

# Oregon North Coast Visitor Insights



*Photos courtesy of Gary Halvorson, Oregon State Archives*

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Final Report

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Institute for Policy  
Research and Engagement



# About the Institute for Policy Research & Engagement

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**School of Planning, Public  
Policy and Management  
Institute for Policy  
Research and Engagement**

The Institute for Policy Research & Engagement (IPRE) is a research center affiliated with the School of Planning, Public Policy, and Management at the University of Oregon. It is an interdisciplinary organization that assists Oregon communities by providing planning and technical assistance to help solve local issues and improve the quality of life for Oregon residents. The role of IPRE is to link the skills, expertise, and innovation of higher education with the transportation, economic development, and environmental needs of communities and regions in the State of Oregon, thereby providing service to Oregon and learning opportunities to the students involved.



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# North Coast Visitor Insights

In August 2018, the University of Oregon’s Institute for Policy Research & Engagement (IPRE) worked with Travel Oregon to conduct a visitor intercept survey on Oregon’s North Coast (defined as Astoria to Pacific City). The survey asked North Coast visitors to provide details of their trip and travel habits, including information about travel patterns, trip activities and spending, and satisfaction with their experience. This report provides a summary of key findings from the survey research, focusing on the strengths and constraints of the North Coast as identified by survey respondents. We highlight visitor draws and popular activities, barriers to visitation and trip enjoyment, and areas to focus on for improving the visitor experience.

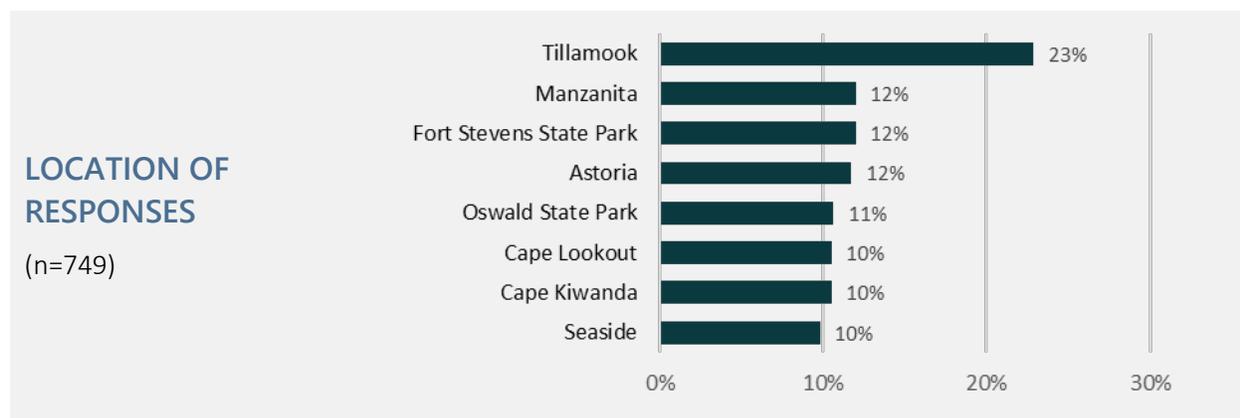
## Survey Methodology

IPRE conducted intercept surveys at eight locations, designated by Travel Oregon, on four separate trips, including two trips covering two weekdays each and two weekend trips covering Saturdays and Sundays. This division of survey locations and times allowed the team to capture a more balanced picture of visitation at both undeveloped and developed locations.

### Survey Locations

Developed	Undeveloped or Less Developed
Tillamook	Cape Kiwanda
Manzanita	Cape Lookout
Seaside	Oswald State Park
Astoria	Fort Stevens State Park

All data was collected between August 18<sup>th</sup>, 2018 and August 31<sup>st</sup>, 2018. In total, the IPRE team gathered 749 complete partial intercept survey responses.

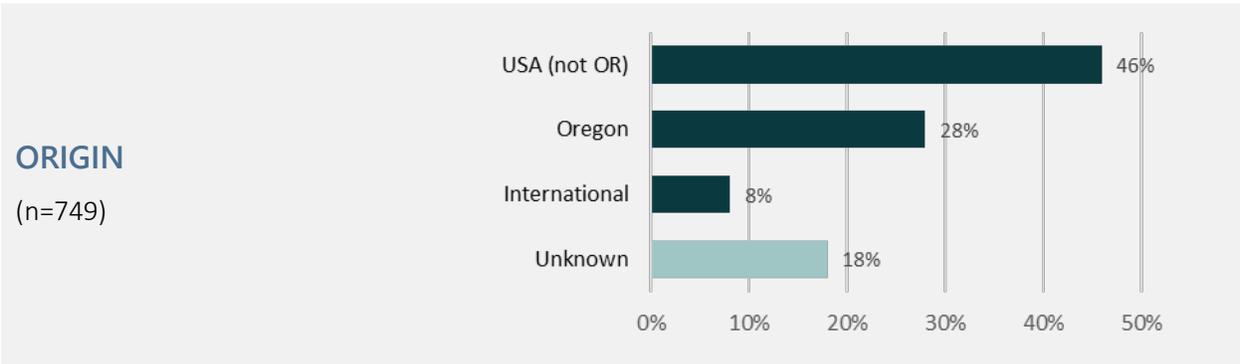
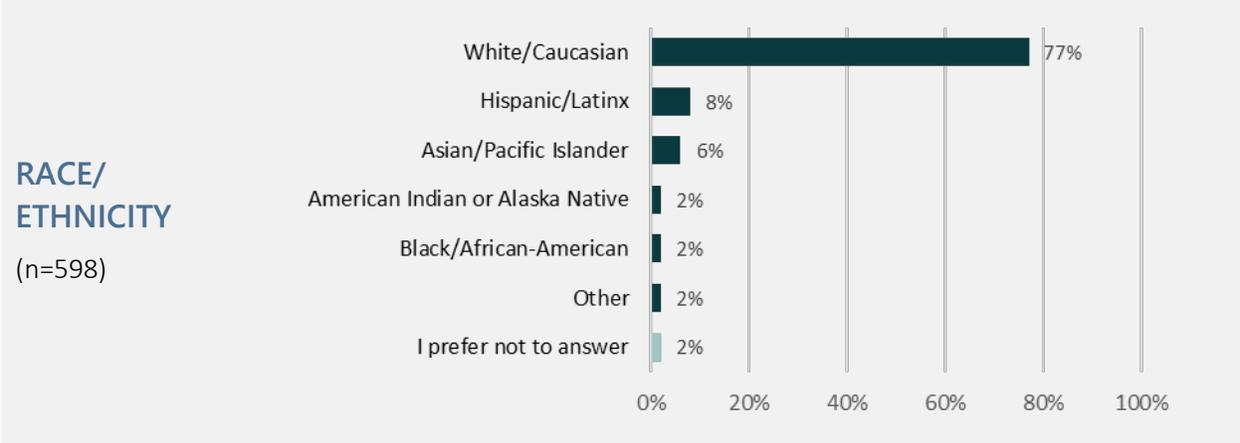


## Limitations

During the IPRE team’s first data collection trip, the team used a 6-page survey with 27 questions. Many potential respondents lost patience with this version of the survey, providing only partial responses or refusing to participate. Given the survey’s poor reception, the IPRE team worked with Travel Oregon to modify or eliminate questions to create a more palatable survey for visitors. The resulting survey had 4 pages with 21 questions and proved to be a much more effective instrument for data collection. The team used this short version of the survey for both weekend trips and one weekday trip. The results presented here combine the answers from the long and short survey versions. Questions that appeared only on the long survey form have much smaller sample size compared to other questions.

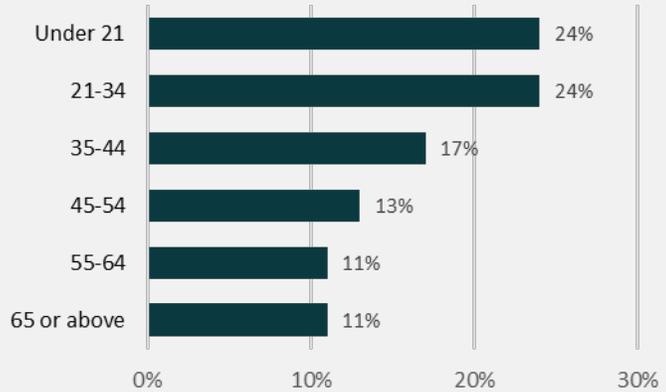
Survey response collection was also partially dependent on the survey location and weather. During several days of surveying at primarily outdoor locations, the team experienced cold or rainy weather, which decreased visitation and therefore limited survey responses.

### Who took the survey?



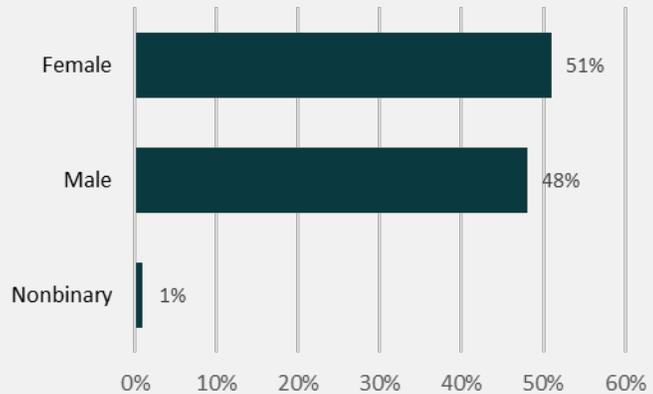
### AGE – Composition of Respondents’ Travel Parties

(n=553)



### GENDER – Composition of Respondents’ Travel Parties

(n=553)

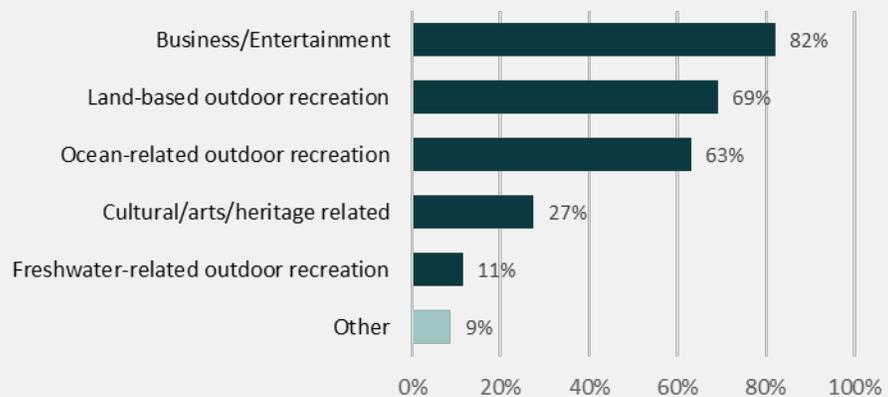


## Visitor Draws

Survey respondents primarily visited the North Coast for leisure purposes, and during their visit, travelers were likely to sample North Coast restaurants and engage in some form of outdoor recreation.

### ACTIVITIES PARTICIPATED IN DURING TRIP

(n=714)



**Leisure was the primary purpose of travel to the North Coast for most respondents.**

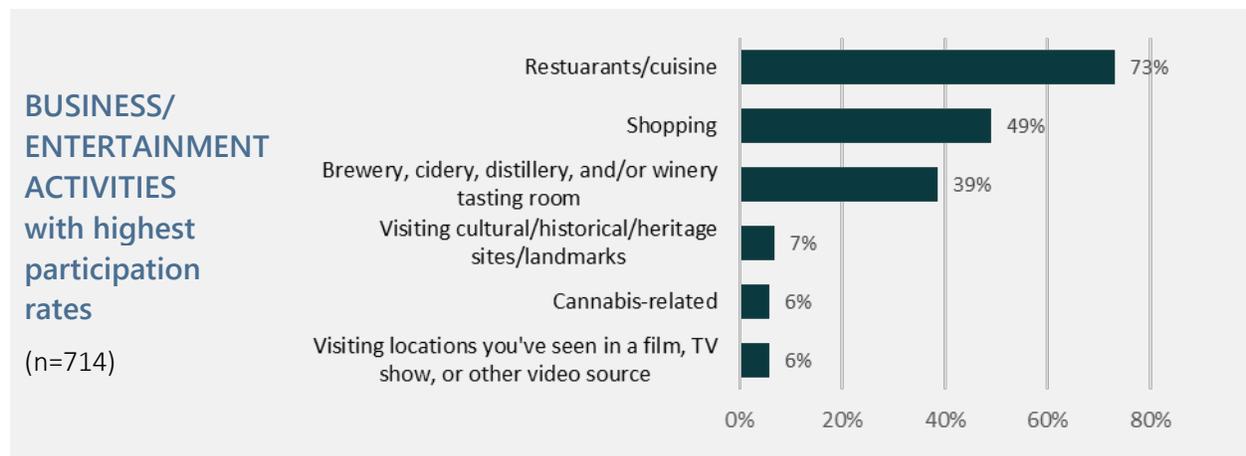
- Only 11% of respondents said the visit was for a purpose other than leisure. (Q3)
- After leisure, visiting family and friends was the most frequent trip purpose indicated (8% of respondents said they were visiting family and friends). (Q3)
- Of those traveling for leisure, 59% characterized their trip as a vacation (more than a one-night stay including weekdays). (Q3a)

**Many respondents said they would visit multiple locations on the North Coast as part of their trip, with cities/developed areas having higher expected visitation than recreation/undeveloped areas.**

- Forty percent or more of respondents said they would visit Tillamook, Seaside, Cannon Beach, and Astoria during their trip. (Q6)
- Eighteen percent or less of respondents said they would visit recreation/undeveloped areas, with Hug Point State Recreation Area being the least visited undeveloped location at 6%. (Q6)

**Business and entertainment activities received the highest participation rate by respondents.**

- As part of their trip, 82% of respondents said they would participate in business/entertainment activities. (Q4)
- Restaurants and shopping are the most common business/entertainment activities, with 73% and 49% of respondents respectively saying they would participate in these activities. (Q4d)

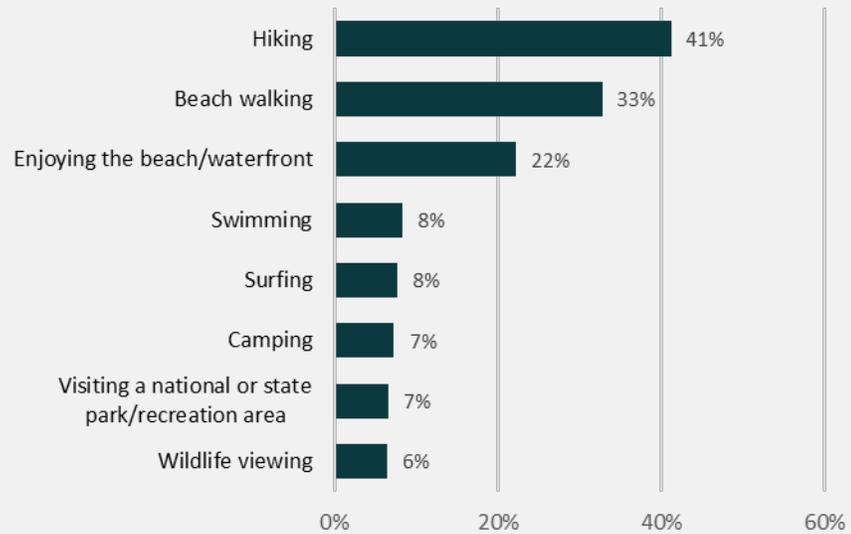


**Various types of outdoor recreation also received high participation rates by respondents.**

- Land-based activities were the most common type of recreation (just under 70% of respondents said they would participate in land-based activities), with hiking as the most popular type of land-based activity. (Q4, Q4c)
- Sixty-three percent of respondents indicated they would participate in ocean-based activities, with “walking the beach” and “enjoying the waterfront” being the most commonly reported types of activities. (Q4, Q4c, Q4a)
- Those surveyed in undeveloped areas were more likely to participate in land-based recreation activities than those surveyed in developed areas. On the other hand, those surveyed in developed areas were more likely to participate in ocean-related recreation activities than those surveyed in undeveloped areas.

## OUTDOOR RECREATION ACTIVITIES with highest participation rates

(n=714)

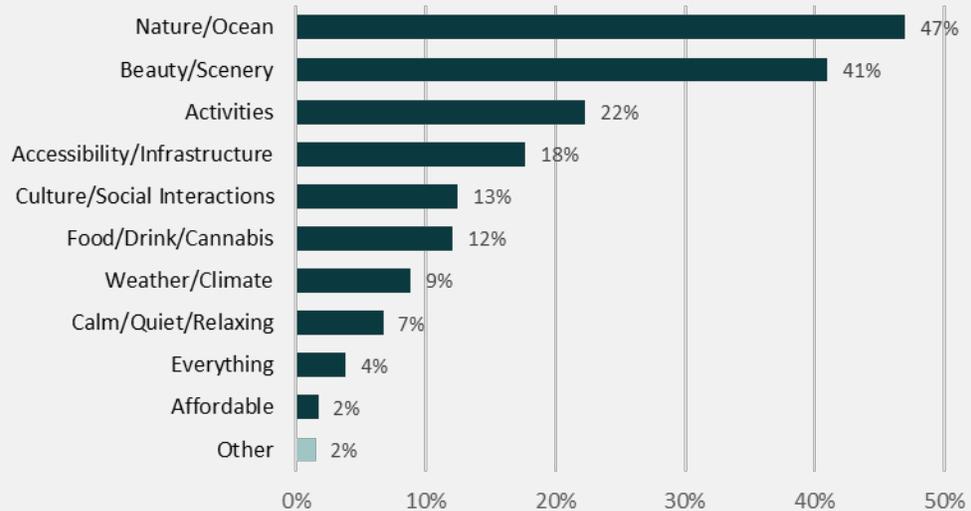


## Key Assets

Survey respondents identified what they believed to be the North Coast’s strengths as a visitor destination. The area’s access to nature, including the ocean, and its natural beauty rose to the top of many visitors’ minds. To a lesser extent, visitors complimented the type and variety of activities available and commented on the North Coast’s accessibility (including the ease of traveling between different amenities) and robust infrastructure (including good campgrounds and beach-access).

## NORTH COAST STRENGTHS

(n=714)



Visitors also eluded to the North Coast’s overall attractive “vibe.” Many indicated that they appreciated the friendly, welcoming atmosphere and others commented on the area’s ability to offer them a calm, quiet, and relaxing escape from their busy lives.

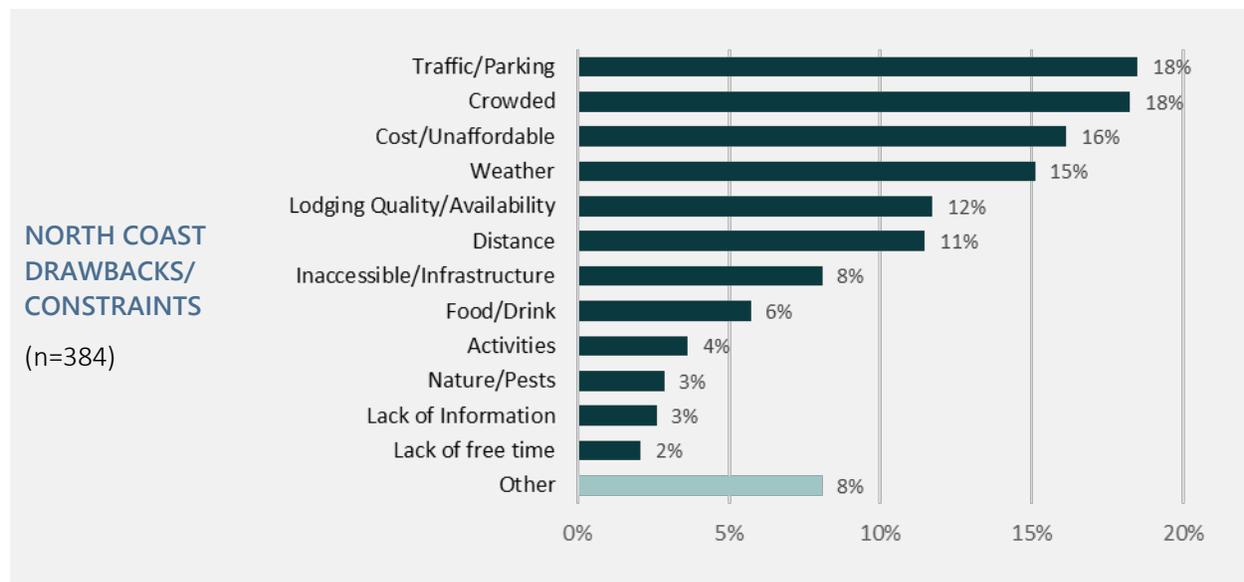
While most visitors—regardless of their origin and trip type—identified similar assets, a few differences arose in responses. International visitors were more likely to compliment beauty, accessibility/ infrastructure, and culture/social interactions than Oregonians or other visitors from the US. Oregonians were more likely to be impressed with the activities available on the North Coast. Perhaps unsurprisingly, visitors surveyed at undeveloped areas were more likely to mention the area’s nature and beauty while visitors surveyed at developed locations were more likely to highlight their pleasure with food, drink, and activities.

## Summary

Overall, survey responses suggest that visitors appreciate the North Coast for its stunning nature and relaxing atmosphere more than other factors. It is viewed as a wonderful place to recreate or passively enjoy natural beauty. While visitors are enjoying the natural features, they also partake in the North Coast’s cuisine and shopping opportunities. Although some visitors enjoyed the area’s cultural attractions and historical sites, the North Coast is not commonly thought of as a cultural destination.

## Visitor Barriers

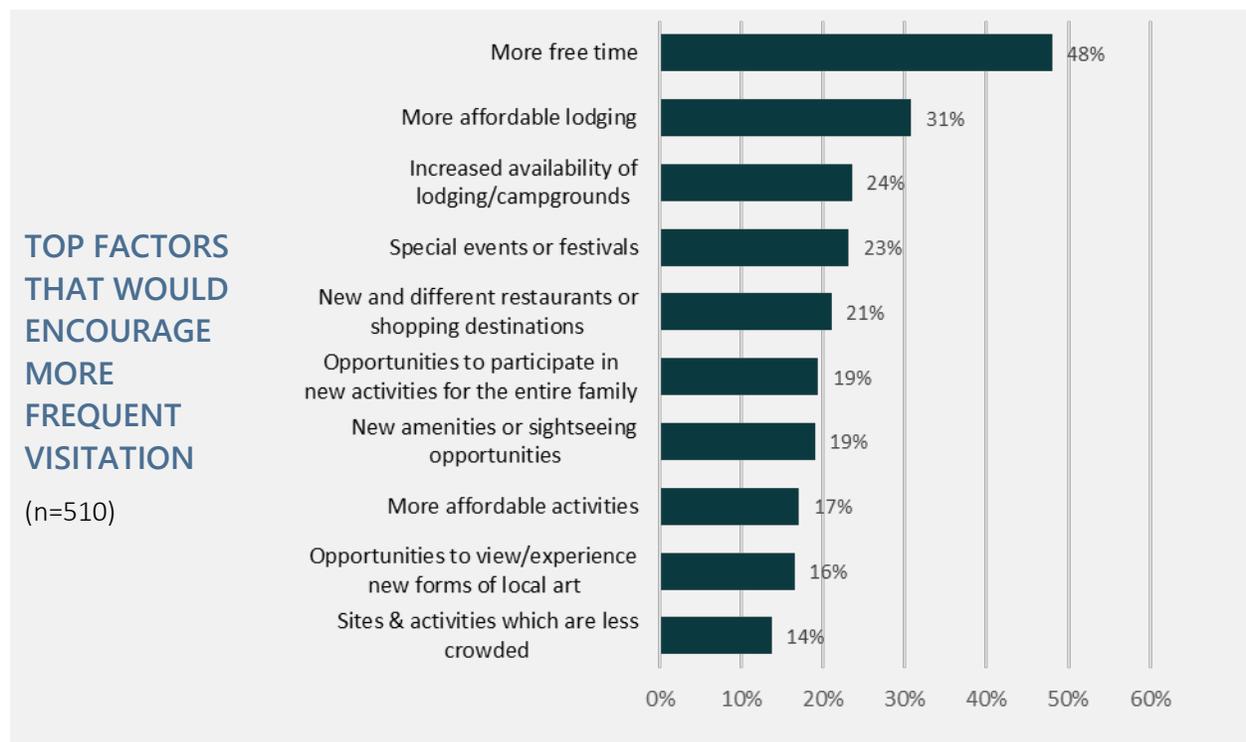
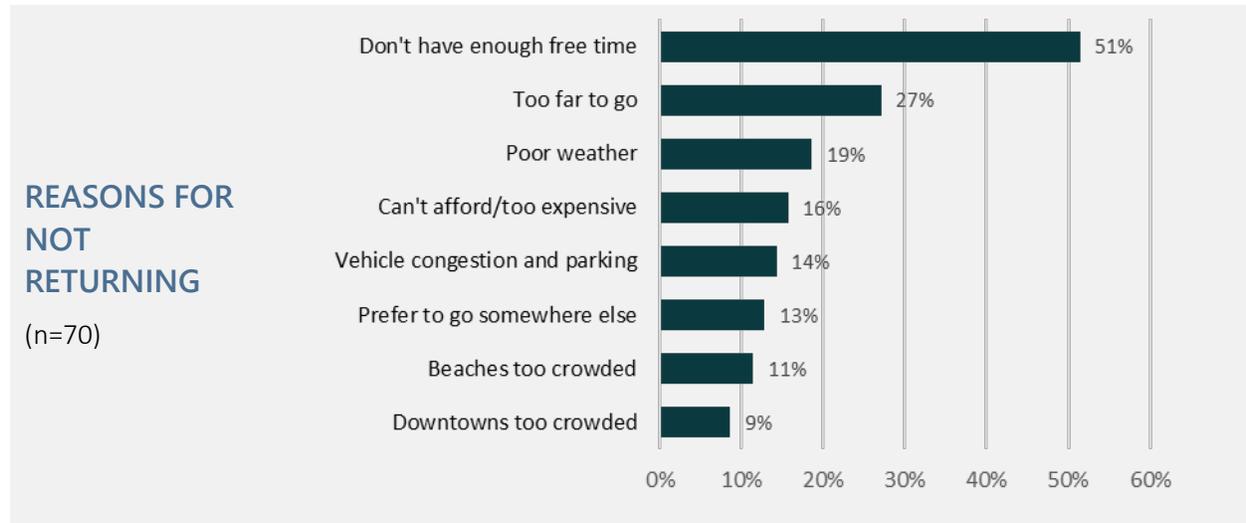
In addition to North Coast strengths, survey respondents also had the opportunity to provide feedback on the area’s drawbacks and constraints. Far fewer respondents were able to identify negative features of the North Coast than those who provided positive feedback, suggesting that overall, visitors were much more satisfied than dissatisfied with their experience. For those who did comment on drawbacks and constraints, the most common complaints mentioned were traffic, lack of parking, crowds, the high costs of lodging and general travel on the North Coast, and the weather (including dissatisfaction with both cold/rainy weather and smoke from wildfires).



Contrary to some of the strengths identified by survey respondents, other respondents mentioned dissatisfaction with infrastructure and the North Coast’s food, shopping, and activity offerings. Those who criticized infrastructure primarily commented on the disrepair of some roads and lack of trail options. Those who mentioned food, shopping, and activities felt that North Coast establishments had inadequate hours (including closing too early) and were unimpressed with the variety of dining and shopping options.

Oregonians and others from the US were more likely than international visitors to complain about traffic and crowds. International visitors were more likely than others to identify lack of lodging and lack of information (including signage and information about activities/events) as drawbacks. Respondents surveyed at developed locations were more likely to cite the weather as a negative factor than those surveyed at undeveloped sites, while those surveyed at undeveloped sites had more complaints about crowds, traffic/parking, and lodging availability than those surveyed at developed sites.

While only 23% of survey respondents indicated they were unlikely to return to the North Coast, these respondents' rationale for not returning provide some insights into other constraints. Similarly, the factors that would make respondents' more likely to return offer clues about barriers to visitation.



While free time, distance, and weather are beyond anyone’s control, concerns with affordability, traffic congestion, and crowds echo the sentiments expressed in feedback about the North Coast’s drawbacks and constraints. Although the majority of survey respondents felt quite satisfied with their North Coast experience, areas that may require some attention to keep visitors happy include cost, congestion, and lodging.

## Areas for Improvement

Although little can be done to mitigate external factors like lack of free time, weather, and distance, there are several opportunities for improving the visitor experience on the North Coast. Based on survey responses, we see opportunities in three main areas:

- Managing development and crowds through infrastructure changes and information dissemination
- Increasing lodging at a variety of price points
- Improving visitors’ experience of activities by adding variety and extending hours of operation

## Managing Development and Crowds

Survey respondents expressed concern over development in a variety of ways. Some focused on how their personal experience was negatively impacted by crowds, traffic, and lack of parking while others expressed concern over the degradation of North Coast caused by increased visitation. As one respondent put it, “[There isn’t] enough planning to deal with increased tourism. [The] State needs to do something to retain the quality of the coast/North Coast.” Some of the primary opportunities to better mitigate the impacts of development come from infrastructure improvements and information dissemination.

In terms of infrastructure, most respondents’ comments related to dissatisfaction with one- and two-lane windy roads clogged with congestion. A few respondents’ however, suggested that they would like to see further development of natural areas including more trail-heads, better bicycling infrastructure, and more campgrounds. Development of new recreation and camping areas (or better publicizing of existing underutilized areas) would help disperse crowds and limit environmental degradation. Additionally, measures to improve road safety (for pedestrians, cyclists, and cars) should be prioritized to make visitors feel more at ease during their travels. Although expanding road size is not necessarily advisable (in many circumstances, road expansions do not result in decreased traffic<sup>1</sup>), smaller changes like adding bike lanes, lighted pedestrian crossings, and cautionary signage can help with safety.

Several survey respondents commented on the difficulty they had with finding information about attractions, activities, and events. This suggests that the North Coast’s tourism professionals and their partners can do more to elevate the area’s lesser-known attractions, further helping to disperse visitation. In addition to print and online materials, marketers should also consider the quantity, placement, and visibility of signage. Expanding the availability of information has the potential to both nudge congestion away from popular areas and help visitors who are confused about where to go and what to do (“not enough signs, especially around trails,” “I would have like to do more, but I didn’t know where to go”).

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<sup>1</sup> Duranton, Gilles and Matthew Turner. 2011. “The Fundamental Law of Road Congestion: Evidence from the US.” *American Economic Review* 101(6), 2616-2652.

## Increasing Lodging

Frustrations around lodging encompassed availability (of rooms, houses, and campgrounds) and cost. Although Travel Oregon and the North Coast Visitors' Association do not have direct control over lodging, there are a few strategies that may encourage progress on lodging issues.

As previously mentioned, visitation pressure may have reached a point where it makes sense to consider developing new campgrounds. New campground development would respond to demand pressures and provide more lodging options at a lower price point than offered by hotels and vacation rentals. Travel Oregon and the North Coast Visitors' Association can move this conversation forward by sharing the results of this survey and other related data with Federal, State, and local land managers. It will be important for travel professionals to have a seat at the table for any discussion of public lands recreation development.

Another opportunity to promote lodging solutions would be to encourage local jurisdictions to complete lodging demand studies. Some jurisdictions may already have completed or are considering lodging studies, but support from travel professionals might help to move the needle towards action. A completed lodging demand study could provide the impetus developers need to act. Support could range from encouraging conversations at the local level to contributing funding for research.

## Improving Visitors' Experience of Activities

Some survey respondents indicated that they were underwhelmed by the variety, quality, and availability of shopping and dining on the North Coast. At the same time, between 19% and 23% of respondents said new special events, new and different restaurants and shopping locations, and new activities or sightseeing amenities would encourage them to visit the North Coast more frequently. This suggests that there are further opportunities to develop the area's amenities and special offerings. In particular, Travel Oregon and the North Coast Visitors' Association can work with commercial establishments and local organizations to expand offerings.

Respondents complained that restaurants and shops did not offer a wide variety of products and that their hours of operation were too limited. Sharing the results of this study with local businesses might provide the starting point for discussion about expansion of products and hours. One suggestion to local businesses would be to consider conducting formal or informal surveys of their customers to better understand their desires for products and their preferences for expanded hours.

Finally, travel professionals should consider opportunities for better promoting existing festivals and events as well as helping local organizations to develop new events and activities. While most of the visitors surveyed in this study have a tremendous fondness for the North Coast and will likely continue to return no matter what, their experience (and what they tell their family and friends about their experience) can be augmented by new and surprising offerings. A few suggestions from survey respondents include more live music, a greater variety of activities for those who aren't outdoorsy, and new options that are great for families to enjoy together.

# Appendix A: Survey Tools

## Short Survey Version

Day of the week:      Sun      Mon      Tues      Wed      Thur      Fri      Sat      Time: \_\_\_\_\_ AM/PM  
Location: \_\_\_\_\_ Surveyor: \_\_\_\_\_

### Intro Script

Hi, I'm \_\_\_\_\_. I'm a student at the University of Oregon conducting a survey for Travel Oregon and the North Coast Visitors Association. May I ask you a few questions?

IF REFUSED: The survey will only take a few minutes and I can enter you into a prize drawing for XXX if you complete it.

IF AGREED: Great! Let's get started. I'm going to ask you some questions aloud and for other questions, I'll hand you this form for you to fill out yourself.

### Screening Questions

SQ1. Are you spending the night anywhere other than your primary residence as part of your trip?

- Yes, on the North Coast (Pacific City to Astoria) → Skip to Part 1, Q1
- Yes, somewhere *other than* the North Coast → Skip to Part 1, Q1
- No

SQ1B. *[Only ask if SQ1 = no]* Did you travel more than 50 miles to visit here?

- Yes → Proceed with survey
- No → End of survey

*[If SQ1B = no: Great! Travel Oregon and the North Coast Visitors Association want to hear from overnight or far-traveling visitors for this survey, so you're off the hook! Thanks for your time and have a great rest of your day.]*

### Part 1 – About your current trip

To begin, we'd like to ask you some questions about your current trip. A "trip" could be anything from a day-trip outing from your home to an extended multi-day stay.

1. *[If Overnight Trip]* Which of the following forms of accommodation are you using on this trip?

- |   |  |
|---|--|
| <input type="radio"/> Hotel or motel  | <input type="radio"/> Private residence (my second/vacation home)    |
| <input type="radio"/> Bed & breakfast or inn  | <input type="radio"/> Private residence of a friend or family member |
| <input type="radio"/> Cabin   | <input type="radio"/> Campground/RV park                             |
| <input type="radio"/> Vacation home/room rental such as booked through Airbnb or VRBO | <input type="radio"/> Other lodging _____                            |

2. What is the primary purpose of your travel in the North Coast?

- |  |  |
|--|--|
| <input type="radio"/> Leisure → <i>What type:</i> <ul style="list-style-type: none"><li><input type="checkbox"/> Leisure day trip</li><li><input type="checkbox"/> Weekend getaway</li><li><input type="checkbox"/> Vacation (includes weekdays as well and more than one-night stay)</li><li><input type="checkbox"/> Special event</li></ul> | <input type="radio"/> Visiting friends & family in the North Coast → <i>What type:</i> <ul style="list-style-type: none"><li><input type="checkbox"/> Wedding</li><li><input type="checkbox"/> Special event</li><li><input type="checkbox"/> Other: _____</li></ul> |
|  | <input type="radio"/> Business/conference/government travel  |
|  | <input type="radio"/> Business and Leisure (Bleisure)  |
|  | <input type="radio"/> Just passing through   |
|  | <input type="radio"/> Other: _____   |

3. What kinds of activities are you participating in as part of this trip? (Select all that apply)

- |   |  |
|---|--|
| <input type="checkbox"/> Ocean-related outdoor recreation → <i>What type:</i><br>_____      | <input type="checkbox"/> Restaurants/cuisine   |
| <input type="checkbox"/> Freshwater-related outdoor recreation → <i>What type:</i><br>_____ | <input type="checkbox"/> Shopping  |
| <input type="checkbox"/> Land-based outdoor recreation → <i>What type:</i><br>_____         | <input type="checkbox"/> Brewery, cidery, distillery, and/or winery/wine tasting room                            |
|   | <input type="checkbox"/> Cultural/arts/heritage-related  |
|   | <input type="checkbox"/> Cannabis-related  |
|   | <input type="checkbox"/> Casino  |
|   | <input type="checkbox"/> Visiting locations you've seen in a film, TV show, or other video source (like YouTube) |
|   | <input type="checkbox"/> Other ( <i>please describe</i> ):<br>_____  |

4. If any of the activities you just marked were professionally guided, please enter the name of the company (or companies) that provided the guiding.  
\_\_\_\_\_

5. On this trip to the North Coast, was the North Coast the only destination you visited, or was it part of a larger trip?

- Sole-destination trip                       Part of a larger trip

6. Which of the following, if any, have you visited, or do you plan to visit during this trip to the North Coast area? (Select all that apply)

- |   |                                       |   |
|---|---------------------------------------|---|
| <input type="checkbox"/> Pacific City   | <input type="checkbox"/> Manzanita    | <input type="checkbox"/> Oswald West State Park                   |
| <input type="checkbox"/> Tierra del Mar | <input type="checkbox"/> Nehalem      | <input type="checkbox"/> Hug Point State Recreation Area          |
| <input type="checkbox"/> Netarts        | <input type="checkbox"/> Cannon Beach | <input type="checkbox"/> Ecola State Park                         |
| <input type="checkbox"/> Oceanside      | <input type="checkbox"/> Seaside      | <input type="checkbox"/> Fort Stevens                             |
| <input type="checkbox"/> Tillamook      | <input type="checkbox"/> Astoria      | <input type="checkbox"/> Lewis and Clark National Historical Park |
| <input type="checkbox"/> Garibaldi      | <input type="checkbox"/> Cape Kiwanda | <input type="checkbox"/> Other ( <i>please enter</i> ):<br>_____  |
| <input type="checkbox"/> Rockaway Beach | <input type="checkbox"/> Cape Lookout |   |
| <input type="checkbox"/> Wheeler        | <input type="checkbox"/> Nehalem Bay  |   |

7. How much do you estimate your party will spend on average per day on this visit?

Lodging	\$
Restaurants/breweries/wineries	\$
Retail Purchases	\$
Gas, rental car, parking, and local transportation	\$
Entertainment/recreation/entrance fee or ticket to attractions or events	\$
Other	\$

8. How much do you estimate your party will spend in total in the North Coast during this visit?

Total North Coast spending: \$ \_\_\_\_\_

9. How much time will you spend on the North Coast as a part of this trip?

# of days: \_\_\_\_\_ # of nights: \_\_\_\_\_

**Part 2: Familiarity with the North Coast**

10. How many times have you visited the North Coast in the past 12 months, including today's trip?

- This is my first time ever visiting       1-2 times       3-5 times       6-9 times       10 or more times

11. What is your level of familiarity with the 'North Coast Food Trail'?

- Never heard of it                                       Heard of it and used it to visit one restaurant
- Heard of it but have not done it                       Heard of it and used it to visit multiple restaurants

### Part 3: Motivation and Satisfaction

12. How likely do you think you are to visit the North Coast again in the next two years?

- Very Unlikely
- Unlikely
- Neither unlikely nor likely
- Likely
- Very likely

13. What, if anything, would most encourage you to return to the North Coast, spend more money on the North Coast, or visit more often? (Select all that apply)

- |  |  |
|--|--|
| <input type="checkbox"/> New amenities or sightseeing opportunities                                      | <input type="checkbox"/> More affordable lodging                             |
| <input type="checkbox"/> Better access/ transportation linkages  | <input type="checkbox"/> Increased availability of lodging/campgrounds       |
| <input type="checkbox"/> New and different restaurants or shopping destinations                          | <input type="checkbox"/> Special events or festivals                         |
| <input type="checkbox"/> Opportunities to participate in new activities for the entire family            | <input type="checkbox"/> More free time                                      |
| <input type="checkbox"/> Opportunities to view/experience new forms of local art (visual, musical, etc.) | <input type="checkbox"/> More or better information about visiting the coast |
| <input type="checkbox"/> More affordable activities  | <input type="checkbox"/> Sites and activities which are less crowded         |
|  | <input type="checkbox"/> Other ( <i>please describe</i> ):<br>_____          |
|  | <input type="checkbox"/> Nothing can encourage me to visit the North Coast   |

14. Based on your experience, what are the strengths of this region as a visitor destination?

15. Based on your experience, what are the constraints/drawbacks of this region as a visitor destination?

16. Is there anything else you would like to tell us about your experience visiting the North Coast?

**Part 4: About you!**

**17. Where do you live (usual place of residence)?**

- In the U.S:
  What is your home zip code? \_\_\_\_\_
  Not in U.S
  What is your Country of residence? \_\_\_\_\_

**18. Please list the number people in your travel party for this trip by age and gender.**

Males		Females		Nonbinary	
	# of males		# of females		# of nonbinary
Under 21		Under 21		Under 21	
21-34		21-34		21-34	
35-44		35-44		35-44	
45-54		45-54		45-54	
55-64		55-64		55-64	
65 or above		65 or above		65 or above	

**19. How many of the members of your travel party would you consider:**

- # Family: \_\_\_\_\_
  # Co-workers: \_\_\_\_\_
  # Friends: \_\_\_\_\_
  # Other: \_\_\_\_\_

**20. If you live in the U.S., what is your annual household income?**

- Less than \$20,000
  \$60,000 - \$79,999
  \$150,000 - \$199,999
  \$20,000 - \$39,999
  \$80,000 - \$99,999
  \$200,000 or above
  \$40,000 - \$59,999
  \$100,000 - \$149,999
  Prefer not to answer

**21. How would you identify your ethnic or racial background? (Select all that apply)**

- White/Caucasian
  Asian/Pacific Islander
  Other
  Hispanic/Latinx
  American Indian or Alaska Native
  Prefer not to answer
  Black/African American

# Long Survey Version

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Location: \_\_\_\_\_ Surveyor: \_\_\_\_\_

## Intro Script

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## Screening Questions

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- Yes → Skip to Part 1, Q1
- No

SQ1B. [Only ask if SQ1 = no] Did you travel more than 50 miles to visit here?

- Yes → Proceed with survey
- No → End of survey

[IF SQ1B = no: Great! Travel Oregon and the North Coast Visitors Association want to hear from overnight or far-traveling visitors for this survey, so you're off the hook! Thanks for your time and have a great rest of your day.]

## Part 1 – About your current trip

To begin, we'd like to ask you some questions about your current trip. A "trip" could be anything from a day-trip outing from your home to an extended multi-day stay.

22. Which best describes this trip?

- Day trip → Skip to Q3
- Just passing through → Skip to Q3
- Overnight trip

23. [IF Overnight Trip] Which of the following forms of accommodation are you using on this trip?

- |   |  |
|---|--|
| <input type="radio"/> Hotel or motel  | <input type="radio"/> Private residence (my second/vacation home)    |
| <input type="radio"/> Bed & breakfast or inn  | <input type="radio"/> Private residence of a friend or family member |
| <input type="radio"/> Cabin   | <input type="radio"/> Campground/RV park                             |
| <input type="radio"/> Vacation home/room rental such as booked through Airbnb or VRBO | <input type="radio"/> Other lodging _____                            |

24. What is the primary purpose of your travel in the North Coast?

- |   |   |
|---|---|
| <input type="radio"/> Leisure → Ask: <ul style="list-style-type: none"><li><input type="checkbox"/> Leisure day trip</li><li><input type="checkbox"/> Weekend getaway</li><li><input type="checkbox"/> Vacation (includes weekdays as well and more than one-night stay)</li><li><input type="checkbox"/> Special event</li></ul> | <input type="radio"/> Visiting friends & family in the North Coast → Ask: <ul style="list-style-type: none"><li><input type="checkbox"/> Wedding</li><li><input type="checkbox"/> Special event</li><li><input type="checkbox"/> Other: _____</li></ul> |
|   | <input type="radio"/> Business/conference/government travel   |
|   | <input type="radio"/> Business and Leisure (Bleisure)   |
|   | <input type="radio"/> Just passing through  |
|   | <input type="radio"/> Other: _____  |

[I'm going to hand you the survey to fill out this next question on your own. You can hand it back to me when you're done.]

25. What kinds of activities are you participating in as part of this trip? (Select all that apply)

<p><b>Ocean Recreation</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Surfing</li> <li><input type="checkbox"/> Swimming</li> <li><input type="checkbox"/> Windsurfing</li> <li><input type="checkbox"/> Kiteboarding</li> <li><input type="checkbox"/> Kayaking</li> <li><input type="checkbox"/> Stand-up paddle boarding</li> <li><input type="checkbox"/> Motorized boating</li> <li><input type="checkbox"/> Dory boating</li> <li><input type="checkbox"/> Sailing</li> <li><input type="checkbox"/> Fishing</li> <li><input type="checkbox"/> Scuba</li> <li><input type="checkbox"/> Oyster/crabbing/clamming</li> <li><input type="checkbox"/> Other (please describe): _____</li> </ul> <p><i>Place an additional checkmark next to any activity that was guided.</i></p> <p><b>Who/what company provided the guiding:</b> _____</p>	<p><b>Land Recreation</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Enjoying the beach/waterfront</li> <li><input type="checkbox"/> Hiking</li> <li><input type="checkbox"/> Backpacking</li> <li><input type="checkbox"/> Trail running</li> <li><input type="checkbox"/> Road cycling</li> <li><input type="checkbox"/> Fat biking</li> <li><input type="checkbox"/> Mountain biking</li> <li><input type="checkbox"/> Off-road/gravel biking</li> <li><input type="checkbox"/> Camping</li> <li><input type="checkbox"/> Wildlife viewing</li> <li><input type="checkbox"/> Foraging (e.g., mushroom picking)</li> <li><input type="checkbox"/> Horseback riding</li> <li><input type="checkbox"/> Geocaching</li> <li><input type="checkbox"/> Hunting</li> <li><input type="checkbox"/> Visiting a national or state park/recreation area</li> <li><input type="checkbox"/> Guided</li> <li><input type="checkbox"/> Other (please describe): _____</li> </ul> <p><i>Place an additional checkmark next to any activity that was guided.</i></p> <p><b>Who/what company provided the guiding:</b> _____</p>
<p><b>Freshwater Recreation</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Swimming</li> <li><input type="checkbox"/> Windsurfing</li> <li><input type="checkbox"/> Kiteboarding</li> <li><input type="checkbox"/> Whitewater kayaking or canoeing</li> <li><input type="checkbox"/> Whitewater rafting</li> <li><input type="checkbox"/> Flatwater kayaking/canoeing</li> <li><input type="checkbox"/> Stand-up paddle boarding</li> <li><input type="checkbox"/> Motorized boating</li> <li><input type="checkbox"/> Sailing</li> <li><input type="checkbox"/> Fishing</li> <li><input type="checkbox"/> Other (please describe): _____</li> </ul> <p><i>Place an additional checkmark next to any activity that was guided.</i></p> <p><b>Who/what company provided the guiding:</b> _____</p>	<p><b>Business/Entertainment</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Restaurants/cuisine</li> <li><input type="checkbox"/> Cooking school/class</li> <li><input type="checkbox"/> Local guide/outfitter</li> <li><input type="checkbox"/> Shopping</li> <li><input type="checkbox"/> Outdoor gear store/bike shop</li> <li><input type="checkbox"/> Brewery</li> <li><input type="checkbox"/> Cidery</li> <li><input type="checkbox"/> Distillery</li> <li><input type="checkbox"/> Winery/wine tasting room</li> <li><input type="checkbox"/> Art Galleries</li> <li><input type="checkbox"/> Artisan producer (chocolate, bakery, salt, wool, flowers, etc.)</li> <li><input type="checkbox"/> Cannabis-related educational tours</li> <li><input type="checkbox"/> Purchase and consume cannabis</li> <li><input type="checkbox"/> Casino</li> <li><input type="checkbox"/> Visiting locations you've seen in a film, TV show, or other video source (like YouTube)</li> <li><input type="checkbox"/> Other (please describe): _____</li> </ul> <p><i>Place an additional checkmark next to any activity that was guided.</i></p> <p><b>Who/what company provided the guiding:</b> _____</p>
<p><b>Cultural Activities</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Attending a festival or event</li> <li><input type="checkbox"/> Attending a live concert</li> <li><input type="checkbox"/> Attending conferences and/or business meetings</li> <li><input type="checkbox"/> Visiting a farm/orchard</li> <li><input type="checkbox"/> Visiting a farmers' market</li> <li><input type="checkbox"/> Visiting an art gallery/viewing public art</li> <li><input type="checkbox"/> Visiting a museum or cultural center</li> <li><input type="checkbox"/> Visiting cultural/historical/heritage sites/landmarks</li> <li><input type="checkbox"/> Other (please describe): _____</li> </ul> <p><i>Place an additional checkmark next to any activity that was guided.</i></p> <p><b>Who/what company provided the guiding:</b> _____</p>	

26. On this trip to the North Coast, was the North Coast the only destination you visited, or was it part of a larger trip?
- Sole-destination trip                       Part of a larger trip                       I'm a resident of the area
27. Which of the following, if any, have you visited, or do you plan to visit during this trip to the North Coast area? (Select all that apply)
- |   |   |
|---|---|
| <input type="checkbox"/> Pacific City   | <input type="checkbox"/> Seaside                                  |
| <input type="checkbox"/> Tierra del Mar | <input type="checkbox"/> Astoria                                  |
| <input type="checkbox"/> Netarts        | <input type="checkbox"/> Cape Kiwanda                             |
| <input type="checkbox"/> Oceanside      | <input type="checkbox"/> Cape Lookout                             |
| <input type="checkbox"/> Tillamook      | <input type="checkbox"/> Nehalem Bay                              |
| <input type="checkbox"/> Garibaldi      | <input type="checkbox"/> Oswald West State Park                   |
| <input type="checkbox"/> Rockaway Beach | <input type="checkbox"/> Hug Point State Recreation Area          |
| <input type="checkbox"/> Wheeler        | <input type="checkbox"/> Ecola State Park                         |
| <input type="checkbox"/> Manzanita      | <input type="checkbox"/> Fort Stevens                             |
| <input type="checkbox"/> Nehalem        | <input type="checkbox"/> Lewis and Clark National Historical Park |
| <input type="checkbox"/> Cannon Beach   | <input type="checkbox"/> Other (please enter): _____              |

28. How much do you estimate your party will spend on average *per day* on this visit?

Lodging	\$
Restaurants/breweries/wineries	\$
Retail Purchases	\$
Gas, rental car, parking, and local transportation	\$
Entertainment/recreation/entrance fee or ticket to attractions or events	\$
Other	\$

29. How much do you estimate your party will spend *in total* in the North Coast during this visit?

Total North Coast spending: \$ \_\_\_\_\_

30. How much time will you spend on the North Coast as a part of this trip?

# of days: \_\_\_\_\_ # of nights: \_\_\_\_\_

**Part 2: Familiarity with the North Coast**

31. **[Don't ask of residents]** How many times have you visited the North Coast in the past 12 months, including today's trip?

- This is my first time ever visiting                       1-2 times                       3-5 times                       6-9 times                       10 or more times

32. Which of the following North Coast locations have you heard of? (Select all that apply)

- |  |  |
|--|--|
| <input type="checkbox"/> Cape Kiwanda                    | <input type="checkbox"/> Ecola State Park  |
| <input type="checkbox"/> Cape Lookout                    | <input type="checkbox"/> Fort Stevens  |
| <input type="checkbox"/> Nehalem Bay                     | <input type="checkbox"/> Lewis and Clark National Historical Park                      |
| <input type="checkbox"/> Oswald West State Park          | <input type="checkbox"/> Other water launches & water trailheads (please enter): _____ |
| <input type="checkbox"/> Hug Point State Recreation Area |  |

33. Which of the following North Coast cities or areas have you visited over the past 12 months (Select all that apply)

- |   |   |  |
|---|---|--|
| <input type="checkbox"/> Pacific City   | <input type="checkbox"/> Rockaway Beach | <input type="checkbox"/> Seaside                     |
| <input type="checkbox"/> Tierra del Mar | <input type="checkbox"/> Wheeler        | <input type="checkbox"/> Warrenton                   |
| <input type="checkbox"/> Netarts        | <input type="checkbox"/> Manzanita      | <input type="checkbox"/> Astoria                     |
| <input type="checkbox"/> Oceanside      | <input type="checkbox"/> Nehalem        | <input type="checkbox"/> Other (please enter): _____ |
| <input type="checkbox"/> Tillamook      | <input type="checkbox"/> Cannon Beach   |  |
| <input type="checkbox"/> Garibaldi      | <input type="checkbox"/> Gearhart       |  |

34. What is your level of familiarity with the 'North Coast Food Trail'?

- Never heard of it                       Heard of it and used it to visit one restaurant
- Heard of it but have not done it                       Heard of it and used it to visit multiple restaurants

**Part 3: Motivation and Satisfaction**

35. How important or unimportant were the following factors in your decision to visit the North Coast?

	Not at all important	Not very important	Neither important nor unimportant	Important	Very important
A place to relax and unwind					
Scenic beauty					
Accessible (easy to get to)					
Affordable					
Quality of accommodation					
Availability of accommodation					
Area offers a wide variety of activities for my entire family					
Offers terrain/geography/climate conducive to a specific outdoor recreation activity I pursue					
Access to outfitting adventures					
Access to guided experiences					
An opportunity to view/experience local arts (visual, musical, etc.)					
Heritage and cultural/historical sites					
Opportunity to experience a farm or farm products					
Access to locally caught seafood or locally raised foods					
Unique, quality local cuisine/restaurants					
Retail shopping					
Doing business in the area					
Visiting friends and relatives					

36. Were there any other factors that were important in your decision to visit the North Coast?

37. How likely do you think you are to visit the North Coast again in the next two years?

- Very Unlikely
- Unlikely
- Neither unlikely nor likely
- Likely
- Very likely

38. How satisfied or dissatisfied have you been with each of the following qualities for the North Coast? If you didn't participate in an activity or don't know, you can say "N/A."

	N/A	Very dissatisfied	Dissatisfied	Neither Satisfied nor Dissatisfied	Satisfied	Very satisfied
A place to relax and unwind						
Scenic beauty						
Accessible (easy to get to)						
Affordability						
Quality of accommodation						
Availability of accommodation						
Area offers a wide variety of activities for my entire family						
Offers terrain/geography/climate conducive to a specific outdoor recreation activity I pursue						
Outfitting adventures						
Guided experiences						
Viewing/experiencing local arts (visual, musical, etc.)						
Heritage and cultural/historical sites						
Experiencing a farm or farm products						
Access to locally caught seafood or locally raised foods						
Unique, quality local cuisine/restaurants						
Retail shopping						
Doing business in the area						

39. What factors prevent you from visiting the North Coast more frequently? (Select all that apply)

- |   |  |
|---|--|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> Prefer to go somewhere else/international travel<br/><i>(What other destinations do you visit instead?):</i><br/>_____</li> <li><input type="checkbox"/> Can't afford/too expensive</li> <li><input type="checkbox"/> Don't have enough free time</li> <li><input type="checkbox"/> Too far to go</li> <li><input type="checkbox"/> Poor weather</li> <li><input type="checkbox"/> Doesn't provide the kind of activities/experiences I am seeking <i>(Which activities does it not provide?):</i><br/>_____</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> Lack of information – don't know what's available or where things are</li> <li><input type="checkbox"/> Companion/family prefers to do other things</li> <li><input type="checkbox"/> Don't like to do things outdoors</li> <li><input type="checkbox"/> Beaches too crowded</li> <li><input type="checkbox"/> Downtowns too crowded</li> <li><input type="checkbox"/> Vehicle congestion on roadways and parking areas</li> <li><input type="checkbox"/> Lack of public transportation options</li> <li><input type="checkbox"/> Other <i>(please describe):</i><br/>_____</li> </ul> |
|---|--|

40. What, if anything, would most encourage you to return to the North Coast, or visit more often? (Select all that apply)

- |   |   |
|---|---|
| <ul style="list-style-type: none"> <li><input type="checkbox"/> New amenities or sightseeing opportunities</li> <li><input type="checkbox"/> Better access/ transportation linkages</li> <li><input type="checkbox"/> New and different restaurants or shopping destinations</li> <li><input type="checkbox"/> Opportunities to participate in new activities for the entire family</li> <li><input type="checkbox"/> Opportunities to view/experience new forms of local art (visual, musical, etc.)</li> <li><input type="checkbox"/> More affordable activities</li> </ul> | <ul style="list-style-type: none"> <li><input type="checkbox"/> More affordable lodging</li> <li><input type="checkbox"/> Increased availability of lodging/campgrounds</li> <li><input type="checkbox"/> Special events or festivals</li> <li><input type="checkbox"/> More free time</li> <li><input type="checkbox"/> More or better information about visiting the coast</li> <li><input type="checkbox"/> Sites and activities which are less crowded</li> <li><input type="checkbox"/> Other <i>(please describe):</i><br/>_____</li> <li><input type="checkbox"/> Nothing can encourage me to visit the North Coast</li> </ul> |
|---|---|

41. Based on your experience, what are the strengths of this region as a visitor destination?

42. Based on your experience, what are the constraints/drawbacks of this region as a visitor destination?

43. Is there anything else you would like to tell us about your experience visiting the North Coast?

**[Now, I'm going to hand you the survey so you can fill out the last section by yourself.]**

**Part 4: About you!**

44. Where do you live (usual place of residence)?

- In the U.S:  Not in U.S  
 What is your home zip code? \_\_\_\_\_  What is your Country of residence? \_\_\_\_\_

45. Please list the number people in your travel party for this trip by age and gender.

Males		Females		Nonbinary	
	# of males		# of females		# of nonbinary
Under 21		Under 21		Under 21	
21-34		21-34		21-34	
35-44		35-44		35-44	
45-54		45-54		45-54	
55-64		55-64		55-64	
65 or above		65 or above		65 or above	

46. How many of the members of your travel party would you consider:

- # Family: \_\_\_\_\_  # Co-workers: \_\_\_\_\_  
 # Friends: \_\_\_\_\_  # Other: \_\_\_\_\_

47. If you live in the U.S., what is your annual household income?

- Less than \$20,000  \$60,000 - \$79,999  \$150,000 - \$199,999  
 \$20,000 - \$39,999  \$80,000 - \$99,999  \$200,000 or above  
 \$40,000 - \$59,999  \$100,000 - \$149,999  Prefer not to answer

48. How would you identify your ethnic or racial background? (Select all that apply)

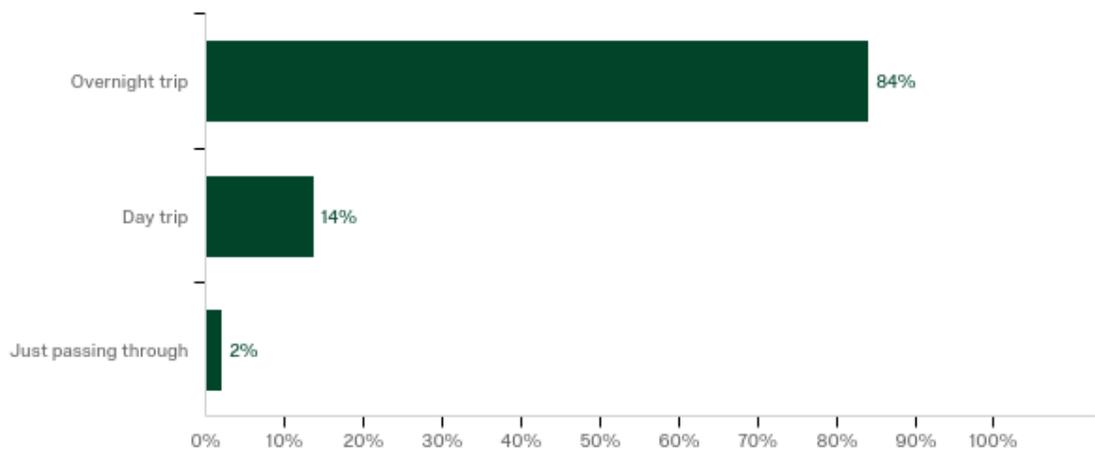
- White/Caucasian  Asian/Pacific Islander  Other  
 Hispanic/Latinx  American Indian or Alaska Native  Prefer not to answer  
 Black/African American

# Appendix B: Survey Results

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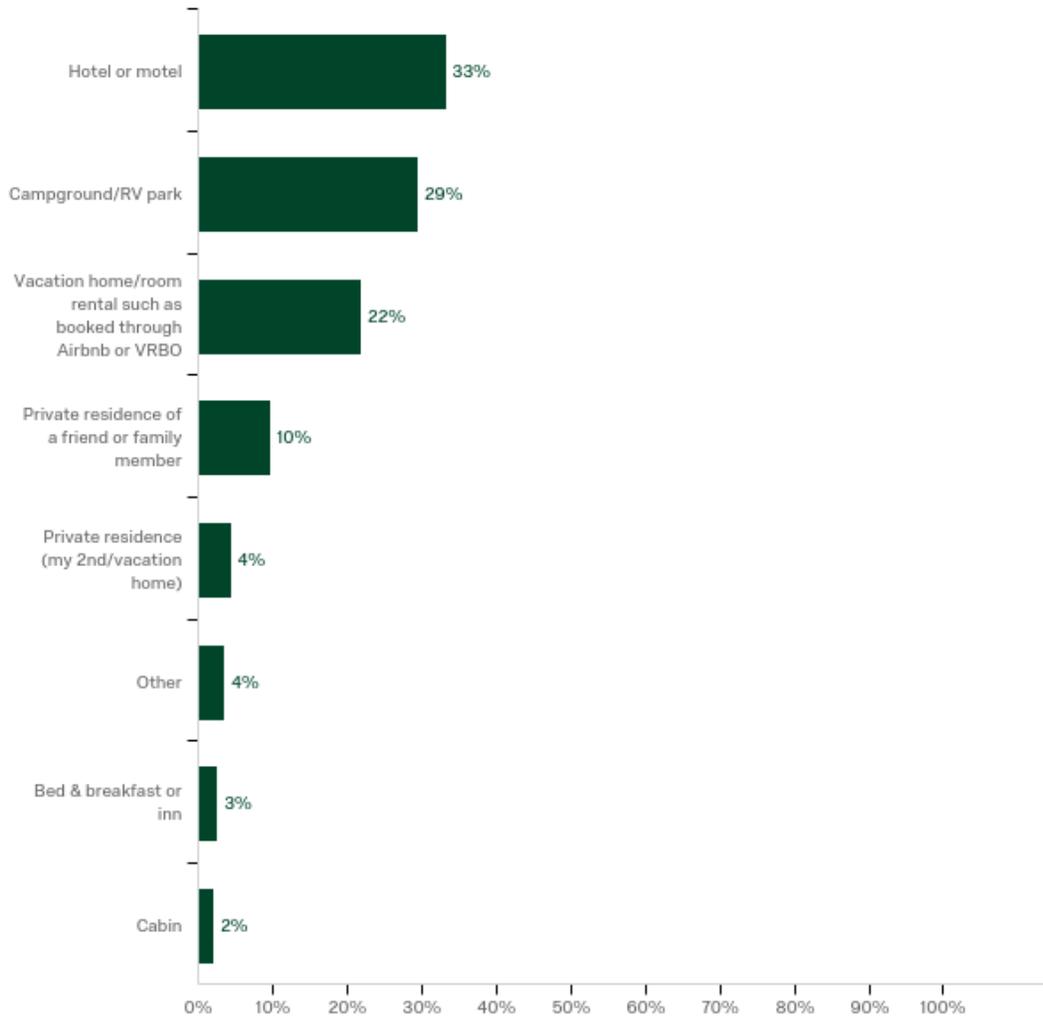
## Part 1: About your current trip

Q1 - Which best describes this trip? (n=190)



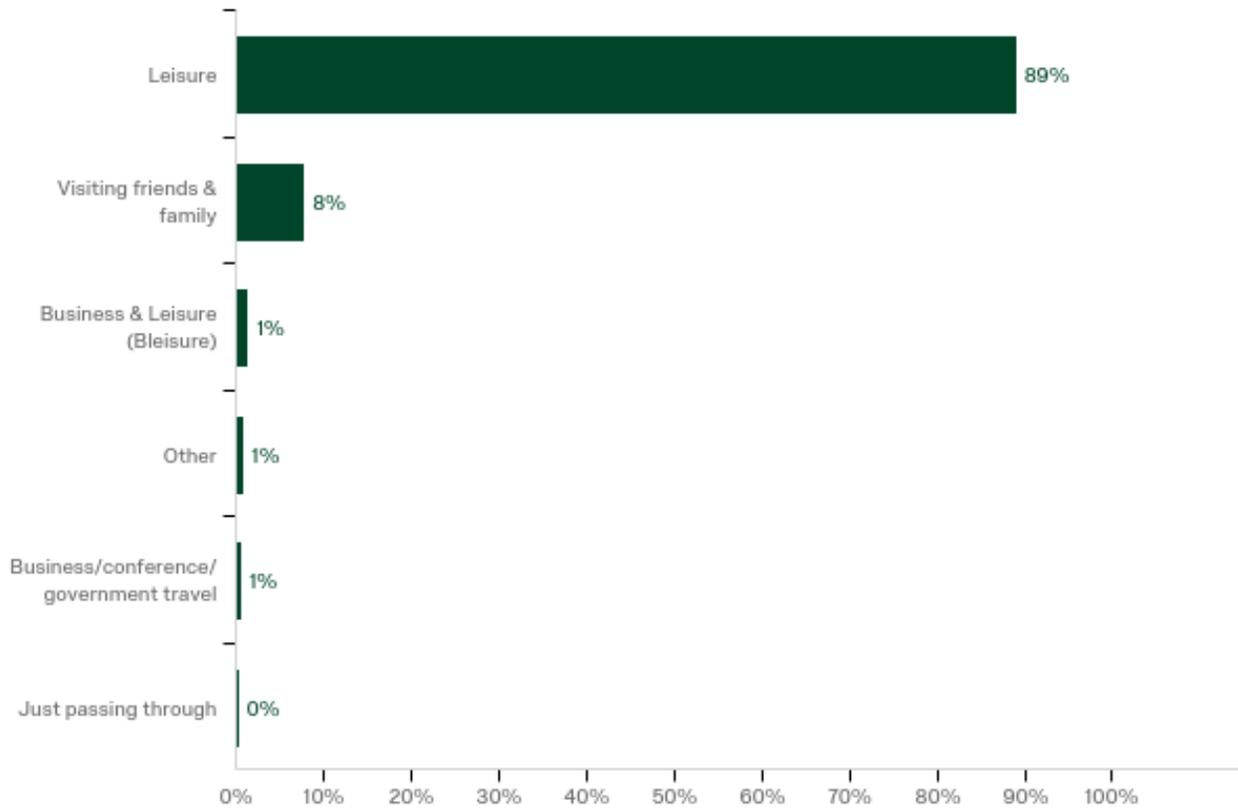
Overnight trip	84%	160
Just passing through	2%	4
Day trip	14%	26
Total	100%	190

**Q2 - Which of the following forms of accommodation are you using on this trip?  
(n=617)**



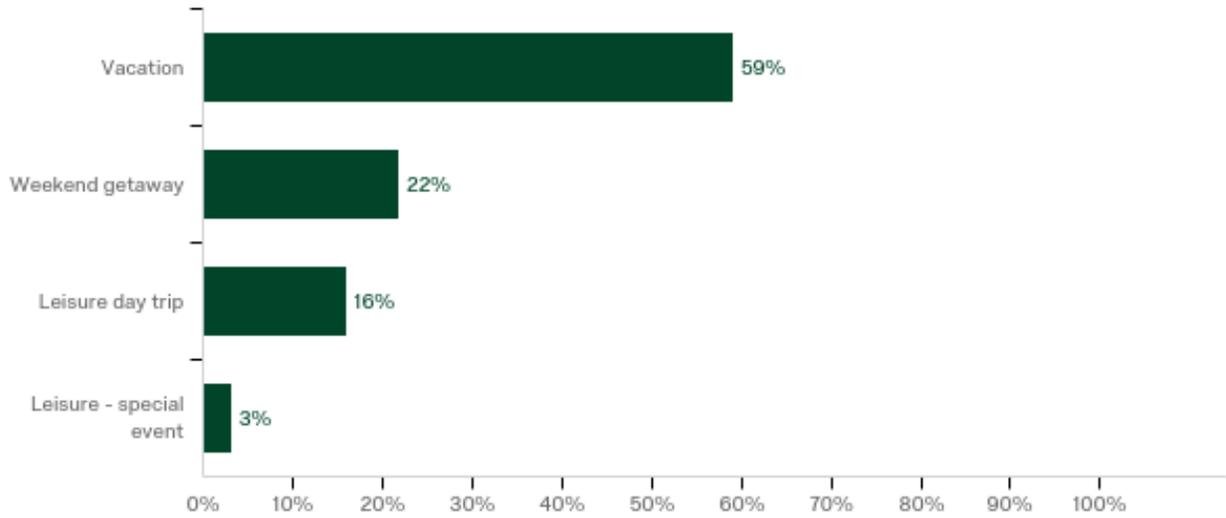
Vacation home/room rental such as booked through Airbnb or VRBO	20%	135
Private residence of a friend or family member	9%	59
Private residence (my 2nd/vacation home)	4%	27
Other	3%	22
Hotel or motel	31%	205
Campground/RV park	28%	182
Cabin	2%	13
Bed & breakfast or inn	2%	16
Total	100%	659

### Q3 - What is the primary purpose of your travel in the North Coast? (n=725)



Leisure	89%	646
Visiting friends & family	8%	57
Business/conference/government travel	1%	4
Business & Leisure (Bleisure)	1%	10
Just passing through	0%	2
Other	1%	6
Total	100%	725

**Q3a - Leisure Details: What is the primary purpose of your travel in the North Coast? (n=641)**

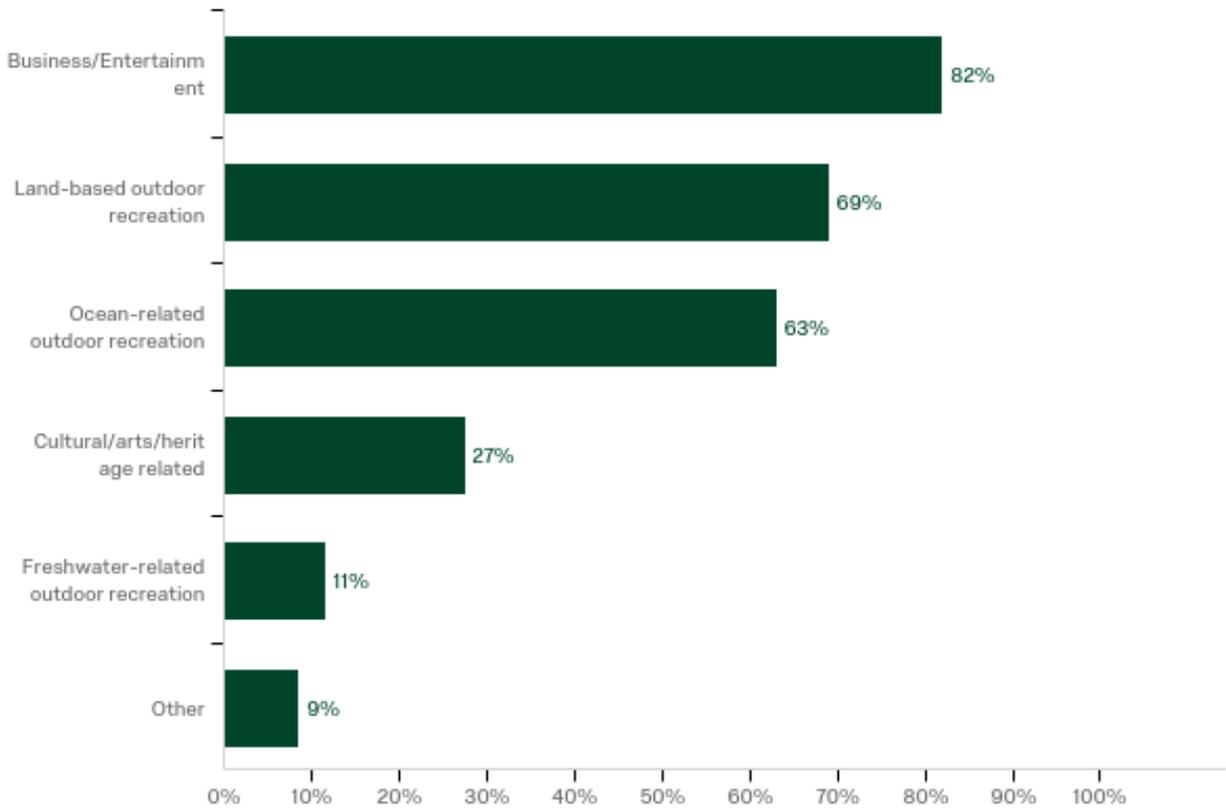


Vacation	59%	379
Weekend getaway	22%	140
Leisure day trip	16%	102
Special event	3%	20
Total	100%	641

**Q3b - Friends & Family Details: What is the primary purpose of your travel in the North Coast? (n=30)**

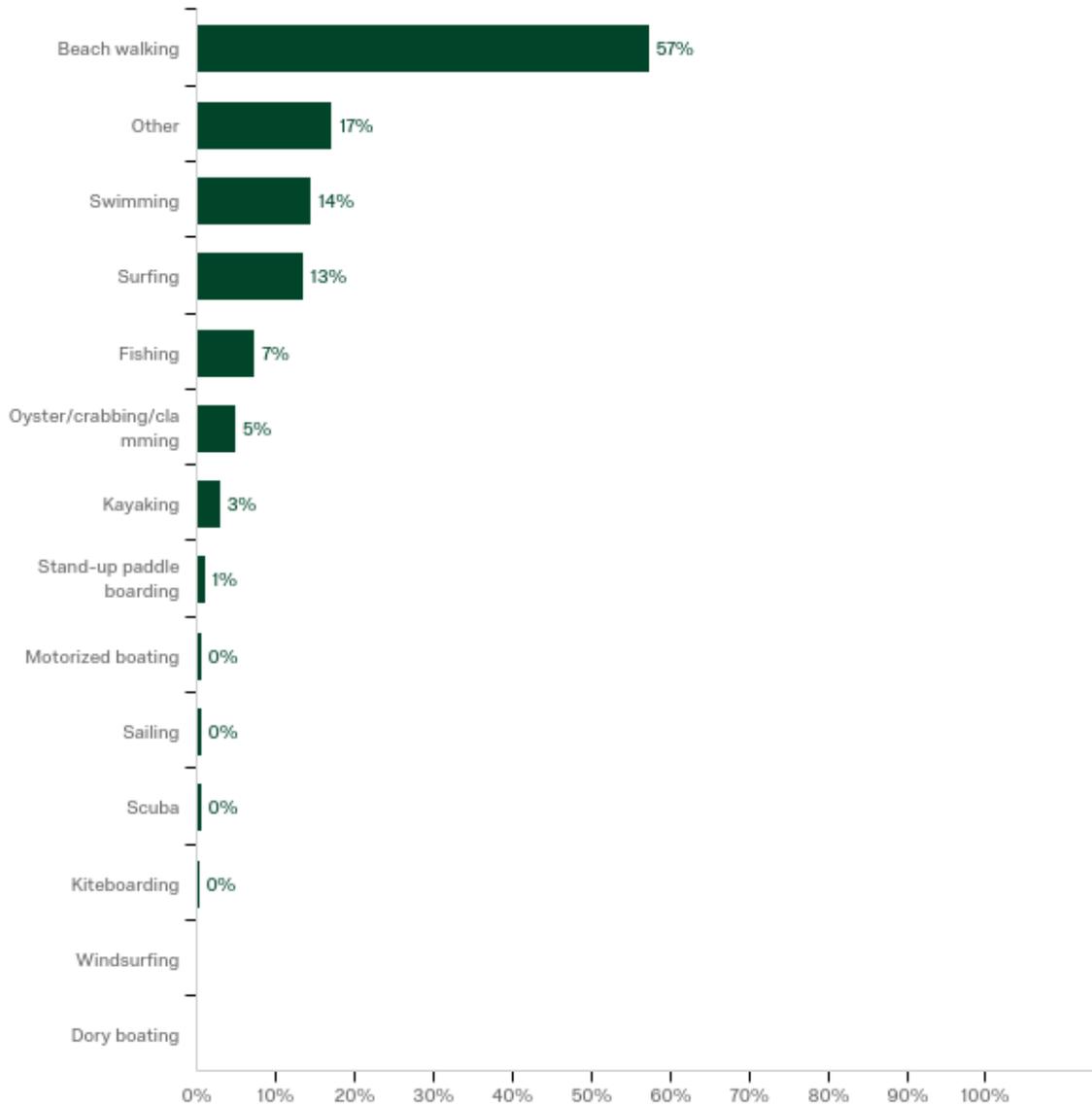
Wedding	37%	11
Other	40%	12
Friends & Family special event	23%	7
Total	100%	30

Q4 - What kinds of activities are you participating in as part of this trip? (n=714)



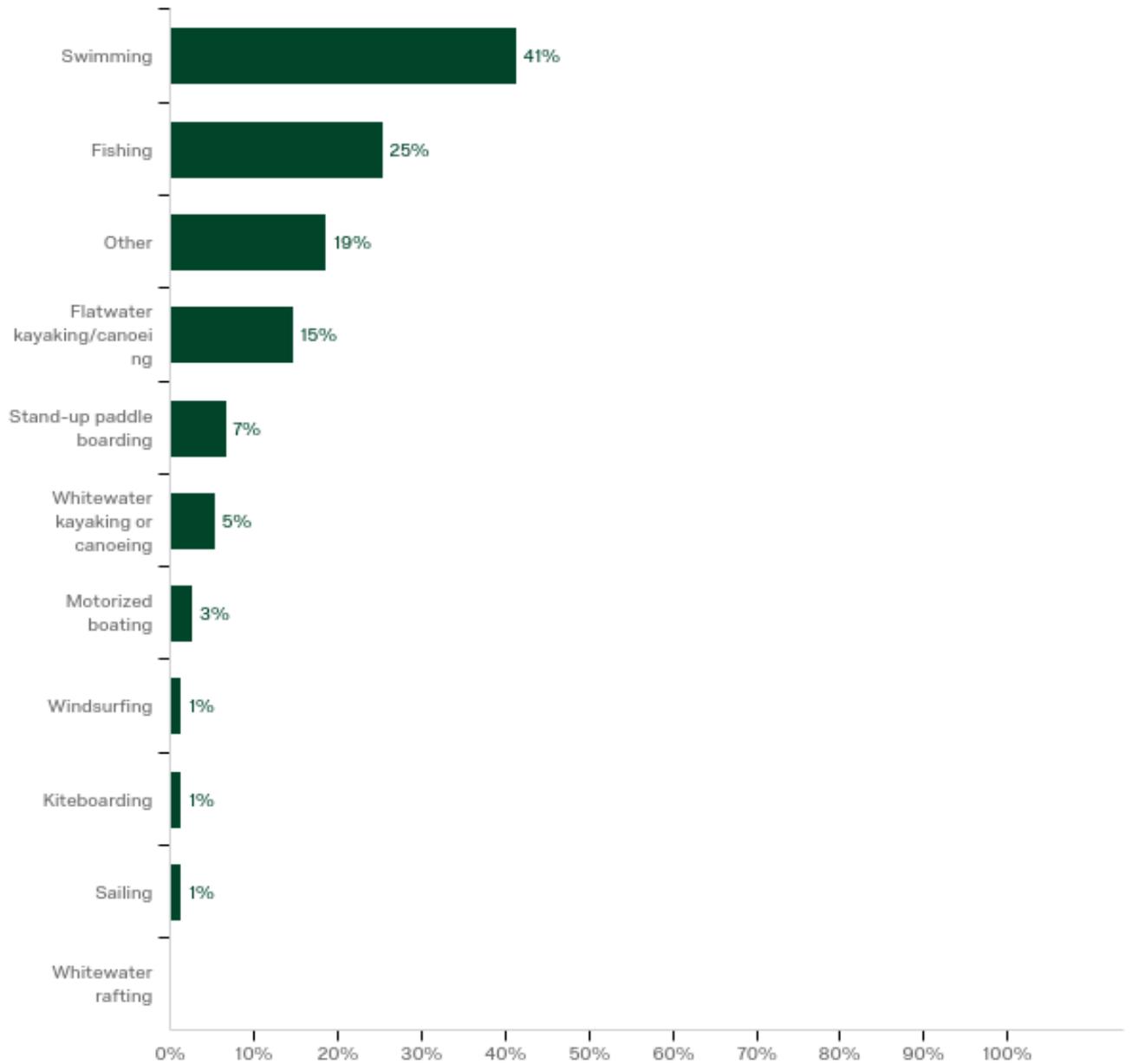
Other	3%	61
Ocean-related outdoor recreation	24%	450
Land-based outdoor recreation	26%	493
Freshwater-related outdoor recreation	4%	82
Cultural/arts/heritage related	10%	196
Business/Entertainment	31%	586
Total	100%	1868

### Q4a - Ocean-based Specifics: (n=408)



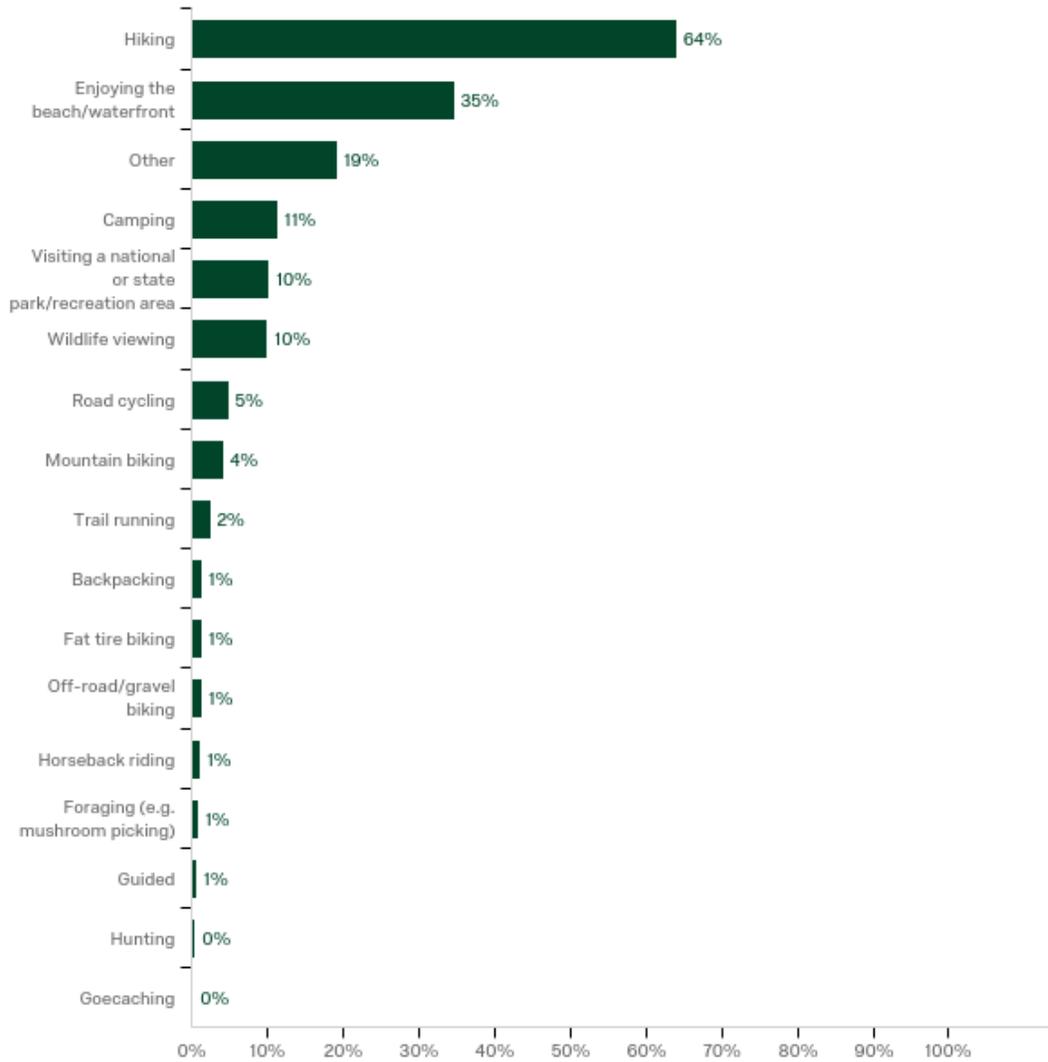
Windsurfing	0%	0
Swimming	12%	59
Surfing	11%	55
Stand-up paddle boarding	1%	4
Scuba	0%	2
Sailing	0%	2
Oyster/crabbing/clamming	4%	20
Other	14%	70
Motorized boating	0%	2
Kiteboarding	0%	1
Kayaking	2%	12
Fishing	6%	30
Dory boating	0%	0
Beach walking	48%	234
Total	100%	491

### Q4b - Freshwater-based Specifics: (n=75)



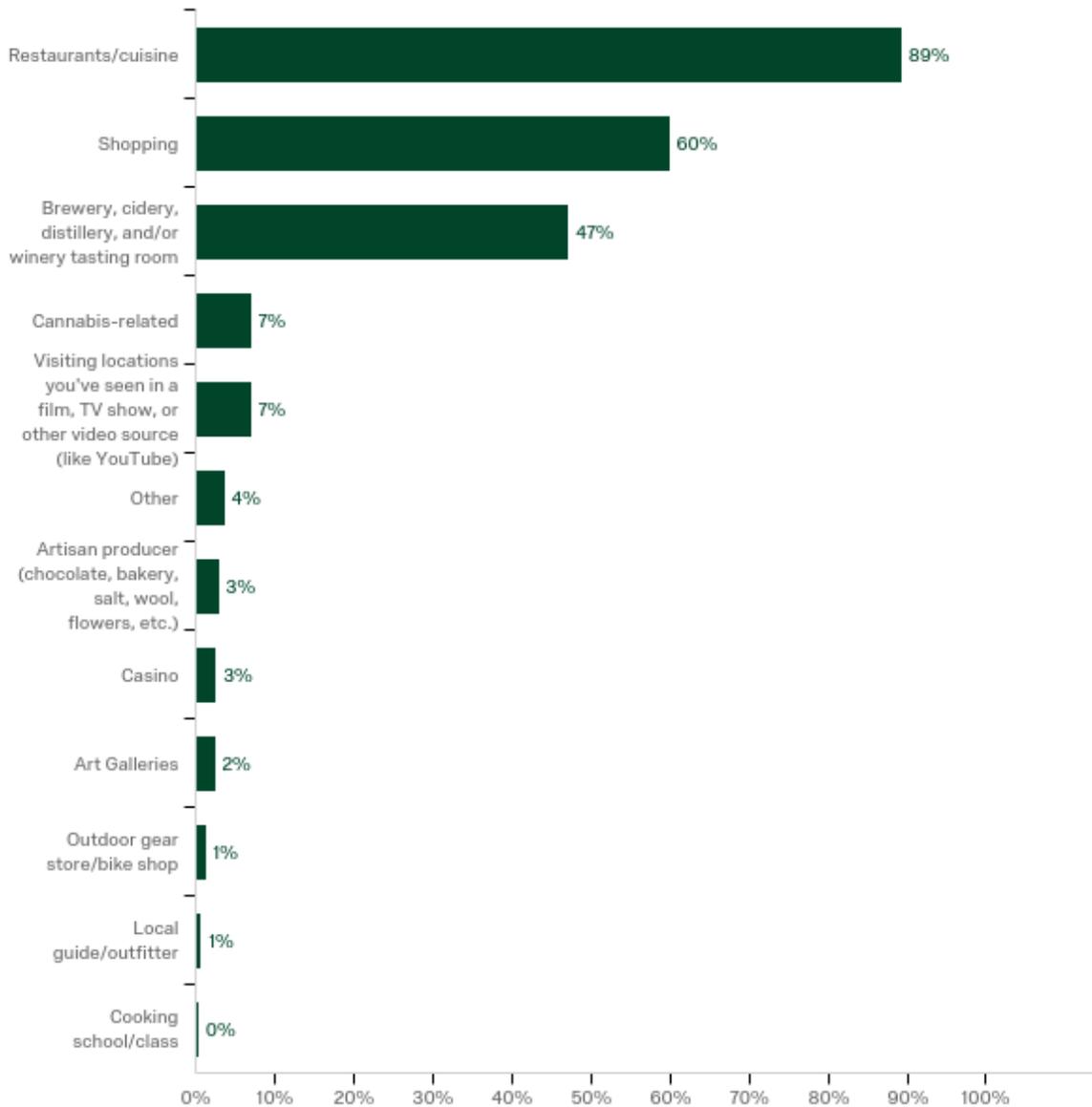
Windsurfing	1%	1
Whitewater rafting	0%	0
Whitewater kayaking or canoeing	4%	4
Swimming	35%	31
Stand-up paddle boarding	6%	5
Sailing	1%	1
Other	16%	14
Motorized boating	2%	2
Kiteboarding	1%	1
Flatwater kayaking/canoeing	12%	11
Fishing	21%	19
Total	100%	89

## Q4c - Land-based Specifics: (n=459)



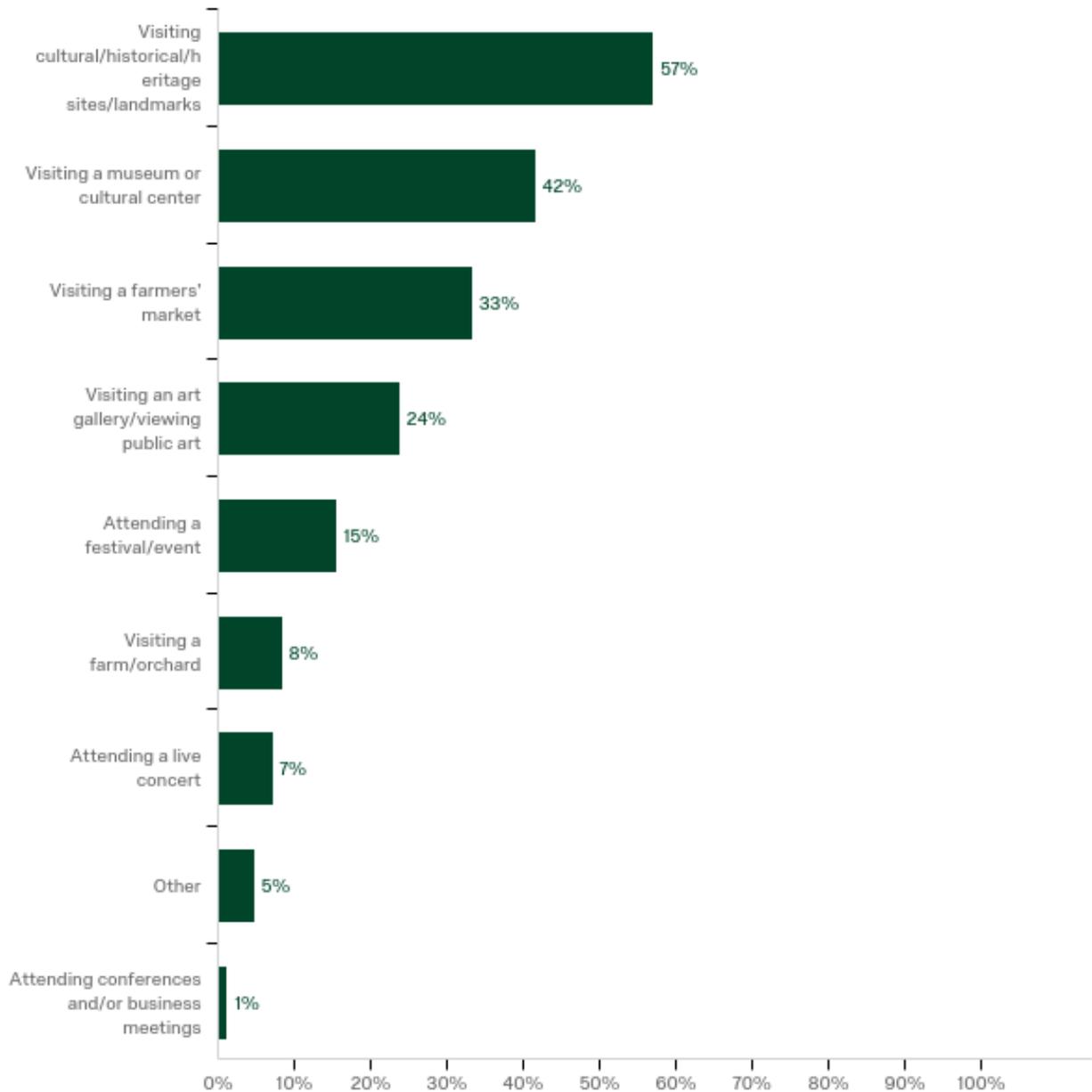
Wildlife viewing	6%	46
Visiting a national or state park/recreation area	6%	47
Trail running	1%	11
Road cycling	3%	22
Other	11%	88
Off-road/gravel biking	1%	6
Mountain biking	2%	19
Hunting	0%	2
Horseback riding	1%	5
Hiking	38%	294
Guided	0%	3
Goecaching	0%	1
Foraging (e.g. mushroom picking)	1%	4
Fat tire biking	1%	6
Enjoying the beach/waterfront	21%	159
Camping	7%	52
Backpacking	1%	6
Total	100%	771

Q4d - (Things below "other" are from the long survey) Business/Entertainment-Specific: (n=584)



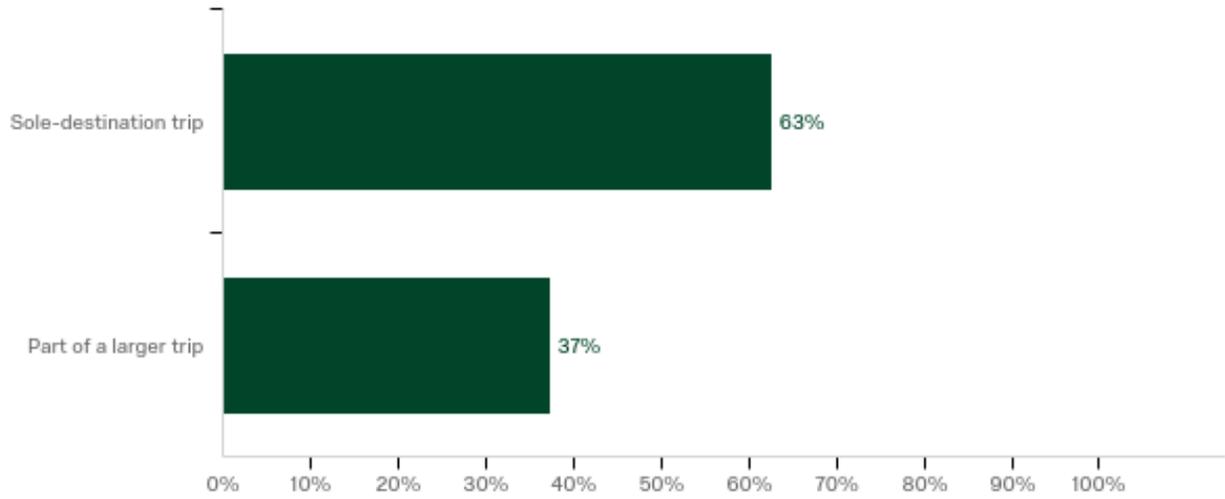
Visiting locations you've seen in a film, TV show, or other video source (like YouTube)	3%	41
Shopping	27%	350
Restaurants/cuisine	40%	522
Outdoor gear store/bike shop	1%	7
Other	2%	21
Local guide/outfitter	0%	4
Cooking school/class	0%	2
Casino	1%	15
Cannabis-related	3%	41
Brewery, cidery, distillery, and/or winery tasting room	21%	276
Artisan producer (chocolate, bakery, salt, wool, flowers, etc.)	1%	17
Art Galleries	1%	14
Total	100%	1310

## Q4e - Cultural Activities Specific: (n=84)



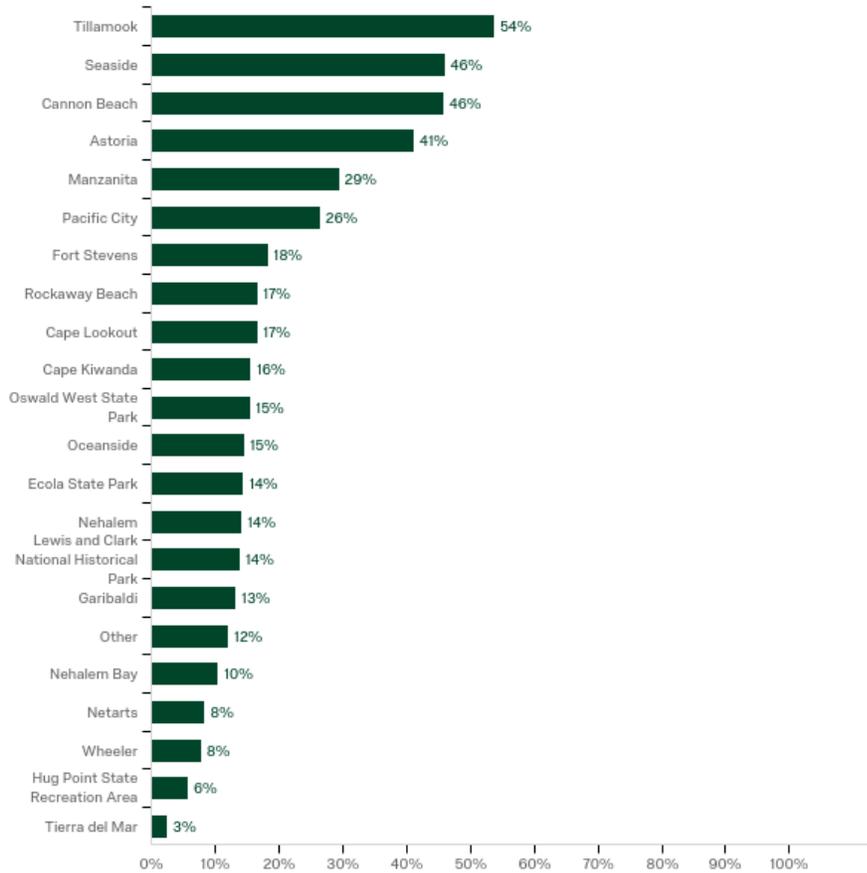
Attending a festival/event	8%	13
Attending a live concert	4%	6
Attending conferences and/or business meetings	1%	1
Visiting a farm/orchard	4%	7
Visiting a farmers' market	17%	28
Visiting an art gallery/viewing public art	12%	20
Visiting a museum or cultural center	22%	35
Visiting cultural/historical/heritage sites/landmarks	30%	48
Other	2%	4
Total	100%	162

Q5 - On this trip to the North Coast, was the North Coast the only destination you visited, or was it part of a larger trip? (n=640)



Sole-destination trip	63%	401
Part of a larger trip	37%	239
Total	100%	640

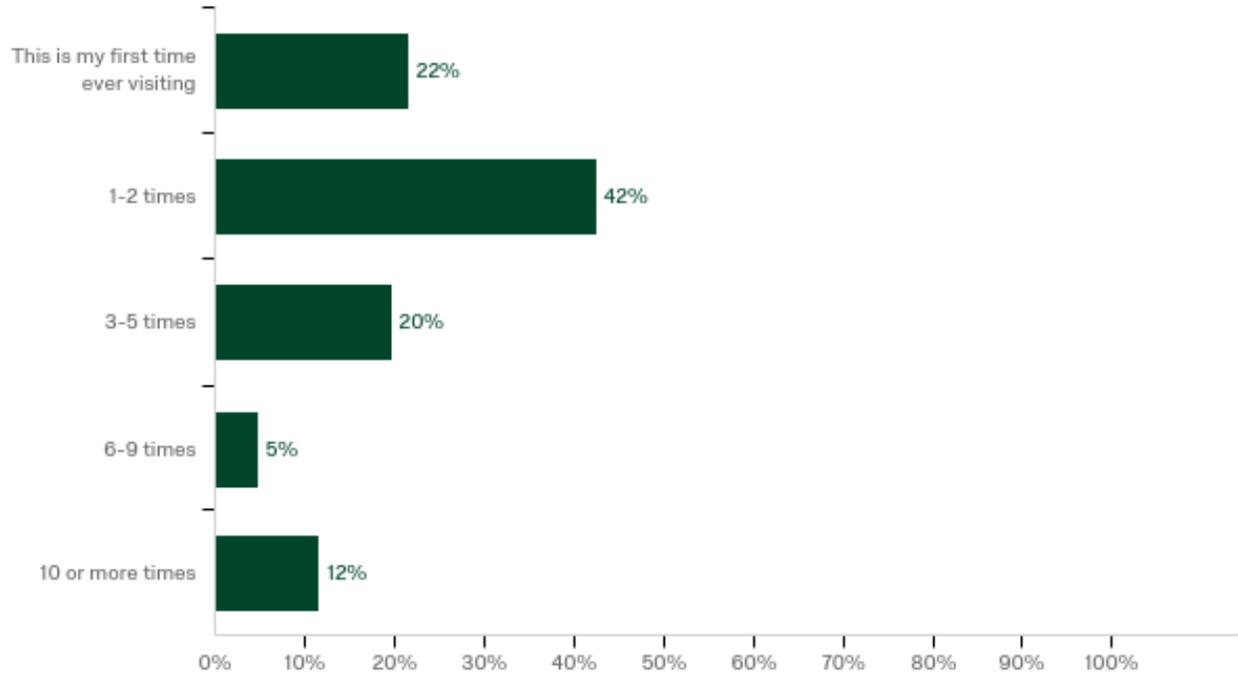
**Q6 - Which of the following, if any, have you visited, or do you plan to visit during this trip to the North Coast area? (n=680)**



Pacific City	6%	180
Tierra del Mar	1%	17
Netarts	2%	57
Oceanside	3%	99
Tillamook	12%	366
Garibaldi	3%	90
Rockaway Beach	4%	113
Wheeler	2%	53
Manzanita	7%	200
Nehalem	3%	96
Cannon Beach	10%	312
Seaside	10%	313
Astoria	9%	280
Cape Kiwanda	4%	106
Cape Lookout	4%	113
Nehalem Bay	2%	71
Oswald West State Park	3%	105
Hug Point State Recreation Area	1%	39
Ecola State Park	3%	98
Fort Stevens	4%	124
Lewis and Clark National Historical Park	3%	94
Other	3%	82
Total	100%	3008

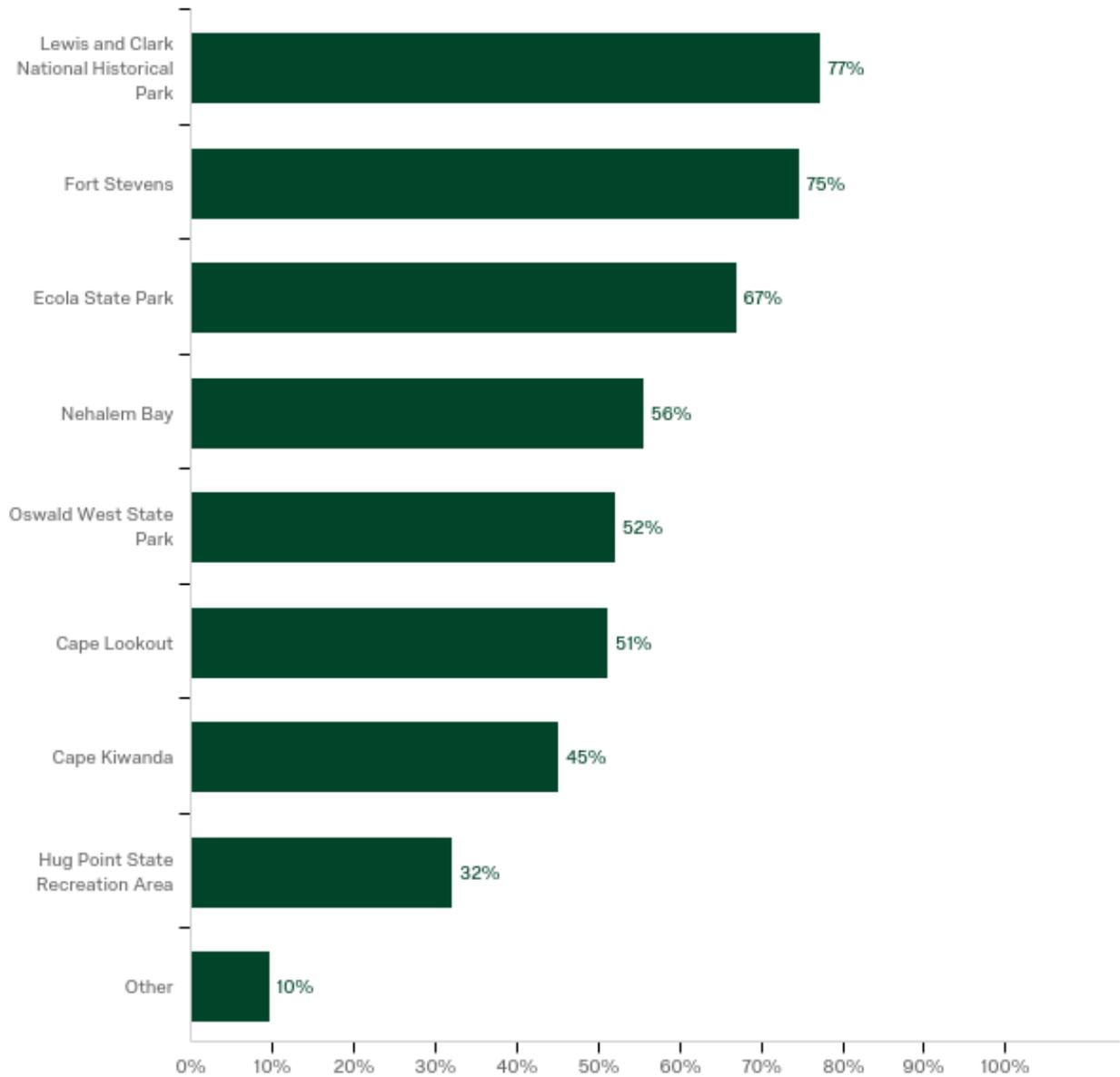
## Part 2: Familiarity with the North Coast

Q10 - How many times have you visited the North Coast in the past 12 months, including today's trip? (n=673)



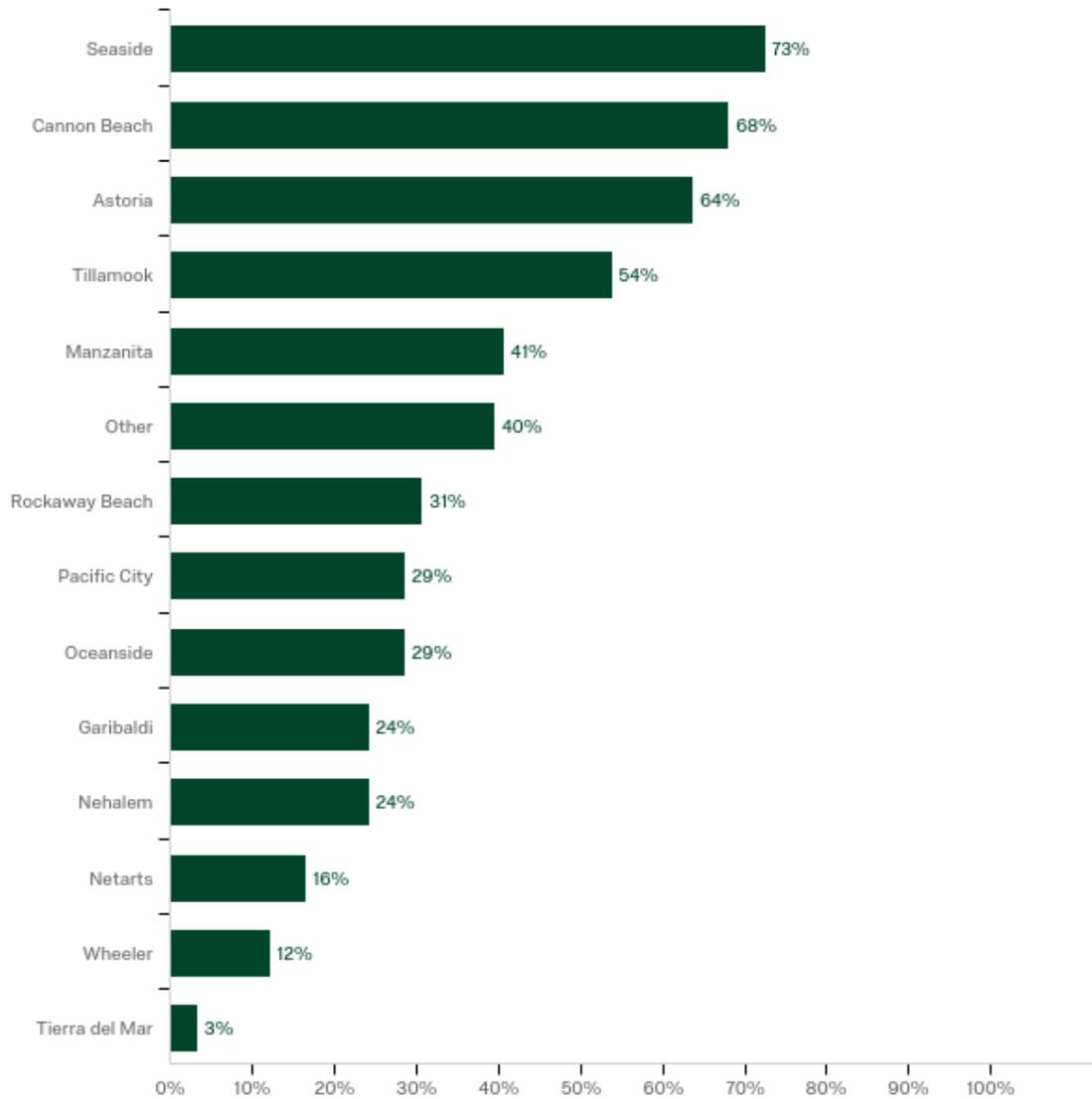
6-9 times	5%	32
3-5 times	20%	132
1-2 times	42%	286
10 or more times	12%	78
This is my first time ever visiting	22%	145
Total	100%	673

Q11 - Which of the following North Coast locations have you heard of? (n=115)



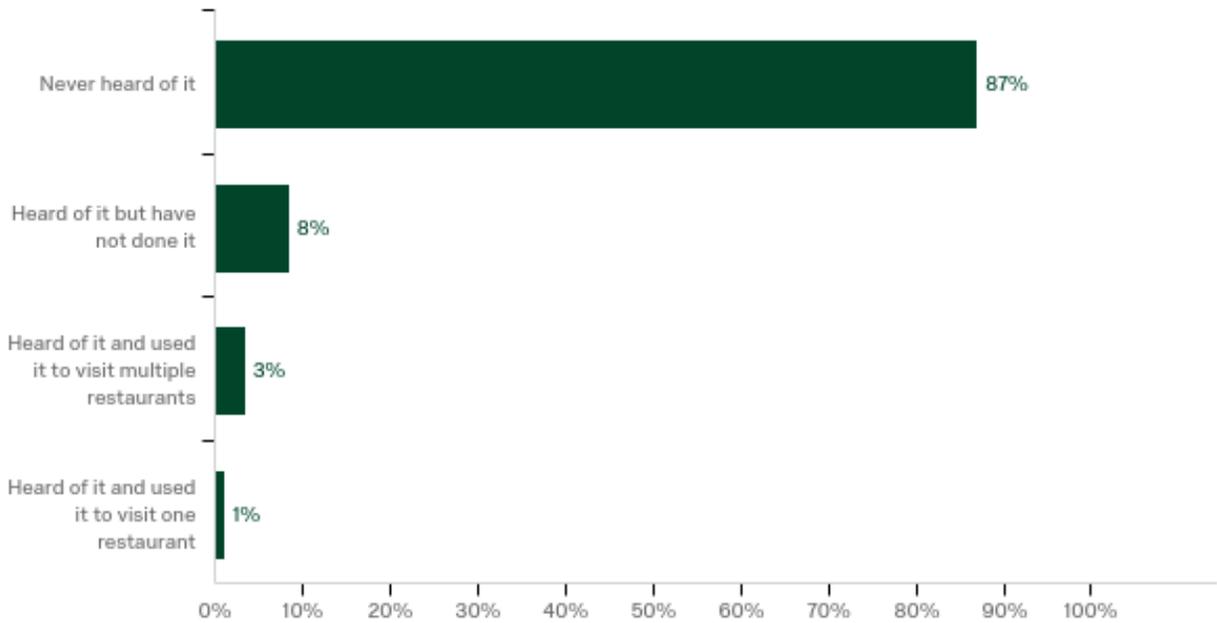
Other	2%	11
Oswald West State Park	11%	60
Nehalem Bay	12%	64
Lewis and Clark National Historical Park	17%	89
Hug Point State Recreation Area	7%	37
Fort Stevens	16%	86
Ecola State Park	14%	77
Cape Lookout	11%	59
Cape Kiwanda	10%	52
Total	100%	535

Q12 - Which of the following North Coast cities or areas have you visited over the past 12 months? (n=91)



Wheeler	2%	11
Tillamook	11%	49
Tierra del Mar	1%	3
Seaside	14%	66
Rockaway Beach	6%	28
Pacific City	6%	26
Other	8%	36
Oceanside	6%	26
Netarts	3%	15
Nehalem	5%	22
Manzanita	8%	37
Garibaldi	5%	22
Cannon Beach	13%	62
Astoria	13%	58
Total	100%	461

Q13 - What is your level of familiarity with the 'North Coast Food Trail'? (n=675)



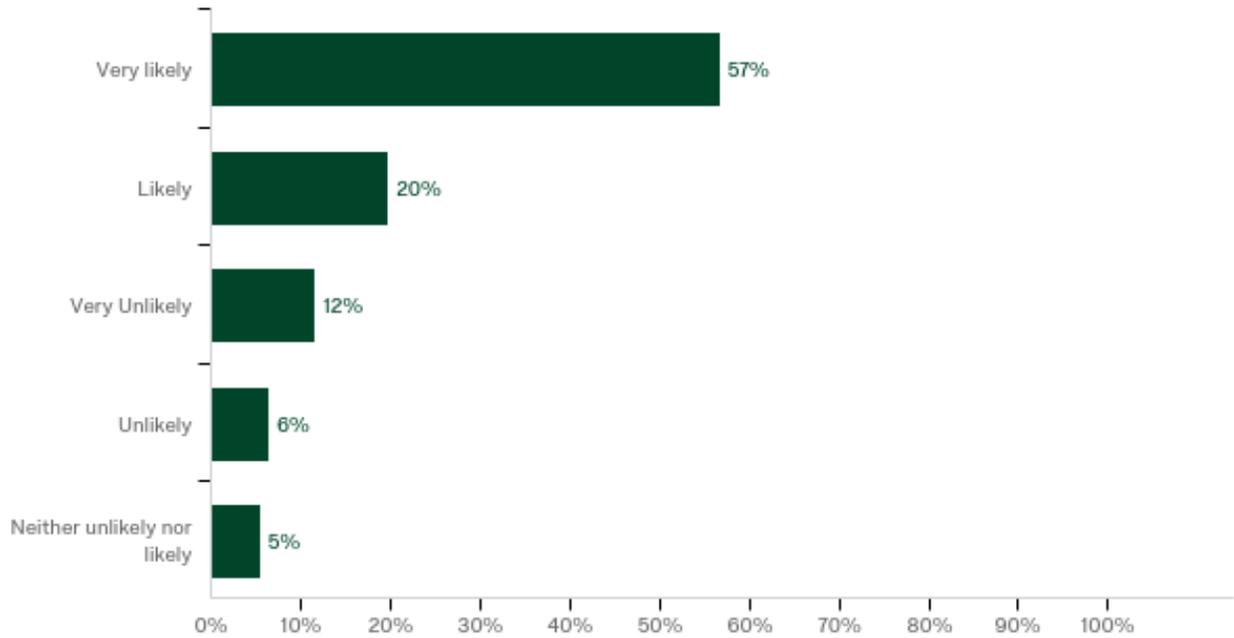
Never heard of it	87%	588
Heard of it but have not done it	8%	57
Heard of it and used it to visit one restaurant	1%	7
Heard of it and used it to visit multiple restaurants	3%	23
Total	100%	675

## Part 3: Motivation and Satisfaction

Q14 - How important or unimportant were the following factors in your decision to visit the North Coast? (n=80-89)

	Not at all important	Not very important	Neither important nor unimportant	Important	Very important	Total
A place to relax and unwind	1%	0%	8%	38%	53%	88
Scenic beauty	0%	0%	4%	37%	58%	89
Accessible (easy to get to)	0%	8%	18%	40%	34%	89
Affordable	2%	3%	22%	44%	28%	89
Quality of accommodations	5%	6%	13%	59%	17%	86
Availability of accommodations	4%	4%	16%	55%	22%	83
Area offers a wide variety of activities for my entire family	2%	4%	20%	48%	26%	81
Offers terrain/geography/climate conducive to a specific outdoor recreation activity I pursue	3%	6%	26%	39%	26%	80
Access to outfitting adventures	15%	24%	34%	21%	6%	82
Access to guided experiences	31%	22%	27%	15%	5%	81
An opportunity to view/experience local art	11%	16%	29%	36%	8%	83
Heritage and cultural/historical sites	6%	9%	26%	46%	14%	81
Opportunity to experience a farm or farm products	16%	17%	44%	16%	7%	82
Access to locally caught seafood or locally raised foods	6%	6%	22%	48%	18%	83
Unique, quality local cuisine/restaurants	7%	2%	18%	54%	18%	83
Retail shopping	15%	20%	39%	22%	5%	82
Doing business in the area	38%	19%	25%	12%	6%	84
Visiting friends and relatives	26%	15%	20%	20%	19%	85

Q16 - How likely do you think you are to visit the North Coast again in the next two years? (n=622)

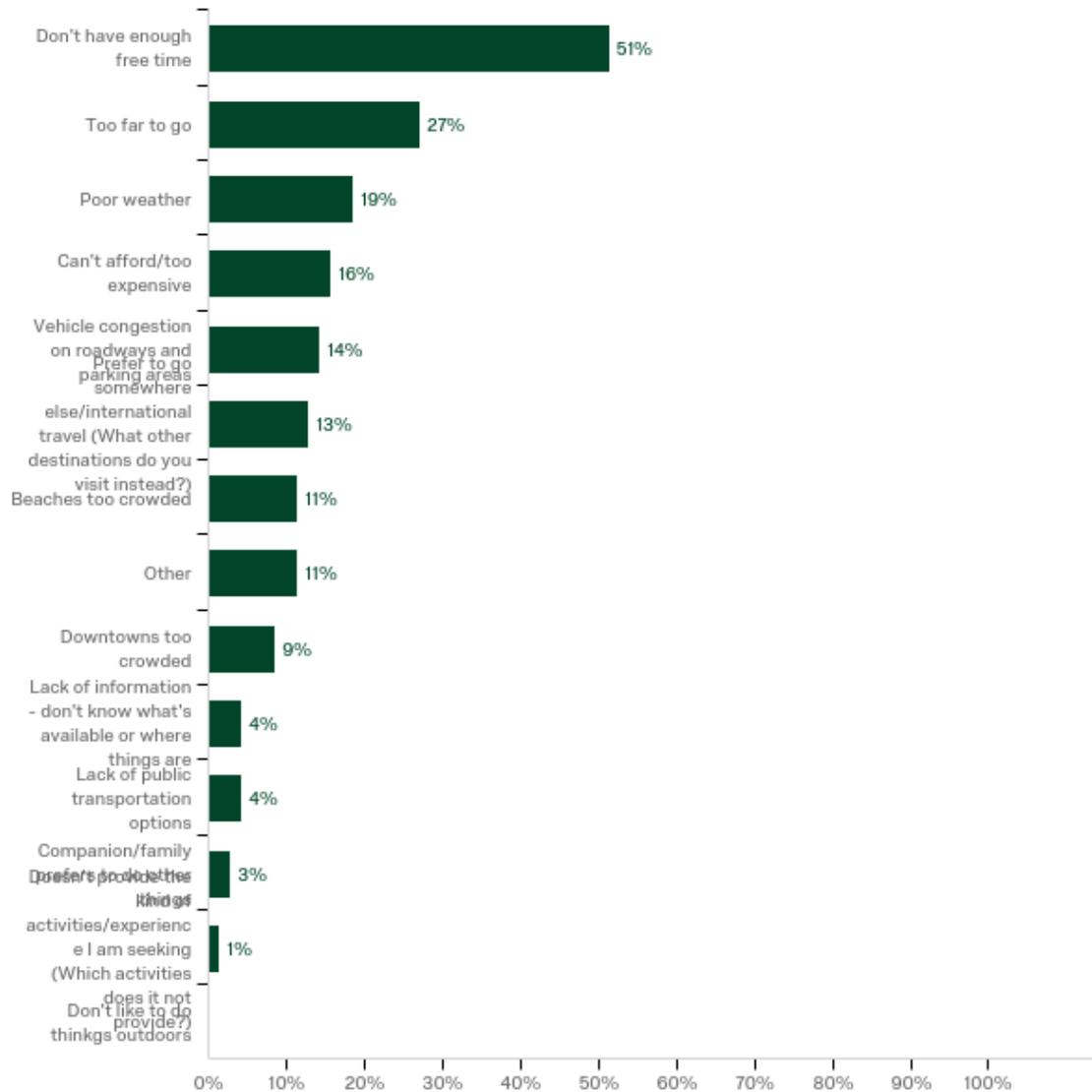


Very likely	57%	353
Very Unlikely	12%	72
Unlikely	6%	40
Neither unlikely nor likely	5%	34
Likely	20%	123
Total	100%	622

**Q17 - How satisfied or dissatisfied were the following factors in your decision to visit the North Coast? (n=64-70)**

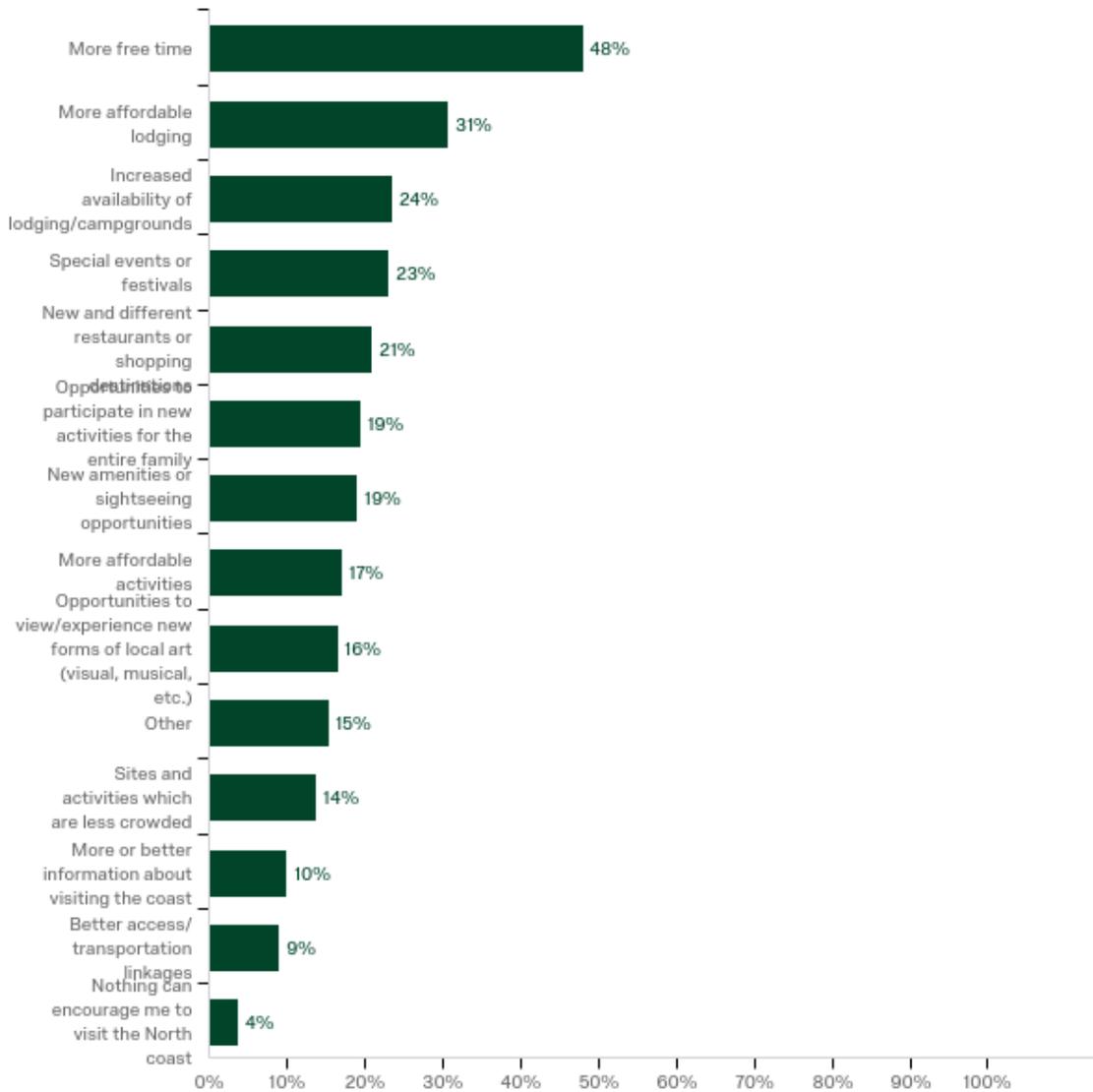
	N/A	Very dissatisfied	Dissatisfied	Neither satisfied nor dissatisfied	Satisfied	Very satisfied	Total
A place to relax and unwind	6%	0%	0%	6%	30%	59%	70
Scenic beauty	4%	0%	1%	4%	21%	69%	70
Accessible (easy to get to)	4%	0%	0%	10%	45%	41%	69
Affordable	7%	1%	4%	20%	41%	26%	70
Quality of accommodations	14%	0%	3%	18%	36%	29%	66
Availability of accommodations	12%	2%	6%	20%	32%	28%	65
Area offers a wide variety of activities for my entire family	9%	2%	2%	11%	44%	33%	66
Offers terrain/geography/climate conducive to a specific outdoor recreation activity I pursue	11%	0%	0%	17%	36%	36%	66
Outfitting adventures	41%	0%	0%	32%	14%	13%	63
Guided experiences	48%	2%	2%	27%	13%	9%	64
Viewing/experiencing local arts (visual, musical, etc.)	36%	0%	2%	25%	25%	13%	64
Heritage and cultural/historical sites	22%	0%	3%	16%	38%	22%	64
Experiencing a farm or farm products	38%	2%	2%	32%	17%	11%	66
Access to locally caught seafood or locally raised foods	19%	0%	0%	25%	33%	23%	69
Unique, quality local cuisine/restaurants	18%	0%	4%	21%	34%	22%	67
Retail shopping	23%	2%	5%	29%	32%	9%	65
Doing business in the area	49%	2%	2%	22%	18%	8%	65

**Q18 - What factors prevent you from visiting the North Coast more frequently?  
(Select all the apply) (n=70)**



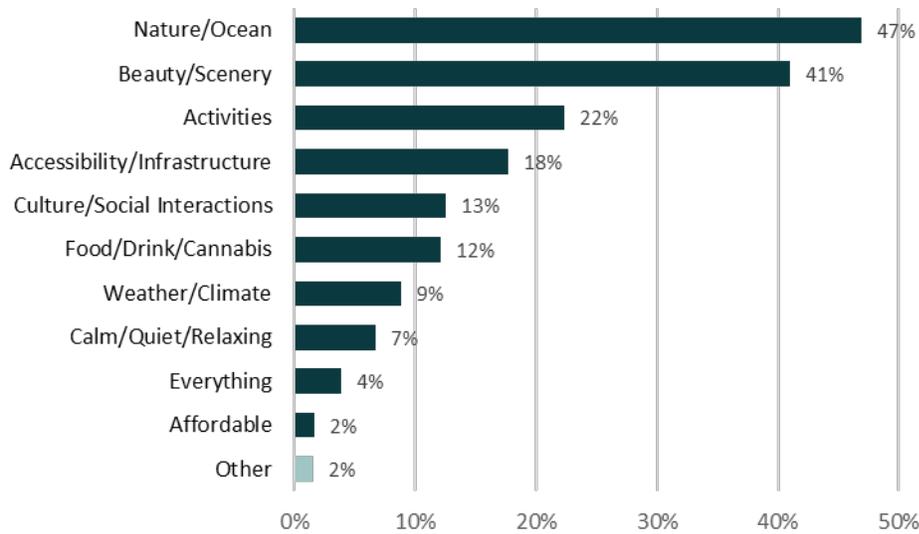
Vehicle congestion on roadways and parking areas	8%	10
Too far to go	15%	19
Prefer to go somewhere else/international travel	7%	9
Poor weather	10%	13
Other	6%	8
Lack of public transportation options	2%	3
Lack of information - don't know what's available or where things are	2%	3
Downtowns too crowded	5%	6
Don't like to do things outdoors	0%	0
Don't have enough free time	28%	36
Doesn't provide the kind of activities/experience I am seeking (Which activities does it not provide?)	1%	1
Companion/family prefers to do other things	2%	2
Can't afford/too expensive	9%	11
Beaches too crowded	6%	8
Total	100%	129

Q19 - What, if anything, would most encourage you to return to the North Coast, or visit more often? (n=510)

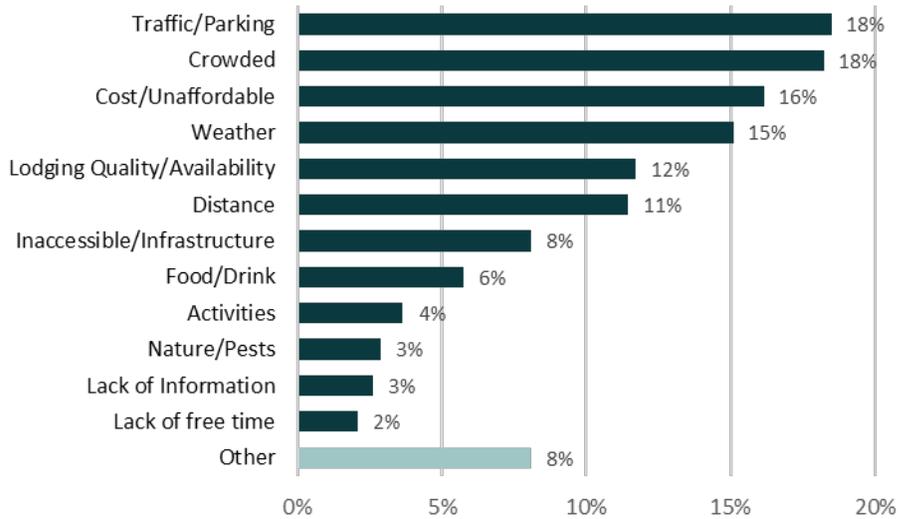


Special events or festivals	9%	118
Sites and activities which are less crowded	5%	70
Other	6%	78
Opportunities to view/experience new forms of local art (visual, musical, etc.)	6%	84
Opportunities to participate in new activities for the entire family	7%	99
Nothing can encourage me to visit the North coast	1%	19
New and different restaurants or shopping destinations	8%	107
New amenities or sightseeing opportunities	7%	97
More or better information about visiting the coast	4%	51
More free time	18%	245
More affordable lodging	11%	157
More affordable activities	6%	87
Increased availability of lodging/campgrounds	9%	120
Better access/ transportation linkages	3%	46
Total	100%	1378

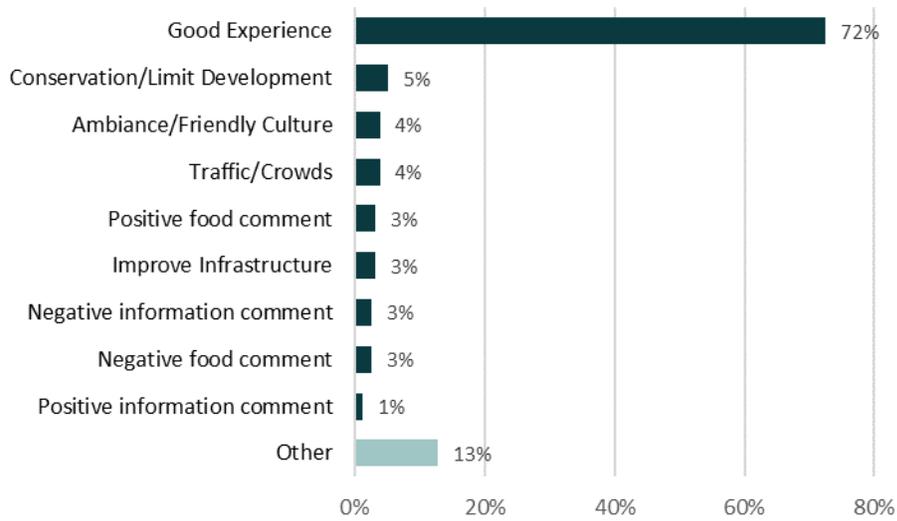
**Q20: Based on your experience, what are the strengths of the region as a visitor destination? (open-ended) (n=520)**



**Q21: Based on your experience, what are the constraints/drawbacks of the region as a visitor destination? (n=384)**

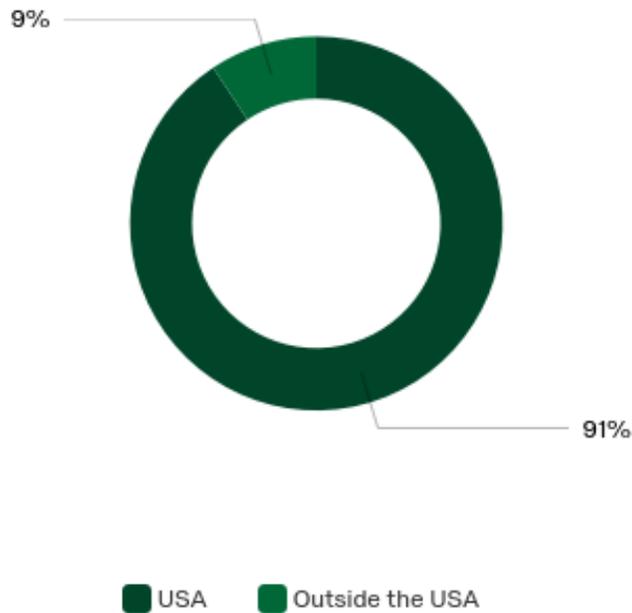


**Q22: Is there anything else you would like to tell us about your experience visiting the North Coast? (n=156)**



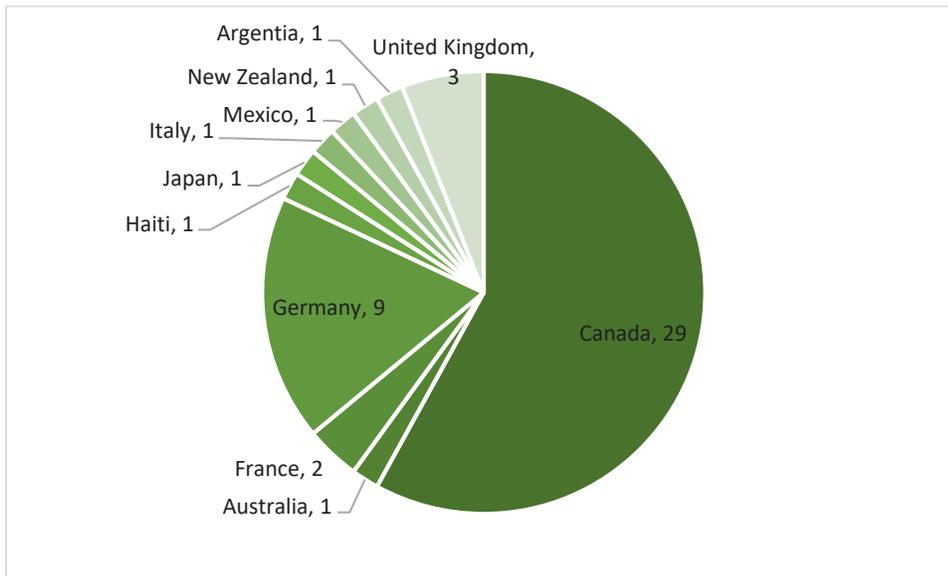
**Part 4: About you!**

**Q23 - Where do you currently live? (n=610)**



USA - Please enter your home ZIP code:	91%	553
Outside the USA - Please enter your country of residence:	9%	57
Total	100%	610

### Q23a Country of Residence (n=50)

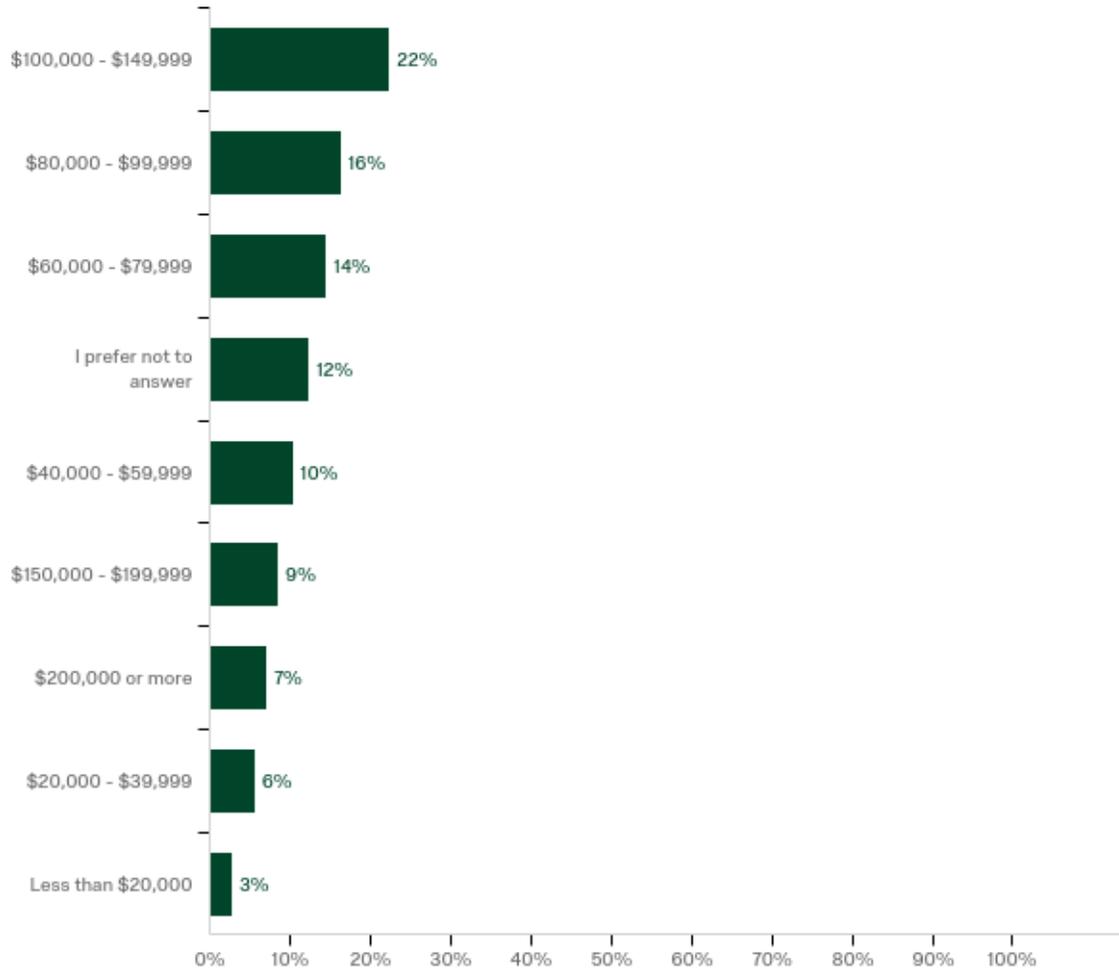


Canada	29	58%
Australia	1	2%
France	2	4%
Germany	9	18%
Haiti	1	2%
Japan	1	2%
Italy	1	2%
Mexico	1	2%
New Zealand	1	2%
Argentina	1	2%
United Kingdom	3	6%
Total	50	100%

### Q24: Please list the number of people in your travel party for this trip by age and gender.

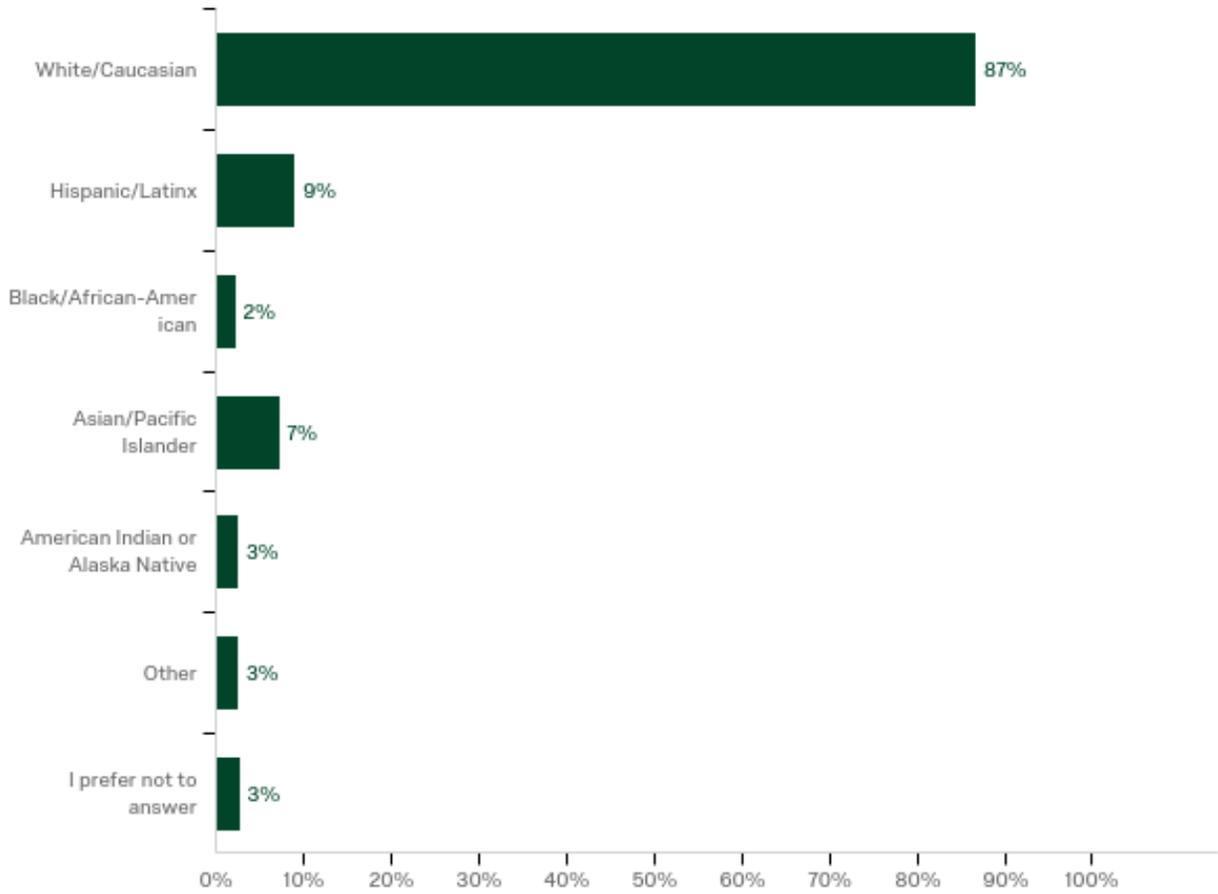
	Male		Female		Nonbinary		Total	
<b>Under 21</b>	273	12%	277	12%	14	1%	564	24%
<b>21-34</b>	272	12%	276	12%	4	0%	552	24%
<b>35-44</b>	184	8%	211	9%	4	0%	399	17%
<b>45-54</b>	140	6%	163	7%	3	0%	306	13%
<b>55-64</b>	115	5%	138	6%	3	0%	256	11%
<b>65 or above</b>	122	5%	136	6%	5	0%	263	11%
<b>Total</b>	1106	48%	1201	51%	33	1%	2340	100%

Q26 - Which best describes the combined annual income of all members of your household? (n=503)



\$200,000 or more	7%	36
Less than \$20,000	3%	14
I prefer not to answer	12%	62
\$150,000 - \$199,999	9%	43
\$100,000 - \$149,999	22%	113
\$80,000 - \$99,999	16%	82
\$60,000 - \$79,999	15%	73
\$40,000 - \$59,999	10%	52
\$20,000 - \$39,999	6%	28
Total	100%	503

Q27 - Which best describes your race or ethnic background? Select all that apply.  
(n=598)



White/Caucasian	77%	519
Other	2%	15
I prefer not to answer	2%	16
Hispanic/Latinx	8%	54
Black/African-American	2%	13
Asian/Pacific Islander	6%	43
American Indian or Alaska Native	2%	15
Total	100%	675