



# **2023 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY**

**SUMMARY OF RESULTS | OREGON COAST**

March 2023



This report summarizes findings from a 2023 survey of tourism industry stakeholders in Oregon. The survey sought feedback from stakeholders to provide guidance and perspective on priorities for future investments from Regional Destination Management Organizations. This report summarizes findings from respondents in Oregon Coast with additional statewide results provided for context.

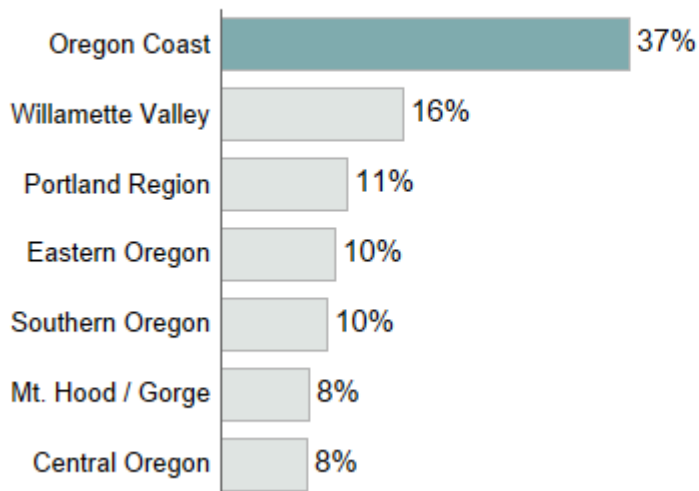
## OBJECTIVES

The 2023 Oregon Tourism Stakeholder Survey was designed to gather feedback from Oregon’s tourism industry professionals, employees, and stakeholders to provide feedback and direction for Travel Oregon and Regional Destination Management Organizations (RDMOs) in setting strategic directions and making funding and programmatic decision in marketing, grants, tourist-related infrastructure, visitor management, and more. The survey built on a framework of past stakeholder surveys conducted in 2018 and 2020. The survey was developed collaboratively by Travel Oregon, the seven RDMOs, and Driftline Consulting.

## DATA COLLECTION

The survey was conducted online and distributed in both English and Spanish between February 9-March 7, 2023, via direct email communications, a press release, industry newsletters and industry partners' distribution channels to an open URL hosted on Travel Oregon's industry website. The survey resulted in a total of 375 valid responses from the Oregon Coast and 1,018 responses overall. Among those who were from the Oregon Coast, 46% indicated that they were from the North Coast, followed by 31% from the Central Coast, and 23% from the South Coast. Sample sizes for individual questions vary. Results presented in this report are segmented by the region in which the respondent indicated that they live or work, and figures show results from the Oregon Coast compared to the statewide survey results (referred to as the “overall” in figures).

### Number of Respondents



**375**

Oregon Coast  
Responses

**1,018**

Overall Responses

# LIMITATIONS

The survey results should be viewed as an aggregation of relevant and thoughtful feedback from stakeholders. The applicability of findings to real life circumstances may depend on whether the feedback is from a broad enough (or representative) swath of stakeholders and whether individual RDMOs believe they have engaged with enough stakeholders to have a good gauge of the stakeholders’ priorities. An assessment of the industries represented, and the overall response numbers suggest that for all regions, a diverse and appropriately sized cross-section of stakeholders responded, adding confidence to the applicability of results. Because the survey was not conducted from a random sample, statistical tests have not been performed on the data.

# ADDITIONAL RESOURCES

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

The survey also resulted in an extensive number of open-ended responses. All open-ended responses may be accessed in the online dashboard.

Access the online dashboards by going to: [bit.ly/2023Stakeholder](https://bit.ly/2023Stakeholder)

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## KEY FINDINGS

### TOURISM DEVELOPMENT

- Almost half of respondents (47%) in the Oregon Coast said they were satisfied with the direction of tourism development in Oregon (selected 4 or 5 on a five-point scale), while 24% were unsatisfied (selected 1 or 2) and 29% were neutral.
- Most respondents in the Oregon Coast agreed or strongly agreed with statements related to what Oregon should do to promote tourism, including promote responsible visitor behavior (88% agreed or strongly disagreed), consider tourism a primary priority for economic development (78%), encourage tourism development in their community (78%), and advertise tourism/attract more visitors (66%).
- Respondents in the Oregon Coast region were most in agreement that they are comfortable collaborating with groups of varying sizes and backgrounds to make positive changes in the tourism industry (92% agreed or strongly agreed), and they are least in agreement that they are able to lobby legislators and policy makers to create positive change within the industry (34%).

### STRENGTHS AND AREAS FOR IMPROVEMENT

- The top three areas that respondents from the Oregon Coast considered as strengths in their community were outdoor recreation opportunities (79%), lodging (36%), and food and beverage (35%).
- The top three areas that the Oregon Coast respondents said their community needs to focus on to improve residents' and visitors' experiences were public infrastructure (e.g., bathroom, parking) (43%), workforce availability (40%), and accessibility for people with disabilities (22%).

### ADDRESSING RISKS TO TOURISM

- The top three challenges that respondents in the Oregon Coast region identified as high risks to tourism were lack of affordable housing (82%), overburdened public resources (43%), and homelessness (42%).
- The top two strategies that respondents in the Oregon Coast selected to best assist their business/organization or community if faced with the challenges listed in the previous question were resources to build tourism related infrastructure (65%) and grant and funding resources/opportunities (62%).

### WORKFORCE

- To develop, attract and retain the local workforce associated with the tourism industry, 59% of respondents in the Oregon Coast selected the strategy, "Hospitality & tourism career programs in local high schools and colleges", followed by "Short-term training options for upskilling of current and future employees" (57%).

### TOURISM PRIORITIES AND FOCUS AREAS

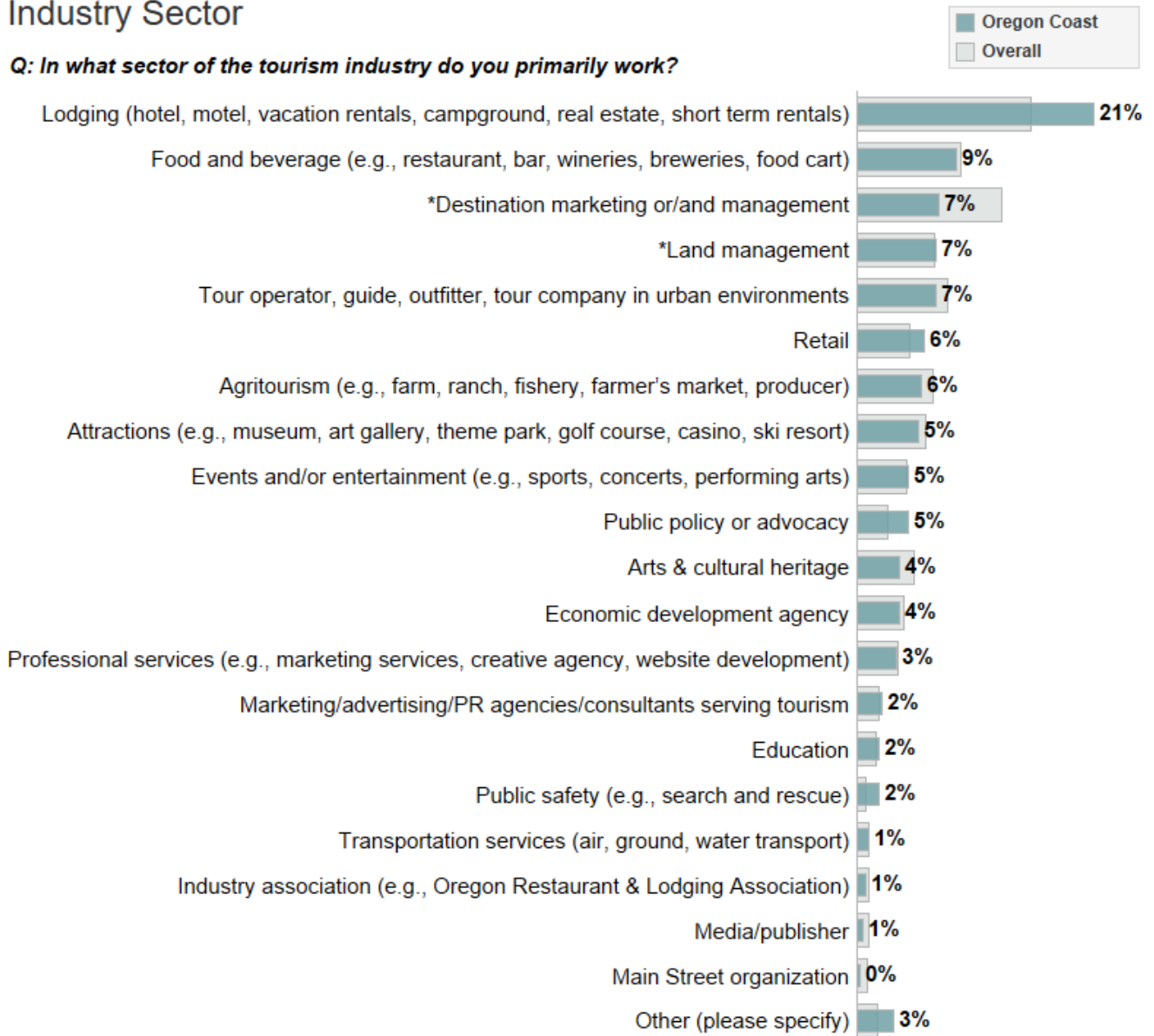
- Respondents were asked to identify the three areas that should be emphasized for tourism planning over the next 2-5 years. Sixty percent of Oregon Coast respondents selected tourism-related infrastructure, followed by grant and funding resources/opportunities (45%) and visitor management solutions (35%).

## RESPONDENT PROFILE

The survey received broad participation by tourism industry sector. Overall, the lodging sector accounted for 15% of total respondents, followed by destination marketing/management (13%), food and beverage (9%), and “Tour operator, guide, outfitter, tour company in urban environments” (8%). “Other” write-in responses, comprising 14% of the overall responses, were diverse and reflected the broad reach of the survey. Members from the Travel Oregon and Driftline Consulting teams collaborated to re-code the “Other” responses to fit into the provided response options, where applicable. Relative to the statewide overall results, respondents from the Oregon Coast were more likely to be employed in lodging (21% vs 15% of the overall), and they had a smaller share of respondents employed in destination marketing or management (7% vs 13% of the overall).

### Industry Sector

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



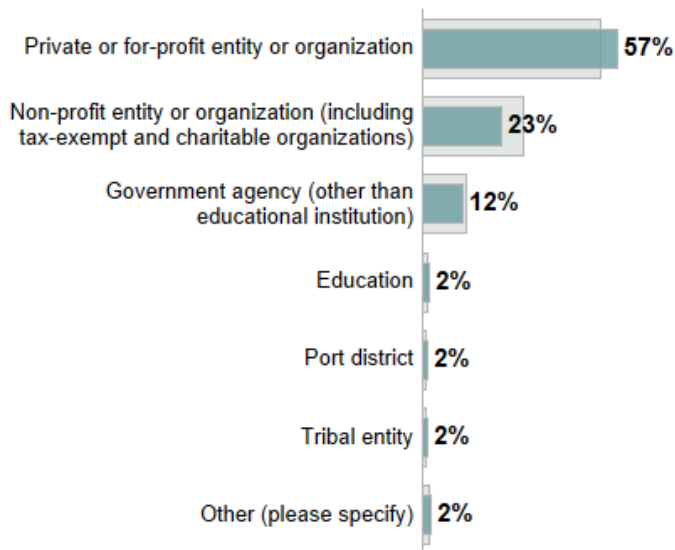
\*Answer option abbreviated in reporting.

Respondents were asked which entity type best describes their business or organization. In the Oregon Coast, the top two response options were private or for-profit entities/organizations (57% vs 52% of the overall) and non-profit entities/organizations (23% vs 30% of the overall).

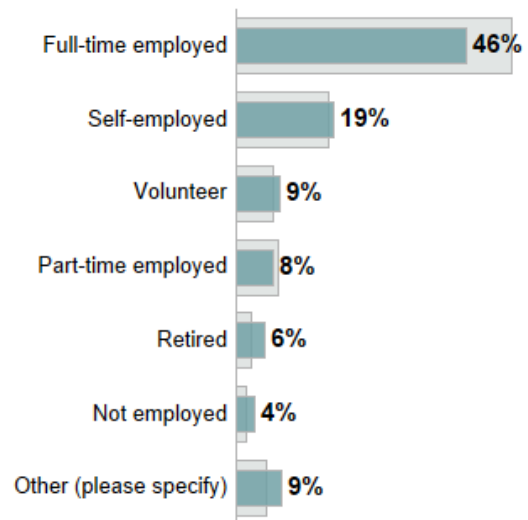
The top employment statuses for the region were full-time employed (46%), self-employed (19%), and volunteer (9%). Compared to the overall responses, the Oregon Coast region had a lower proportion of full-time employed individuals. The proportion of respondents who identified as self-employed, volunteers and part-time employed were relatively similar across the region and overall responses.

## Entity Type, & Employment Status

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



**Q: Which of the following best describes your current employment status in the tourism industry? (Select one)**



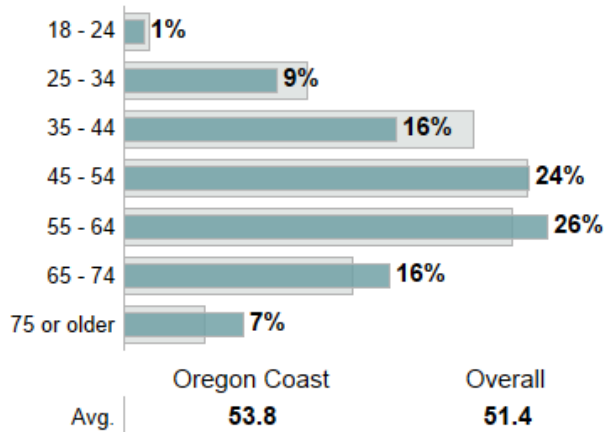
\*For both questions, where applicable, "Other" write-in responses were recoded to appropriate categories.

In the Oregon Coast, the majority of respondents fell into the 45-64 age range, with 24% aged 45-54 and 26% aged 55-64. The proportion of respondents aged 65 and older was greater in the Oregon Coast compared to the overall results. The average age of Oregon Coast respondents was slightly older at 53.8 years, compared to 51.4 years among the overall.

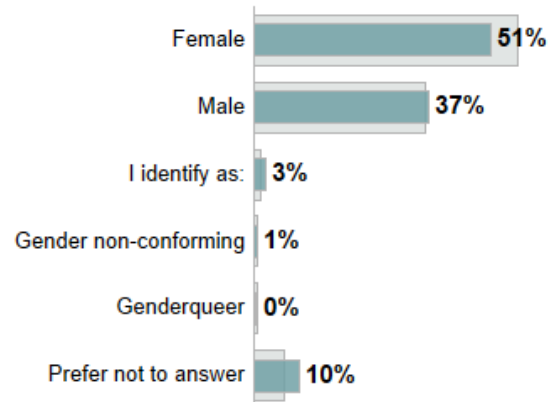
Statewide, 56% of respondents identified as female and 37% identified as male. Fewer Oregon Coast respondents (51%) identified as female.

## Age & Gender

**Q: Respondent Age**



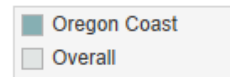
**Q: To which gender identity do you most identify? Please check all that apply.**



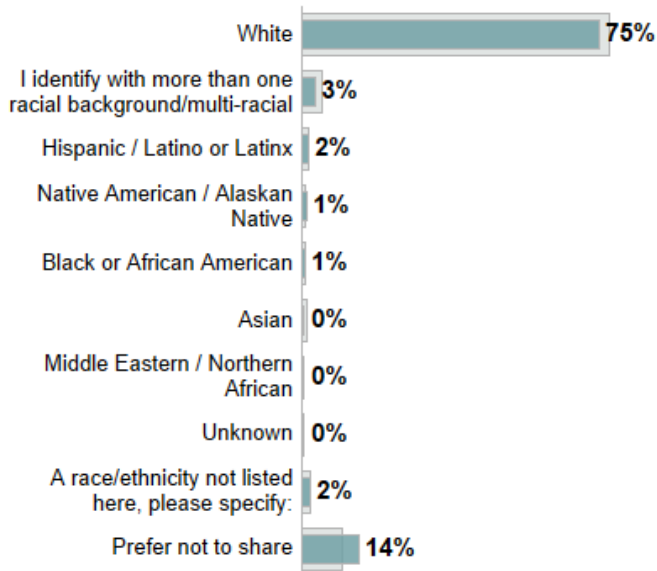
Statewide, just over three quarters of respondents (78%) described themselves as white, and 5% identified as multi-racial. Results from the Oregon Coast closely resemble the statewide overall.

Forty-four percent of survey respondents overall indicated that they had annual household incomes of \$75,000 or more. In the Oregon Coast region, the most common response options were \$50,000-74,999 (19%) and \$75,000-99,999 (18%). Compared to the overall, the Oregon Coast region had a lower percentage of respondents in the \$100,000-149,999 range (16% vs 20%), the \$150,000-199,999 range (7% vs 10%) and the under \$25,000 range (2% vs 4%).

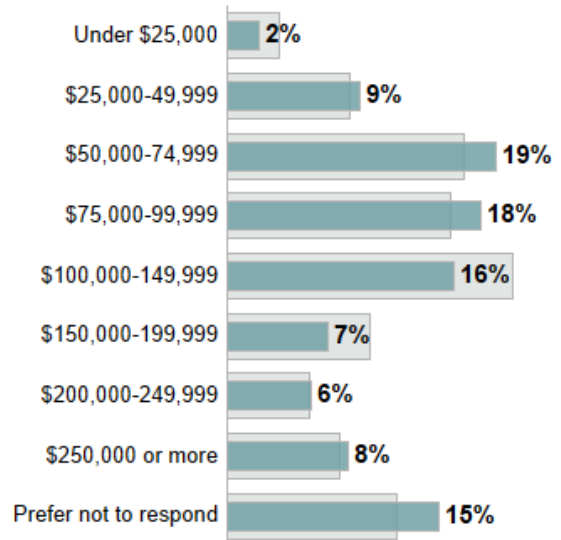
## Race & Household Income



**Q: Which of the following best describes you? (Please select one answer)**



**Q: Which of these categories best describes the total gross annual income of your household (before taxes)?**



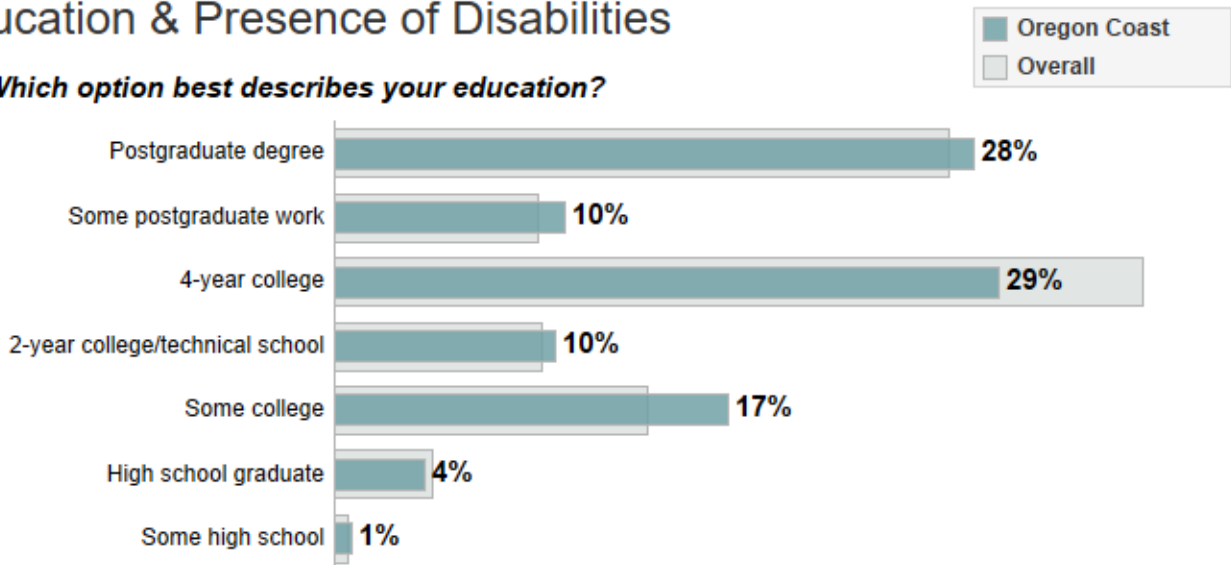


Oregon Coast respondents had fewer respondents who completed a 4-year college degree (29% vs 36% of the overall) and about the same proportion of respondents who completed some postgraduate work or a postgraduate degree.

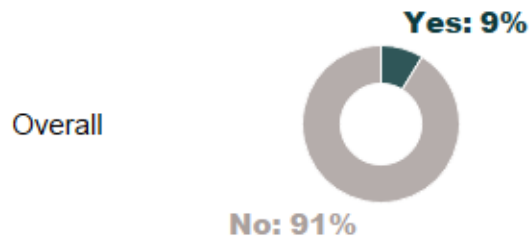
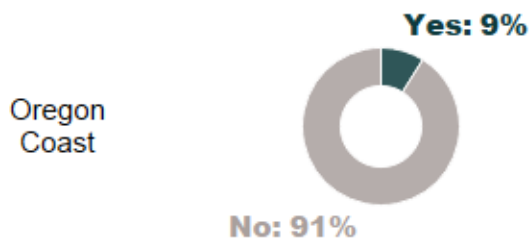
Nine percent of Oregon Coast respondents reported having a disability, compared to 9% among overall respondents.

## Education & Presence of Disabilities

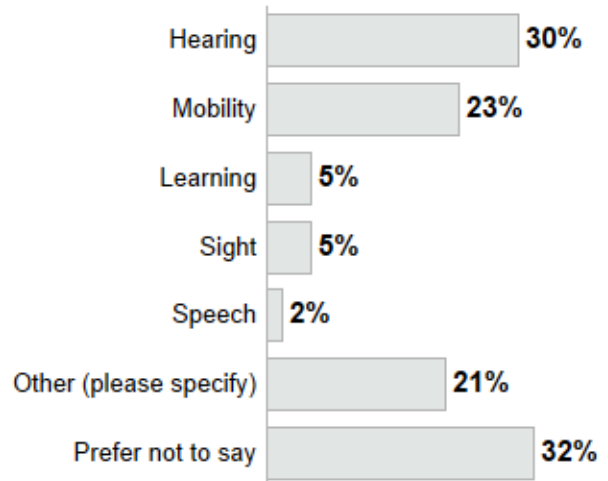
**Q: Which option best describes your education?**



**Q: Do you have a disability?** ■ Yes ■ No



**Q: [If yes] What are these disabilities? (Select all that apply)**



\*Overall only due to insufficient sample size within regions.

## TRAVEL OREGON'S 2023 – 2025 STRATEGIES

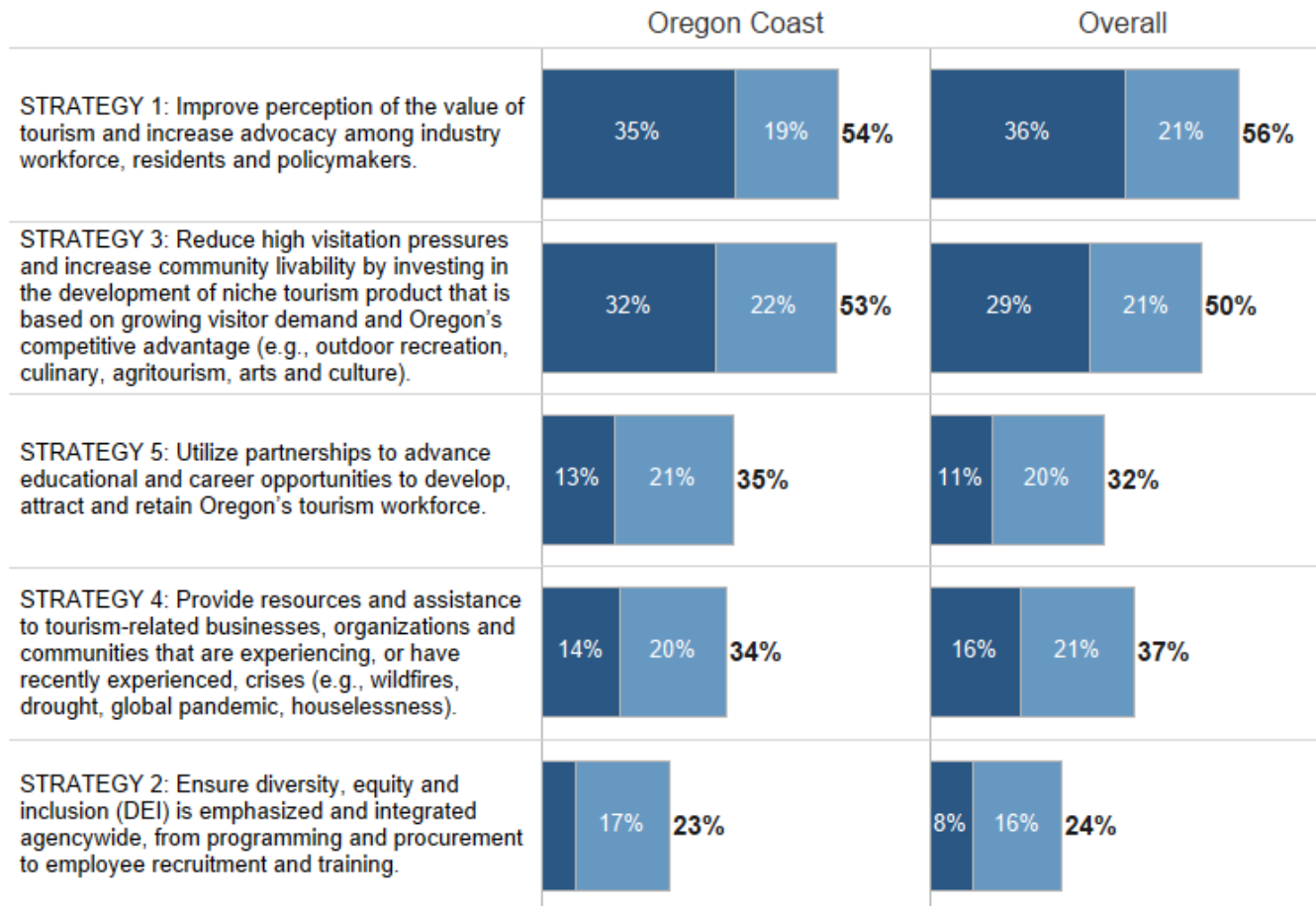
Travel Oregon has embarked on its 10-year strategic vision for tourism in the state, focusing on a destination stewardship approach that aims to maximize the economic potential of Oregon's economy while protecting the environment and promoting cultural diversity. A series of questions were identified to inform various strategies for the next biennium (2023 – 2025) to meet these goals.

Respondents were asked to rank five strategies in terms of how they would prioritize them for their community. Strategy 1, improving the perception of the value of tourism and increasing advocacy among industry workforce, residents and policymakers was ranked highest, with 35% of Oregon Coast respondents identifying it as their top priority and 54% identifying it among their top-two highest priorities. Strategy 3, reducing high visitation pressures and increasing community livability by investing in the development of a niche tourism product that is based on growing visitor demand and Oregon's competitive advantage, was identified as the second most-favored strategy, with 32% of Oregon Coast respondents identifying it as their top priority and 53% identifying it among their top-two highest priorities. Overall, these were also the top-two strategies identified among respondents, with Strategy 1 rated as the first or second priority among 56% of respondents, and Strategy 3 rated as the first or second priority among 50% of respondents.

# Strategies

**Q: Please read the following 5 strategies that are being prioritized by Travel Oregon, and rank them based on priority for your community, from 1=highest priority to 5=lowest priority.**

**Top 2 Priorities Displayed** ■ First Rank ■ Second Rank

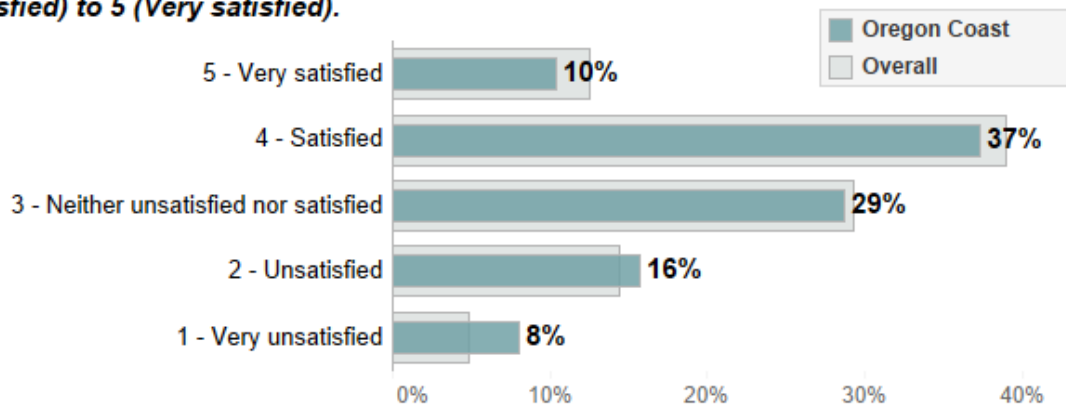


Respondents were also asked to characterize their satisfaction with the general direction of tourism development in Oregon. Note that “tourism development” refers to overall tourism development in Oregon. The following definition was provided to survey respondents: “Tourism development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets.”

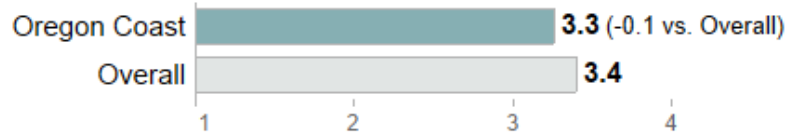
Overall, 52% of respondents were satisfied with the direction of tourism development in Oregon (selected 4 or 5 on a five-point scale), while 19% were unsatisfied (selected 1 or 2). Twenty-nine percent were neutral (selected 3, neither unsatisfied nor satisfied). Respondents in the Oregon Coast indicated they are slightly less satisfied (47%) with the direction of tourism development in Oregon; the average was 3.3 among Oregon Coast respondents, versus 3.4 overall.

## Satisfaction with Tourism Development in Oregon

**Q: Please rate your satisfaction with the direction of destination development in Oregon, from 1 (Very unsatisfied) to 5 (Very satisfied).**



**Average Rating 1 - 5**



Note that “Destination Development” refers to overall tourism development in Oregon. The following definition was provided to survey respondents: “Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets.”

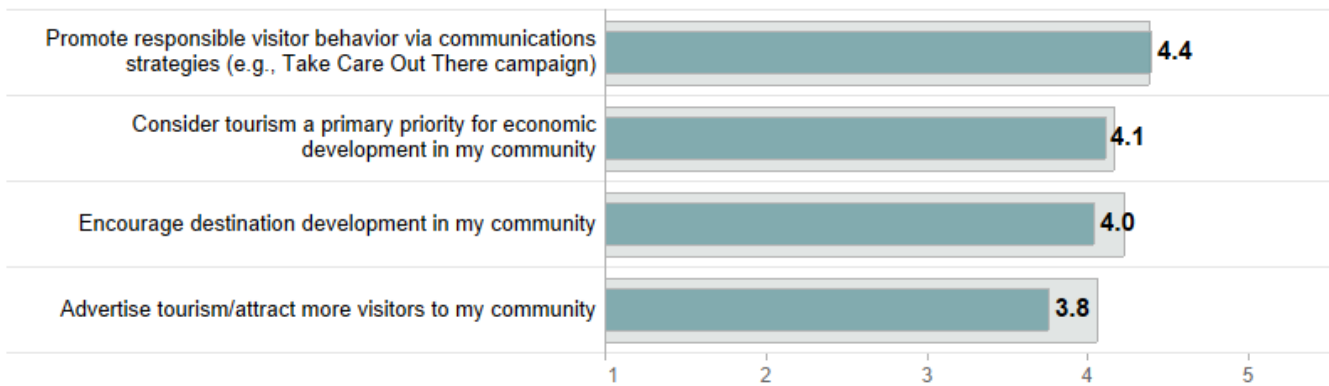
Both overall and in the Oregon Coast, most respondents agreed or strongly agreed with statements related to their support for tourism development, including promoting responsible visitor behavior, considering tourism as a primary priority for economic development, and encouraging tourism development in their community. In the Oregon Coast, fewer respondents agreed or strongly agreed that Oregon should advertise tourism/attract more visitors to their community compared to the overall (average of 3.8 in the Oregon Coast vs 4.1 overall).

Respondents were also asked to provide their level of agreement with four statements that were meant to measure their advocacy for tourism. Both overall and in the Oregon Coast, respondents were most in agreement that they are comfortable collaborating with groups of varying size and backgrounds to make positive changes in the tourism industry and least in agreement that they are able to lobby legislators and policy makers to create positive change within the industry. The patterns of support for the statements were similar between the overall and the Oregon Coast.

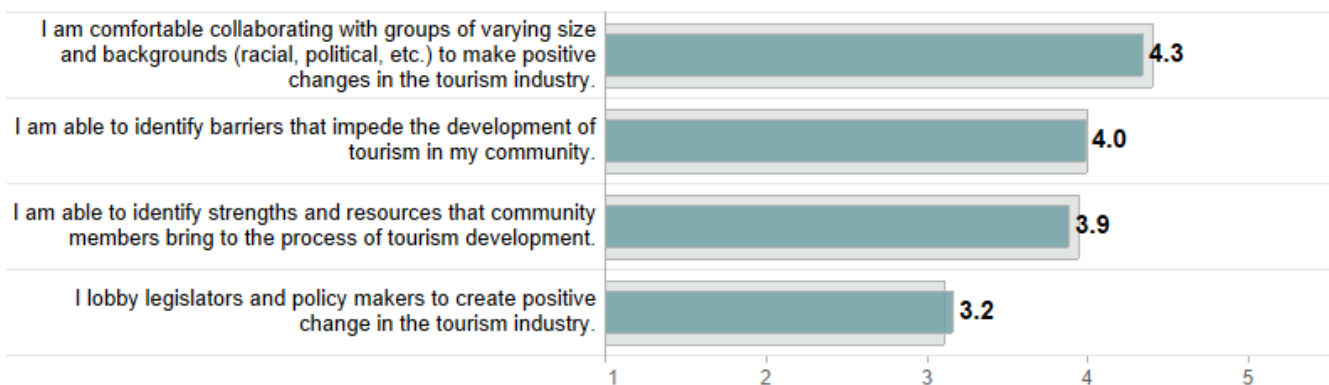
## Tourism Development in Oregon



**Q: Please rate your level of agreement with the statements below, from 1 (Strongly Disagree) to 5 (Strongly Agree). I believe Oregon should...**



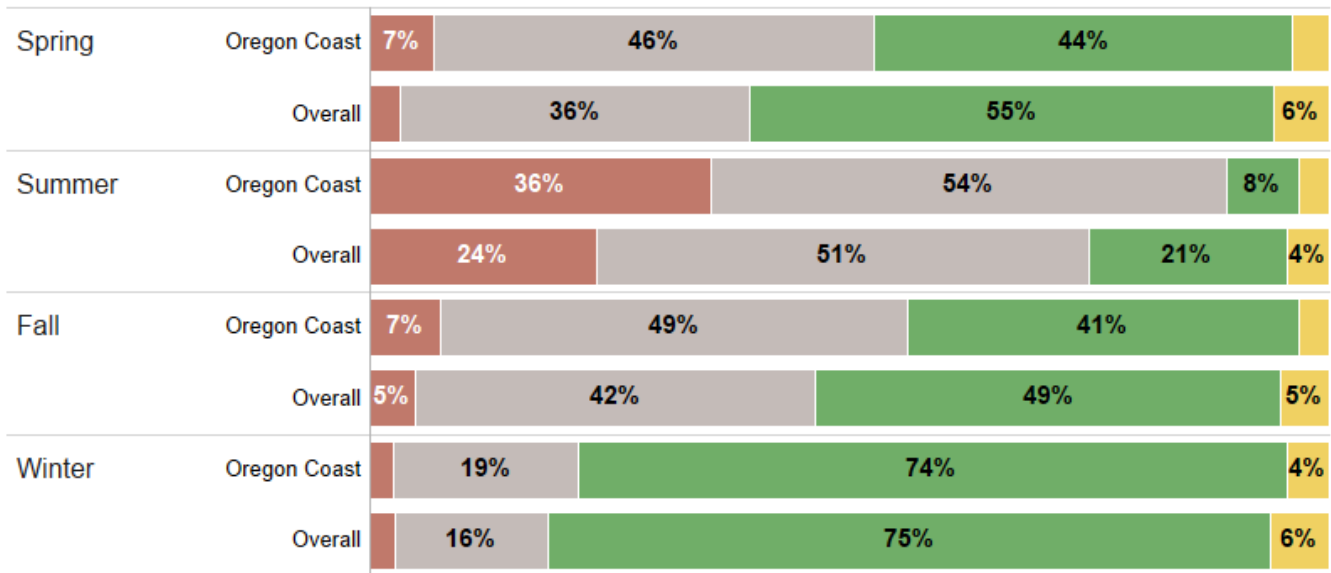
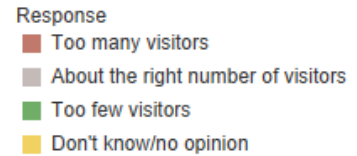
**Q: Please rate your level of agreement with the statements below, from 1 (Strongly Disagree) to 5 (Strongly Agree).**



Respondents were asked to characterize the number of visitors their community receives during each of the four seasons. Overall, 3% of respondents said there were too many visitors in the spring, followed by 24% in summer, 5% in fall and 3% in winter. More respondents in the Oregon Coast indicated that they thought there were too many visitors in the spring and summer seasons compared to the overall sample. Oregon Coast respondents were also less likely to say there were too few visitors in the spring, summer and fall seasons compared to the overall.

## Visitation Levels by Season

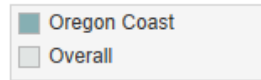
**Q: With respect to the number of visitors that your community receives each season, would you say there are:**



The following figure portrays areas that respondents felt are strengths in their community and areas they felt their community needs to focus on to improve residents' and/or visitors' experiences. The top three areas that respondents from the Oregon Coast considered as strengths in their community were outdoor recreation opportunities (79%), lodging (36%), and food and beverage (35%). In comparison to the overall responses, respondents in the Oregon Coast region were more likely to identify outdoor recreation opportunities and lodging as strengths and less likely to identify food and beverage and agritourism.

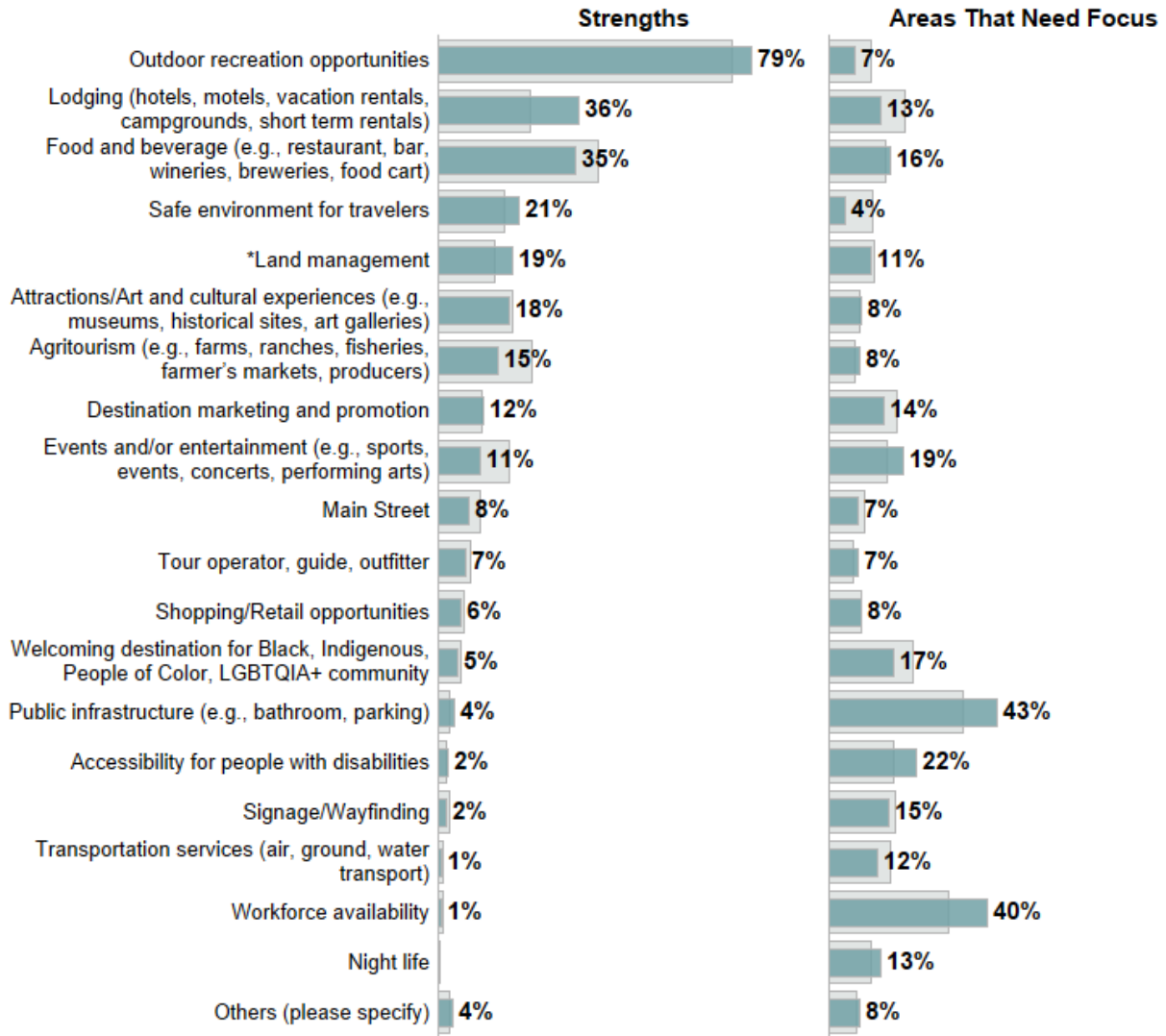
The top three areas that the Oregon Coast respondents said their community needs to focus on to improve residents' and visitors' experiences were public infrastructure (e.g., bathroom, parking) (43%), workforce availability (40%), and accessibility for people with disabilities (22%). It's worth noting that when looking at the results for the overall survey population, the top three priorities were public infrastructure (34%), followed by workforce availability (30%), and then being a welcoming destination for Black, Indigenous, People of Color, and the LGBTQIA+ community (21%).

# Strengths & Areas to Improve



**Q: Please identify up to three areas that you consider strengths in your community &**

**Q: Please identify up to three areas that your community needs to focus on to improve residents' and visitors' experiences:**



\*Answer option has been abbreviated

The survey asked respondents to rate the extent to which various challenges pose a risk to tourism in their communities. The top three challenges that respondents in the Oregon Coast region identified as high risks were lack of affordable housing (82%), overburdened public resources (43%), and houselessness (42%). The percentage of respondents who rated lack of affordable housing as a high risk was lower (65%) among the overall respondents, as was those who rated overburdened public resources (33%). Additionally, a high share of respondents, both overall and in the Oregon Coast, indicated that an economic downturn was a risk (81% responding high or medium risk in the Oregon Coast).

## Risks to Tourism in Your Community

**Q: Please rate the extent to which each challenge poses a risk to tourism in your community:**

Response  
■ High risk  
■ Medium risk  
■ Low risk

Challenge	Region	High risk	Medium risk	Low risk
Lack of affordable housing	Oregon Coast	82%	12%	5%
	Overall	65%	24%	10%
Overburdened public resources	Oregon Coast	43%	35%	22%
	Overall	33%	35%	32%
Houselessness	Oregon Coast	42%	36%	22%
	Overall	42%	33%	25%
Economic downturn	Oregon Coast	33%	48%	19%
	Overall	33%	50%	17%
Increasing negative resident sentiment towards visitors	Oregon Coast	33%	44%	23%
	Overall	25%	42%	33%
Increasing negative visitor perception	Oregon Coast	17%	43%	40%
	Overall	22%	40%	39%
Wildfires	Oregon Coast	13%	34%	52%
	Overall	33%	35%	32%
Global pandemic or other health concerns	Oregon Coast	13%	42%	45%
	Overall	15%	36%	49%
Flooding	Oregon Coast	13%	38%	50%
	Overall	7%	27%	66%
Drought	Oregon Coast	6%	21%	73%
	Overall	18%	29%	54%
Community violence and crime	Oregon Coast	13%	30%	65%
	Overall	13%	30%	57%
Other	Oregon Coast	43%	20%	37%
	Overall	45%	19%	35%

\*Categories sorted in descending order by the percent of Oregon Coast respondents selecting "High risk."

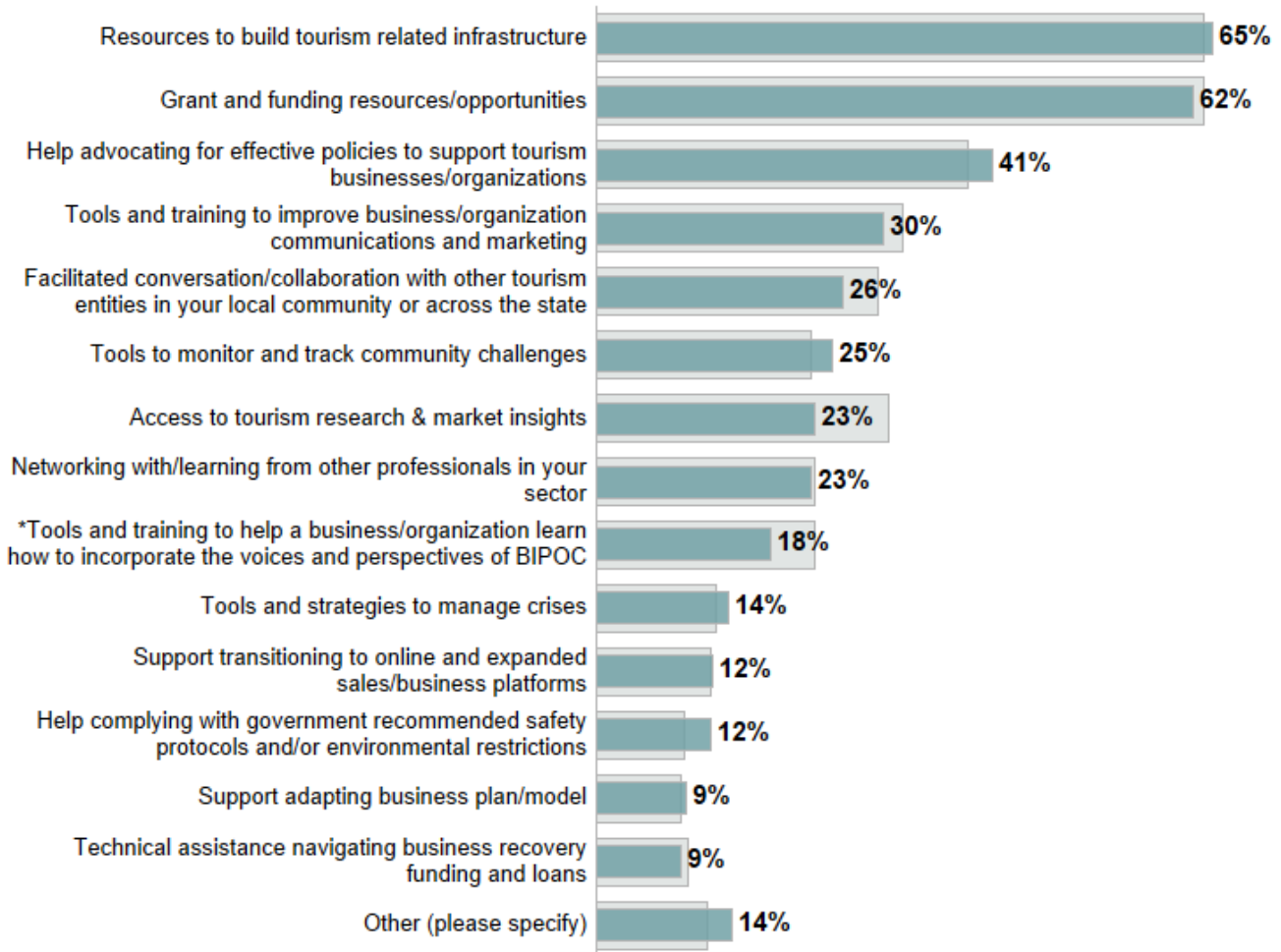


The survey asked respondents to identify the resources or programs that would best assist their business/organization or their community if faced with the challenges listed in the previous question. Two strategies emerged as likely to be particularly effective among respondents overall and those in the Oregon Coast: resources to build tourism related infrastructure (64% overall and 65% in the Oregon Coast) and grant and funding resources/opportunities (64% overall and 62% in the Oregon Coast). After that, respondents from the Oregon Coast and overall indicated that they would like programs to help advocate for effective policies to support tourism businesses/organizations.

## Resources & Programs (1 of 2)



**Q: Please select up to five resources or programs that would best assist your business/organization or community if faced with the challenges listed in the previous question.**



Respondents were then asked to specifically rank the programs or resources that they selected from the previous question from highest to lowest priority. Again, grant and funding resources/opportunities and resources to build tourism-related infrastructure emerged as clear top priorities with 48% and 47% of Oregon Coast respondents, respectively, identifying them among their top-two highest priorities.

## Resources & Programs (2 of 2)

**Q: Please rank the top resources or programs that would best assist your business/organization or community if faced with the challenges previously listed (1=the top resource or program).**

**Top 2 Priorities Displayed** ■ First Rank ■ Second Rank

	Oregon Coast			Overall		
Grant and funding resources/opportunities	30%	18%	<b>48%</b>	30%	20%	<b>50%</b>
Resources to build tourism related infrastructure	26%	21%	<b>47%</b>	25%	20%	<b>44%</b>
Help advocating for effective policies to support tourism businesses/organizations	8%	9%	<b>18%</b>	8%	11%	<b>18%</b>
Tools and training to improve business/organization communications and marketing	9%		<b>12%</b>	9%		<b>13%</b>
Tools to monitor and track community challenges	7%		<b>12%</b>	5%		<b>10%</b>
Access to tourism research & market insights	5%		<b>9%</b>	7%		<b>13%</b>
Help complying with government recommended safety protocols and/or environmental restrictions	5%		<b>7%</b>			<b>4%</b>
Facilitated conversation/collaboration with other tourism entities in your local community or across the state	5%		<b>7%</b>	5%		<b>9%</b>
Networking with/learning from other professionals in your sector			<b>6%</b>			<b>6%</b>
Tools and training to help a business/organization learn how to incorporate the voices and perspectives of BIPOC communities	5%		<b>6%</b>	6%		<b>9%</b>
Support transitioning to online and expanded sales/business platforms			<b>5%</b>			<b>3%</b>
Tools and strategies to manage crises			<b>4%</b>			<b>4%</b>
Support adapting business plan/model			<b>4%</b>			<b>3%</b>
Technical assistance navigating business recovery funding and loans			<b>3%</b>			<b>4%</b>
Other	10%		<b>13%</b>	8%		<b>11%</b>

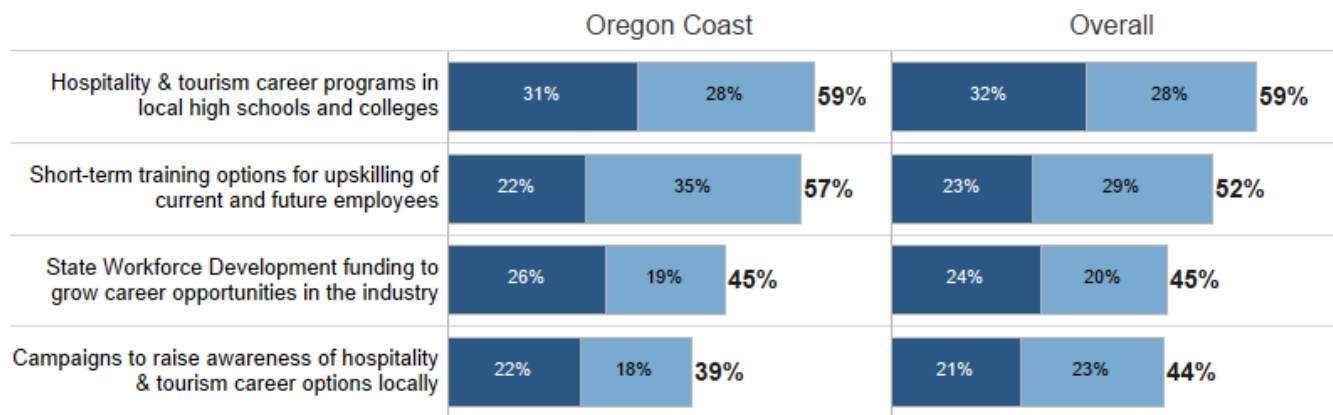
In order to rebuild the local workforce, the survey asked respondents to rank educational and career opportunities from highest to lowest priority in order to develop, attract and retain the local workforce to the industry. The following figure shows the share of respondents that rated each category among their top-two highest priorities. Overall, "Hospitality & tourism career programs in local high schools and colleges" was the most popular strategy (59% overall and in the Oregon Coast), followed by "Short-term training options for upskilling of current and future employees" (52% overall and 57% in the Oregon Coast).

## Developing the Local Workforce

**Q: As we seek to rebuild the local workforce, please rank (from 1=highest priority to 4=lowest priority) the following educational and career opportunities to develop, attract and retain the local workforce to our industry.**

**Top 2 Priorities Displayed**

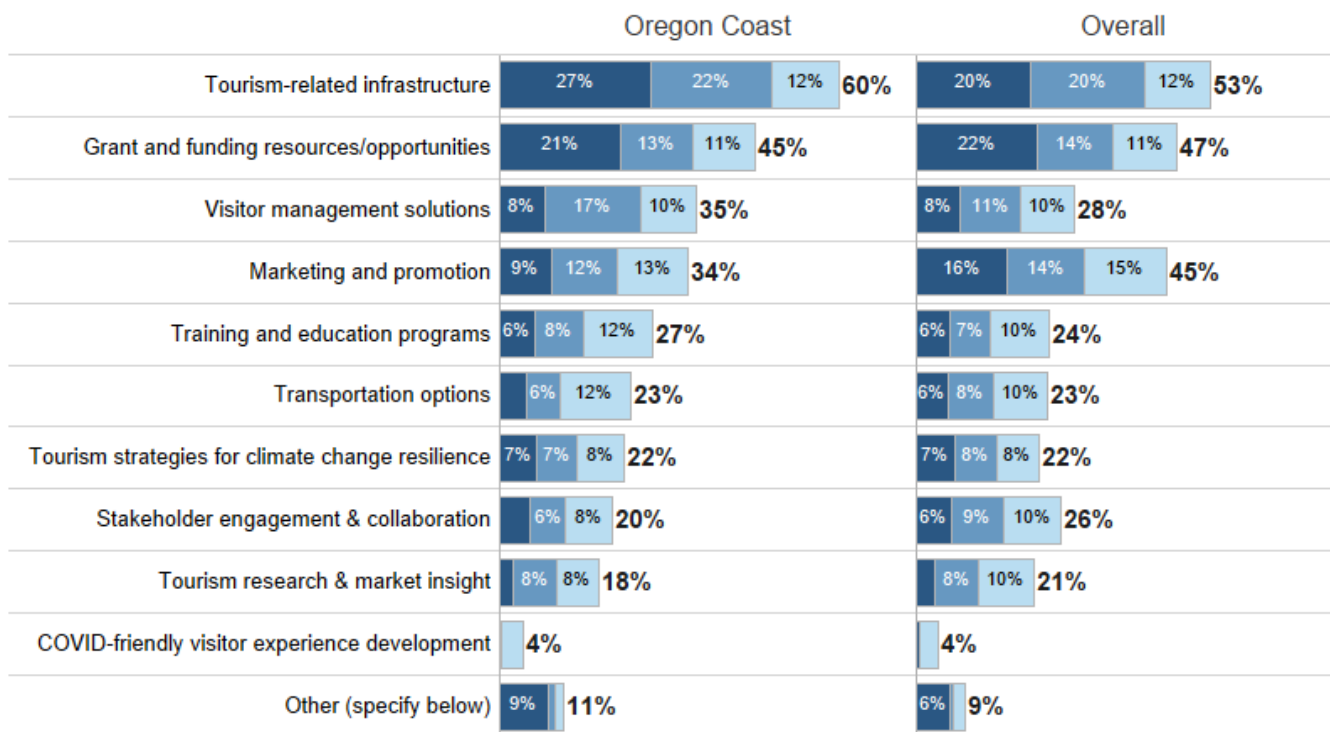
■ First Rank    ■ Second Rank



As in prior iterations of the Oregon Tourism Industry Stakeholder Survey, respondents were asked to identify the three areas that should be emphasized for tourism planning over the next 2-5 years. Overall, tourism-related infrastructure emerged as the top priority with 20% of respondents identifying it as their top priority and 53% identifying it among their three highest priorities. Grant and funding resources/opportunities was the second most-identified priority (47% among their top three), followed by marketing and promotion (45% among their top three). Relative to 2020, these are the same top focus areas; however, the rank order changed with marketing falling from first to third priority. Oregon Coast respondents also favored tourism-related infrastructure with 60% identifying it among their top-three priorities. This was followed by grant and funding resources/opportunities (45%) and visitor management solutions (35%).

## Tourism Priorities & Focus Areas

**Q: Please identify the three areas that you believe should be emphasized for tourism planning over the next 2 to 5 years in Oregon:** ■ First Rank ■ Second Rank ■ Third Rank



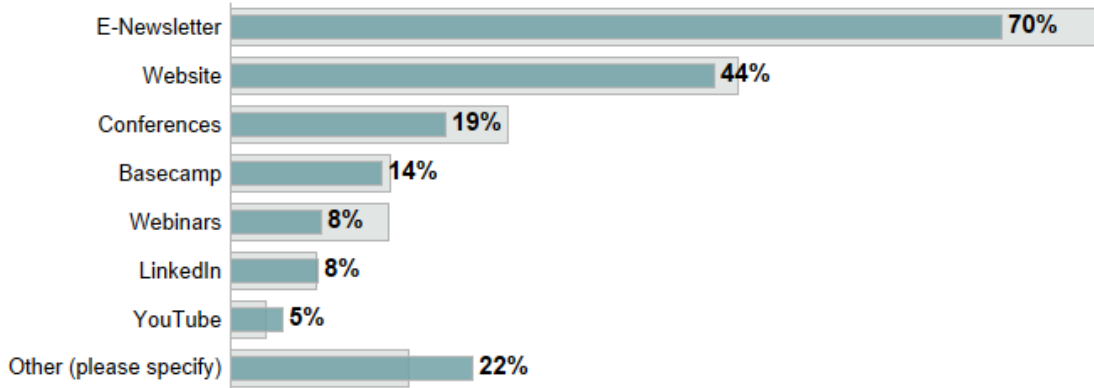
# INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Seventy percent of Oregon Coast respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter, followed by website (44%). By a large margin, e-newsletters are considered the best way for respondents to receive information.

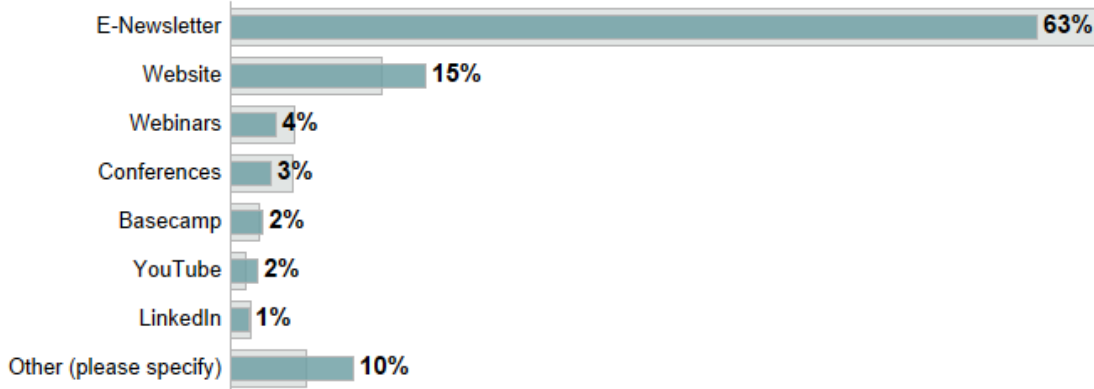
## Communications



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



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

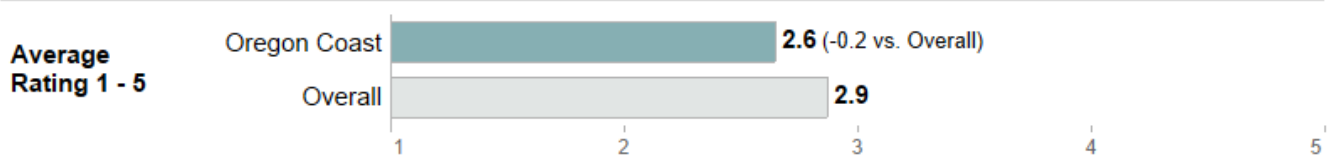
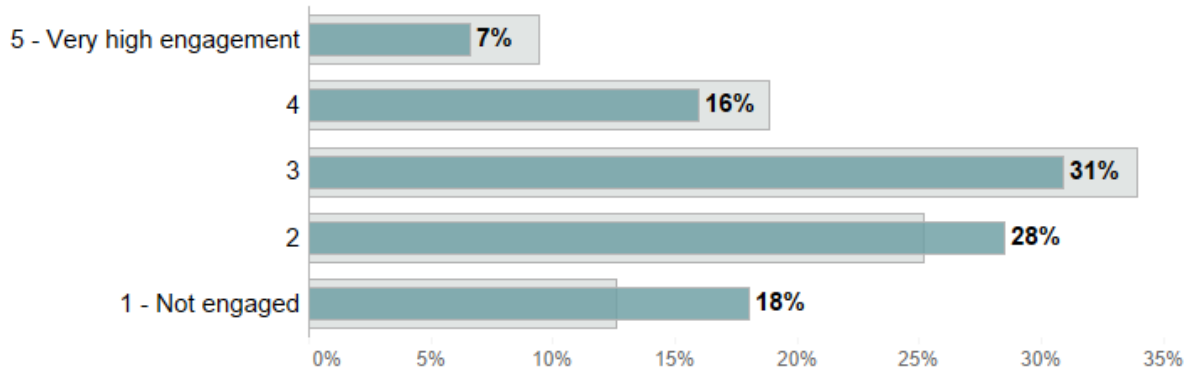


Respondents were asked to rate their engagement with Travel Oregon, from 1 (not engaged) to 5 (very high engagement). Twenty-three percent of respondents in the Oregon Coast rated this question a 4 or 5, compared to 28% in the overall sample. The average rating was lower among Oregon Coast respondents (2.6) compared to the overall average (2.9).

## Engagement with Travel Oregon

■ Oregon Coast  
 ■ Overall

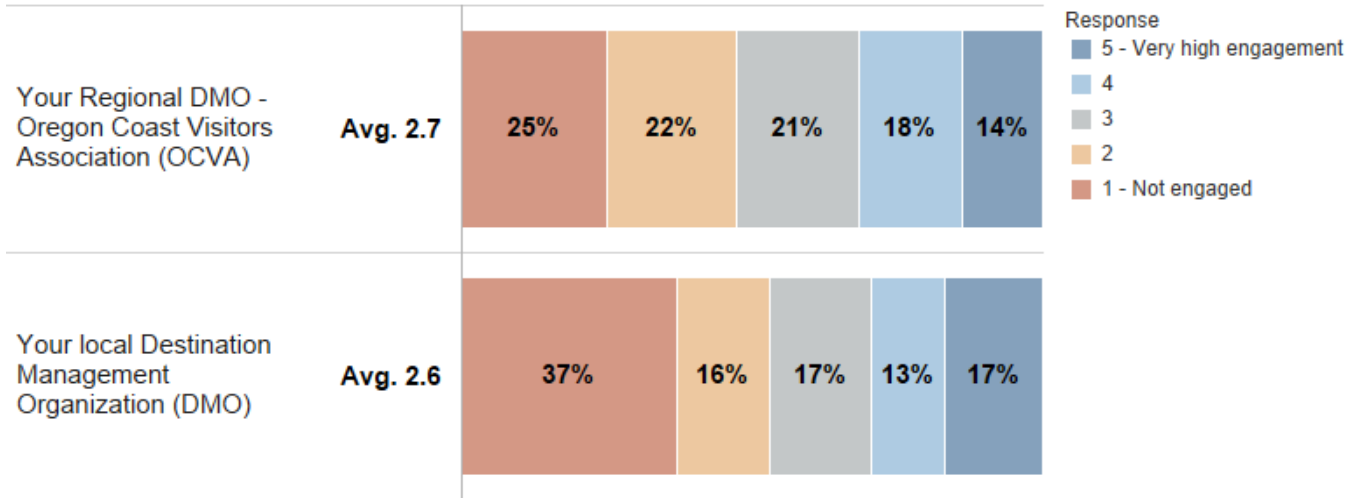
**Q: Please indicate your level of engagement with Travel Oregon, from 1 (Not engaged) to 5 (Very high engagement).**



## OREGON COAST QUESTIONS

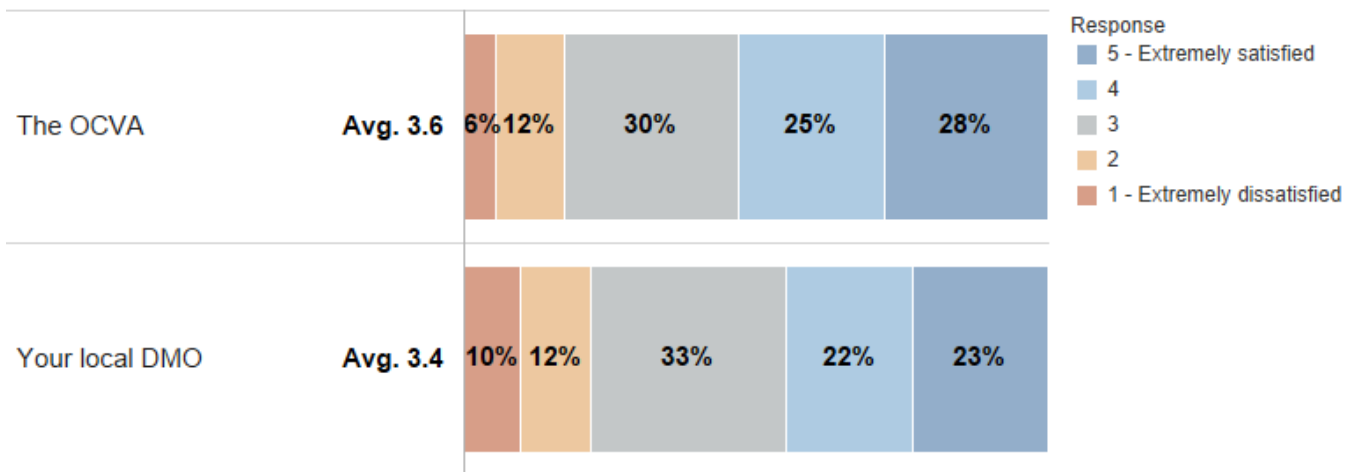
Each region had the opportunity to ask a series of custom questions of specific interest to their stakeholders, challenges, and opportunities. The findings from these custom questions are presented below. Responses to regional questions that were open-ended are presented in the open-ended response appendix.

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



\*Categories sorted in descending order by the average rating  
Source: 2023 Oregon Tourism Stakeholder Survey

**Q: Please rate your satisfaction with the services of the following Destination Management Organizations, from 1 (Extremely dissatisfied) to 5 (Extremely satisfied).**



\*Categories sorted in descending order by the average rating  
Source: 2023 Oregon Tourism Stakeholder Survey

## OPEN-ENDED RESPONSES

The survey resulted in an extensive number of open-ended responses. In addition to open-ended questions asked of all respondents, each region was given the opportunity to ask customized questions to respondents from their region. Responses to the following Oregon Coast questions follow:

- *If you would like, please explain your ratings for your engagement levels with your local and regional DMOs.*
- *If you would like, please explain any of your ratings for your satisfaction with your local or regional DMOs.*

Note that responses are presented in the respondents' own words with no editing, spelling, or punctuation changes. The opinions expressed are the respondents' own and do not reflect the opinions of Travel Oregon. All other open-ended responses are viewable in a spreadsheet format or in an online dashboard format with accompanying word clouds and bar charts.

<b>If you would like, please explain your ratings for your engagement levels with your local and regional DMOs.</b>
<b>As I work in Habitation, not Hospitality, I have not engaged in Tourism Organizations in the past.</b>
<b>As mentioned, our work is adjacent to tourism, but is important work as we restore and protect Oregon coast rivers and forests, which are vital to tourism and the coastal economy.</b>
<b>Board member, local chamber Board member, TCVA Board member OCVA</b>
<b>Can't get involved as much as I would like due to time constraints of running a business.</b>
<b>Can't think of any recent opportunities or invitations to engage.</b>
<b>Despite the fact that vacation rentals are 75% of TLT in Tillamook and Lincoln Counties, we get treated like crap and no support from Travel Oregon</b>
<b>Don't know who DMO is</b>
<b>excellent engagement</b>
<b>have no idea what these groups are.</b>
<b>Have not had positive responses from OCVA. Do not intend to renew membership this year but use funds in more productive areas.</b>
<b>i am a real estate agent. when i get a lead, i talk about all the positive aspects of moving to or buying investment in oregon. i do not associate with any government entity.</b>
<b>I am hearing disabledso that presents challanges!</b>
<b>I am in the process of rebuilding and developing my business and will fully engaged locally when I know which direction I am going. Getting close! I received a grant from OCVA last year and am developing a tourist related business.</b>
<b>I am my local DMO, so ranked very high</b>
<b>I am new in the business and just getting off the ground. Also there is no local DMO (only the Chamber of Commerce in Reedsport.) I will be building a hotel in the area and plan to get much more involved.</b>
<b>I am not sure what out local destination management is but we work closely with OCVA</b>
<b>I didn't even realize they existed.</b>



<b>I don't feel connected to either of these organizations. I wish there was more communication and notice about events, meetings, etc.</b>
<b>I don't know who they are....</b>
<b>I feel like they are good people with good ideas without the authority to be creative or take risks.</b>
<b>I have participated in a few workshops with OCVA, but it's been a few years. (Perhaps COVID has slowed these activities in recent years.)</b>
<b>I have spent many years involved in the local Chamber. I have made many attempts to belong and get involved with the Oregon Coast Visitors association only to be told by the director I was not needed. I have never felt welcome by OCVA actually feel like they prefer the Short Term rentals industry stay away.</b>
<b>I own a small business &amp; we are open 7 days. I cannot attend mid day meetings</b>
<b>I sometimes think our regional DMO doesn't understand the value of our property because we're older and maybe not as 'cool' as other properties. I will start bugging them more. Because our guests actually love it here. It's pretty amazing!</b>
<b>I speak with them every week. We collaborate often.</b>
<b>I spend over 30k a year advertising online. Why don't I spend money with OCVA? No outreach from OCVA. In business 10 years. I have heard of the organization. Not once have I met someone from it or educated about how they can help. Maybe more outreach? I think lately I have seen more outreach and that's why I am back and interested.</b>
<b>I think North Coast DMOs and OCVA understand the importance of dynamic and proactive tourism management strategies. They also are receptive and proactive to the idea that climate is an important part of tourism planning.</b>
<b>I wasn't aware of them.</b>
<b>I work alongside OCVA on Blue Economy-related initiatives, like their Ocean Cluster Initiative with the Yaquina Lab.</b>
<b>I work at a nonprofit that does economic development for all of Lincoln County, so we collaborate with OCVA and all our local chambers on various projects often.</b>
<b>I would like to be more engaged.</b>
<b>I'm the President of the Florence Senior and Activity Center and am not engaged in tourism at this time.</b>
<b>i'm not certain it completely ties into my work.</b>
<b>I'm very highly engaged with my local DMO because I am employed there. I'm slightly less engaged with OCVA because of the work we do with/for them.</b>
<b>Information is not shared on a regular basis .</b>
<b>Local organization contracts with and works directly with our community</b>
<b>Never heard of these places. They need to get the word out STR owners can really help with tourism</b>
<b>No one has reached out with information regarding these organizations.</b>
<b>OCVA has been engaged in the Oregon Coast Trail Action Planning Process . . . and so have !!</b>
<b>OCVA team is VERY collaborative and a great resource for brainstorming. They also promote our new initiatives, and assist with resources.</b>
<b>Only lived here two years</b>

<b>Our city is not a good DMO. They keep a much higher amount of Transient Tax than what is mandated by the state because they were Grandfathered in. They also dissolved the volunteer Advisory Committee for how the few available dollars are spent promoting tourism.</b>
<b>Our local DMO (TCVA) does a great job marketing and providing resources, but as a community partner is often viewed as territorial and not very inclusive. Our RDMO is engaging, inclusive, transparent and has earned the trust of a wide and diverse range of stakeholders. The fact that their team is dispersed along whole coast is helpful, convenient, efficient.</b>
<b>Our manager follows relevant news and distributes information</b>
<b>Our RDMO operates in a silo. Projects started but no reporting, follow up or accomplishment. We suddenly get big announcements without any warning or involvement, then no follow up</b>
<b>Service equity.</b>
<b>Still learning what the DMO's and Travel Oregon have to offer.</b>
<b>The Astoria Warrenton Area Chamber of Commerce is incredible and I direct my time and energy there.</b>
<b>The coast seems to be too involved in environmental issues to do any real good for the people who need it.</b>
<b>These are not very related to the work that I do...</b>
<b>They are a frequent granting agency and many of their employees are involved in other cultural and tourism-related organizations my museum partners with.</b>
<b>They are mostly invisible</b>
<b>Time commitments</b>
<b>To the best of my knowledge, my DMO does not have a newsletter.</b>
<b>Too busy working</b>
<b>Tourism is not ethical or sustainable, so it should not exist moving forward.</b>
<b>Travel curry is more focused on making videos or dumping money into the bankruptcy fairgrounds than they are in establishing or developing the future</b>
<b>Unaware of a local DMO, closest appears to be in Tillamook</b>
<b>Unaware of their existence. Example - today 3/2/23 I received this survey request and it is due in 4 days. First time hearing of this. Not publicized well at all.</b>
<b>Unaware of what they have to offer to owners of STRs</b>
<b>Very little time due to staff shortage</b>
<b>Wasn't aware these organizations existed.</b>
<b>we don't have a viable local DMO in Brookings. Travel Curry Coast is trying, but they're new, and their focus is on the county as a whole rather than on the individual communities...which is as it should be.</b>
<b>we have had a lot of managerial turnover in the past decade, with some managers very committed and others not at all, which makes it difficult to remain engaged</b>
<b>We appreciate the sophisticated and abundant support for our educational artwork.</b>
<b>We are still a fairly young DMO, and COVID slowed our entry into the space. So essentially, we are still being introduced to many of our industry colleagues, and we are allowing ourselves to organically begin to engage more with our local and regional DMOs.</b>
<b>We are very far south on Oregon's southcoast. Hard to make personal connections.</b>

We fully intend to become very highly engaged this year. There's been a lot of reasons we haven't been able to interact as much as we'd like to. Looking to spring!

We have the best intentions to be more engaged, but admit we are very busy operating our business. That said, when contacted, we are always eager to participate!

We would love to have contact information for those on the Coast that could help with our growth in this area.

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

Both local DMO and OCVA are very responsive, receptive to ideas, and willing to work with us. I am very impressed with OCVA's commitment to elevating different voices in Oregon, its commitment to addressing DEI challenges, and to its attention to environmental issues including habitat degradation and climate change.

Both organizations focus too much on marketing rather than assisting to enhance the product and ensure repeat business and demand.

Come to Tillamook, get an ice cream cone, then leave. Very little else here to retain tourist dollars.

Everyone is doing a good job in my opinion. Would just like more exposure for our niche market especially from Travel Oregon. We feel we are often overlooked.

Have no idea who our local DMO is, if anyone.

I did attend a conference and felt the OCVA was pretty active. There really isn't a local DMO, just the chamber, and it isn't staffed.

I don't even know what these acronyms are, or what they are supposed to do. They are focused on their pet projects in my opinion

I don't even know who these people would be.

I don't see them doing any outreach or marketing until last season.

I have very little contact with anyone that explains what is happening or available.

I haven't really heard of these before

I realize that the coast is 363 miles but the South Coast is extremely under marketed from OCVA. not to mention when TO goes to Tradeshows, you don't include the south coast on any of your itineraries.

I work with many so not really able to answer

I wouldn't want their jobs. There's so much anger from hurting businesses or only enthusiastic input from recent business purchasers

I'm had no idea these organisations existed

Let's communicate more!

Local DMO, (Explore Lincoln City) has outsourced marketing strategy to Portland-based marketing firm with little connection to the coast. Very unresponsive.

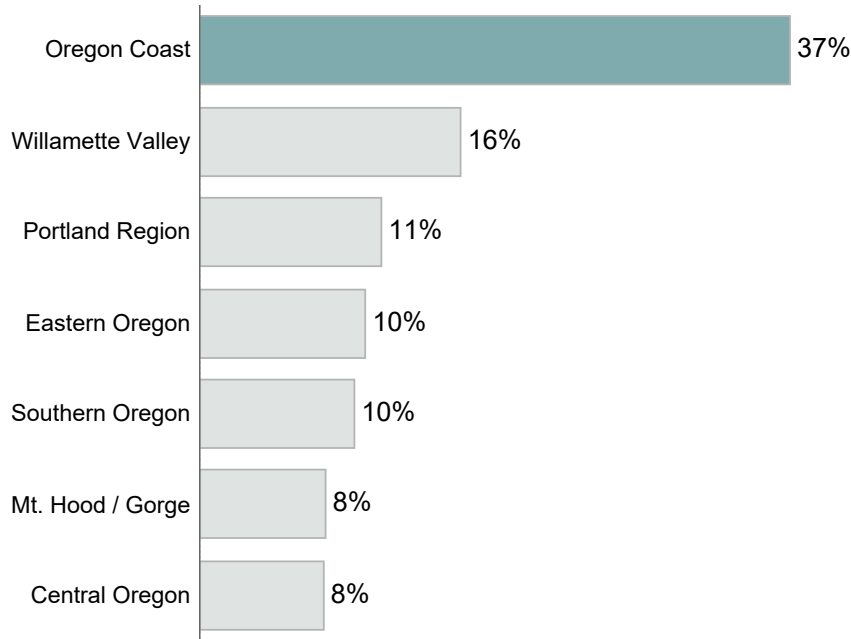
Look into it, before it becomes a public disaster

My "slightly-less-than-5" rating for my DMO isn't due to a lack of satisfaction. It has everything to do with where we can go and the work it will take to get there. The work and education is never done, so it's impossible to reach a "5." The 5 for OCVA is due to be

extremely satisfied with the work and help we've received since I started at the Chamber. I can't speak to their internal workings so my rating is based on what I've seen so far.
No love for vacation rentals
No presence, no clue of existence
OCVA's team is highly collaborative and enjoyable to work with! I don't engage with my local DMO, so I can't rate them.
Our city is horrible when it comes to how promotion is done, how that budget is handled and the amount that they allow in that direction.
Our local DMOs are all very different and vary greatly on their talent, resources, and ability so some of the local DMOs are incredibly active and host great events with local businesses but others struggle to get the funding or quality employees to make it happen.
Rarely see them use my news releases about news/events of the central coast. OCVA promotions are mostly north coast-centric.
same as my answer before - there is no local DMO with whom to get services...
Self-serving answer to "your local DMO" but feel we are doing good work.
Sometimes, I get the feeling that OCVA staff are snotty, and think they are cooler or more hip than the rest of us doing the work.
They have always been willing to help when assistance has been requested.
They need to be more engaged and available via social media like FB and IG
We just don't work with them. I am not sure why. I guess I just don't know what is locally here, how to start conversation with them or how to work together with them to promote CTSI.

## **APPENDIX: RESULTS BY OREGON COAST SUBREGION**

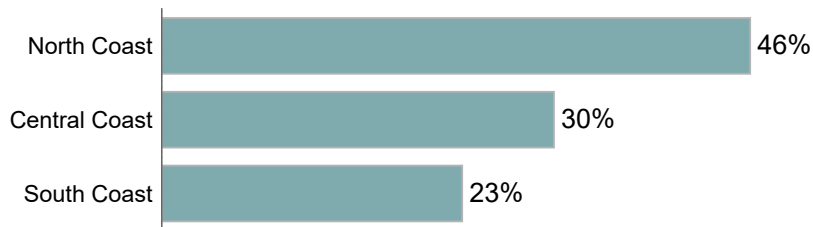
**Number of Respondents**



**375**  
Oregon Coast Responses

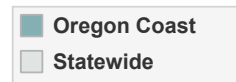
**1,018**  
Statewide Responses

**By Oregon Coast Subregion:**  
Percent of Total Oregon Coast:



<b>North Coast</b>	<b>171</b>
<b>Central Coast</b>	<b>114</b>
<b>South Coast</b>	<b>87</b>

# Industry Sector



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

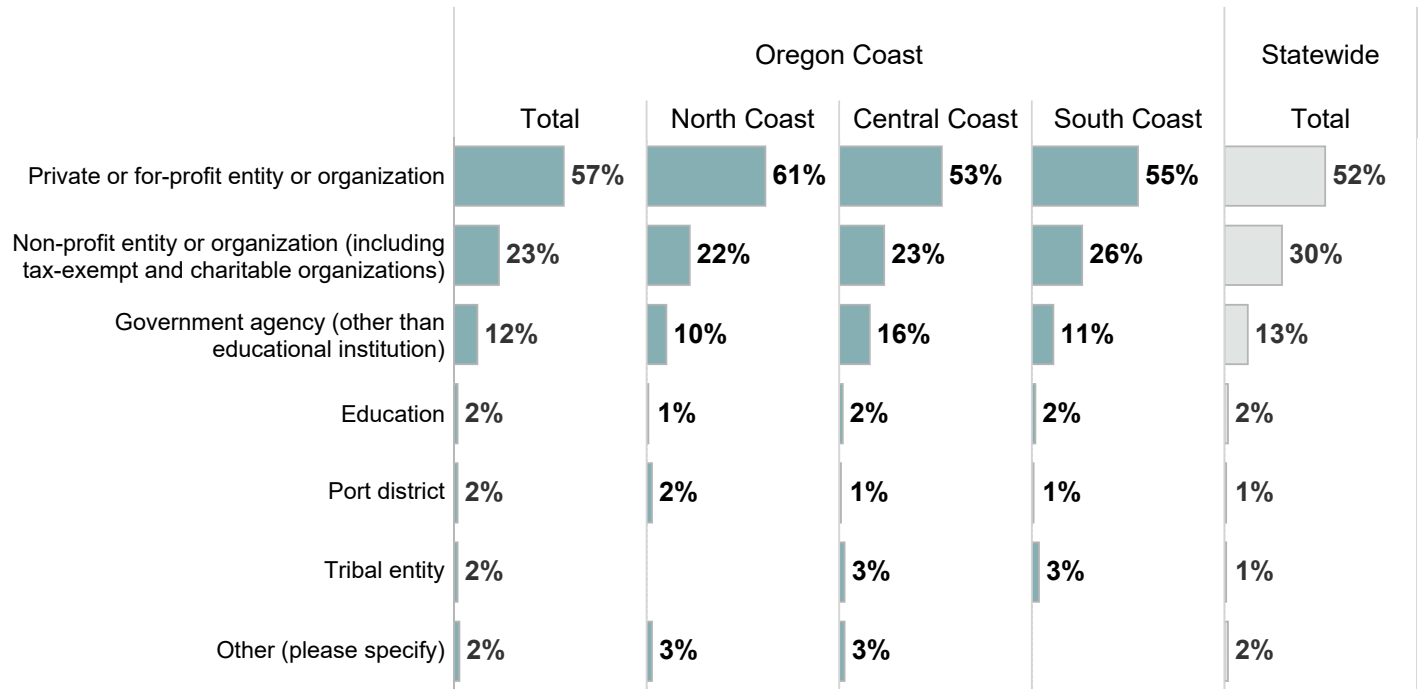
	Oregon Coast				Statewide
	Total	North Coast	Central Coast	South Coast	Total
Lodging (hotel, motel, vacation rentals, campground, real estate, short term rentals)	21%	28%	19%	10%	15%
Food and beverage (e.g., restaurant, bar, wineries, breweries, food cart)	9%	10%	7%	9%	9%
*Destination marketing or/and management	7%	6%	8%	9%	13%
*Land management	7%	6%	9%	7%	7%
Tour operator, guide, outfitter, tour company in urban environments	7%	9%	4%	7%	8%
Retail	6%	4%	10%	6%	5%
Agritourism (e.g., farm, ranch, fishery, farmer's market, producer)	6%	6%	3%	8%	7%
Attractions (e.g., museum, art gallery, theme park, golf course, casino, ski resort)	5%	2%	7%	9%	6%
Events and/or entertainment (e.g., sports, concerts, performing arts)	5%	3%	3%	9%	4%
Public policy or advocacy	5%	6%	4%	3%	3%
Arts & cultural heritage	4%	4%	4%	3%	5%
Economic development agency	4%	2%	7%	3%	4%
Professional services (e.g., marketing services, creative agency, website development)	3%	2%	4%	3%	4%
Marketing/advertising/PR agencies/consultants serving tourism	2%	1%	2%	5%	2%
Education	2%	4%	1%		2%
Public safety (e.g., search and rescue)	2%	2%	1%	2%	1%
Transportation services (air, ground, water transport)	1%	2%			1%
Industry association (e.g., Oregon Restaurant & Lodging Association)	1%	1%	1%		1%
Media/publisher	1%	1%	1%		1%
Main Street organization	0%			1%	1%
Other (please specify)	3%	2%	6%	2%	2%

\*Answer option abbreviated in reporting.

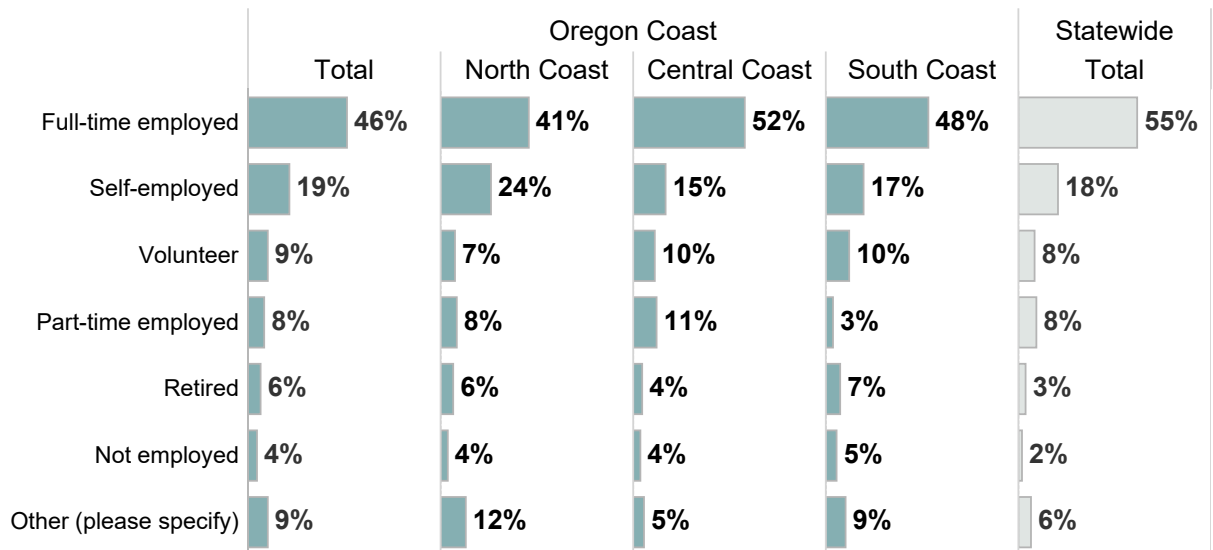
# Entity Type & Employment Status



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



**Q: Which of the following best describes your current employment status in the tourism industry? (Select one)**

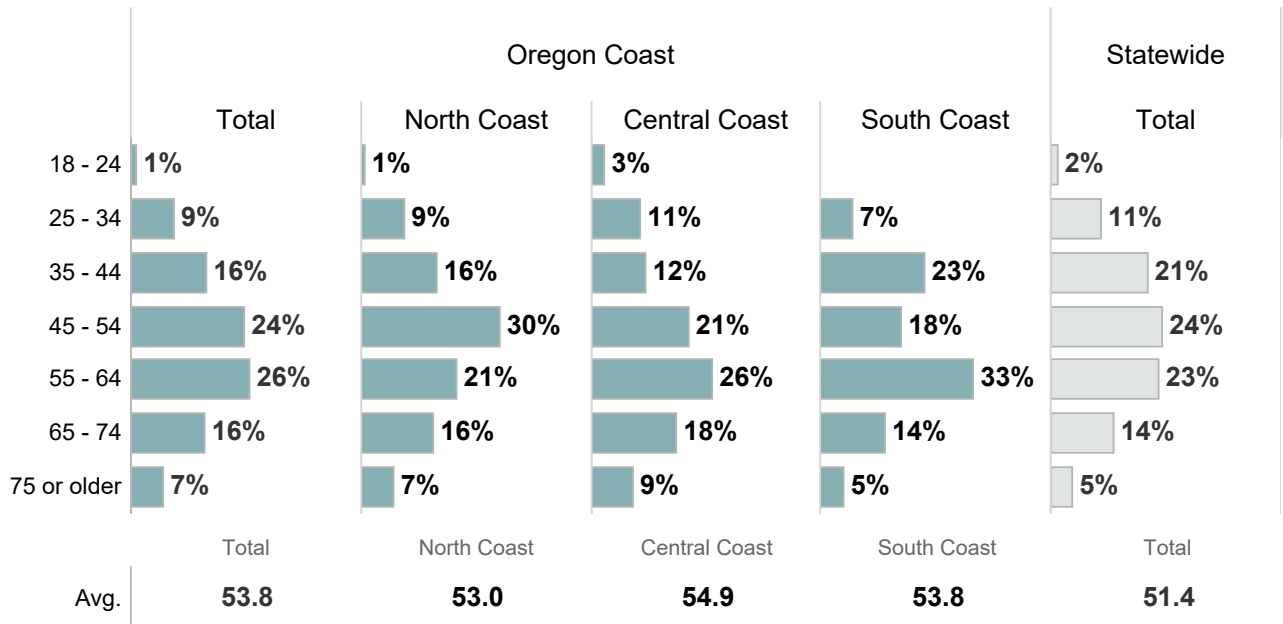


\*For both questions, where applicable, "Other" write-in responses were recoded to appropriate categories.

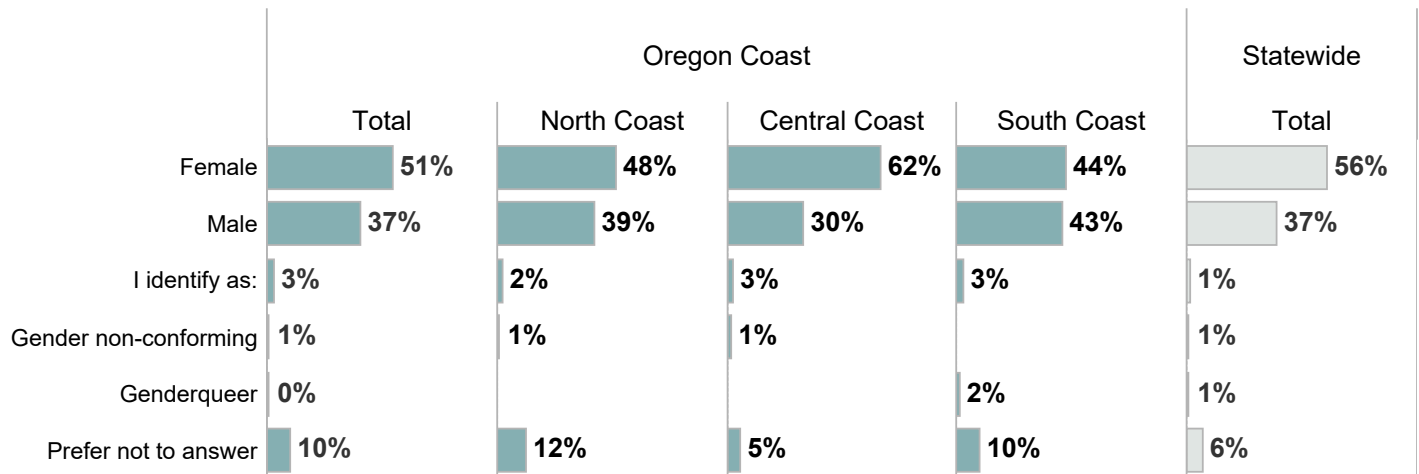
# Age & Gender



## Q: Respondent Age



## Q: To which gender identity do you most identify? Please check all that apply.

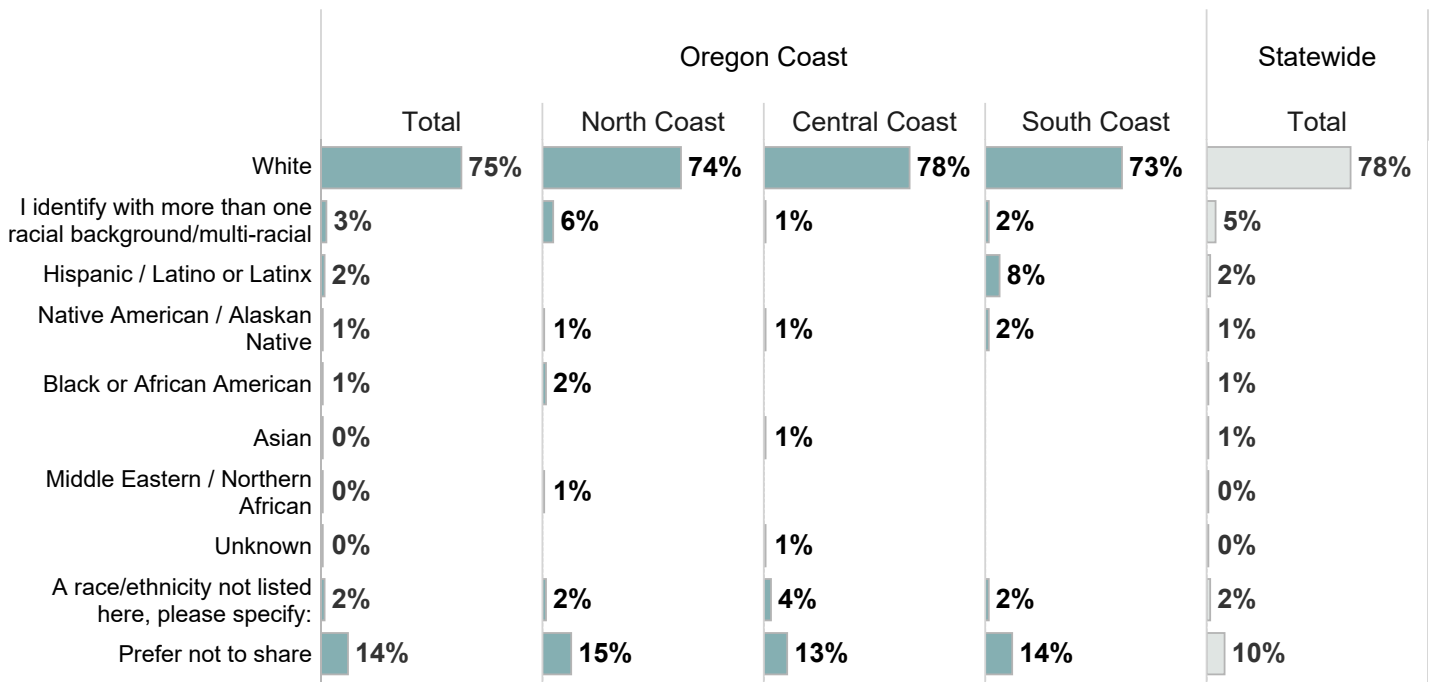




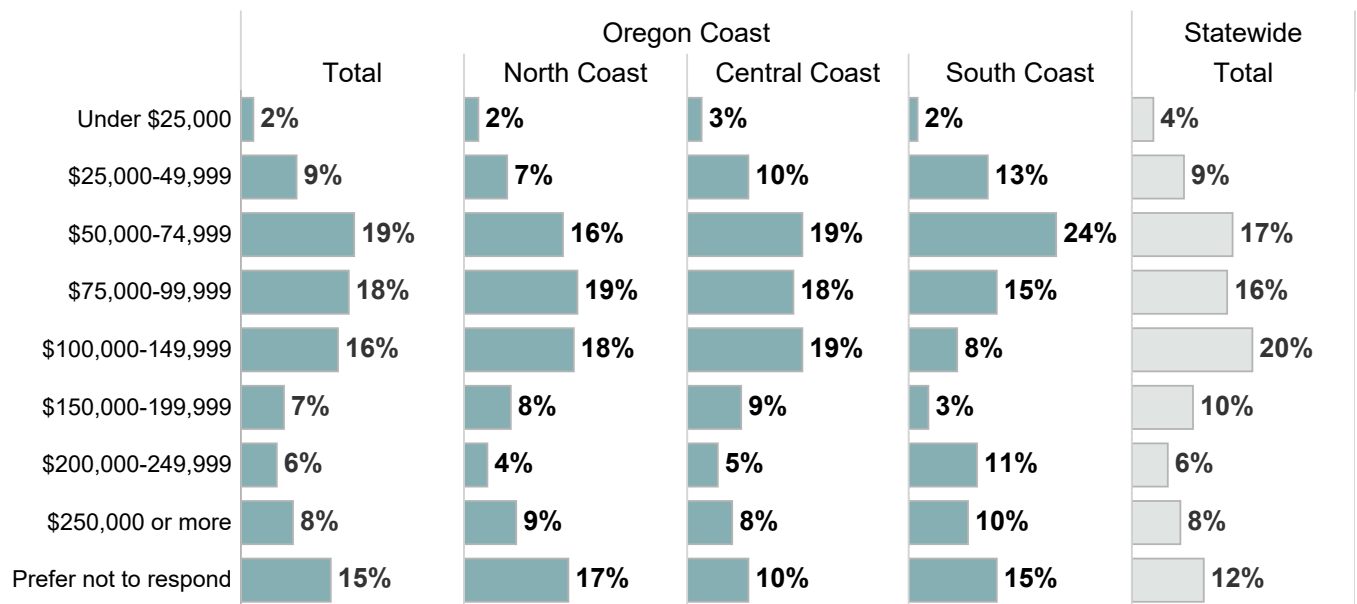
# Race & Household Income



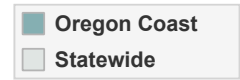
**Q: Which of the following best describes you? (Please select one answer)**



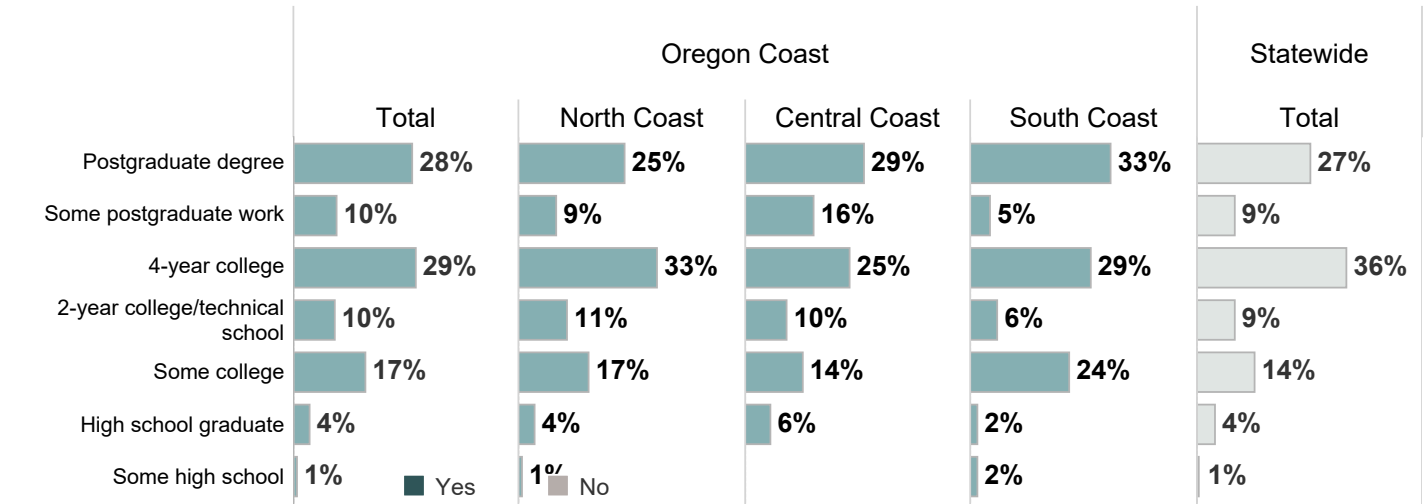
**Q: Which of these categories best describes the total gross annual income of your household (before taxes)?**



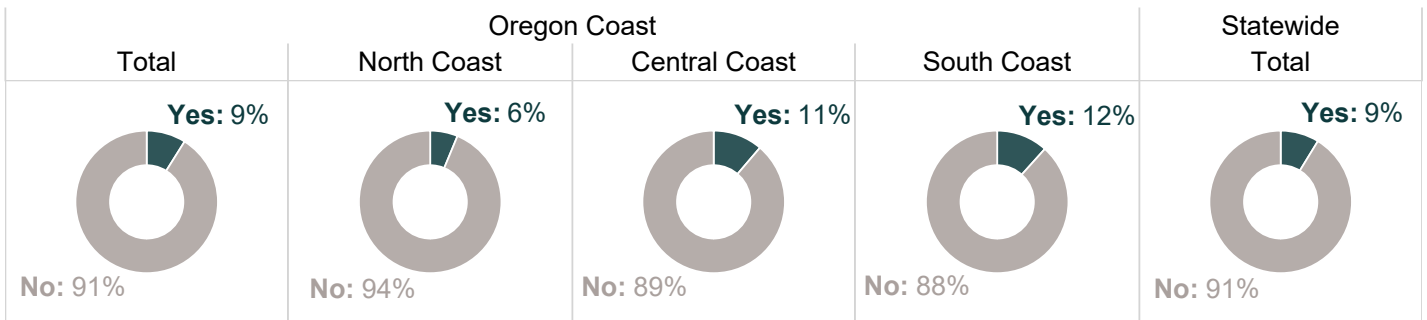
# Education & Presence of Disabilities



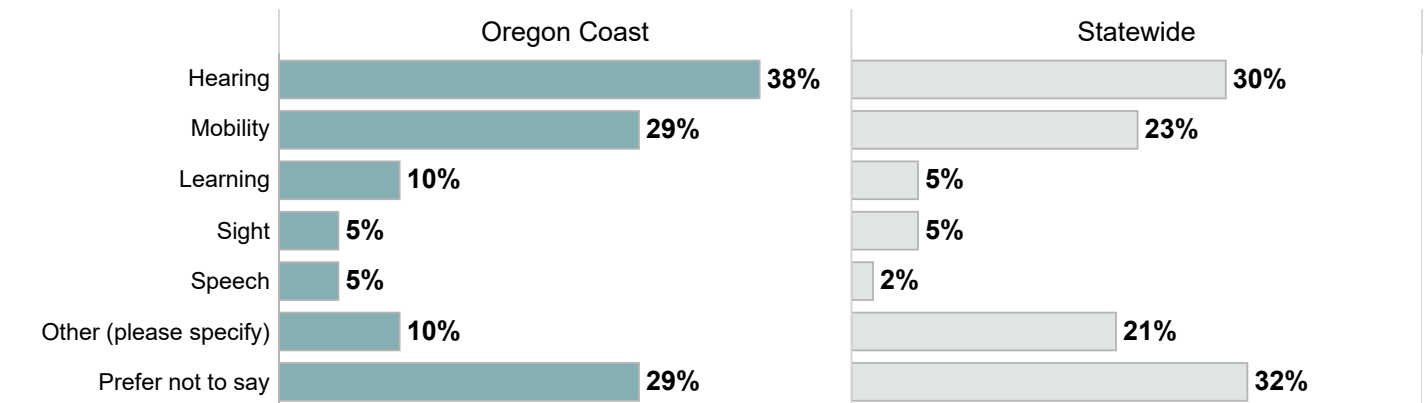
**Q: Which option best describes your education?**



**Q: Do you have a disability?**

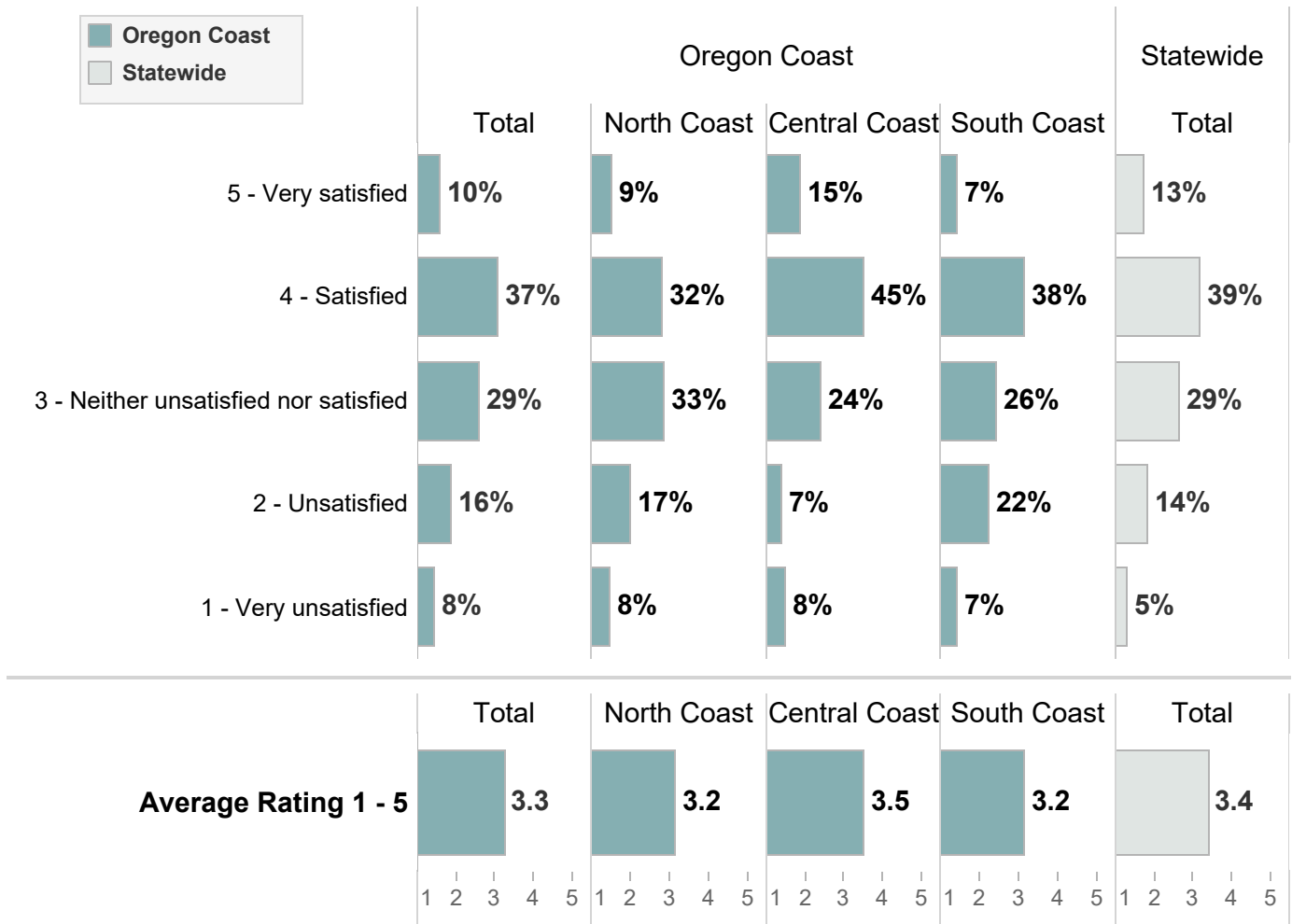


**Q: [If yes] What are these disabilities? (Select all that apply)**



# Satisfaction with Tourism Development in Oregon

**Q: Please rate your satisfaction with the direction of destination development in Oregon, from 1 (Very unsatisfied) to 5 (Very satisfied).**

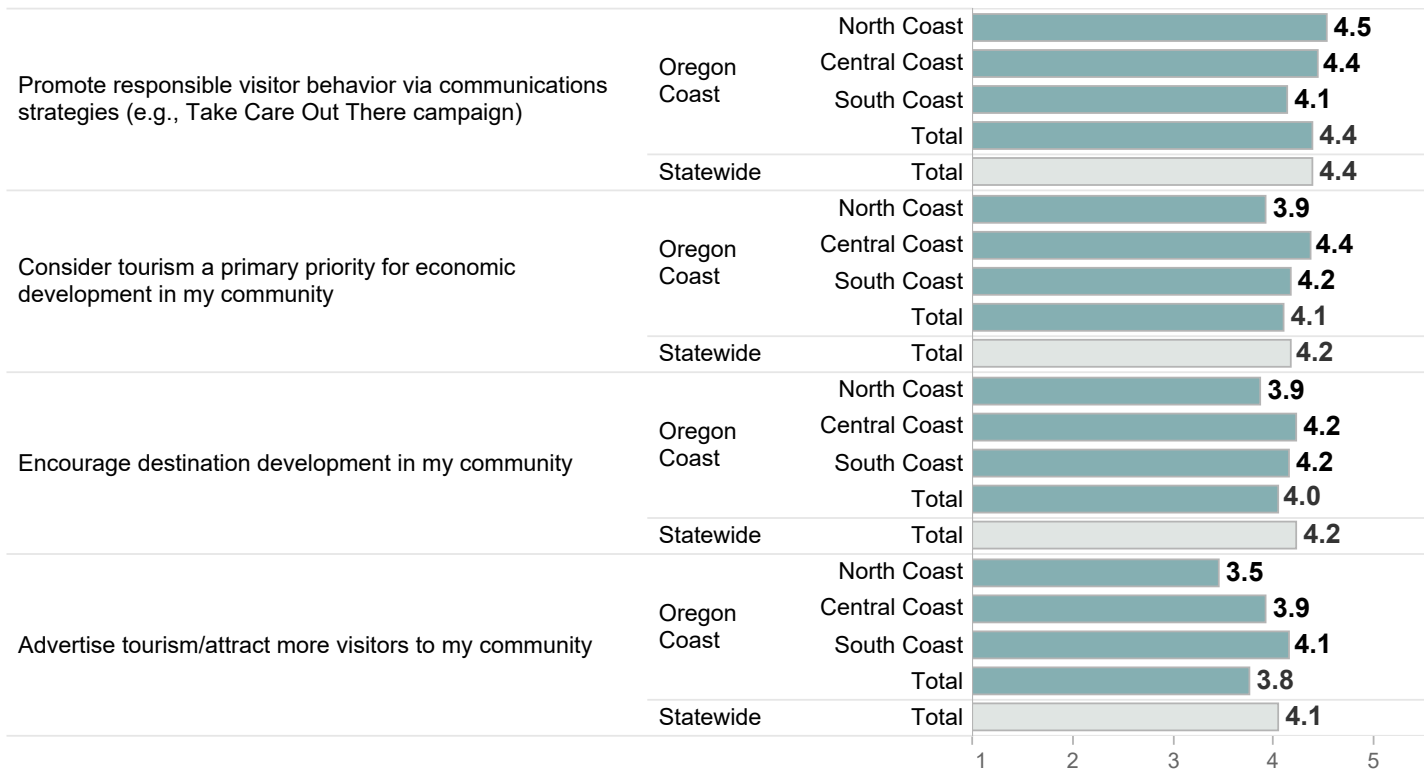


Note that "Destination Development" refers to overall tourism development in Oregon. The following definition was provided to survey respondents: "Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets."

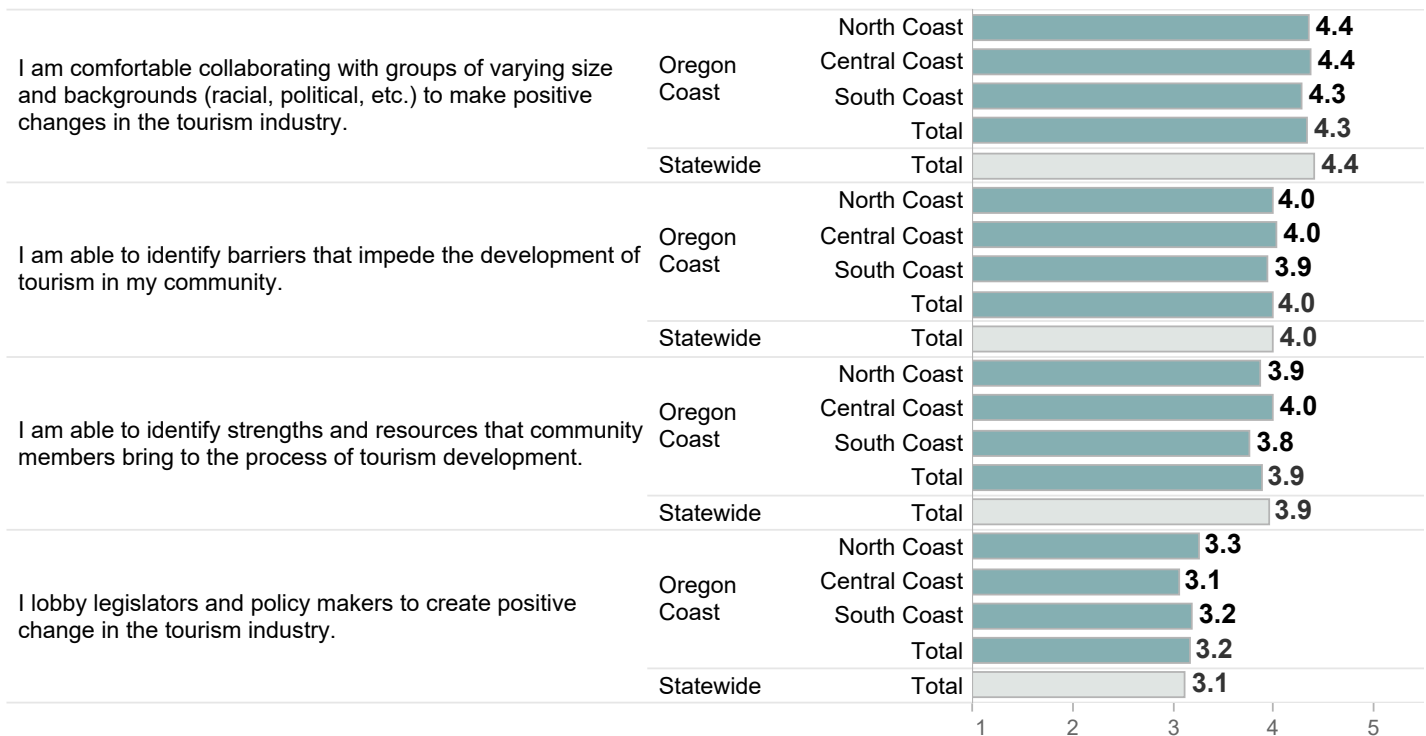
# Tourism Development in Oregon



**Q: Please rate your level of agreement with the statements below, from 1 (Strongly Disagree) to 5 (Strongly Agree). I believe Oregon should...**



**Q: Please rate your level of agreement with the statements below, from 1 (Strongly Disagree) to 5 (Strongly Agree).**

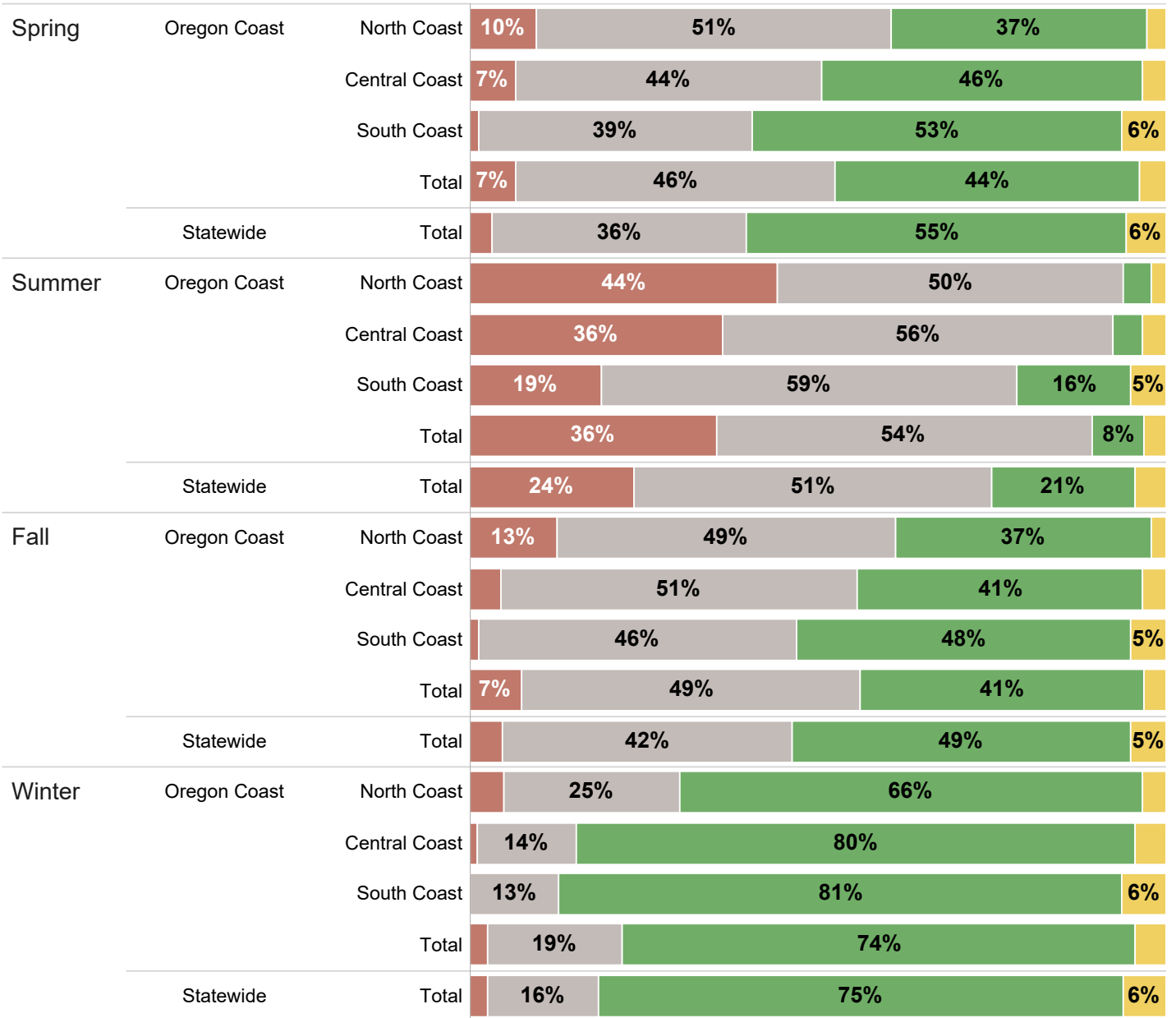


# Visitation Levels by Season

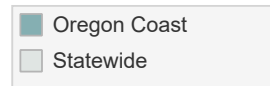
## Response

- Too many visitors
- About the right number of visitors
- Too few visitors
- Don't know/no opinion

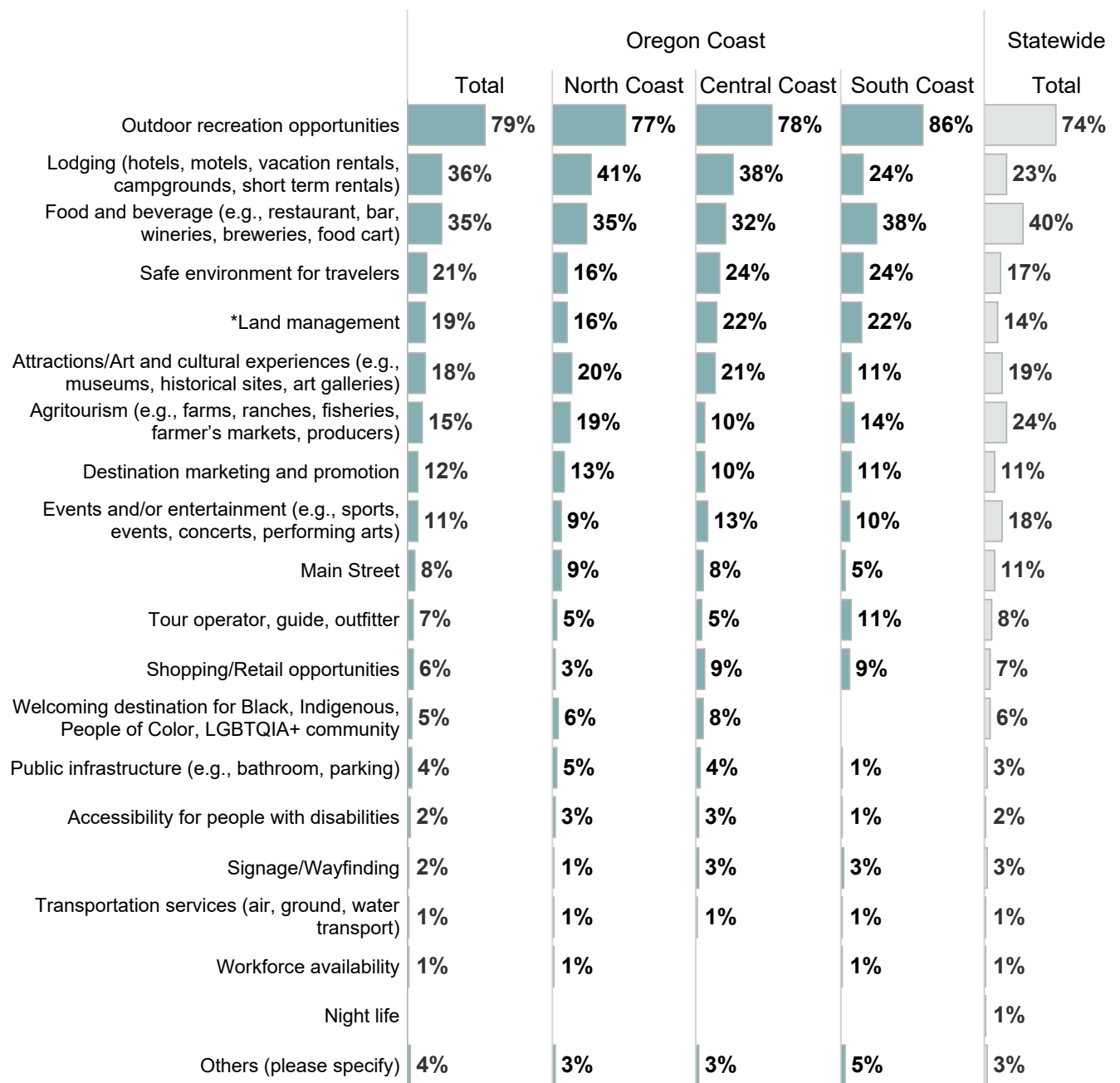
**Q: With respect to the number of visitors that your community receives each season, would you say there are:**



# Strengths & Areas to Improve

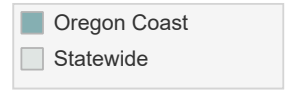


**Q: Please identify up to three areas that you consider strengths in your community**

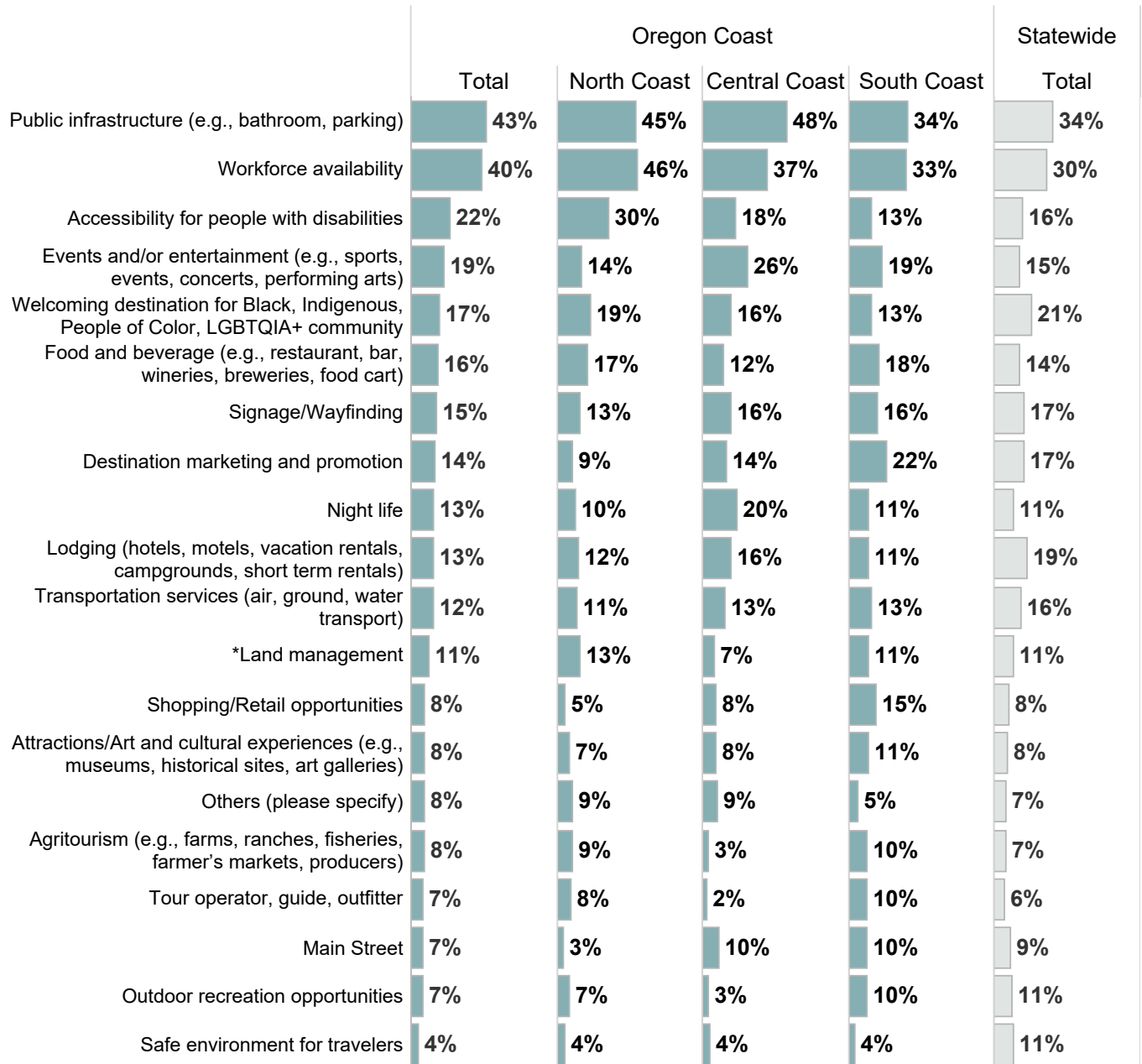


\*Answer option has been abbreviated

# Strengths & Areas to Improve



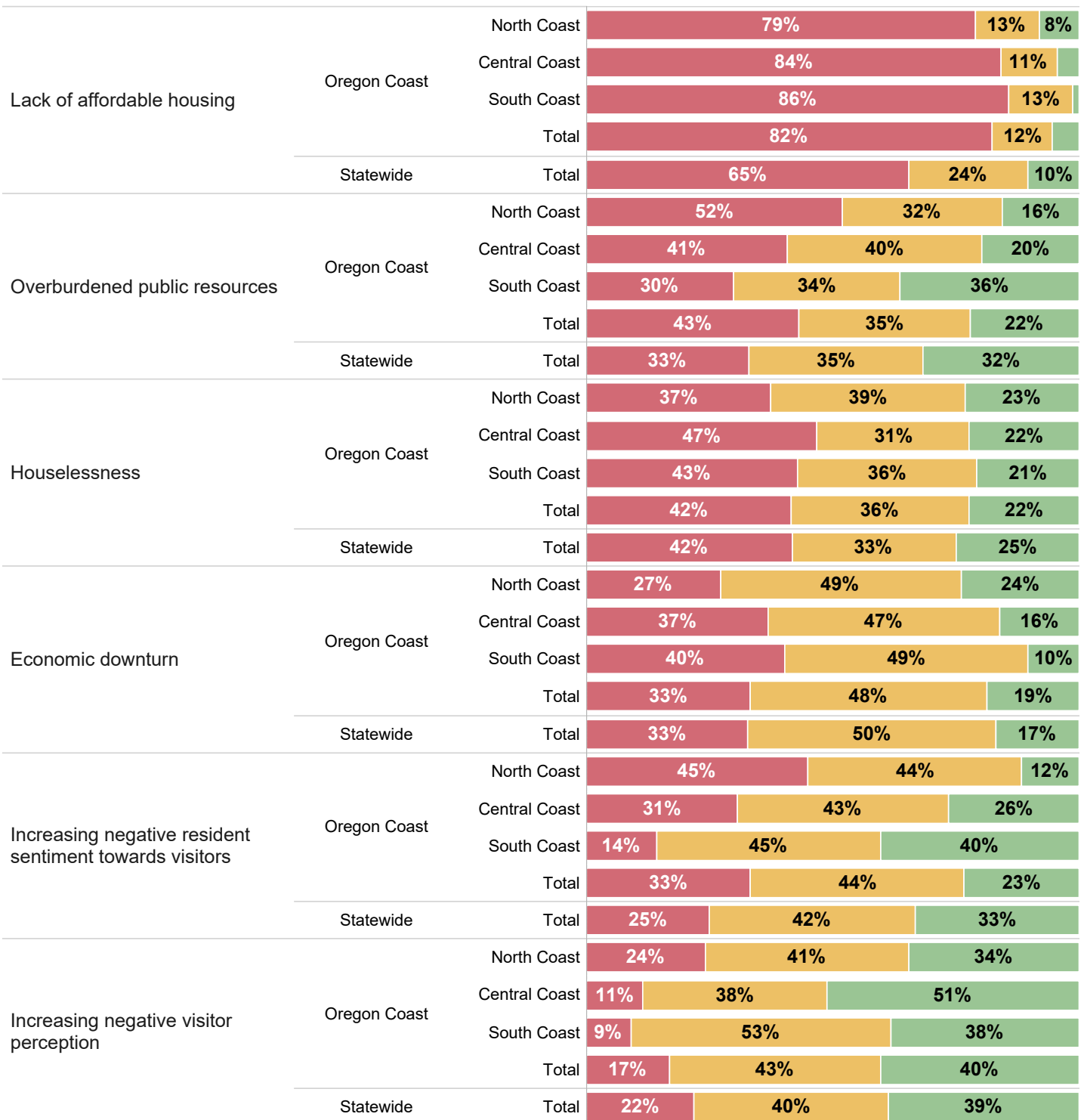
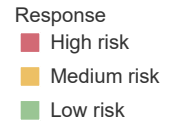
**Q: Please identify up to three areas that your community needs to focus on to improve residents' and visitors' experiences:**



\*Answer option has been abbreviated

# Risks to Tourism in Your Community (1 of 2)

**Q: Please rate the extent to which each challenge poses a risk to tourism in your community:**

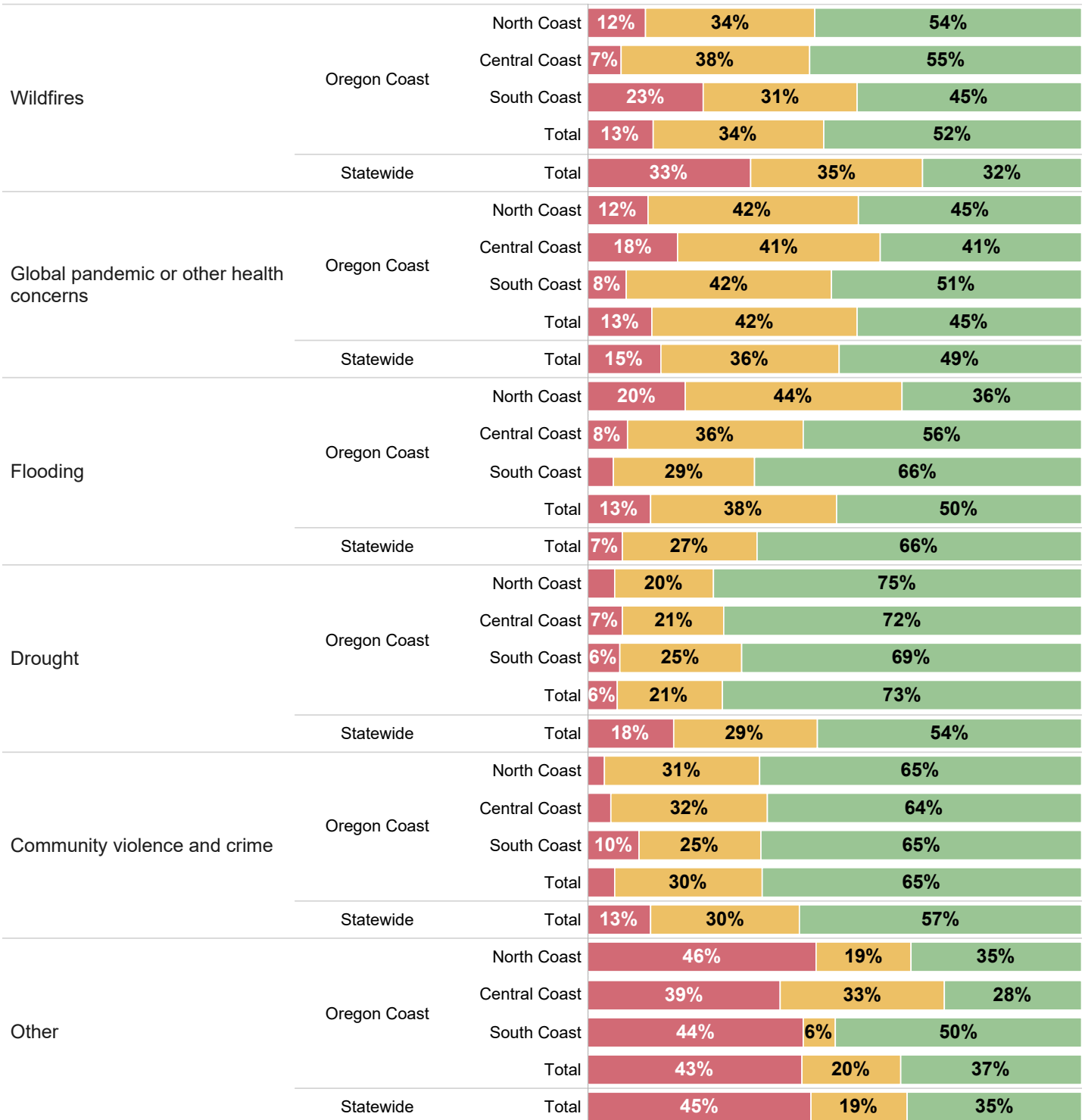
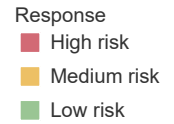


\*Categories sorted in descending order by the percent of Oregon Coast respondents selecting "High risk."



# Risks to Tourism in Your Community (2 of 2)

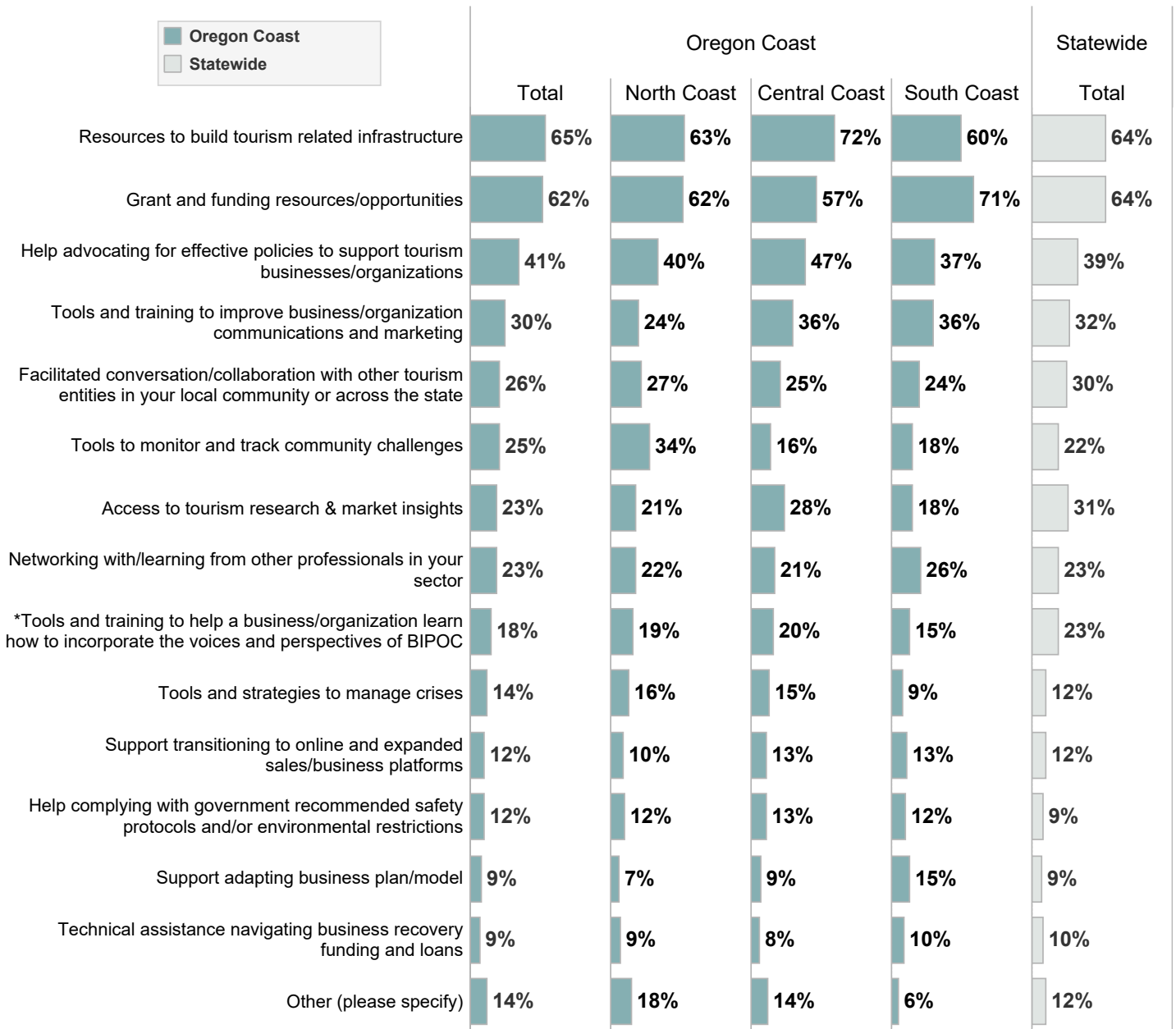
**Q: Please rate the extent to which each challenge poses a risk to tourism in your community:**



\*Categories sorted in descending order by the percent of Oregon Coast respondents selecting "High risk."

# Resources & Programs

**Q: Please select up to five resources or programs that would best assist your business/organization or community if faced with the challenges listed in the previous question.**



# Resources & Programs Ranking

**Q: Please rank the top resources or programs that would best assist your business/organization or community if faced with the challenges previously listed (1=the top resource or program).**

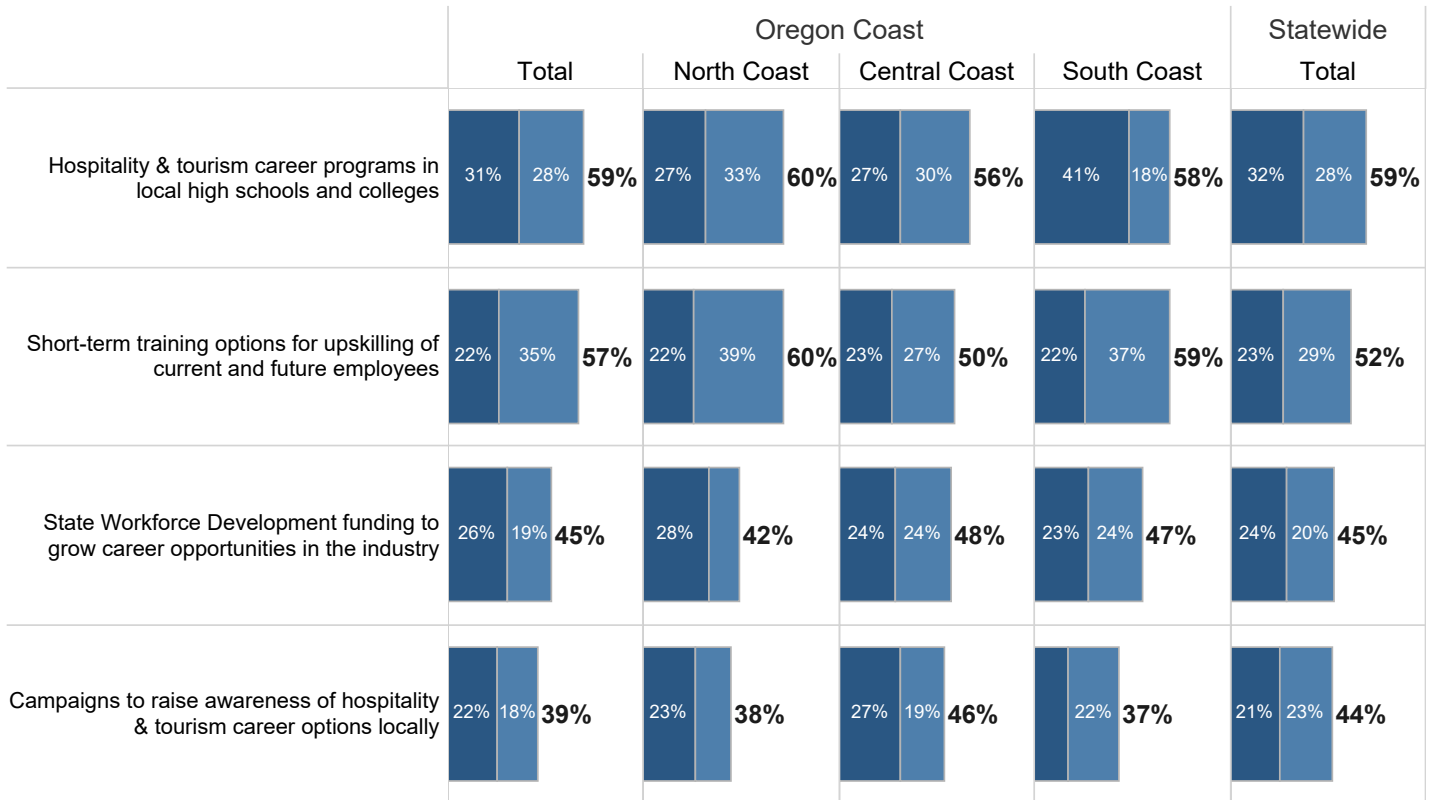
**Top 2 Priorities Displayed**    ■ First Rank    ■ Second Rank

	Total		Oregon Coast			Statewide Total									
			North Coast	Central Coast	South Coast										
Grant and funding resources/opportunities	30%	18%	48%	32%	19%	51%	27%	40%	32%	22%	54%	30%	20%	50%	
Resources to build tourism related infrastructure	26%	21%	47%	27%	18%	45%	24%	27%	51%	26%	21%	47%	25%	20%	44%
Help advocating for effective policies to support tourism businesses/organizations		18%		19%		19%		16%			16%			18%	
Tools and training to improve business/organization communications and marketing		12%		10%		14%		13%			13%			13%	
Tools to monitor and track community challenges		12%		16%		7%		10%			10%			10%	
Access to tourism research & market insights		9%		5%		14%		8%			13%			13%	
Help complying with government recommended safety protocols and/or environmental restrictions		7%		7%		7%		7%			7%			4%	
Facilitated conversation/collaboration with other tourism entities in your local community or across the state		7%		7%		7%		6%			9%			9%	
Networking with/learning from other professionals in your sector		6%		4%		6%		11%			6%			6%	
Tools and training to help a business/organization learn how to incorporate the voices and perspectives of BIPOC communities		6%		6%		5%		6%			9%			9%	
Support transitioning to online and expanded sales/business platforms		5%		4%		3%		6%			3%			3%	
Tools and strategies to manage crises		4%		4%		7%					4%			4%	
Support adapting business plan/model		4%		3%		2%		7%			3%			3%	
Technical assistance navigating business recovery funding and loans		3%		2%		3%		4%			4%			4%	
Other		13%		17%		15%		6%			11%			11%	

# Developing the Local Workforce

**Q: As we seek to rebuild the local workforce, please rank (from 1=highest priority to 4=lowest priority) the following educational and career opportunities to develop, attract and retain the local workforce to our industry.**

**Top 2 Priorities Displayed**    ■ First Rank    ■ Second Rank



# Tourism Priorities & Focus Areas

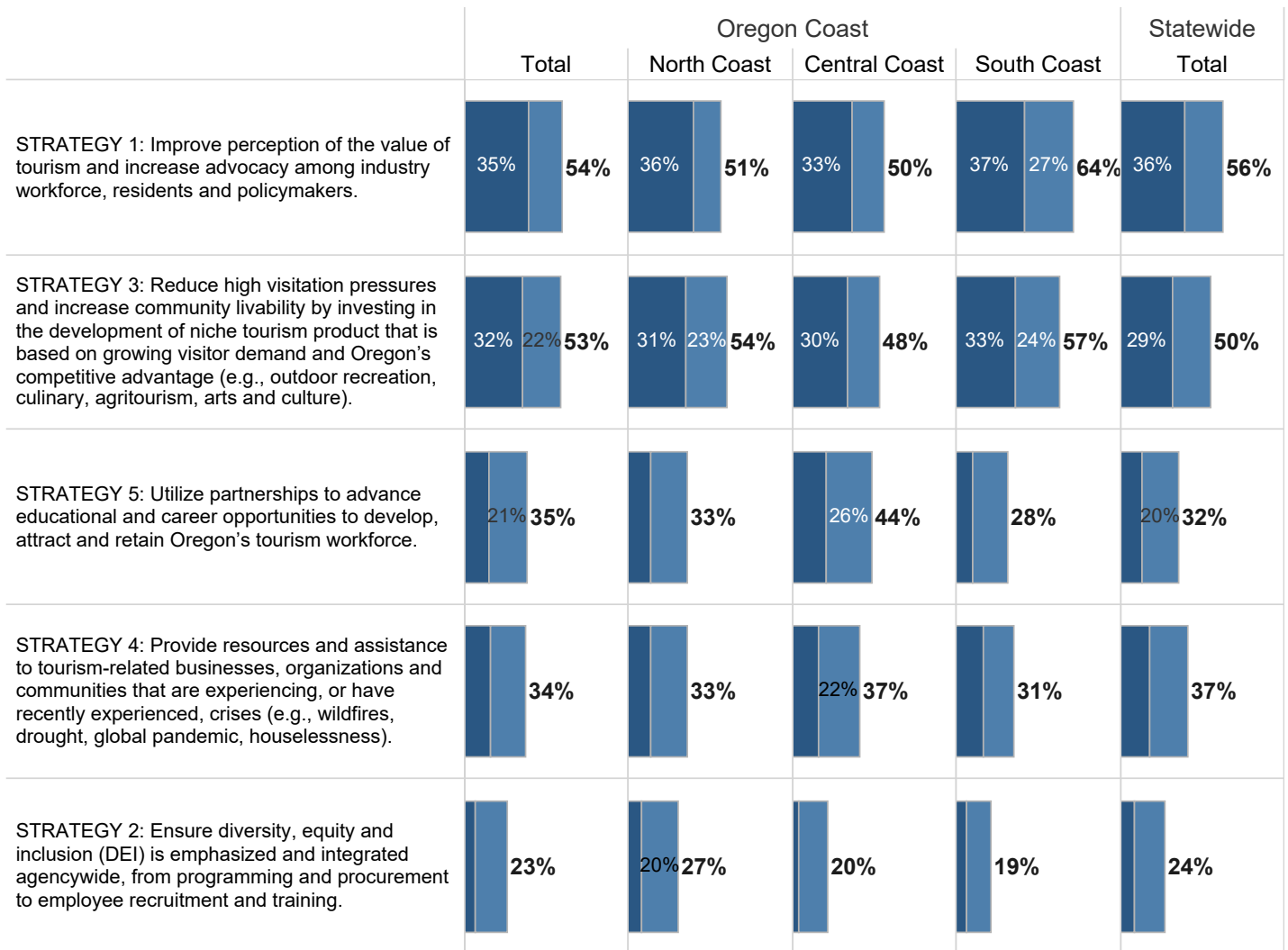
**Q: Please identify the three areas that you believe should be emphasized for tourism planning over the next 2 to 5 years in Oregon:** ■ First Rank ■ Second Rank ■ Third Rank

	Oregon Coast					Statewide Total
	Total	North Coast	Central Coast	South Coast		
Tourism-related infrastructure	27% 22% 60%	28% 56%	21% 27% 64%	32% 21% 65%	20% 20% 53%	
Grant and funding resources/opportunities	21% 45%	22% 44%	42%	22% 21% 52%	22% 47%	
Visitor management solutions	35%	21% 46%	28%	23%	28%	
Marketing and promotion	34%	21%	35%	21% 55%	45%	
Training and education programs	27%	23%	18% 32%	29%	24%	
Transportation options	23%	20% 32%	22%	8%	23%	
Tourism strategies for climate change resilience	22%	25%	21%	18%	22%	
Stakeholder engagement & collaboration	20%	19%	20%	20%	26%	
Tourism research & market insight	18%	13%	22%	19%	21%	
COVID-friendly visitor experience development	4%	5%	2%	4%	4%	
Other (specify below)	11%	15%	9%	7%	9%	

# Strategies

**Q: Please read the following 5 strategies that are being prioritized by Travel Oregon, and rank them based on priority for your community, from 1=highest priority to 5=lowest priority.**

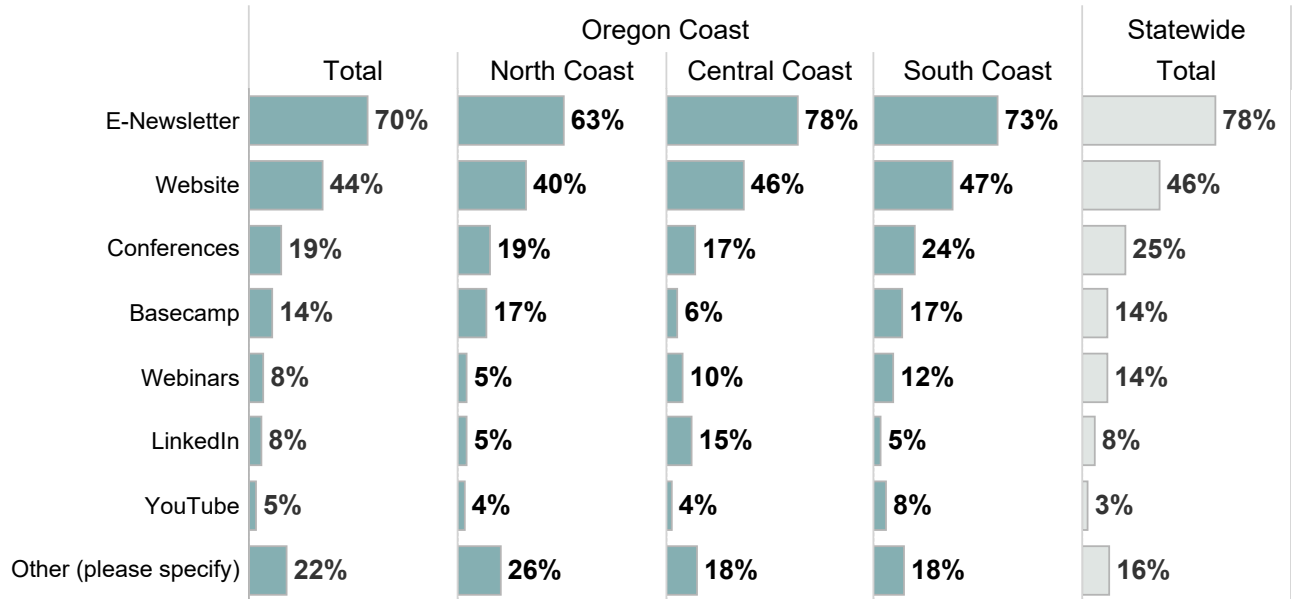
**Top 2 Priorities Displayed**    ■ First Rank    ■ Second Rank



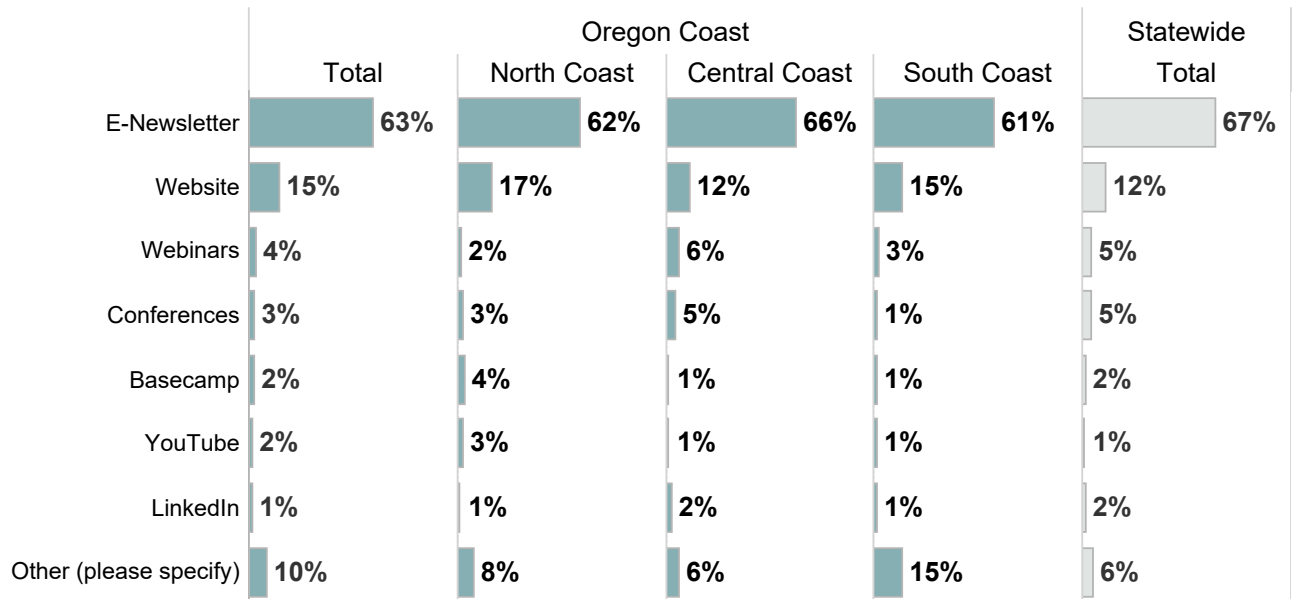
# Communications



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



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



# Engagement with Travel Oregon

**Q: Please indicate your level of engagement with Travel Oregon, from 1 (Not engaged) to 5 (Very high engagement).**

