amp;B, hard off-season drop off, businesses that serve local communities out-competed by tourist focused ones, etc. )</li> </ul>										
<ul style="list-style-type: none"> <li>Strong focus on sustainability and clear look at the environmental impacts of too many people. The economy will go away if every place gets ruined with crowds.</li> </ul>										

<p><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></p>	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Assets	Downtown Renewal of Beautification	Tourism Impact Communication
<b>Oregon Coast</b>										
<ul style="list-style-type: none"> <li>• Provide infrastructure for non-vehicular transportation to benefit tourism AND community residents and promote healthy outdoor activity for all. Provide greater resources for public safety...sherif deputies, fire and emergency response personnel, safety campaigns, etc.</li> </ul>										
<ul style="list-style-type: none"> <li>• Slow down the tourist development</li> </ul>										
<ul style="list-style-type: none"> <li>• Would like to see Brookings develop a common architectural/color/style theme so the town would look attractive to travelers passing through on Hwy. 101.</li> </ul>										
<ul style="list-style-type: none"> <li>• An educated and informed tourism group with members from local business, organizations and community leaders.</li> </ul>										
<ul style="list-style-type: none"> <li>• we need more tourism in the oct-may time frame and to develop better ways to deal with the traffic in the summer months.</li> </ul>										
<ul style="list-style-type: none"> <li>• Developed adequate work force housing Residents understand the micor economics of tourism locally and act in ways that enhance tourists' experiences</li> </ul>										
<ul style="list-style-type: none"> <li>• Improved infrastructure with assistance to volunteer organizations already keeping rail excursion, local trolleys, historic seaport opportunities etc...</li> </ul>										
<ul style="list-style-type: none"> <li>• Hospitality should be increased. It is difficult however to maintain this in the off season. That is why we need year around visitors. Such as conferences and training programs to out side businesses.</li> </ul>										
<ul style="list-style-type: none"> <li>• Work together as a region to promote tourism!</li> </ul>										
<ul style="list-style-type: none"> <li>• Increased off-season tourism; improvement of storefronts; improvement of public infrastructure to provide a cleaner, friendlier face to the community; improvement of public art programs; enhancement of resources meant for small business owners.</li> </ul>										
<ul style="list-style-type: none"> <li>• I would love to see the Southern Oregon &amp; Northern CA Coast to be a destination area similar to Monterey.</li> </ul>										
<ul style="list-style-type: none"> <li>• More marketing to travelers who come to experience a true 'sense of place' via local food, farms, geography, natural beauty, walking tours and interaction with locals who can provide those opportunities.</li> </ul>										
<ul style="list-style-type: none"> <li>• Change the ratio of funding - we don't need more money for marketing - we need more money to support local communities to continue to provide a wonderful experience for those who visit us!</li> </ul>										
<ul style="list-style-type: none"> <li>• Redirect some promotion dollars to enhanced capability to serve visitors and provide suitable housing, etc. for workers in the industry. The coast region needs less promotion and more attention to the conditions that tourists encounter when they visit.</li> </ul>										
<ul style="list-style-type: none"> <li>• The Oregon coast doesn't need more tourism promotion; it needs the infrastructure, including highway maintenance, to support the over-visitation we already have. Tourism is having a negative affect on housing affordability, traffic, &amp; condition of the natural environment that attracts tourists in the first place. I'm tired of trash on the beaches, dog poop in plastic bags on trails, and imperious visitors. We are not ALL for sale!</li> </ul>										
<ul style="list-style-type: none"> <li>• This year Oregon State Parks decided to enact an indefinite suspension to all relationships with private businesses as they review how to deal with them in the future. As a tour operator on the South Coast, I'm negatively affected by OPRD not allowing my business to operate or even advertise my service to park guests. I sincerely hope Travel Oregon can convince OPRD that working with licensed, bonded and professional vendors helps boost the local economies and provides a richer experience for the park visitor.</li> </ul>										

<p><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></p>	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Assets	Downtown Renewal of Beautification	Tourism Impact Communication
<b>Oregon Coast</b>	■	■	■	■	■	■	■	■	■	■
<ul style="list-style-type: none"> <li>I think that developing a better public transportation system from Portland to the central coast is needed.</li> </ul>							■			
<ul style="list-style-type: none"> <li>I would like to see sustainable tourism development that aligns with industrial development. They can both coexist and I think people don't get that.</li> </ul>								■		
<ul style="list-style-type: none"> <li>Sustainable shoulder season and off-season tourism infrastructure and marketing that creates livable communities, doesn't negatively impact our environment, and creates year round economic benefits of tourism to the region</li> </ul>		■						■		
<ul style="list-style-type: none"> <li>We desperately need affordable housing to help address workforce shortages for businesses that serve tourists.</li> </ul>			■							
<ul style="list-style-type: none"> <li>This was not a 15 minute survey. Respondent is frequently forced to have a choice where N/A would have been my response.</li> </ul>	■									
<ul style="list-style-type: none"> <li>Environmental stewardship and education, which will help tourists understand and respect our ecosystem and calm the nerves of locals.</li> </ul>								■		
<ul style="list-style-type: none"> <li>All the regional DMOs need to develop membership-based programs to engage every one locally who wants to contribute to and benefit from a healthy tourism trade. Big staffs eat up big budgets from State room tax...let's budget some of the staff for "membership development AND engagement"!</li> </ul>	■					■				
<ul style="list-style-type: none"> <li>Continue to implement and expand on action items from last year's Rural Tourism Studio. Provide more assistance for smaller communities without dedicated tourism organization or staff.</li> </ul>	■									
<ul style="list-style-type: none"> <li>Address the burden of intense tourism on small communities.</li> </ul>	■									
<ul style="list-style-type: none"> <li>Get the OCT off highway 101 and vastly improve signage.</li> </ul>	■			■						
<ul style="list-style-type: none"> <li>Educate and encourage the local population to be more involved with tourism. This could be ambassadors in smaller communities to regional experts to leverage the work Travel Oregon has accomplished.</li> </ul>	■									
<ul style="list-style-type: none"> <li>Upgrade emergency responders and infrastructure (roads and bridges) to handle influx of tourists.</li> </ul>	■						■			
<ul style="list-style-type: none"> <li>Increase in economic impact due to tourism (more evenly distributed across all of our communities) - keeping residents, local businesses, the local food system and the natural environment at the forefront of the decision making process along the way.</li> </ul>	■							■		
<ul style="list-style-type: none"> <li>I would like to see personal tourism experiences of celebrities or well recognized public figures who have enjoyed a exceptional visit to Oregon heavily publicized.</li> </ul>					■					
<ul style="list-style-type: none"> <li>More focus to increase domestic and international tourism to the south coast. Also more education for residents and merchants to embrace international tourism</li> </ul>										■
<ul style="list-style-type: none"> <li>For the South Coast to be as recognized as a destination and visited as our friends in the Central &amp; North Coast.</li> </ul>	■									
<ul style="list-style-type: none"> <li>Help business owners in the Garibaldi/Bay City area communicate with Verizon and (other phone companies) about the extensive problems with phone networks this past summer 2018. Businesses losing customers and providing less than optimal service to clients due to failing infrastructure from "jammed networks" on busy weekends with too many visitors using their phones in our area. Every business owner I have talked to in this area has lost business due to failing communication network. Please contact me if you have questions about this - we (as an area) need help! Tamara - 503-322-0007</li> </ul>	■			■						

<p><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></p>	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Assets	Downtown Renewal of Beautification	Tourism Impact Communication
<b>Oregon Coast</b>										
<ul style="list-style-type: none"> <li>1. Collaborate with the Oregon South Coast Regional Tourism network to create consensus around priorities, projects and outcomes that will set up South Coast Tourism Organizations for success. 2. Market and develop product that encourages shoulder and off-season visitation and assist with project capacity and funding.</li> </ul>										
<ul style="list-style-type: none"> <li>A train from Portland to Astoria.</li> </ul>										
<ul style="list-style-type: none"> <li>The growth of tourism requires well trained, knowledgeable people who love what we do. If we do not pay attention to developing a work force that is educated and able, tourism will die. We need our policy makers, educators, government officials to understand the relationship between long term growth of tourism and the educational components to provide a well trained, educated work force. This is not an industry that will adapt to robots well.</li> </ul>										
<ul style="list-style-type: none"> <li>Market and develop product that encourages shoulder and off-season visitation</li> </ul>										
<ul style="list-style-type: none"> <li>We need infrastructure to support the increase in tourism in our area. We also need workforce housing and opportunities to train staff and volunteers.</li> </ul>										
<ul style="list-style-type: none"> <li>We need to continue to better coordinate around specific outcomes as a region. Focused on marketing, product development and pr/community relations. Capacity needs cannot be overlooked to get the work done. Our local businesses and chambers are stretched doing their work. Collaboration and networks are the key!</li> </ul>										
<ul style="list-style-type: none"> <li>Solutions to peak season congestion would be a major step forward to show the positive impact of our industry to local citizens. Increased visitation from Oct. through May when our businesses need the additional support.</li> </ul>										
<ul style="list-style-type: none"> <li>We need more professional event creators and manager/operators - beyond the usual 20 people who wear too many hats and are not experts or understand what it takes to do events.</li> </ul>										
<ul style="list-style-type: none"> <li>We'd like to see greater demand translate into higher ADR and RevPAR versus simply more visitors. We're hoping to have a gradual shift to more upscale visitors, driving more upscale experiences. We have amazing natural beauty on our side, but need the amenities (dining, attractions, upscale lodging) to back it up.</li> </ul>										
<ul style="list-style-type: none"> <li>I would like to have some workforce solutions in place. On the Coast, we have extreme labor shortages, lack of affordable housing, few training opportunities, and a culture of viewing tourism as ruining our standard of living. Local (non tourism activity related) community engagement and addressing labor deficiencies is drastically needed to continue to develop the Oregon Coast as a brand</li> </ul>										
<ul style="list-style-type: none"> <li>I would like to see mountain bike trails developed as soon as possible. I am located on the coast (Pacific City area) and there is great opportunity here. Oregon and the PNW has some amazing terrain for mountain bikers but a lot of these areas are very dry during the summer months. Leading to blown out, dusty trails or they are snowed in during the winter months. With the lower elevations and proximity to the ocean, the opportunity for great year round riding is here in on the coast. Low to no snow months and marine air that helps keep the ground from getting too dusty. With mountain biking making such a huge impact on cities like Oakridge, Bend and Sandy, the Oregon Coast's depleted tourism traffic could greatly benefit from mountain bike trails being added to the list of outdoor activities.</li> </ul>										

<p><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></p>	Other	Shoulder and Off-Season	Housing	Product and Experience Development	Marketing Tactics and Messages	Regional Collaboration	Transportation	Sustainability & Stewardship of Natural Assets	Downtown Renewal of Beautification	Tourism Impact Communication
<b>Oregon Coast</b>	■	■	■	■	■	■	■	■	■	■
• More collaboration between local residents/hosts/travelers.	■									
• improved signage on hwy 101				■						
• Promotion to educators, such as universities and educational facilities globally.	■									
• I would like to see my region have a controlled and sustainable tourism	■									
• Reduce congestion and volume of waste by visitors.	■						■			
• Developing more of a more profitable brand identity for the coast using, e.g., local seafood vs. whale watching as the only winter story, would help define the area. I'm happy to help as a travel journalist.				■						
• we are in need of housing for workers point blank, lack of it is affecting local businesses, no one to hire. help wanted is everywhere			■							
• We need an indoor sports facility on the north coast for racquet sports and swimming.	■									
• South coast region embraces tourism as an economic driver instead of an after thought.									■	
• Increase off-season visitation, add destination development efforts and develop messaging related to sustainability and conservation.		■		■				■		
• Build hotels on beaches, with internal protected rooms. Increase cohesive signage. Develop a special wireless network which is activated thru phone when a "site" is visited. Create an investment consortium to build/invest in tourism-related projects.	■			■						
• I would like to see OCVA be more inclusive in its operation. It feel's like if you are not part of the board or friend you are not really involved.	■									

## Appendix, Continued – Open-Ended Responses

Choose the top five Travel Oregon programs that you believe are the most impactful: Other (please specify)  
% on social sites? Print form? Campuses? Executive level? CEO level? 5\* & above marketing grocery sites & walk-in grocery/shopping; print-kiosk etc.

Community member engagement and education

comprehensive signage for all roads/areas in Oregon - larger, more colorful and dynamic.

Don't know

Don't know or see enough of what is being done to say

grants to local agencies to improve tourism

Honestly haven't had enough interaction to know what more of these programs are. It seems that being on the South Coast makes engagement tougher.

I am not familiar enough to answer.

I am not familiar with any of these so cannot rank them

I can't pick anything else because I don't know about or understand the programs.

I don't know

I don't know which of these best address public transportation for tourists as well as affordable housing, but that's the program I would select as being most impactful

I have no idea - do not want active recruitment of tourists here, it is too small a residential community with too many 2nd homeowners as it is.

I like the attention given to bicycle tourism

Improvements to local area infrastructure.

Incentive programs

Infrastructure to support additional visitors (parking, restrooms, kiosks, etc)

N/a

need more focus on environment and retaining what makes Oregon special

Not aware of any more

open forums to the public/information in our area

Our local city government for our coastal towns Are shutting down vacation rentals

Partnership with Wild River Coast Food Trail

Programs to help rural areas develop a tourism theme

Roads; repair and improvement to handle traffic!

scads more time dealing with the people who live here full time.

Sorry, I don't know anything about your organization.

Support to non profit and education based based tourism

The Lodging Tax money should be distributed to local cities and counties to support improvements to infrastructure, police, parks, etc. that are impacted by tourism.

Too many tourist make for a bad environment

Tourism research

we. need jobs. Reduce green job-killer

Wild Life and the Ecosystem of Public Land

Given limited resources, what three priority areas do you believe are most important for 2019-2021 tourism planning? If you selected "Other" as a priority, please describe:

Affordable workforce housing. Higher minimum wage for tourism workforce.

Bring outdoor recreation to the areas that lack options in there area.

Carrying capacity research and partnering. Many areas of Oregon are being loved to death (Travel OR has had a role in over-marketing) while other areas remain under-accessed

## Appendix, Continued – Open-Ended Responses

Cities shutting down vacation rentals give the tourist feeling they are NOT welcome! We need to start with local city council's and find a way to fight it without vacation rentals, we have no tourist needed to support local economies

Collaboration with community partners, vital to the ultimate success of our life and economy.

Conservation. The profits of ever-increasing tourism come at the cost of precious resources. Greed is rampant. There is no balance.

Creating workforce

development of healthy tourism infrastructure: incentives on tobacco policies, highlighting healthy foods/restaurants, etc etc etc

Eco conscious

ensure that tourism infrastructure needs don't overshadow or impact resident/environment needs.

Environmental protection and residential livability.

Fix our roads and infrastructure. Inadequate for more people

Funding for emergency services

Help local governments develop coherent policies

Housing

housing for low wage earners that serve this market

Housing for workforce

Housing the workforce

I don't think any money should be allocated to promoting tourism until the state puts that money into ODOT for lighting and signage. This state is disgraceful.

Impacts on local communities - especially on infrastructure. The rise of Airbnb, VRBO, etc has changed the game. Impacts are not being addressed.

Incentive programs

interact with the local community, 1st, 2nd and 3rd!!!

Management of the tourist, public safety, traffic, assist Fire, EMS, law enforcement

more industry jobs. Get rid of sanctuary state. Getting too dangerous to visit

Mountain biking opportunities as 1st, 2nd and 3rd

None keep them away

One of the effects of the increase in Oregon's popularity is that the cost of living has increased exponentially, however wages and even the tips have not increased to accommodate this change. Most service and tourism industry employees on the coast can barely afford their rent, which is constantly going up. Small towns like Manzanita and Cannon Beach have had to close down many small businesses because they could not keep staff - no one can afford to live here on those wages. Astoria has many hotels, restaurants and retail stores, (even the Walmart in Warrenton) that are all currently understaffed because of this same issue, and we are in a housing crisis. Meanwhile we continue to have new proposals for additional hotels to bring in more tourists and 'create jobs'. We do not need more low paying jobs. As it is now, if you're not making at least \$20/hour, you can't afford to have any sort of quality of life here. And that is what we are ultimately selling to tourists, isn't it? Our amazing lifestyle?! Clearly, I don't have the solution, if I did, I wouldn't be writing a long meandering paragraph about it here. But what we need someone to put as a priority in Oregon is affordable workforce housing. And not some pitiful situation where a career Server is forced to share a house with 4 other adults in their mid 30's, because that honestly just sucks. We need either an increase in wages, or rent control (take it up in Salem) or some other housing program for the folks who work 50 hours a week and still can't afford to live in their own hometown anymore. Perhaps a housing initiative, where some tourism tax money goes directly to local housing for those who work in the industry could be useful? I know that the grants we get to support our local arts non-profits are incredibly helpful! I don't know how to do something similar in the way of supporting the working class.

promotion of locally made, sourced products, sustainability

Public safety (law enforcement, Fire districts, ambulance services, etc.)

Public Safety campaigns - Beach/Ocean safety; hiking safety; driving/roads

## Appendix, Continued – Open-Ended Responses

Regional capacity to continue to collaborative effectively through the Southern Oregon Tourism Network

Stronger and more inclusive regional destination marketing organizations!

Tax Payers spent \$70 to "manage" Wild Horses /BLM needs to be held Accountable for the cruelty and inhumane treatment of Wildlife.

The traffic is very dangerous! Hwy 30 there are always wrecks! Need passing lanes and slow vehicle pull outs at the very least! Just outside of Astoria is the worst!

Tourism based on Education Travel Oregon directly working with small cities. In recent years the multiple layers of entities, waters down the connections.

Travel Oregon needs to partner with conservation organizations to protect Oregon's ecosystems and character from overtourism, etc.

Vastly important to direct more resources toward infrastructure development. The coast is fully discovered. We need to take care of the visitors and those who serve them - housing, etc.

Workforce housing

workforce housing: tiny homes, 3D printed homes...anything to provide affordable housing for the workforce. As for workforce training, teaching excellence in service and caring about being excellence to a generation who doesn't get it.

Working on changing the ratio of funding - we don't need more marketing of the coast - we need more funding to support infrastructure here to support tourism - affordable housing, grants to support emergency preparedness, and help with supporting those who work here - living wages and transportation are huge issues. We have had enough of the marketing - it worked! Now we need help with sustaining our communities.

Working with local community eco-region groups to consider what type of tourism works best for that area.

Please indicate any other areas of marketing that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

\$\$

?

Adding mountain biking to this area would be an amazing asset to this area. There are no mtb specific trails, yet, on the Oregon Coast. This area has the elevation needed and a year round riding experience that will capture the PNW. Generally, the PNW mtb destinations are snowed in during the winter and are very dry and dusty during the summer months. The coast, with it's lower elevations and marine air, will have mountain biker's traveling from all over the world to capture what will be known as one of the best places to ride on this planet.

Advocacy for more trails, and less motorized traffic for visitors (and residents)

Assist in collaborative marketing by multiple area agencies/organizations

Be extremely focused on your target market. More sniper less blanket bombing.

beach access, access to the ghost forest

Breakdown of current assets to maintain focus and realize the long-term vision of Travel Oregon.

Co-op thought was good. Partnering 2-4 cities together.

cooperative grants and training to maximize the value for the money invested in advertising.

Coordinated effort between different providers to market nature/camping areas. i.e. a guide to camping at USFS, State Parks, County Parks, commercial camp/RV sites, all in one guide for making reservations.

Creating infrastructure for activities such as hiking biking beachcombing improving roads and destination points reducing traffic

Customer service and tourism training for work force

Do you work with an 'ideal' visitor in mind? Some people are way better tourists than others. Focusing on getting the folks we want in town with make the impacts easier to overlook.

Educate the public who live here!

Engage local partners & tourism-related businesses in regional DMO planning, budgeting & program execution!!!

## Appendix, Continued – Open-Ended Responses

Environmental protection vis-a-vis tourism...€pack it in, pack it out€ campaign was somewhat successful in the Woods...should be implemented €œon steroids€ on the coast. The garbage tourists leave behind is obscene! Public Safety - major campaign on beach/ocean shore safety. Tourists at the coast routinely leave their common sense at home when they go to the beach. Their lives and those of our local volunteer fire/rescue personnel are at serious risk. Slogan idea...€THINK TWICE ABOUT WHAT YOU ARE ABOUT TO DO!€ □

Focus on South Coast to improve economic situation

Fund more programs like "Explore Nature" = recognizes and educates attendees about the balance of nature and fragile ecosystem

Get more flights into the south coast

Goes along with training, but offering basic marketing toolkit/templates.

Grant dollars made available to grow or establish more tourism offerings in smaller communities.

Home sales, for resettlement future

Increase funding for transportation and workforce housing. Quit marketing, we have too many tourists now.

International airport's. New York airport, and rental agencies for vehicles.promotional plans for incentive marketing concepts.

Leave no foot print - vacation like you live here

Listening sessions with communities that are tourist destinations, develop strategies to help local residents cope with the impact of tourism in meaningful ways. A community that truly sees tourism as a benefit and not a problem will be more likely to support tourism efforts in their region.

Make sure you are marketing what the local community wants to be marketed. Do not continue to market areas that are over run and do not have the resources to manage the high use.

Marketing the culinary/locovore opportunities associated with resource available in our Region, and their tie to Adventure Tourism.

Marketing to seasonal workers, showing why it's worth spending a season in our area.

Marketing which communicates sustainable leave-no-trace messaging. Not just telling people to visit, but explaining "how they should visit"

Media

Meeting with tourism business owners to try to align interests and better spend marketing dollars.

More community shuttles

More marketing efforts to promote localized stand out visitor opportunities. Every town has unique local experiences, making sure we promote all of these features for each demographic. Example: there could be marketing behind the promotion of local museum but no effort to promote the skateboard park. It's important to have touch points for each demographic that could be visiting or just passing through.

No

NO Marketing for tourists until you use these funds to transfer to ODOT for lighting and signage. This state is an embarrassment. One of the reasons there are so many accidents in this state and bad drivers.

None keep them away

Overall: OCVA is effective, but Port Orford has NO organization working on tourism development (our Chamber disbanded) - this is the key issue for us.

photo/video archive accessibility

PLEASE LET our visitors know that "real people" live here!!!!

PPC, Evergreen content for regional efforts on social and regional websites, and remarketing

Promote more activities in the off season November through April.

Promote other economically challenged areas of Oregon, besides the Oregon Coast.

Provide tourism businesses better access to photos and videos to assist in marketing and PR efforts.

Public outreach/education about SAFETY - beaches/oceans, water/rivers, hiking/trails, roads/driving, etc. We are inviting them here and not informing them about the inherent dangers. We want them to come, and be able to come back again and again.

Roads!!!!!!! Hwy 101 is a death trap!

Social media full time

## Appendix, Continued – Open-Ended Responses

Spend money improving communities recreational and natural attractions. Damage of our attractions is increasing due to insufficient information.

Stop drawing in people from Arizona(SW) to the Oregon Coast. They are cold, complaining & miserable here. Instead focus on affluent east coast hubs.

Stop marketing summer on the Oregon Coast. Drive business in the fall, winter and spring. Work with resource management agencies to educate visitors about our ecosystems and how to visit communities respectfully. Respectfully consider local folks and don't anger them and destroy their quality of life in a rush to market some of their "hidden gems" to visitors.

Target educators from other regions, by using the small, special communities. Oregon is the best place to study, learn and teach!

targeted radio

The south coast needs the branding expertise coupled with the capacity to assist smaller communities in how to be a part of the brand and visitor experience.

The tenor of these questions indicates a high probable need for a tourism market analysis and needs assessment to 1) understand what and where Oregon's tourist destinations are, how and why to target tourists to various destinations, and 2) to identify what services, infrastructure, and community services are needed, both to provide quality experiences for tourists and to protect quality of life for residents, including providing living wages and benefits that are structured to keep pace with the inflation that forces local residents out of their communities as a consequence of being popular destinations. Once you have completed the market analysis (which should engage the public, not just tourism stakeholders), and analyzed the needs assessment results (e.g., by doing the work I identified as high priority) then move to the steps marked lower priorities, because each of these needs to be informed by the higher priority work that should be done first. Engage the public, including underserved, low income, and rural communities, at every step of the way.

To promote the sustainability of tourism, we need to support local communities - we need infrastructure support, not marketing.

Tourist trash pick up.

Tourists should be enjoined to live like a local, respecting in the environment

Transient lodging taxes committed to specific needs in specific communities

Travel Oregon has a great website. Better highlight sub-regions & the experiences they are working to develop & promote. Calendar of Activities for each Sub-region

We already get everyone coming here. We need help with getting our businesses to excel, not just settle for "doing well enough."

Please indicate any other areas of global sales and international travel trade and media that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

"Advancing the economic impact" is falsely equated here with the "sustainability" of tourism. It's more important to ensure the sustainability of those intangible things that bring tourists to Oregon (i.e., forests, fish, wide-open beaches, clean air, clean water, spectacular mountains, plentiful natural resources). Advance. I can't help but be suspicious of that word. In my job it's used constantly, and mostly it's used to keep things vague.

\$\$

?

A Tale of Two Projects€! by Sustainable Land Development Initiative <https://www.triplepundit.com/2010/09/tale-projects/>

Advertise much Korea!

Assist with local college in promoting language courses for international tourist

Basic Internet Advertising showing how beautiful the Oregon coast and it's trail systems are for tourists

Continuing extreme marketing while capacity/ infrastructure fails under the current load is leadership by fools.

Culinary resources available for tourists to Oregon Coast.

Develop. educate more partners locally

Don't know

Eco-tourism

## Appendix, Continued – Open-Ended Responses

Educate visitors about how to respectfully care for Oregon's environment and resources before they visit.

Environmental tourism. Keep Oregon clean from tourists. We don't need their rubbish.

Far more Consideration to the Communities that suffer from the tourist mob scene.

Focus on countries whose economies are strong enough to promote ecotourism. You need to be very targeted on which markets to approach. Germany for example has a citizenry that has resources and likes ecotourism. France on the other hand not so much...

I believe that if you empower and promote local companies and individuals with global touch points you'll advance the impact of domestic and international tourism, as well as sustain the local economy.

I do not feel global sales should be a high priority until the workforce is training and we have the infrastructure to support it.

I don't think international travel marketing etc is overall as high a priority as developing a better balance for tourism economy balanced against its challenges for the local community.

I have no idea...

I'll say it again: develop tours, marketed to Japan and the rest of the Far East, highlighting kite festivals. They could tie into the WA State Intl. Kite Fest (not too far from Portland), Lincoln City Summer, Lincoln City Fall, or Southern OR Kite Fest. With advance notice to the producers, special arrangements could probably be made.

i'm not a fan of global promotion--

Individual businesses, agencies, chambers, local DMOs cannot afford to penetrate the sales trade arena. Travel Oregon does a bang-up job of getting to them...do more...share appropriate leads with regional DMOs...they should share them with tourism-related partners in the region.

More coordination between the "sale of a destination" to international markets and the training the region will need in order to best serve that market.

N/a

None

Oregon free taxes

Perhaps offering some sort of education for tourists about how to travel sustainably, respectfully and mindfully of the communities that they visit.

PLEASE - no tourism promotion. This state doesn't have the space needed and this region is all full with tourists and 2nd home owners.

Promoting Oregon adventures to Hawaii

ROADS HIGHWAY 101!!!

sales tax instead of property tax

Social media like Explore Oregon

Stop already w the international marketing

The jargon increases as this very long survey goes on.

Too long of a survey

Train locals on opportunities in guiding activities unique to the coast

We don't need any more tourists. We have too many now, local transportation and housing is overwhelmed.

When conducted on a mass scale, I am concerned that international travel trade is more damaging than beneficial.

Focus should be on small groups of independent travelers.

Work force education re international cultural differences

Please indicate any other areas of planning, management, development, training, or capacity building that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

\$\$

?

Address the negative local impacts! Waste systems, roads, parking, noise, etc.

Again, we need support with infrastructure and capacity building with local issues resulting from increased tourism and its impacts. Affordable housing, living wages and emergency preparedness.

## Appendix, Continued – Open-Ended Responses

Agricultural landscapes should emphasize cannabis.

Alleviate congestion during peak tourism season in areas of high visitation

Bring tourism education into the local middle school and high school system. A healthy and sustainable tourism industry is a multi generational investment and the next generation needs to be trained on the importance of protecting the ecosystem that is the draw for tourism. A condition that will only intensify over time. So train the local youth as to what it means to the economy and the well being of their families and themselves.

Community College two year programs in hospitality and tourism which emphasize quality services for visitors, Courses should include marketing and facility management.

Counter the perception that tourism industry jobs are low-paying.

Cut back on tourism marketing. The coast is overwhelmed with tourists. Transfer funding to transportation and workforce housing development.

Developed ways to better control and regulate short term tourist rentals in residential zones. Address problems of low wages, inadequate housing, and seasonality of income for the tourism workforce.

Direct work with TO and local communities. OCVA is useless

Direct/insist/require regional DMOs to be MORE inclusive with every one in their region with an interest in tourism...makes logical, perfect sense that we can cover many of these survey priority items by having a tourism-engaged based living and working here!!!

Don't know

Educate local youth to be able to arrive to work sober and relatively drug free. Teach local youth to use proper grammar. Don't allow ignorant locals to breed.

Education and emphasis on the damage caused by any type of mining on our rivers and streams.

Engage in some futures-planning. What will Oregon look like forty years from now? What will be the legacy of the "economic impact and sustainability of tourism?" From analyses of the futures that possibly await us, what future is probable for all Oregonians? Given the probable future our grandchildren must endure, what is the most plausible future that Oregonians today should strive to realize?

Enhanced communication and collaboration between regional Chambers of Commerce

facilitate collaboration

FORGET THIS NONSENSE - create a place for the already-existing places here to hire employees they need to work and live in affordable housing. First things first.

Fund local support to develop tourism experiences, leveraging local relationships and long term project support and advice to keep new experiences vibrant & high quality.

Get rid of tourism..it produces limited \$ and creates low pay seasonal work. Its a huge drain oon our community.

Help me with the cruise lines coming into Astoria

Housing

In addition to collaborating with universities, include community colleges and local high schools.

Increase visitation to the region during off-peak seasons was not on the dropdown for question 25

Increased capacity of local Networks working with local chambers and RDMO etc to have the time to develop the partnerships needed in order to effectively create products and experiences and market the destination.

Insure that regional branding supports maximum effectiveness of out-of-region and out-of-state marketing. I believe that the brand "The Peoples Coast" falls way short of this objective.

It would be lovely if the "planning folks" considered what is desirable to the local population

Look to other destinations which have failed in this regard and to destinations which have been successful. Share this knowledge.

Making working in the tourism or service industry economically viable. It does not pay enough to attract people. Hard to find people that will show up to work each day.

More outreach and sponsored events in the communities if Oregon

More parking for high impact areas like Cape Kiwanda parking lot.

More short-term rental tax dollars should be spent to upgrade/repair infrastructure that is being being stressed by increased tourism.

## Appendix, Continued – Open-Ended Responses

Outreach/education about safety - on beaches, trails, roads in our rural areas

Parking

Programs to inculcate an attitude of excellence and pride in service and what a work ethic looks like. What visiting tourists AND an employer expect from their staff.

Public Safety

Retail

Services for special need Citizens

Share the wealth and development capacity for local communities to absorb the load you have created on our infrastructure and quality of life, please.

Start educating about tourism in grade and high school

strategize how to maintain a balance between tourism and having a town that can support its tourism industry workers. Currently the lack of housing badly impacts the work force and pool from which to draw and train industry employees and future managers/executives. Why is there no program for youth in the area to mentor and groom them for hospitality?

Support for local chambers and organizations that have already identified their needs

trail and recreation planning to inform developments

Trail systems for mountain bikers making it a destination point and giving back to the community

Training in how to operate environmentally sustainable tourist resources.

We should reduce the negative impact of tourism. Tourism isn't sustainable. Look at all of the tourist traps throughout the world. Let's not make Oregon a tourist trap as well.

Whole community meetings

Wild Horse Sanctuary for Tourism

With the above is enough

Work force housing.

Your request "to advance the economic impact and sustainability of tourism" would be best addressed with a triple-bottom-line understanding of true sustainability - <https://www.triplepundit.com/2010/10/southern-oregon-coast-mixing-nature-tradition-economics-sustainable-future/>

Please indicate any other areas of of industry services that you believe should be an extremely high priority in order to advance the economic impact of tourism:

\$\$

Advocacy about the value of the industry

Again, design/develop ways to be MORE engaging with local entities, agencies, businesses, attractions, accommodations to develop, budget and executive regional DMO activities!!!

Align local resources for coast-wide and/or regional benefit

ALL TERRIBLE IDEAS.

Ask any housekeeper, wait staff or law enforcement person if they would appreciate more civility among the tourist population.

Assist local governments in understanding the value of tourism. Assist local governments in using funds to better manage tourism and its impact.

Avoid making Travel Oregon in to a big inefficient buerocracy

Awareness of diversity of regions.

Bring back the fishing fleet.

Change the state law so that a higher percentage of TLT goes to maintaining roads and infrastructure.

Communication and education with community

Congestion of travel through Central Oregon Coast towns ie Lincoln City, 6 months out of the year, need a by pass highway for local traffic !

considering the impacts of tourism for year-round residents (especially in rural communities) on housing stock availability and rent/home values, workforce development in general but also off-peak season job opportunities, infrastructure like roads, parking, etc.

## Appendix, Continued – Open-Ended Responses

Coordination with local city & county officials and ODOT address the traffic congestion and safety issues.

Customer service skills.

Develop grants to provide much needed infrastructure--i.e. restrooms, better roads and transportation--to meet the needs of visitors, especially with increasing numbers of visitors.

Develop multimodal transportation system to alleviate traffic and damage to roadways.

Eco tourism

educating local residents to its value.

Emergency preparedness

Encouraging more people to become guides! Roadmap to becoming a professional guide/ leader of outdoor experiences

Explore housing. With tourism comes growth for the community. Housing plays a LARGE roll in this.

Explore possibility of micro-grants with quick turnaround times for short-term opportunities.

Get ODOT on board for signage and road directions.

Help Sub-regions secure long term, part time funding for supporting quality, local infrastructure support, like Action Teams. These folks would have the training, knowledge, and relationships, including a good understanding of the tourism network, to support new and existing experiences.

Help with increasing opportunity for TLT funds to assist with emergency response.

If tourism is an industry, then one of the services it provides is easy and free access to open spaces, scenic views, and natural resources that are the lure that attracts tourism in the first place. Protect these irreplaceable assests from encroachment by tourist-dependent services and destinations that detract, and plan for growth accordingly.

Include a category for short term rental and vacation rental hosts to work with Travel Oregon.

Include more historic museums in local communities to share their history.

Inform the population at large in understandable terms of the value of tourism, i.e. not millions or billions of dollars but dollars per inhabitant for example.

Infrastructure for local businesses.. housing etc

Infrastructure or discourage tourism

Light rail or train service to all areas of tourism From Portland airport

Local business participation

Many groups in our region are unaware of what you can do for them. Market yourselves to the groups that are destinations for the tourists.

micro grants

Micro grants Leverage private partnerships.

More communication with Regional manager to local organizations

More economic reports that are broken down into sectors on the effect of tourism. This could be a 2-3 page report and it may exist.

More front line staff and guide training. Not sure if ORLA and OSU are pulling it off.

More public awareness as in newspaper puff stories...

Move tourism funds from promoting tourism to protecting and enhancing the environment that has attracted the tourism in the first place. Help finance improvements to infrastructure that is overburdened by tourism in small towns and rural areas. Help finance improvements and expansion of our park systems (state, county and city parks).

No

Parking

## Appendix, Continued – Open-Ended Responses

Perhaps developing an effective union for workers in the service, tourism and hospitality industries. Or some sort of standard of compensation, or affordable workforce housing. Most food and beverage workers do not get any breaks, even during a 10 hour shift, don't get healthcare or hourly wage increases. And now the newest fad is the restaurant owners have the servers split their tips evenly with the kitchen staff, perhaps to subsidize the kitchen staff wages so thenonwer cans save a few more bucks. What is essentially happening is that the city may be seeing more tourist dollars, but the locals and industry workers are making less money at the end of the day, and paying more for their rent and daily needs. For a positive economic impact of tourism in my community, I would expect those working in tourism based industries to be not only able to make ends meet, but to be thriving, and able to spend their days off of work (to even have days off of work) enjoying the incredible natural beauty and community that we promote and sell to tourists. The wealth is not trickling down from the business owners to their employees. Nor from the Chamber of Commerce or the Port to the citizens. It's quite unsettling To watch my hometown drift into some unrecognizable place that I will likely not be able to afford to live in soon enough. I do believe the majority of the negative changes I have seen are a direct result in the steady increase in tourism.

Provide easily accessible tourism information to entities for education and events (i.e., connect cities for regional events, provide lists of vendors, sponsors, etc)

Provide support for appropriate conditional uses of Forestry-Grazing land in Curry County for recreational purposes.

Providing information and training specifically to local government (ie City Manager, City Council).

Providing more information on grants available throughout the region and country.

Recycling should be a high priority to decrease the amount of trash tourists leave behind.

Rest areas and public bathrooms and parking .

Revise the structure of the program to emphasize infrastructure development rather than marketing.

Roads Hwy 101 is killing people!

Rural areas, and transportation to and from them.

Some thought to the single owner/worker very small business.

The 20 & 30 yr old market. Fortune 100 companies. Food sites. Social sites.

The multi part series being done on the Coast is a good example of a cooperative effort to improve the experience for the tourist

The negative impacts on small communities need to be addressed. The positive impacts are well understood, but the "externalities" are not.

Too many tourists, roads are overwhelmed. Cut back on marketing.

Tourism training for locals A!

Travel Oregon working directly with community members. All the layers, distances the communities from important resources and connections.

View-shed corridor management - Limiting development on the coast to protect the vistas that are the attraction for tourists. Especially in areas of high scenic and ecotourism. This will play nicely with international marketing.

We have rural infrastructure and surges of urban population, thanks to the successful marketing your organization has done. Problem is, the fun factor of tourism is waning rapidly because we don't have the money to build roads, housing is unaffordable and unavailable for the work force, and the local population is infuriated by the floods of tourists. If you don't help deal with the unintended consequences of your success, the future looks grim for all of us, you and local communities.

Work with local agencies and communities to determine tourism "carrying capacity" of their current infrastructure and listen to their desires for what healthy sustainable tourism looks like to them..

Workforce housing options

Workshops for local and regional communities that help them develop tourism activities that they see as appropriate for their area.

Year ago we were provided a fantastic customer training called "Put the OH back in Oregon". We need something like that to inspire and renew all that oregon tourism has to offer.

Zine articles,

## Appendix, Continued – Open-Ended Responses

Please indicate any other areas of PUBLIC AFFAIRS AND COMMUNICATIONS that you believe should be an extremely high priority for in order to increase visitation in your area.

\$\$

?

After looking over the list, I would rather you spend staff time, money and research on: > identifying visitor audiences, needs, trends, and potential areas of conflict and communicating those to legislators and decision makers; > qualifying destination desirability levels for areas of the state to help disperse tourism from over-used (over-loved) areas, and developing communications messages to support those efforts; > identifying and assessing tourism trends to leverage Oregon's options for early adoption, and communicating the results to local governments or entrepreneurs for action; > helping public land and resource managers with training, skills, and funds to monitor and manage the human dimensions of tourism on rural and underserved communities and communicating the value of wise stewardship of public lands and resources in economic terms; > helping public land and resource managers with training, skills, and funds to monitor and avoid or reduce visitor impacts on natural areas and highly-desirable destinations; > celebrating cultural values and resources, including engagement with native sovereign nations; > engaging with local governments to develop regionally appropriate tourism management policies and practices; > working with state, local and regional communicate best practices for moderating tourism to prevent tourism-related development from driving the costs of living in popular areas higher than local people, many of whom will be employed at low wages in tourism industries, will be able to afford; > being a voice for living wages, benefits, and employment security for tourism workers and tourism-dependent communities, and communicating the economic multipliers that tourism workers, earning wages sufficient to sustain their families, contribute to the economic basis of their towns and cities.

Children from Oregon are responsible for The Wild Horse and Burrow Protection Act passed 1971 with the letters they wrote to Congress...the \$70 Million would benefit Education

Clear visibility on how TLT dollars are being spent

Communication to citizens of the importance of tourism and the positive outcomes needs to be addressed. They aren't in the industry and don't benefit directly from tourism and are often left out when it come to information or engagement.

Consider conducting interviews and research within the communities most effected by tourism. Not the ones with the most to gain, but those with the most to lose. Historically, when a place becomes a 'desirnation' It's because it's somewhat affordable, it's beautiful or quirky or charming, and it typically becomes neither of those things once gentrification hits full force. So, I suggest speaking with the marginalized communities who will likely have the most to lose, and actually listen. I used to work part time and volunteered for multiple local non-profits, the senior center, etc. Now, I literally work 7 days a week and may still have to move out of my house because of another rent increase. I no longer get to serve my community the way that I used to through volunteerism because I no longer have the time. I no longer have time to create music or art. I no longer have the time to go for a hike in the summer months, and the one time I did, the trail was so crowded, it was incredibly unpleasant. My way of life, my quality of life is no longer what it was growing up in my small Oregon town. I know I'm not the only one who feels this way. The locals sit around and discuss how to possibly save what's left of Astoria before it's too late. I don't think that anyone else should be trying to increase visitation to our area. I would beg you to stop promoting Astoria.

Create clear messaging about how the tourism sector functions in Oregon: state, regional, local, industry, and consumer as well as its associated benefits (jobs, economic development, etc.)

Crime prevention & Disaster Preparedness for tourists

Develop printed material and presentations to communicate the economic impact of tourism.

Digital Media influencers

Education and guidance on how to properly communicate.

Educational Workshops &/or Tool Kits for front facing visitor contact businesses: Visitor Centers, Chamber of Commerce's, grocery store, restaurants, gas station, etc.

## Appendix, Continued – Open-Ended Responses

Emphasize the environmental responsibility that locals take pride in and how tourists can help locals maintain beautiful environments for future generations through environmental tourism...get people to come to help restore a habitat area or cull invasive species or learn about fish habitat by helping with an annual fish count. Teach tourists to invest in the places they visit instead of trashing them.

end sanctuary state, less environmental stuff, enforce laws, let jobs come in

Engage with Public Affairs staff from State Agencies and other entities that have resources important to Tourism in this Region.

Familiarization tours

For the umpteenth time, this is the LAST THING needed in this region - we are full-up with tourists and 2nd homeowners. They threaten the fulltime population's welfare.

For Travel Oregon to propagandize local officials is as wrong as can be. Develop communications telling the truth about the impact of too many tourists on local capacity.

i hope you didnt pay much for this

I think that if TO could develop digital content that documented the economic impact of tourism, others would be willing to present the information or otherwise get it in front of change-makers and community decision makers

I think we should be focused on multiple areas of education, such as studying the ocean and environment, working on what we are inviting.

Impact of too many visitors and not enough parking for them.

Increase visitation has affects on, affordable housing, natural resources, transportation/roads - how to deal with issues and communicate that.

infrastructure and workforce stability

Interact respectfully with elected public officials and staff; both are essential partners.

Keeping up on new local businesses

Local

Marketing using regional news channels- interviews with videos of the Oregon Coast-the Coast scenic beauty is the tourism attraction for many visitors internationally, regionally, and within the US.

More emphasis on camping options - commercial, USFS, State Parks, County Parks. Visitors need to know how to connect to each provider.

More information to stakeholders

Motivate the politicians to recognize the importance and impact of tourism into our area. Quit referring to tourists as "terrorists" that destroy the "quiet" quality of life in the area.

Mountain Bike trails.

N/a

Outreach with a multi generational view of tourism in Oregon. When the SW Coast is the only coastline on the continent with tall trees and clean rivers people will pay top dollar to experience that. Think of the Yosemite Valley business model with bus loads of international tourists driving through spending lots of money and then going away. This can only happen if this vision is consistently delivered for decades as the assault on the dark coast will continue. For that it must be integral to any public affairs interaction and communications with stakeholders and potential short-term economic opportunists.

Parking

Partnering and Listening to regional needs including capacity issues, not just economic drivers.

Provide resources for additional research and assistance with accessing same

Reach out to the communities most impacted by tourism and help them mitigate the impacts that increased tourism brings to their area. Happier local residents are more likely to provide a welcoming experience to visitors, and it will prevent some of our most impacted areas from turning into tourism-based ghost towns in the off season.

ROADS!!!!!!!

Seriously WAY TOO LONG of a Survey!

shared media - photos, videos, etc.

social media

## Appendix, Continued – Open-Ended Responses

Stories and messages to inspire travel to our region in the fall, winter and spring and not the summer.

Stress the detrimental impact of mining on tourism.

Super important. Media reach and reaching out with representation in major marketplaces.,

Support local safety personnel

Teaching tourists to honor the people who serve them!

Too many here already keep them away

Tourism in this area suffers due to severe lack of affordable housing for workers. This necessitates pulling in J1 workers for summer and even then housing is difficult.

Traffic is the main deterrent to visitation in our area Highway 26 and 30 have traffic jams for many miles.

Infrastructure of Rhodes is imperative to increasing visitation or area

Transportation infrastructure and destination infrastructure

Transportation issues - how to move people without rental cars.

Travel Oregon is on the front-line with this effort and doing a great job. We need a wider spectrum of media messaging to expand our appeal at the regional DMO level (e.g. there's lots more than the beach that's attractive for the Oregon coast...lots more than wine for the Valley...etc).

We do not need to increase tourists...our infrastructure needs work first. Water pressure is horrible when tourists are here. Trash increases on the beach and roadways. Train the tourists not locals.

We need to be more proactive when Portland media scares people away due to stormy weather and other issues that affect tourism.

We really don't need to increase visitation. We need support dealing effectively with the increase in visitation we've experienced.

What happening in the Winter Months

While increasing visitation is important, I think it is even more important to communicate to visitors how to have less impact on natural resources.

Work more and spend more on protecting and enhancing the places that attract tourism and mitigating the adverse effects of that tourism, rather than spending money and effort bringing in more tourism.

Work w local agencies to keep outdoor recreation areas litter free, clean and with public facilities i.e. Restrooms and public access parking , tHat function and are maintained.

Work with the chambers and business communities - not just those connected to tourism. Whole communities need to get involved and have a stake in making their area a destination. Example - Coquille -small and amateurish efforts to establish a Carousel and family activity center is a whole-city enterprise. I didn't see one Travel Oregon staff member at their fundraiser or here of any connection! This would be a destination - so working & supporting city and city governments is vital and critical - otherwise rural Oregon will be broke and your org won't get any money!

Workforce development. I have been stunned by the lack of quality in the workforce as I travel about the area.

X

If you would like, please explain your ratings for your engagement levels with your local and regional DMOs:

0 cero

As a travel journalist specializing in Oregon and the PNW for several high-volume publications, I have had little success reaching and working with these folks.

As a volunteer it is hard to attend meetings that occur during work hours.

As an innkeeper, I have little free time. What I have I created and manage the city's government and visitor websites pro bono.

Excellent. I work in 5-6 areas around the state so the coast is the one I picked over Bend, Oakridge, Southern Oregon

For my local DMO's on the south coast there has been some turn over and very busy schedules that have kept me from being more highly engaged. I have direct connections with the RDMO, hence the high engagement.

have a rep. who reports back

Have had conversations with the Oregon Coast Visitor Association, from the executive director to field reps, especially relative to the Oregon Coast Trail.

## Appendix, Continued – Open-Ended Responses

I am a volunteer in NGOs, not money-making groups.

I am the local DMO and I'm on the board of the RDMO.

I am too busy

I backed off a little when the Wild Rivers Coast group decided to join with the South Coast group. The far South Coast has always been the small fish in the big pond, and many of us were much more engaged when we weren't thrown in with the whale in the region (Coos Bay/North Bend). We'll see how it turns out for the little communities, but I am less than hopeful.

I believe OCVA's recent focus has been on the south coast, rather than the north coast.

I currently sit on the committee for our local DMO. I have approached the OCVA director several times to get involved and been told there is enough North Coast representation.

I currently work for a DMO.

I have been attending the North Coast Trail Coalition meetings for about 1.5 years and have been attending the Tillamook Wellness Access to Physical Activity Committee meetings for about a year as well. I have been an advocate for mountain bike trails. Both for the economic development aspect and also the physical and mental health benefits that come from mtb'ing.

I have been ill and have had to withdraw my time.

I sit on the local EDC board which houses Visit Tillamook Coast.

I use marketing materials to spread information to both tourists and locals about places to visit.

I work 2 full time jobs to survive here. No energy left to get involved.

I'm a member of our Chamber and downtown group. I've seen little of regional folks.

I'm busy and they haven't reached out to me. I reach out to them periodically.

i'm involved with our local chamber who is currently our DMO. i know what ocva is doing only because of a personal relationship. otherwise, ocva is pretty invisible.

I'm not aware of these opportunities.

I'm not sure I understand "who is who". Who/What organization is the DMO? Is that different than Travel Oregon? Is it OCVA? The roles/hierarchy are confusing to me. Who is doing what?

I'm on the board of the Reedsport/Winchester Bay Chamber of Commerce and Travel Southern Oregon Coast. I'm part of the Oregon South Coast Regional Tourism Network and South Coast Regional Marketing Team.

I'm part of the Eat Fresh & Local Action Team, hence my work for the team involves constant interaction with the local and regional DMOs

I'm usually working when meetings take place. Life of a small business owner. . .

Just connected to all of this so am a beginner.

Lack of time mainly.

Limited means for business referral and engagement

Local DMO does not communicate with businesses

Many of our DMO's lack the capacity to represent their destinations in an effective manner. Our mission is to assist them with capacity in a forward thinking manner.

mostly retired

My focus is education and student welfare.

N/a

na

Neither has ever made any effort to contact the largest tourist draw of the summer, the Southern Oregon Kite Festival. I know of them only because I've attended Travel Oregon workshops.

Never been asked.

never been invited and don't know where to start

No need to talk further until land use permits are obtained.

not aware of any services locally

Not aware of their role, impact or existence in all honesty.

not happy

not interested in the local opinions

## Appendix, Continued – Open-Ended Responses

OCVA has not been helpful at all. Our county DMO is great, very supportive, checks in frequently and offers grants yearly.

OCVA's team has grown and become more engaged in Central Coast tourism efforts

On local chamber/DMO board

Our group is as engaged as we have time. We appreciate the efforts and when there is a staff person available to participate in meetings, etc. we do

Our local chamber is not active. OCVA is very active in our community/area and along the entire coast.

Our local DMO is struggling to survive, so interaction with the RDMO/OCVA is not as developed or strong as I would like.

Our local VCB is amazing and does a great job. For the coast, my knowledge is limited to the destination development person who seems to be doing a great job. Otherwise, I'm afraid I am not aware of what OCVA is doing in the fields of marketing... I know they're doing something.. I just don't know what it is.

Our organizations do not meet the needs of local retail in the tourism picture.

Running business leaves little outside time

Somehow following the Studio, I did not get connected with the local tourism group. Being fully engaged with my business, it is difficult to take the time to search and seek outside opportunities. Meetings need to be clearly communicated.

The "Coast" is not a cohesive or manageable region; separate into three support organizations. Recognize Wild Rivers Coast and its inclusion of Del Norte County, CA.

There are conflicting agendas and priorities

There is little to no communication from the local and regional management. The local and regional management do not advertise opportunities to the public, they pick and choose who to offer opportunities or training to. Many organizations are not being informed.

Time and priorities

Tourism is moderately important to our agency but I generally don't interact with the industry, except case by case. We do have a staff member who works more closely with tourism.

Travel Oregon is the 500 lb. gorilla pouring tourists in to areas already overwhelmed by transportation and workforce housing problems.

Via several community groups I participate in --nothing direct.

Visit Tillamook Coast has been active and cares about the area.

Volunteer in many organizations in Neskowin.

We are a paying partner with OCVA

We are the local DMO.

We are the local DMO. We also have board representation with OCVA.

We basically don't have a local DMO in my community. I have relationships with nearby local DMO's. Close relationship with Dave Lacey from OCVA.

We have just begun getting involved with our local Chamber. This is good, however, we need other agencies to be involved.

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

As a center, there's too many brochures - a waste

As a travel journalist specializing in Oregon and the PNW for several high-volume publications, I have had little success reaching and working with these folks.

As I am the local DMO, I won't respond to that question.

Basically the same explanation as above.

Communication is an ongoing problem. I know they have a lot of talented new staff, I just have no idea what they're doing other than in the destination development space.

Continuing to promote areas that are overflowing is not successful. Trash, restrooms, roads and emergency services all cost money yet the grants are only for "destinations" and marketing. There needs to be a better balance of promotion and support.

Good communicators

## Appendix, Continued – Open-Ended Responses

Great resource for providing information on our coastline

I am new to these meetings and I have found that nothing happens overnight. I understand this process. I am finding the Oregon Coast Visitors Association to be very helpful with my goals to create mtb trails here on the coast. They have all been very pleasant and a great crew of people.

I have found that the information made available really promotes the local area-and is exiting to visitors.

I ignore the promotion materials. I live here; I'm a native Oregonian and could be guiding tours to the entire coast. I've traveled the world and the entire U.S. What's good here will be destroyed for visitors and residents alike if we don't figure out how to "tone it down". More visitors doesn't increase the economic well-being of residents, except for a few. Wages are low in the industry housing is now impossible to obtain because some much wealthier visitors occupy whatever housing used to be available.

I listed satisfied instead of extremely satisfied, because the RDMO has been awesome but capacity (staff/time/money, etc.) has restricted the level of some services - as is the case with anything in life. There is only so much time, money and services one can do - there has to be priorities/decisions along the way.

I think the local/regional services need to perform "follow-ups" after large projects, etc. A lot is spent getting the grants or the project completed and nothing is done or asked in a follow up of how to improve the project for long-term sustainability for the region and the community.

I work hard with our local DMO and sit on that committee As far as OCVA it seems like a club and unless your invited they prefer you are not involved..

Idon'tknow anything about our DMO. The Seaside Visitors Center is great - I assume it's an example of the work of the OCVA.

In early stages of working with a new Executive Director. Somewhat underwhelmed with the interaction we are having with our RDMO in these early stages.

Just not sure who is doing what, and how best to engage.

Lack of communication.

Little appetite for innovation, not enough focus on new ideas or engaging or acting upon input from key stakeholders.

Local coast transportation and workforce housing is overwhelmed with tourists. Quit bring ever more numbers of tourists. Quit propagandizing local officials.

Local DMO was not at all connected with what Travel Oregon does, or how they were related to their work. Last I heard they have disbanded, and I don't know where the tax funds are going. OCVA hired a local community Member to serve the South Coast. Dave is great! He is a working member of our Outdoor Recreation experiences, and has a pulse on the needs of our sub-region. He understands the need to highlight conservation in tourism, and set up a good infrastructure so that our special place is not loved to death by over visitation, or lack of development of supporting infrastructure.

local org always helps promote specific activities; I think it can offer more support if I seek it

na

Neither has ever made any effort to contact the largest tourist draw of the summer, the Southern Oregon Kite Festival. I know of them only because I've attended Travel Oregon workshops.

Neither interested in helping develop new attractions activities.

new to all of this.

Not aware of DMO. Not much interaction with OCVA.

not aware of what they offer or how they help

OCVA listens to you and responds with sincere interest, and is collaborating with OPRD and ODOT on the development of a plan to complete the gaps in the Oregon Coast Trail.

Our DMO's priorities are not in order. They focus on events instead of concentrating on what we need, which is a long-term destination management strategy.

Our local DMO doesn't seem to get a lot of support from further up the chain; our regional DMO is good, but could use clearer communication avenues when it comes to various stakeholder needs.

Our local group does a really nice job of promoting what our area has to offer. It is our government, economy and infrastructure that create a less inviting atmosphere for tourism growth.

---

## Appendix, Continued – Open-Ended Responses

---

Our regional South Coast DMO is working well. Excited about the progress to date and the plan to be implemented. Hoping as it develops, there will be more opportunities to provide training/support for smaller communities without an organized tourism group or paid staff.

---

See previous answer.

---

The Chamber - our local DMO - no longer exists. They disbanded and the city council has not created a replacement.

---

The Oregon Coast Visitors Association has made great strides over the last year. They have built a strong team and I have high hopes that next year I will be able to mark Extremely Satisfied.

---

the studied refutation of the local opinion by the consulting populace....they have a feigned interest to keep the natives less restless.

---

Too busy with doing our own marketing and day to day bus requirements to be able to engage with DMOs that may or may not be of help to micro businesses

---

Unaware of either.

---

Very unhappy with OCVA, when I view tte website all I see is promotions for kayaks.I think it's a conflict of interest.

---

We have a long history of shooting ourselves in the foot, subversive competition, and pulling different directions. It will take some time and concerted efforts to overcome those divisions and all begin to work together toward common goals. It's getting better already!

---

We see no value in OCVA at this time, and have not for years. We are no longer members.

---

Willamette Valley in a tired rut of "wine" only and NOT interested in developing a non-wine effort. Just getting introduced to OCVA and trying to development 'attachments' and 'involvements'. Slow-moving process.

---

Your local DMO needs to become much more engaged in branding, marketing and promoting our area.

---