



NORTH COAST DESTINATION MANAGEMENT STUDIO

CASE STUDY ANALYSIS - JUNE 2020



NORTH COAST DESTINATION MANAGEMENT STUDIO

CASE STUDY ANALYSIS

JUNE 2020

The purpose of this case study review is to provide an objective and analytical assessment of the North Coast Destination Management Studio. A key feature of this studio was the systems approach, which has been pioneered by Travel Oregon to help regional communities solve complex tourism challenges. This report was co-produced by Future iQ and Travel Oregon and represents a technical and initial outcome evaluation. This project represents a contemporary and important case study of a regional approach to addressing tourism destination impact management.



COVER IMAGES CREDIT:

MAIN IMAGE: TRAVEL OREGON

BOTTOM LEFT IMAGE: TRAVLEOREGON.COM (PHOTOGRAPHER: DYLAN VAN WEELDEN)

BOTTOM MIDDLE IMAGE: TRAVEL OREGON

BOTTOM RIGHT IMAGE: TYLER ROEMER

TABLE OF CONTENTS

- 1.0 EXECUTIVE SUMMARY 4**
- 2.0 INTRODUCTION 5**
- 3.0 NORTH COAST OREGON -**
- UNIQUE TOURISM CHALLENGES 6**
 - 3.1 REGIONAL PROFILE AND CHARACTERISTICS 6
 - 3.2 CRITICAL NEED FOR A 'SYSTEMS APPROACH' 7
- 4.0 NORTH COAST MANAGEMENT STUDIO -**
- ENGAGEMENT HIGHLIGHTS 8**
 - 4.1 TOURISM STUDIO - PROGRAM DESIGN 9
 - 4.2 CREATING A 15-YEAR VISION FOR SUSTAINABLE TOURISM 10
 - 4.3 ARTICULATING OUTCOMES - STATEMENT OF INTENT 11
 - 4.4 TARGETING PRIORITIES – WORKSHOP TOPICS AND KEY IMPACT AREAS 12
- 5.0 MAJOR FOUNDATIONAL STEPS -**
- BUILDING LONGEVITY AND MOMENTUM 13**
 - 5.1 FORMATION OF NORTH COAST TOURISM MANAGEMENT NETWORK 13
 - 5.2 TOURISM STUDIO ACTION TEAMS – INITIAL SUCCESSES IN 2019 14
 - 5.3 CREATING A TOURISM FOCUS 'RESET' ON NORTH COAST 15
- 6.0 CASE STUDY ANALYSIS - KEY SUCCESS FACTORS 16**
 - 6.1 INVESTING IN SHARED VISION AND COLLABORATION 16
 - 6.2 PIVOTING TO DESTINATION IMPACT MANAGEMENT 17
 - 6.3 FOCUS FORMING ENDURING REGIONAL NETWORKS 18
 - 6.4 PROMOTION OF TOURISM STUDIO OUTCOMES 19
- 7.0 NEXT STEPS - 2020 AND BEYOND 20**
- 8.0 ACKNOWLEDGEMENTS 21**
- 9.0 RESOURCES AND REFERENCES 22**
- 10.0 STUDIO DESIGN AND PRESENTATION TEAM 23**

The North Coast Destination Management Studio commenced in spring 2018 with community listening sessions, and formal programming was completed in January 2019 closing with a workshop to ignite community action teams. The Destination Management Studio was initiated following an application from a group of local stakeholders who saw the potential to engage in destination management planning for the region.

The North Coast draws large crowds from the Portland metro area, which threaten to overwhelm the small communities and limited infrastructure. Issues of local concern include traffic congestion, overuse of fragile natural areas, insufficient and increasingly expensive housing, limited off-season job opportunities, and potential loss of authentic cultural identity.

The Destination Management Studio engaged approximately 250 local stakeholders in a series of workshops and planning sessions. This included a regional tourism summit, five topical workshops, and an action planning workshop.

The initial analysis shows that the program was successful in a number of ways:

- Momentum and sustainability were built, notably with the formation of the North Coast Tourism Management Network.
- Local action teams have been established to identify and address critical priorities and are being led by local stakeholders.

There has been a significant reset in approach to tourism industry planning in the region, with Tillamook County and the Tillamook Coast Visitors Association undertaking subsequent planning to refocus their efforts.

This project represents a contemporary and important case study of an innovative regional approach to addressing tourism impacts through destination management.

1.0 EXECUTIVE SUMMARY

“We understand the economic value of tourism, as do businesses that benefit from visitor spending. In addition to lodging and restaurants, tourist dollars are spent in gas stations, grocery stores, museums, retail shops, tire repair places and many more businesses that benefit communities. We also understand the concern of possible high visitation, which many European destinations have experienced in the past 20 years. We live here, too, and that’s why we’re working together now to mitigate issues.”

Nan Devlin, Manager,
North Coast Tourism
Management Network



CaseStudy

CASE STUDY INSIGHTS:

- This case study review aims to provide an objective and analytical assessment of the North Coast Destination Management Studio, and its short-term outcomes.
- A key feature of this studio was the ‘collaborative systems approach’, which has been pioneered by Travel Oregon to help regional communities solve complex tourism challenges. This included the successful addition of training to establish a destination action network.

2.0 INTRODUCTION

“The North Coast is clearly entering a new part of its destination lifecycle. Key to moving forward will be finding the right balance between the economic and social benefits of tourism, and the impacts that high visitation can have on traffic, local services, natural resources and quality of life.

Each destination faces unique challenges and has unique resources available to solve those challenges. On the North Coast, we’re already seeing that there’s a strong commitment to collaboration and local problem solving.”

Kristin Dahl, VP Destination Development, Travel Oregon

Tourism has long been part of the economy on the North Coast. It has provided an important economic engine as the other industries have waxed and waned. The region has long been a favored vacation destination for Oregonians and visitors.

The growth in the Portland metro region has coincided with a rapid growth in inbound tourism to Oregon over the last decades. The advent of a stronger outdoor recreation culture, coupled with improved transportation routes, has meant that the North Coast is more easily accessible for daytrips from Portland. This has led to growth in visitation and the tourism economy, to the point where it is now placing heavy strain on amenities, infrastructure and livability.

In response to this growth and attendant challenges, the region has embraced and participated in a North Coast Destination Management Studio. This program, developed and offered by Travel Oregon, is designed to allow local stakeholders to convene and plan the future of how their destination develops.

The underlying principles of the program are anchored in pursuing sustainable principles that achieve balanced outcomes for visitors, residents, businesses and the environment. The North Coast has small town experiences, immensely scenic and sensitive ecosystems, and unique recreation opportunities.

This case study analysis documents the North Coast Destination Management Studio outcomes, including the initial regional impact.



3.1 REGIONAL PROFILE AND CHARACTERISTICS

The North Coast Region was defined by the steering committee, and represents a major destination area. It is uniquely defined by its coast, the 90-mile stretch of coastal communities from Neskowin to Astoria. This coastal strip accounts for the majority of population and development within the two counties on this part of the coast, Clatsop and Tillamook Counties. The region covers 2,417 square miles of land mass, and another 159 square miles that lies under water. Unlike most other rural counties in Oregon, there is very little public land along the coast except for the beach itself which is publicly owned in its entirety.

The region's coastal communities are unusually diverse -- from working harbors to boardwalk-lined beaches, fishing cottages to luxury developments, and century farms to cutting edge art galleries. The ecology is diverse, and includes everything from coastal ecosystems to forest and river systems. This area also holds the Coast's largest concentration of nationally significant heritage resources at the terminus of Lewis and Clark's epic journey to the Pacific Ocean.

The fertile natural environment of this region has been home to permanent Native American villages for thousands of years, bands and tribes including the Clatsop, Chinook, Tillamook, Kathlamet and more whose descendants are largely part of the Confederated Tribes of Grande Ronde. The region was an important center of inter-tribal trade as well. The first known white person to land on the Oregon Coast, Robert Gray, arrived here on the North Coast. He first came ashore in Tillamook Bay in 1788, thinking the bay was the mouth of a large river. Four years later, he "discovered" the mouth of the Columbia River at Astoria.

With the closest coastline to the Portland Metropolitan area, the North Coast draws large crowds that threaten to overwhelm the small communities and limited infrastructure of the region. Issues of concern include traffic congestion, overuse of fragile natural areas, insufficient and increasingly expensive housing, limited off-season job opportunities, and potential loss of authentic cultural identity.

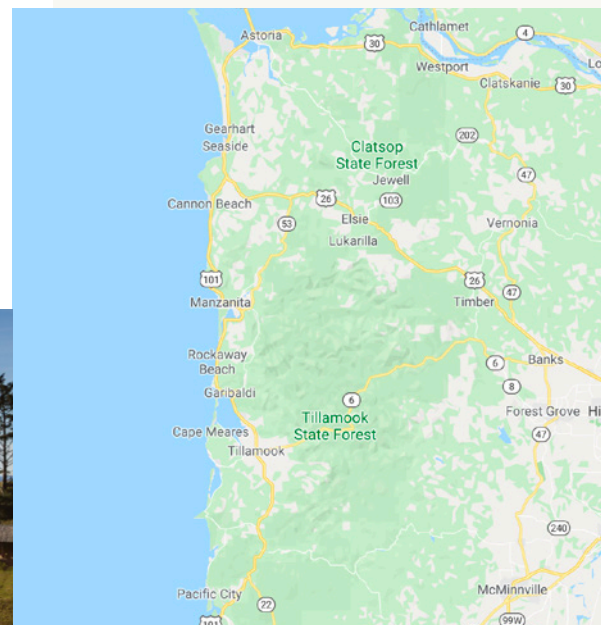
TRAVELOREGON.COM (PHOTOGRAPHER: JONI KABANA)



3.0 NORTH COAST OREGON - UNIQUE TOURISM CHALLENGES

"The North Coast is fortunate to have spectacular natural resources with vibrant, diverse communities to share with visitors. Yet the increased visitation to our region has also created some challenges, and it's vital that we come together as a region to address them."

Donna Quinn, Former Director of Sales and Marketing, Cannery Pier Hotel & Spa



CaseStudy

CASE STUDY INSIGHTS:

- The North Coast, as a tourism destination, represents a delightful respite from urban intensity and offers some of the most scenic vistas and experiences on the West Coast.
- The urban based visitation has been growing, but the regional and local amenities, and the ability to dissipate impact, has fallen behind.

ACCORDING TO THE DEAN RUNYAN ECONOMIC IMPACT REPORT DEVELOPED FOR TRAVEL OREGON, VISITORS IN 2018 SPENT \$580 MILLION IN CLATSOP COUNTY, AND \$240 MILLION IN TILLAMOOK COUNTY.



TRAVELOREGON.COM
(PHOTOGRAPHER: JONI KABANA)

3.2 CRITICAL NEED FOR A SYSTEMS APPROACH

Oregon's North Coast is one of the most visited regions in the state. Its close access to major urban areas makes it easy for visitors to reach the beach in 90 minutes or less from Portland. This has resulted in tourism becoming one of the North Coast's major industries. As a tourism destination, the North Coast represents a challenging destination management situation. It is defined by three key geographic factors:

- Close proximity to a large recreation-oriented metropolitan population (Portland).
- Limited access roads from the city, and a single north-south route.
- Narrow coastal strip with a range of highly sensitive ecosystems.

The largely seasonal influx of visitors has many implications:

- The regional population is approximately 65,000 and is mostly located in the narrow coastal strip that spans two rural counties. It is dotted with numerous small towns, the largest being Astoria with around 10,000 people. However, visitation dwarfs the local population. Oregon State Parks on the North Coast experienced over 7 million day visits in 2017, and more than 550,000 overnight campers. These trends, along with local geographic limitations have the effect of compressing visitation into localized hotspots. The result is that the Coast's small towns can become overcrowded, especially in the peak tourism months between May and September.
- The tightly defined transit route of Highway 101 becomes easily congested as the region's only north-south corridor. This corridor is used by locals and visitors alike, creating traffic delays and degradation of visitor and resident experience.
- At a societal level, there is emerging conflict between the tourism economy and its impacts, and the resource and rural-based industries that have occupied the region for over 100 years.

These conditions create a complex set of challenges with no easy solutions. From a destination management perspective, the only viable option is to create a systemic approach. This is where the macro issues of traffic, congestion, seasonality, environmental impact and community engagement are all tackled simultaneously and regionally through a strong network of interactions between community leaders.



CaseStudy

CASE STUDY INSIGHTS:

- Despite tourism being a key economic driver, the North Coast is clearly facing the danger of negative community impacts from a high level of visitation and is on the verge of seeing heightened resident alienation, where communities begin to resist tourism.
- The region is home to traditional industries and communities, and there is clear potential for cultural clashes and tensions between urban visitors and local residents.

4.0 NORTH COAST MANAGEMENT STUDIO - ENGAGEMENT HIGHLIGHTS

The North Coast Destination Management Studio ran from spring 2018 through winter 2019. The program was developed and delivered by Travel Oregon with the guidance and support from a local steering committee representing 23 local and regional organizations.

A key feature of the North Coast Studio was the intentional effort to create broad collaboration and stakeholder engagement. The purpose of this engagement was to harness the collective insight, perspective and creativity of the regional stakeholders to solve the complex challenges of the regional tourism industry. This engagement included a range of steps, including:

- **Listening Sessions** - Listening sessions were held throughout Tillamook and Clatsop counties, starting in spring 2018. These sessions guided the topics for a series of five Impact Area Workshops, running through fall and winter.
- **Tourism Summit** - As part of the studio, a summit was held for the North Coast in Sept 2018, which was a unique opportunity for area stakeholders to take a deep-dive into regional tourism development through scenario planning, local conversation and taking a look at inspiring case studies.
- **Shared Vision** - Through the combined efforts of the program steering committee and the tourism summit participants, a 15-year vision for the region's tourism economy was developed, together with a Statement of Intent.
- **Impact Area Workshops** - Over 100 local tourism stakeholders and residents participated in five Impact Area Workshops. Workshop topics included high-impact destination management strategies, visitor transportation, adventure travel and outdoor recreation, cultural heritage tourism development, visitor communications and destination marketing, and action planning for impact.
- **Action Planning Workshop** - In January 2019, an Action Planning Workshop was held where the steering committee formed the North Coast Tourism Network which is currently convened by Visit Tillamook Coast. Action teams were formed to address critical issues within each impact area.



TRAVEL OREGON

NORTH COAST – KEY METRICS

- Regional Summit drew over 100 attendees
- Five Impact Area Workshops held over four months
- 102 Workshop Participants
- Action Planning workshop
- Created Regional Network



CaseStudy

CASE STUDY INSIGHTS:

- The early investment in engagement allowed the local steering committee to build deep trusting connections with many stakeholders across the otherwise disconnected region. This helped ensure the outcome reflected community and industry desires and built a solid foundation for future work.
- Workshop notes, presentations, outreach materials and other resources can be viewed on the North Coast Destination Management Studio Resource page.

4.1 TOURISM STUDIO - PROGRAM DESIGN

Travel Oregon designed the North Coast Destination Management Studio based on previous experience developing a destination management process for the Mt. Hood & Columbia River Gorge region. It included extensive input from the regional steering committee to ensure a process that would meet the needs of this high-use visitor destination.



The Oregon Tourism Studio model is divided into three main phases:

- **Program design and outreach** – This phase included work with communities and the steering committee to ensure local issues are understood and reflected in the program design.
- **Workshops and Events** – This was the technical and action planning core of the program. These workshops ran over five months, and included Summit, Impact Area workshops and Action Planning.
- **Implementation** – Post Studio, the North Coast Tourism Management Network and action teams have been implementing regional priority projects.

This model allows a seamless transition from idea initiation to implementation. Throughout the process there is an ongoing blending of local knowledge and technical expertise, to help create practical and implementable action ideas.



CaseStudy

CASE STUDY INSIGHTS:

- The steering committee provided strong continuity through the process, by helping keep discussions focused on the regional needs and the vision. This leadership role was critical in keeping stakeholders engaged.
- The Travel Oregon Destination Development team provided a critical support role to help convene and organize the workshops and assemble the content expertise.

4.2 CREATING A 15-YEAR VISION FOR SUSTAINABLE TOURISM

The Community Tourism Vision was crafted by nearly 100 participants at the North Coast Tourism Summit in September of 2018 and refined by a core group of 15 members of the steering committee.

COMMUNITY TOURISM VISION 2030 - OREGON'S NORTH COAST (JAN. 16, 2019)

[NATURAL FEATURES & PRESERVATION] As part of Oregon's 363 miles of Pacific coastline open to the public, the North Coast -- from Astoria to Neskowin -- remains one of the world's most exceptional places. This is a place of unparalleled beauty with miles of beaches featuring picturesque rock formations and protected coves knitted together with trails weaving in and out from tall stands of lichen-laden forest. Rivers from the mighty Columbia to the small headland streams flow through these forests to the sea supporting diverse, interconnected habitats. Because we have protected our special places -- from our public lands to our conservation areas and marine reserves -- people are able to experience the power of nature firsthand. We have created a 'caring for the coast' ethic for locals and visitors resulting in respect and appreciation for our unique environment.

[OUTDOOR EXPERIENCE] Visitors from near and far come to restore themselves with infinite views of crashing ocean waves and pure relaxation with sand between their toes. Explorers can easily walk or bike the long sandy beaches or hike the Oregon Coast Trail which links together the landscape with iconic towns of the North Coast. Where foot trails are impassable, water taxis carry explorers from point A to B. Road cyclists can ride the Oregon Coast Bike Route from north to south and find what they need at any number of bike-friendly establishments. Mountain bikers now have an interest in the region with new networks of epic purpose-built trails in the coastal range. Kayakers, paddleboarders and other non-motorized boat enthusiasts have numerous put-in points with launch facilities built for people of all abilities. Recreational fishing continues to be a major activity, supporting a strong economic base for charters, guides, ports and marinas.

[RICH CULTURAL HERITAGE] From historic Astoria, the oldest U.S. settlement west of the Rockies, to tucked away Pacific City, each community on the North Coast is a jewel of its own with a singular and rich history. These fascinating histories come to life as an integral part of the experience of being on the North Coast. Locals know and share diverse stories of their heritage, commercial fishing and farming lifestyles, and Native American culture. Musicians, artists and fisher poets interpret and celebrate life on the North Coast. Visitors are made to feel a part of the community while they are here.

[CULINARY & AGRITOURISM] Locally grown and harvested food is a prominent part of the experience whether it's visiting the iconic Tillamook Creamery or relishing a platter of locally grown oysters at a local eatery. Visitors can get to know farmers, fishers, beverage makers, harvesters, producers and chefs through Oregon's North Coast Food Trail and they can venture out to do their own crabbing and clamming, fish for salmon in rivers and bays, purchase seafood directly from boats at the docks, and forage for salal berries, fiddleheads and mushrooms. Farm stays provide opportunities to bridge the rural/urban divide and provide education on how food is grown and raised. The North Coast is known for its breweries and distilleries, and visitors can learn the craft through experiential tours.

[BUSINESS + TRANSPORTATION] Together these rich experiences have helped connect communities, disperse visitor impacts and embolden local businesses. Transportation systems help move the visitor easily and seamlessly throughout the region helping to ease traffic congestion and encourage car-free travel experiences. Businesses across all sectors are thriving as they continue to meet local needs and benefit from the visitor economy. Locals experience a strong, year-round tourism industry that is in harmony with local values, culture, heritage and resources.

Local leaders have transformed the North Coast tourism industry by being proactive and managing the impacts from visitation and taking a strong regional collaborative approach. New voices are at the table as the regional conversation is strong and held together by a well-networked team of leaders. Significant investments have been made in building systems for sustainable management of local assets, waste streams and traffic flows. Priority projects to manage visitation are well-funded, helping to stay ahead of the visitation wave. Larger regional issues such as affordable housing, workforce housing and workforce retention are being addressed because of this strong, collaborative regional approach.



CaseStudy

CASE STUDY INSIGHTS:

- This all-encompassing vision reflects the deep passion people feel for the region and its people, ecosystems and heritage. It is intended to act as a guiding framework for investments and projects over the coming years.
- The creation of the vision was a powerful exercise in articulating the stakeholders' shared outcomes and desires.

4.3 ARTICULATING OUTCOMES - STATEMENT OF INTENT

The early work of the steering committee was defining their Statement of Intent, which reflected the overall outcomes they wanted to create throughout the Tourism Studio process. This was developed over a number of their initial meetings and was built from the concepts and philosophy embedded in sustainable tourism.

NORTH COAST TOURISM STUDIO – STATEMENT OF INTENT

Oregon's North Coast Tourism Studio steering committee is committed to developing the region as a premier example of a vibrant sustainable tourism economy. This explicitly includes maintaining and preserving quality of life for residents, as well as building local pride in the region's unique sense of place. Key to future sustainability is the continued need to enhance the visitor experience while understanding and managing the impacts of tourism on local environment, economies and communities.

The North Coast Tourism Studio steering committee believes the immediate focus must include strategies that aim to achieve systemic change and deliver innovative solutions aimed to:

- Preserve and enhance the natural and cultural resources of the region while offering high-quality experiences.
- Encourage stewardship best practices by visitors and the industry.
- Integrate cultural heritage into the visitor experience, authentically and respectfully.
- Reduce congestion during peak seasons and in high-use areas.
- Spread the seasonality of visitation.
- Spread the positive economic benefits of tourism throughout the region and maximize the integration with other key economic drivers including fisheries, forestry, agriculture and main street retail.
- Increase local understanding and appreciation of the value of tourism, and the contribution it makes to the local economy.
- Capitalize upon the array of visionary projects already underway to bolster momentum and ensure this region remains a unique destination.

The North Coast is clearly entering a new part of its destination lifecycle. Key to moving forward will be finding the right balance between the economic and social benefits of tourism, and the impacts that high visitation can have on traffic, local services, natural resources, and quality of life.

TRAVELOREGON.COM (PHOTOGRAPHER: JONI KABANA)



CaseStudy

CASE STUDY INSIGHTS:

- The Statement of Intent reflects the priority placed on a systemic approach – and looks to transform issues, rather than apply quick-fix solutions.
- This statement reflects the strong awareness that tourism is one part of this region's economy and has a significant impact on residents' quality of life.

4.4 TARGETING PRIORITIES – WORKSHOP TOPICS AND KEY IMPACT AREAS

Technical Workshops

The North Coast Destination Management Studio included a series of five technical workshops and networking events. These workshops represent the core of the program and guided participants on how to address issues of congestion, waste management, product development solutions for seasonality, collaborative visitor communication strategies, and complex collaboration through network development. The workshops were a mixture of expert presentations, group synthesis and local planning.

Igniting Tourism Action Teams

- **Improve and diversify visitor transportation options:** This action team is working to find ways to encourage visitors to use alternate transportation to and around the coast, and incentives and outreach are being developed to encourage it. This will help reduce peak season traffic, especially along Highway 101.
- **Enhance outdoor recreation experiences:** This action team will develop a Trailhead and Beachhead Ambassador pilot program at four locations on the North Coast. The goals of ambassadors are to provide information on area activities, reduce congestion at popular locations by suggesting alternative, nearby trails and beaches, and communicate safety and stewardship.
- **Encourage stewardship behavior:** Using the Ready, Set, GOrgel model deployed in the Columbia River Gorge, and the Haystack Rock Awareness Program in Cannon Beach, the goal of this action team is to educate and inform residents and visitors about diverse stewardship practices such as: how to enjoy and interact with native wildlife and vegetation, how to recreate safely in fragile coastal ecosystems, responsible waste disposal, etc. The action team will work with a facilitator to develop new messaging techniques to reach a wider audience.
- **Champion the value of tourism:** Clarifying and communicating the economic impact and value of tourism to North Coast communities is important at a time when residents are concerned about issues stemming from high visitation to the region. This action team will develop a tourism ambassador program for the region. Local proponents will engage with residents and visitors to highlight and champion the value of year-round, managed tourism and the positive impacts it has on each coastal community.
- **Align and enhance regional marketing:** The first priority for this action team is to develop a database of contacts for sharing information with media, groups, government and more. Once the “encourage stewardship behavior” messaging is developed, this action team will utilize and promote the content across all communications channels.

A KEY OUTCOME OF THE FINAL WORKSHOP WAS THE FORMATION OF THE NORTH COAST TOURISM MANAGEMENT NETWORK, WHICH THEN CARRIED FORWARD THE PRIORITIZATION AND ACTION PLANNING WORK THROUGH 2019.

NORTH COAST TOURISM STUDIO WORKSHOP and NETWORKING SCHEDULE 2018-19

Sept. 25	North Coast Tourism Summit Full Day Workshop
Sept. 25	North Coast Tourism Summit Evening Networking Event
Oct. 16	Destination Stewardship Think Tank Evening Networking Event
Oct. 17	Visitor Transportation for High-Use Destinations Full Day Workshop
Nov. 13	Adventure Travel & Outdoor Recreation Evening Networking Event
Nov. 14	Adventure Travel & Outdoor Recreation Full Day Workshop
Dec. 4	Cultural Heritage Tourism Evening Networking Event
Dec. 5	Cultural Heritage Tourism Full Day Workshop
Jan. 15	Visitor Communications & Destination Marketing Full Day Workshop
Jan. 16	Igniting Tourism Action Teams Full Day Workshop
Jan. 16	Community Kickoff Evening Celebration Event



CaseStudy

CASE STUDY INSIGHTS:

- The Oregon Tourism Studio model has a strong action orientation. The deliberate focus of delivering actionable outcomes helps ensure momentum is built.
- The relatively short duration and high intensity of the programming helps move people through the information absorption and brainstorming stage, and into an action mode.

5.0 MAJOR FOUNDATIONAL STEPS - BUILDING LONGEVITY AND MOMENTUM

At the end of the formal tourism studio programming, the steering committee morphed into the North Coast Tourism Management Network. This is a key step in building longevity and momentum of the efforts.

INITIAL FUNDING OF \$70,000 FOR THE TOURISM MANAGEMENT NETWORK WAS PROVIDED BY:

- Astoria-Warrenton Chamber of Commerce (\$5,000)
- City of Seaside Visitors Bureau (\$5,000)
- Cannon Beach Chamber of Commerce \$10,000)
- Visit Tillamook Coast (\$10,000)
- Oregon Coast Visitors Association (\$15,000)
- Travel Oregon (\$25,000)

5.1 FORMATION OF NORTH COAST TOURISM MANAGEMENT NETWORK

At the final North Coast Destination Management Studio workshop session, held in Astoria in January 2019, it was decided to launch the North Coast Tourism Management Network. It was formed by a leadership team that includes a network coordinator, core leaders, project team leaders, the original steering committee that worked with Travel Oregon, and active community participants.

Core team members include (as of June 2020):

- **Nan Devlin**, Tillamook Coast Visitors Association (TCVA) - Network coordinator
- **Arica Sears**, Oregon Coast Visitors Association (OCVA).
- **David Reid**, Astoria Warrenton Chamber of Commerce
- **Jeremy Strober**, Heartfelt Hospitality
- **Jim Paino**, Cannon Beach Chamber of Commerce

The network has focused on six main projects, split into two phases. Phase One projects were tackled in 2019, and included four initial projects:

- Creating awareness and incentives for using mass transit to and around the North Coast.
- Encouraging stewardship practices by locals, visitors and tourism organizations.
- Introduction of beach and trailhead ambassadors to help disperse crowds in peak months.
- Communication efforts to create understanding of how tourism benefits the economy and communities.

Phase Two projects were planned for 2020, including expanding agritourism and the North Coast Food Trail and developing a cultural heritage trail. COVID-19 lead to a reprioritization to pursue additional projects in culinary and agritourism with a focus on food systems and small business resiliency.



TYLER ROEMER



CaseStudy

CASE STUDY INSIGHTS:

- The formation of the North Coast Tourism Management Network is a pivotal step in ensuring the activities of the Oregon Tourism Studio continue, and that regional collaboration is able to continue.
- All of the projects implemented or planning by the Tourism Management Network support established sustainable tourism principles.

5.2 TOURISM STUDIO ACTION TEAMS – INITIAL SUCCESSES IN 2019

The North Coast Tourism Management Network set up action teams for each priority area as part of Phase 1. These action teams identified top priorities and action steps for 2019. A summary of these activities and highlights for 2019 includes:

1. IMPROVING AND DIVERSIFYING VISITOR TRANSPORTATION OPTIONS

A pilot program has been launched in Cannon Beach in cooperation with the Chamber of Commerce and local hotels. When a room was booked, the confirmation email included information on getting to the coast using one of two bus systems, and then how to get around while in Cannon Beach, including a trolley, tour bus and public transportation. Cannon Beach is an easy walking town, so a walking map was also available. The team is now working to expand the program/rack card distribution/hotel messaging up and down the North Coast including: Astoria-Warrenton Area Chamber of Commerce, Cannon Beach and hotel partners in Manzanita, Rockaway Beach and Pacific City.

2. ENCOURAGE STEWARDSHIP BEHAVIOR

The Oregon Coast Visitors Association (OCVA) is developing stewardship messaging for the entire Oregon Coast. Once OCVA has formed their plan, it will be adapted to specifics for the North Coast, including how messaging should be shared. (e.g. broadcast, signage, brochures, website).

3. ENHANCE OUTDOOR RECREATION EXPERIENCES

This action team is creating a Trail and Beach Ambassadors program. They held volunteer recruitments and two training sessions, although the number of volunteers did not meet expectations in 2019. There will be new recruitment activities in 2020. Team members were able to secure equipment needed (tents, tables, vests, etc.). The intent of the group is to provide stewardship information and to disperse visitors from overcrowded beaches and trails to other underused areas. They will be working closely with the stewardship messaging group.

4. CHAMPION THE VALUE OF TOURISM

After some changes, the lead person is now David Reid of Astoria Warrenton Chamber of Commerce, and the team includes representatives from Clatsop County Commissioners, Seaside City Council, Seaside Tourism, and Cannon Beach Chamber. As part of Tillamook Coast Visitors Association messaging, a story piece for Oregon Business magazine about the network's development and activities appeared in the February 2020 issue.



TRAVELOREGON.COM
(PHOTOGRAPHER: JONI KABANA)



CaseStudy

CASE STUDY INSIGHTS:

- The North Coast Tourism Management Network provides a critical role in coordinating the activities of the action teams and providing cross linkages.
- The progress during 2019 was promising, and was underpinned by robust regional brainstorming, planning and prioritization.

The North Coast Destination Management Studio created the opportunity for new conversations about tourism in the region. This has spurred new connections and thinking.

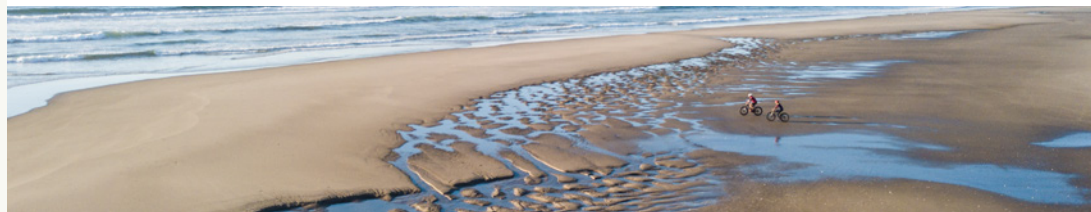
- Tourism Summit and workshops allowed stakeholders to wrestle with tough systemic issues in a new way.
- Community concerns about high-visitation were able to be expressed.
- Stakeholders and agencies were able to come together to explore innovative solutions and best practice from other regions.

5.3 CREATING A TOURISM FOCUS 'RESET' ON NORTH COAST

The North Coast Destination Management Studio, and the subsequent work by the North Coast Tourism Management Network, has begun a regional conversation about a reset in the tourism industry. It was abundantly clear that the existing trajectory of tourism visitation growth would create significant negative impact on the livability in the region. Issues of transportation congestion, workforce shortage, environmental degradation were discussed at length. This was also balanced by recognition of the significant economic impact and contribution that the tourism economy makes to the region.

Specific examples of how the North Coast Destination Management Studio had broader impact across the region include:

- **Tillamook County – Strategic Vision and Action Plan.** Subsequent to the studio, Tillamook County undertook a similar planning process, but focused more specifically on how to best allocate Transient Lodging Tax (TLT) funds within the scope of the required guidelines for expenditure on tourism related infrastructure. The planning process showed a strong county-wide appetite to focus on destination impact management, as opposed to growth. Additionally, it also validated a collaborative approach. This process is a significant reset in local priorities and the way various tools are applied to manage tourism impact. More information is available at <https://lab.future-iq.com/tillamook-tourism-investment-strategic-action-plan/>
- **Tillamook Coast Visitors Association (TCVA) - Strategic Action Plan for 2020-2022.** During middle and late 2019, TCVA undertook a strategic planning process to better align their priorities with the Tillamook County plan, and the work emerging from the North Coast Tourism Studio. This plan has delivered a fresh new approach to destination impact management and the role that local DMOs (Destination Market Organizations) can play in impact management. See the plan at <https://tillamookcoast.com/industry/>



TRAVEL OREGON



CaseStudy

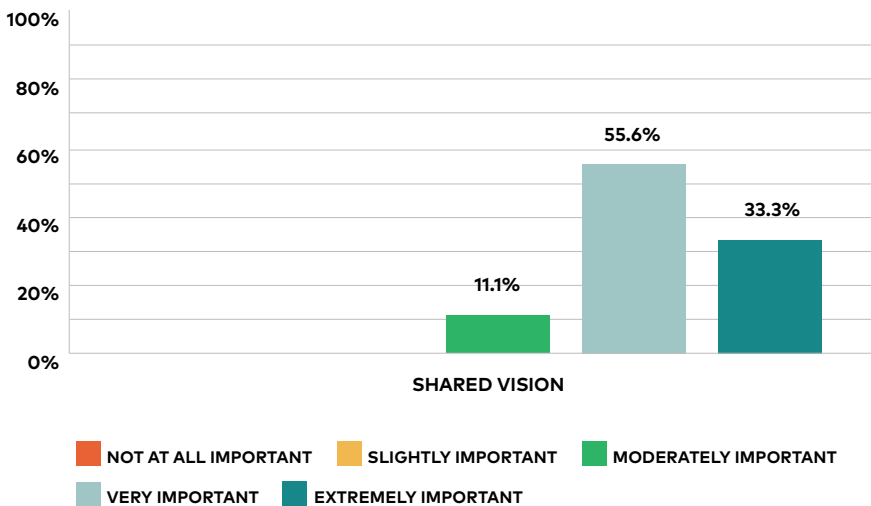
CASE STUDY INSIGHTS:

- New collaborations have been created as a result of the North Coast Destination Management Studio. In particular, the broader consortium of partners collaborating in the transportation action group offers great promise. The support and thought leadership being provided by the Oregon Department of Transportation is very encouraging.
- Oregon Coast Visitors Association (OCVA) staff and leadership OCVA has continued to have a strong leadership role in the implementation work – leading two action teams, sitting on the core team, and managing the alignment of work between the local, regional, and state level. As an organization, they have great leverage to help communicate new messaging about the coast, stewardship principles and visitor responsibilities.

6.1 INVESTING IN SHARED VISION AND COLLABORATION

A key element in the design of the Oregon Tourism Studios is considerable front-end time that was invested in working with the steering committee to create a Shared 15-year Vision and a Statement of Intent. This foundation work is critical work that brings the group together in a collaborative manner and coalesces their thinking on a common understanding of outcome and purpose.

HOW IMPORTANT IS IT TO HAVE A SHARED VISION FOR TOURISM IN THE REGION?



IMPORTANCE OF SHARED VISION

- During stakeholder surveys before the tourism summit in Sept 2018, 89% of respondents said that having a shared vision for tourism in the region was very or extremely important.
- 73% of the respondents also said that this shared vision was very or extremely important for when making decisions in their own work.



CaseStudy

CASE STUDY INSIGHTS:

- The shared vision and the Statement of Intent become powerful guiding statements and documents that create the context for work in the studio.
- The investment made in these early formative steps is a unique feature of Travel Oregon's Tourism Studio program. This aspirational stage tends to ignite people's commitment and passion, which leads to greater engagement and creativity. These studios are intended to have long-term and far reaching impacts, and the visioning stage helps build this perspective.

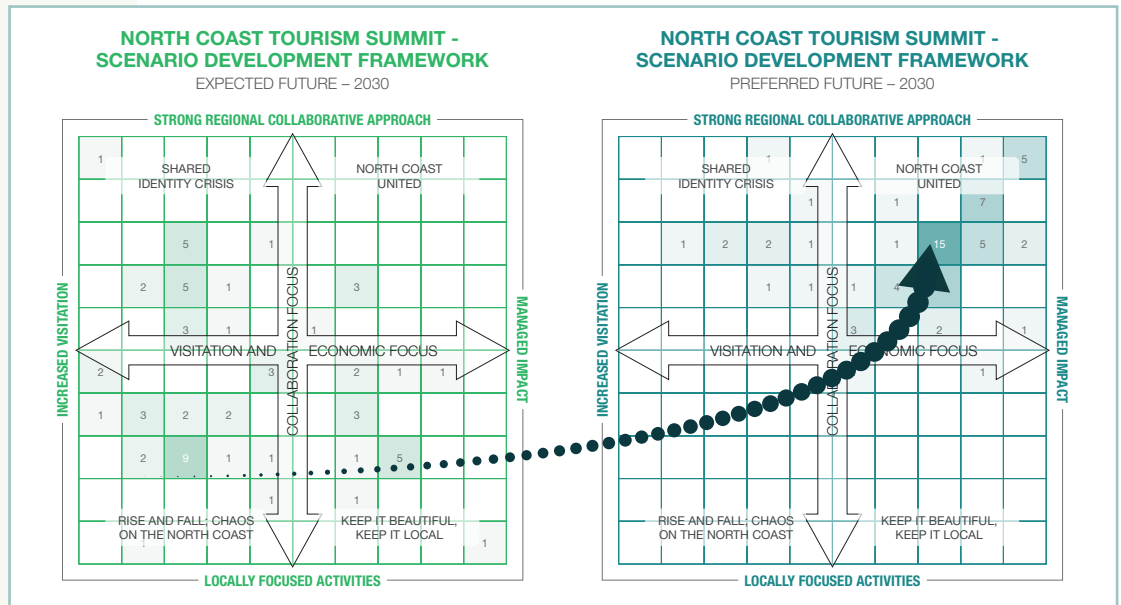
6.0 CASE STUDY ANALYSIS - KEY SUCCESS FACTORS

Part of the purpose of this case study analysis is to identify critical success factors. This will help the shared learning with other tourism regions facing similar challenges. The Destination Management Tourism Studio model has been developed by Travel Oregon over a number of years. It incorporates best practice and learnings from previous studios. The following sections explore key success factors that shaped the North Coast Destination Management Studio.



6.2 PIVOTING TO DESTINATION IMPACT MANAGEMENT

During the tourism summit held in September 2018, approximately 100 regional stakeholders undertook a scenario planning exercise. This exercise played out four different scenarios, built around different trajectories in visitation and economic focus and collaboration focus. The following diagram shows the responses to the notion of Expected Future (which is what will happen if we stay on the same trajectory), versus the Preferred Future (which is an aspirational or optimal future).



In this case, the results show a very strong desire for a pivot from a focus on increased visitation to managing impact. It also highlights a desire for a much stronger regionally collaborative approach. The end points on these axes were described as:

- **Strong regional collaborative approach** - Strong focus on building regional collaboration and connectivity up and down the region. The emphasis is on building interconnected regional scale product and visitor experiences, which spans across the various amenities and regional destination locations.
- **Managed impact** - Focus is primarily on optimizing the economic impact, with the intent of protecting and enhancing the natural and cultural assets. Sustainability and societal impacts are carefully managed by applying active destination management efforts. Investment is made to carefully moderate potential negative visitor impact and enhance positive impact.



CaseStudy

CASE STUDY INSIGHTS:

- The strong desire for a pivot from visitation growth to impact management was repeated throughout this tourism studio and was reflected in subsequent planning in Tillamook County.
- The recognition of this underlying sentiment, and the ability for the studio design to listen and flex, points to the ability to get to the issues that are most important to people. This pivot to an impact management focus is a critical inflection point in tourism planning on the North Coast.

TRAVELOREGON.COM
(PHOTOGRAPHER: JONI KABANA)

6.3 FOCUS FORMING ENDURING REGIONAL NETWORKS

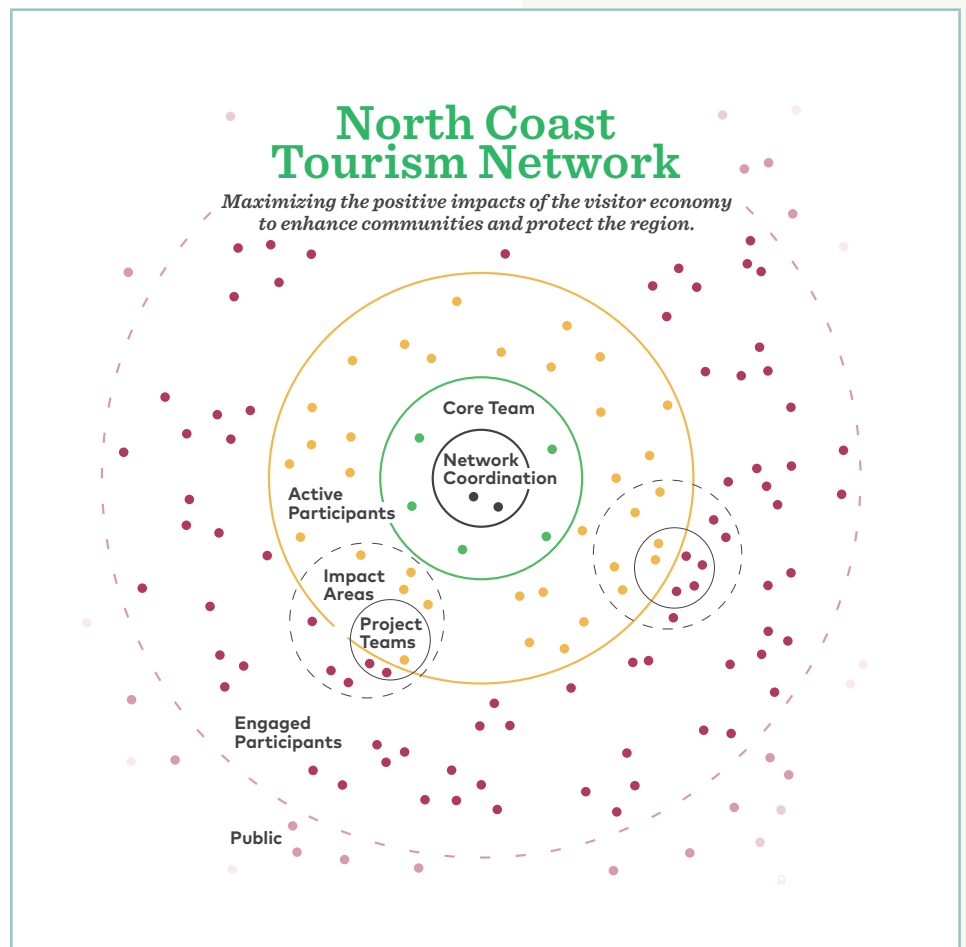
The North Coast Destination Management Studio also included a new element, that was introduced at the final action planning workshop in January 2019. This focused on building networks and collaborations. Workshop presenter David Sawyer, Converge, introduced the network forming concepts.

The group explored the five C's of collaborating to form a successful and effective network:

- Clarifying purpose
- Convening the right people
- Cultivating trust
- Coordinating existing activities
- Collaborating for systems impact

The network concept explored the relationship between core teams, projects teams and engaged participants and the broader public. This framework allowed the participants to then identify the importance of creating the North Coast Tourism Management Network.

This model is very well-suited to the organic nature of the North Coast region, and the fluid nature of partnerships and collaborations that are needed to respond to regional challenges. This organic nature is also very reflective of the systemic approach, which has defined this tourism studio work.



CaseStudy

CASE STUDY INSIGHTS:

- The introduction and training in the concept of fluid networks appeared to resonate well with the participants. This approach is very well suited for situations where there is not a strong organizational structure, such as in social movements or grassroots organizing processes, like the case on the North Coast.
- The network approach has been a very positive addition to the tourism studio model. The ability to identify and support a network coordinator was a vital step.

6.4 PROMOTION OF TOURISM STUDIO OUTCOMES

The Tourism Studio design intends to be catalytic in nature and helps destination communities come together to tackle grand challenges. However, the typical tourism studios rarely directly engage more than 300 people. Using media to create understanding within the broader community is a critical tool to build momentum and local support.

Examples of media articles and posts that reported on the North Coast Tourism Studio include:

- OCVA: North Coast Tourism Summit kicks off workshop series (08/2018)
- The Astorian: Tourism Studio Seeks Ways to Manage Future Growth (09/2018)
- Tillamook Headlight-Herald: Oregon's North Coast bands together to manage tourism impacts (05/2019)
- Tillamook Headlight-Herald: Adjusting the Course of Tourism for Long-Term Sustainability (06/2019)
- Tillamook Headlight-Herald: New Year, New Focus, New Strategy (01/2020)
- Oregon Business: Oregon's North Coast bands together to manage regional tourism impacts (02/2020)



Oregon's North Coast bands together to manage regional tourism impacts

Oregon's North Coast — Astoria at the north end, Neskowin at the south end — is one of the most visited regions in the state. Its close access to major urban areas makes it easy for most Oregonians and visitors to reach the beach in 90 minutes or less. That's just one of the reasons tourism has become one of the North Coast's major industries. According to the Dean Runyan economic impact report developed for Travel Oregon each year, visitors in 2018 spent \$580 million in Clatsop County, and \$240 million in Tillamook County (the 2019 report will be available in May).

These two rural counties are dotted with small towns. Farms, forests, waterways, beaches and public lands make up a majority of the landscape. Tourism growth also brings challenges: Highway 101, for example, becomes easily congested as the region's only north-south corridor. And the coast's small towns become overcrowded, especially in peak tourism month of July and August.



Travel Oregon's Destination Development team hosts regional tourism studios throughout the state.

"The North Coast is clearly entering a new part of its destination 'lifecycle,'" said Kristen Dahl, vice president of destination development for Travel Oregon. "Key to moving forward will be finding the right balance between the economic and social benefits of tourism, and the impacts that

high visitation can have on traffic, local services, natural resources and quality of life." Dahl and her team brought Travel Oregon's Destination Management Tourism Studio to the North Coast, engaging a local steering committee representing 24 organizations and agencies. The studio began



CaseStudy

CASE STUDY INSIGHTS:

- The North Coast Tourism Studio directly engaged approximately 200-250 people via surveys, workshops and summit. However, it has had a much larger impact on the regional thinking about tourism.
- The key messages of the tourism studio were able to be amplified via local media and articles, helping reach a much wider audience.

7.0 NEXT STEPS - 2020 AND BEYOND

The North Coast Tourism Management Network has planned for the rollout Phase 2 activities in 2020. The planned approach has been to:

- Extend Phase I projects based on lessons learned in 2019 and initial successes.
- Include two new action teams, focusing on:
 - Cultural heritage development and trail.
 - Further development of the North Coast Food Trail (expanded to Seaside in 2020, and next year will include Astoria).

The early outcomes and successes during and following the studio demonstrate the strength of the program design, and the commitment and innovative thinking of local leaders and stakeholders. The program has been effective, in part because it has created new partnerships and collaborations. This helps maximize impact and amplify outcomes.

It has also importantly laid down new thinking, and a shared focus on regional collaborations and destination impact management. This has already cascaded down to more local efforts and helped create a 'reset' in the industry approach. This creates a new foundation for decision making and investment in the industry.

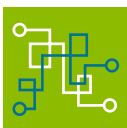
IMPACT OF COVID-19

The global pandemic associated with the Coronavirus (COVID-19) emerged at the end of this case study analysis. While the trajectory and ultimate impact is still playing out, it is clear the global tourism industry and economy will face significant disruption and challenges. The direct and immediate impact on the North Coast will be similar to other heavily tourism dependent economies, which will include steep declines in visitor numbers, loss of revenue, temporary business closure and increased unemployment. This will create disruption and hardship for significant sections of the community. Business support programs are still being developed and made available, and appear to offer immediate support, well suited to tourism businesses.

In the medium term, as restrictions on movement are lifted, this may see a return to moderate to heavy coastal visitation, especially this summer. The likely reduction of air travel will drive the recreation-oriented Portland community to nearby recreation and vacation locations, and the North Coast is in immediate proximity.

In the longer term, the underlying trends are likely to emerge, and the challenges of high visitation will return. The region is well placed to use this 'pause' moment to prepare for implementation of some of the 2020 projects and initiatives that have been planned.

TRAVEL OREGON



FutureInsight

FUTURE INSIGHTS - IMPACTS OF COVID19:

- The impact of the Coronavirus on the global tourism industry will be huge, essentially curtailing all international and domestic travel for months. History would suggest that travel will begin to recover once the pandemic passes.
- This pause offers the chance for the community leadership and stakeholders to consider the form of the future tourism industry, and how to achieve the optimal balance. The commitment to sustainable tourism principles will serve the region well in the coming years.

8.0 ACKNOWLEDGE- MENTS



The case analysis summarizes the process of the North Coast Destination Management Studio. It also explores successes and key lessons. One of the observations of the process and the regional efforts, is the deep commitment that local stakeholders have for their region, community and industry. Many local people invested exceptional time and effort into making the North Coast Destination Management Studio a success and ensuring that momentum flowed over to the North Coast Tourism Management Network. Key groups involved in the initial steering committee and then the Network, include:

NORTH COAST STEERING COMMITTEE (2018 - Current)

- Astoria-Warrenton Chamber of Commerce
- Cannery Pier Hotel + Spa
- Cannon Beach Chamber of Commerce
- City of Cannon Beach
- City of Seaside Visitor's Bureau
- Clatsop Economic Development Resources
- Community Supported Fishery
- Friends of Cape Falcon Marine Reserve
- Manzanita Visitor Center
- National Park Service
- North Coast Land Conservancy in Seaside
- Oregon Coast Visitors Association
- Oregon Department of Forestry
- Oregon Department of Transportation
- Oregon Parks and Recreation Department
- Pacific City + Nestucca Valley Chamber of Commerce
- Pelican Brewing
- Regional Solutions
- Sunset Empire Transportation District
- Tillamook Area Chamber of Commerce
- Tillamook County Transportation District
- Tillamook Estuaries Partnership
- Visit Tillamook Coast

NORTH COAST TOURISM MANAGEMENT NETWORK (2020)

- Nan Devlin, Tillamook Coast Visitors Association (TCVA) - Network Core Team Manager
- Arica Sears, Oregon Coast Visitors Association (OCVA)
- David Reid, Astoria Warrenton Chamber of Commerce
- Jeremy Strober, Heartfelt Hospitality
- Jim Paino, Cannon Beach Chamber of Commerce

TRAVELOREGON.COM (PHOTOGRAPHER: JONI KABANA)



This case study analysis draws from a number of published reports and documents. Additional information was provided by local stakeholders.

- North Coast Tourism Studio Baseline Assessment, Write to Know Consulting, August 2018
- North Coast Pre-Summit Stakeholder Survey, Travel Oregon and Future iQ, 2018
- North Coast Tourism Studio – Summit Report, Travel Oregon and Future iQ, 2018
- North Coast Tourism Studio Program Overview, Travel Oregon, 2018
- North Coast Tourism Studio Workshop Notes, Travel Oregon, 2018 and 2019 - visit [North Coast Destination Management Studio Resource page](#)
- Additional information and key reports are available for download on Travel Oregon's industry website for the North Coast Tourism Studio.

9.0 RESOURCES AND REFERENCES



10.0 STUDIO DESIGN AND PRESENTATION TEAM

The North Coast Destination Management Studio was a production of Travel Oregon's Destination Development department. The Oregon Tourism Studio program is designed to assist communities interested in sustainable tourism development. As a result of the program, Travel Oregon and community organizers hope to see an increase in high-value, authentic experiences for travelers across the state. This program contributes to community livability and a positive economic impact, strengthening Oregon's position as a premier destination in North America.

PROGRAM DESIGN AND DIRECTION – Kristin Dahl, Vice President of Destination Development, Travel Oregon

PROGRAM PRODUCTION – Kayla Dunn, Coordinator, Destination Development, Travel Oregon

PROGRAM FACILITATION AND TRAINING:

- Kristin Dahl, Vice President of Destination Development, Travel Oregon – North Coast Tourism Summit, Destination Stewardship Think Tank, Adventure Travel and Outdoor Recreation
- David Beurle, CEO, Future iQ – North Coast Tourism Summit, Visitor Transportation for High-Use Destinations
- Scott Bricker, Director of Product Development, Travel Oregon – Adventure Travel and Outdoor Recreation
- Judy Walden, President, Walden Mills Group – Cultural Heritage Tourism
- Kelda Schmidt, Global Marketing Coordinator, Travel Oregon – Visitor Communications and Destination Marketing
- Alexa Carey, Director of Community-Based Services, Travel Oregon – Igniting Tourism Action Teams
- David Sawyer, Network Design Specialist, Converge – Igniting Tourism Action Teams

GUEST SPEAKERS:

- Todd Davidson, CEO, Travel Oregon
- Nan Devlin, Tourism Director, Visit Tillamook Coast
- Marcus Hinz, Executive Director, Oregon Coast Visitors Association
- Andrew Grossmann, Destination Development Manager, Travel Oregon
- Stephen Hatfield, Outdoor Recreation Manager, Travel Oregon

POST-PROGRAM PROJECT IMPLEMENTATION AND NETWORK SUPPORT:

- Bri Matthews, Community-Based Services Manager, Travel Oregon
- Alexa Carey, Director of Community-Based Services, Travel Oregon



For more information on the North Coast Tourism Management Network, contact:

Arica Sears, *Destination Management Coordinator, Oregon Coast Visitors Association*, icom@thepeoplescoast.com

For information on Travel Oregon's Destination Development work, contact:

Alexa Carey, development@traveloregon.com



319 SW Washington St. Suite 700 Portland, Oregon 97204

traveloregon.com industry.traveloregon.com

