



2024 OREGON TOURISM INDUSTRY PARTNER SURVEY

SUMMARY OF RESULTS | OREGON COAST

March 2025



OVERVIEW

This report summarizes findings from a 2024 survey of tourism industry partners in Oregon. The survey sought feedback from partners to provide guidance and perspective on priorities for future investments from regional destination management organizations. This report summarizes findings from respondents on the Oregon Coast, with additional statewide results provided for context.

OBJECTIVES

The 2024 Oregon Tourism Industry Survey was designed on behalf of the Oregon Tourism Commission, dba Travel Oregon, and the state's seven official regional destination management organizations (RDMOs) to elicit feedback from individuals and organizations linked to the tourism industry.

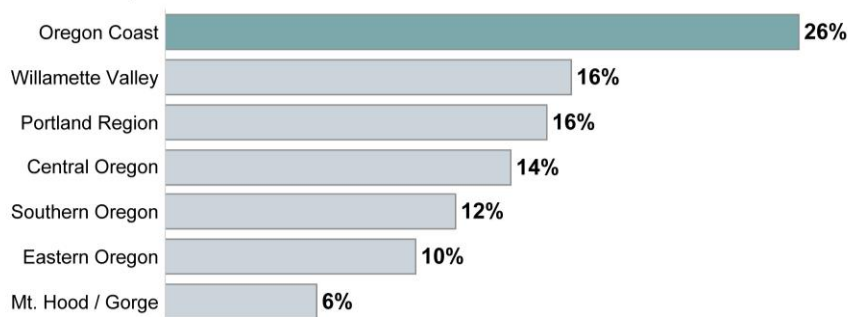
As Travel Oregon embarks on its 10-year strategic vision for tourism in the state, the results of the survey will help inform strategic direction for Travel Oregon and its regional partners to fulfill the strategic vision. The survey will also assist funding and programmatic decisions in marketing, grants, tourism-related infrastructure, visitor management, and more.

The survey built on a framework of past partner surveys conducted in 2018, 2020, and 2023. The survey was developed collaboratively by Travel Oregon, the seven RDMOs, and RRC Associates.

DATA COLLECTION

This study consisted of a digital survey that was fielded to Oregon tourism industry employees from September 12–October 14, 2024. The 2024 study is the fifth edition of the Industry Partner Survey, formerly known as the Stakeholder Survey. This year, the survey distribution methods included the Travel Oregon Industry Newsletter, partner and staff outreach, industry conferences, and social media.

The survey resulted in a total of 350 valid responses from the Oregon Coast (slightly down from 375 responses in 2023) and more than 1,300 responses statewide. Responses were well dispersed across the three sub-regions of the coast with 28% from the South Coast, 34% from the North Coast, and 39% from the Central 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.

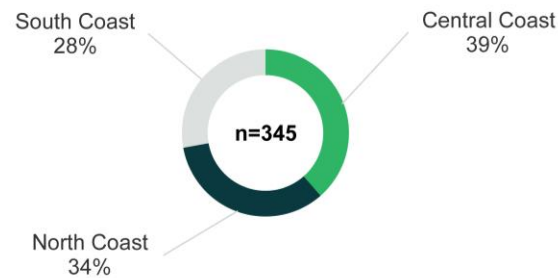
Number of Respondents

350
Oregon Coast
Responses

1,363
Overall Responses

Source: RRC

Q: In which Sub-Region of the Oregon Coast do you work or live?



Source: RRC

LIMITATIONS

The survey results should be viewed as an aggregation of relevant and thoughtful feedback from partners. The applicability of findings to real-life circumstances may depend on whether the feedback is from a broad enough (or representative) swath of partners and whether individual RDMOs believe they have engaged with enough partners to have a good gauge of the partners' priorities. An assessment of the industries represented, and the statewide response numbers, suggest a diverse and sufficient sample was collected from all regions, 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 partner 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 dashboard by going to: bit.ly/2024TOPartnersurvey

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KEY FINDINGS

TOURISM STRATEGIES

DESTINATION DEVELOPMENT

- **Satisfaction Levels:** 56% of Oregon Coast respondents are satisfied with the direction of tourism development, slightly lower than the statewide average of 62%.
- **Focus Areas:** Key focus areas for improving the resident and visitor experience include public infrastructure (43%), downtown development (19%), and outdoor recreation opportunities (19%).
- **Perceived Strengths:** Respondents highlight outdoor recreation opportunities (72%), food and beverage (39%), and lodging (31%) as the region's strongest tourism assets.

PLANNING PRIORITIES

- **Top 3 Priorities for the Next 2–5 Years:**
 1. Tourism-related infrastructure (38%).
 2. Grant and funding opportunities (35%).
 3. Enhancing tourism perceptions for residents and workforce (32%).
- **Shift from 2023:** Tourism-related infrastructure and grant and funding opportunities remain top priorities. However, marketing and promotion, was more of a priority in 2023 (34%), has dropped to 21% this year.

ADVOCACY

- **Collaboration and Engagement:** Oregon Coast respondents feel confident collaborating with diverse groups to support tourism (4.5 out of 5).
- **Legislative Engagement:** Engagement with policymakers is low (3.2 out of 5), suggesting a need for stronger advocacy efforts.
- **Tourism Perception:** Respondents see the value tourism brings to their community (4.8 out of 5). For the coast, these results are very high and show an important understanding of tourism's value.

VISITATION AND SEASONALITY

- **Overcrowding in Summer:** 54% of Oregon Coast respondents say summer visitation feels very crowded, higher than the statewide response.
- **Winter Visitation Concerns:** 78% of respondents feel they could use more visitation in winter, slightly higher than the statewide average of 75%.
- **Potential for Redistributing Visitors:** Visitor dispersal strategies could help balance tourism demand throughout the year, especially during the summer season.

STRENGTHS AND CHALLENGES

- **Housing and Workforce Challenges:**
 - 84% cite a lack of affordable housing as a high-risk challenge compared to 74% statewide, a challenge regionally and statewide that has continued to rise in risk.
 - 73% report workforce housing shortages compared to 67% statewide. Similar to affordable housing, this issue has continued to rise in risk regionally and statewide.
 - Wildfire and drought are seen as much lower risks for the Oregon Coast than statewide.
- **Workforce Recruitment Issues:**
 - 55% report inconsistent work hours as key barriers and 49% struggle with seasonal employment.

RESOURCES AND PROGRAMS

- **Most Needed Resources:**
 - Grant and funding opportunities (66%).
 - Resources to build tourism-related infrastructure (64%).
 - Help advocating for effective policies to support tourism businesses/organizations (56%).
- **Lowest Priority Resources:**
 - Support adapting business plans/models (13%) and technical assistance navigating business recovery funding and loans (18%) are less pressing concerns.

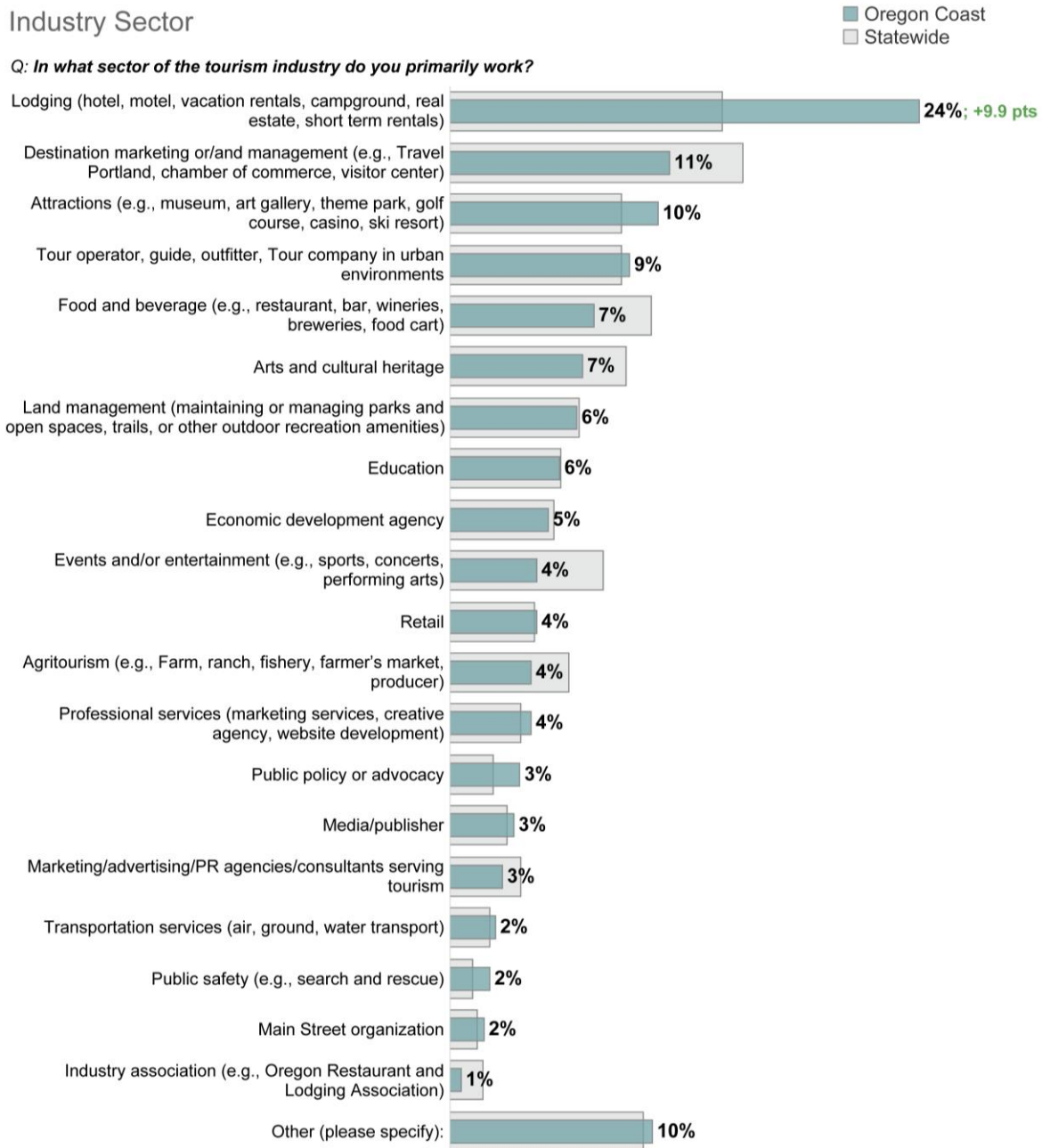
Oregon Coast respondents express moderate satisfaction with tourism development (56%) and emphasize the need for enhanced public infrastructure, downtown development, and outdoor recreation opportunities. To support sustainable growth, focusing on grant and funding opportunities, strengthening legislative engagement, and exploring visitor dispersal strategies could help address seasonal overcrowding and bolster winter visitation.

RESPONDENT PROFILE

The survey received broad participation by the tourism industry sector. Statewide, destination marketing and/or management accounted for 15% of total respondents, followed by lodging (14%) and food and beverage (10%). The top represented organizations remain similar to 2023. Like respondents statewide, respondents from Oregon Coast were most often employed in lodging (24%) followed by destination marketing and/or management (11%). Respondents from Oregon Coast were more likely to work in lodging than statewide respondents. Distribution across the various sectors is similar to 2023.

Industry Sector

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



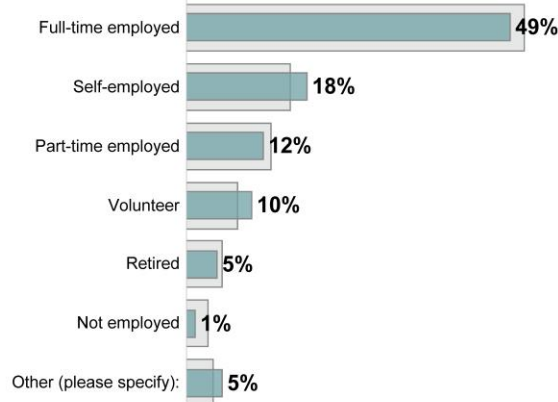
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

The top employment statuses for the region were full-time employed (49%), self-employed (18%), and part-time employed (12%), similar to statewide respondents. Respondents were asked which entity type best describes their business or organization. In Oregon Coast, the top two response options were private or for-profit entities/organizations (49%) and non-profit entities/organizations (23%). Those who responded in the "other" category for entity type nonprofit leaders, government employee, and RARE member in some of the open-ended comments.

Entity Type & Employment Status

Q: Which of the following best describes your current employment status in the tourism industry?

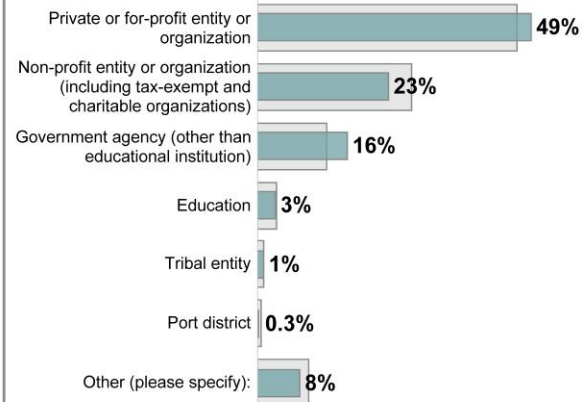


Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

■ Oregon Coast
■ Statewide

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

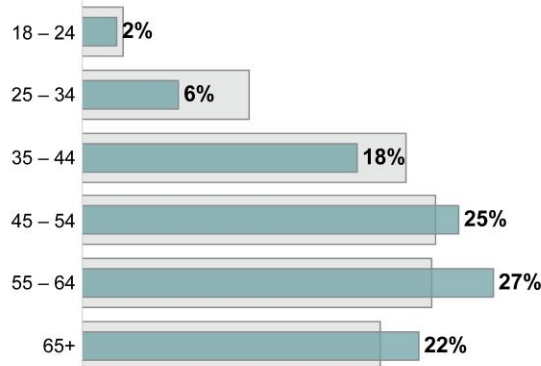


More Oregon Coast respondents fell in the 45+ age ranges than statewide respondents while less were in the 25-44 age range. In the statewide results, the largest share of respondents were in the 45-64 range, with this being consistent among respondents from the Oregon Coast.

Oregon Coast respondents were slightly less likely to identify as female (56%) and more likely to identify as male (38%) than statewide respondents.

Age & Gender

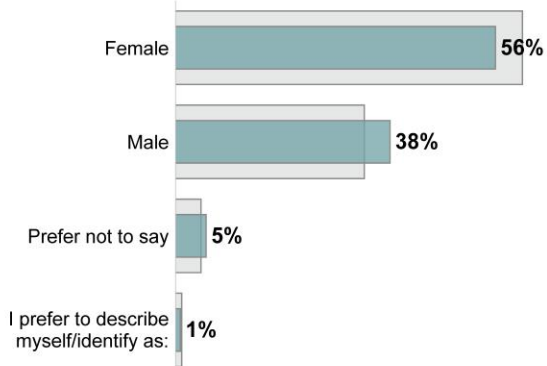
Q: *What is your age?*



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Q: *What is your identified gender?*

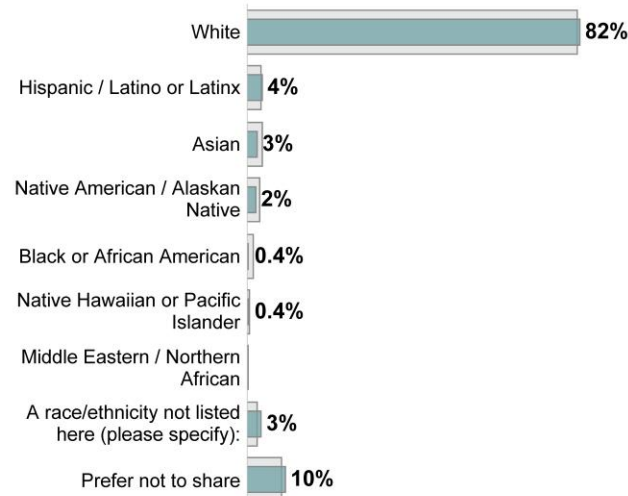


For race and ethnicity, 82% of Oregon Coast respondents identify as white, and the overall racial profile of respondents aligns closely with statewide results.

Fifty-nine percent of survey respondents statewide indicated that they had annual household incomes of \$75,000 or more. Compared to the statewide results, the Oregon Coast region had a higher percentage of respondents in the \$100,000-149,999 range.

Race & Household Income

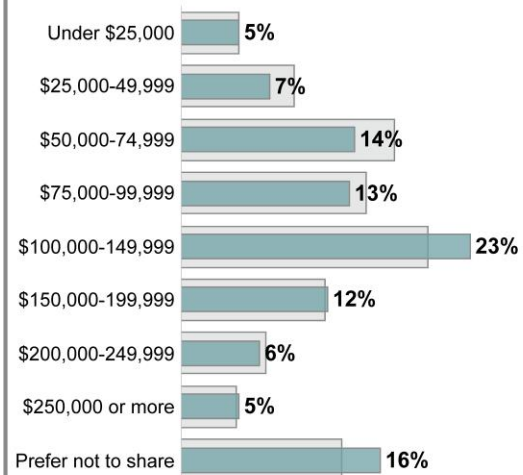
Q: *Which of the following best describes you?*



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

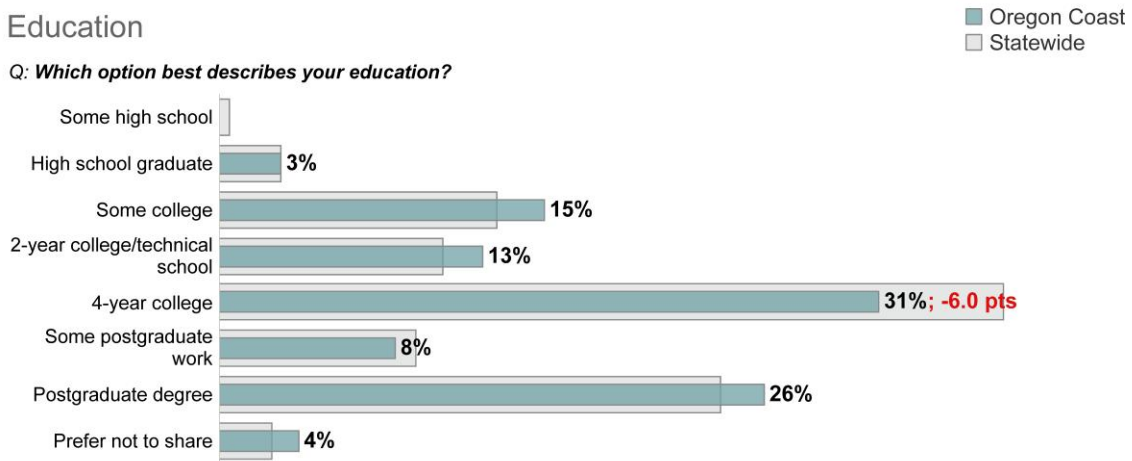
Q: *Which of these categories best describes the total gross annual income of your household (before taxes)?*



Oregon Coast respondents were somewhat different compared to the sample in terms of level of education. Fewer respondents from the Oregon Coast have completed a 4-year college degree and greater shares have completed some college or 2-year college/technical school than the statewide sample.

Education

Q: *Which option best describes your education?*



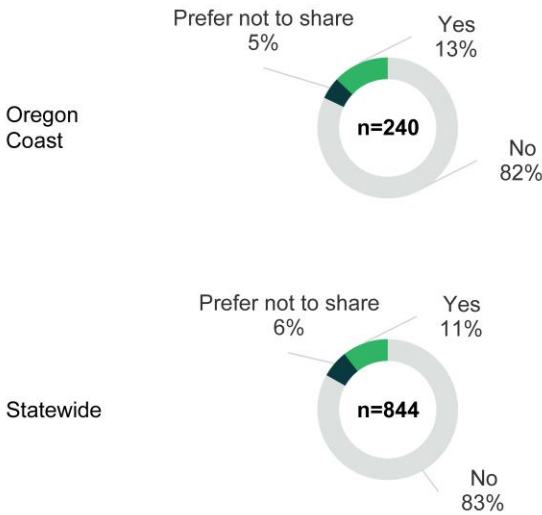
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

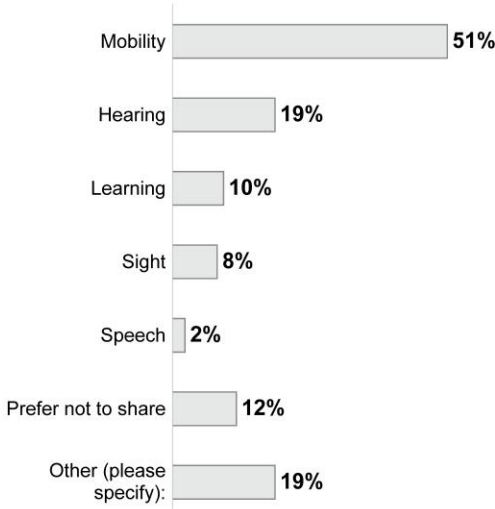
Thirteen percent of Oregon Coast respondents reported having a disability, compared to 11% of respondents statewide. Statewide, mobility has the highest percentage of all disabilities at 51%. Other disabilities listed include mental health (including anxiety/depression, ADHD, and PTSD), autoimmune disease, and neurodivergence.

Presence of Disabilities

Q: Do you have a disability?



Q: Which of the following best describes these disabilities?



*Only displaying statewide sample due to insufficient sample size within regions.

Source: RRC

TOURISM STRATEGIES

As Travel Oregon continues their work on the 10-year strategic vision for tourism adopted in June 2022, these survey findings will play a crucial role in shaping strategic priorities for Travel Oregon and its regional partners. These insights will be a vital source of information in guiding Travel Oregon and RDMOs in funding and program decisions across key areas including marketing, grants, tourism-related infrastructure, and visitor management, ensuring alignment with the broader vision for sustainable tourism development in the state.

Respondents were asked to characterize their satisfaction with the general direction of tourism development in Oregon.

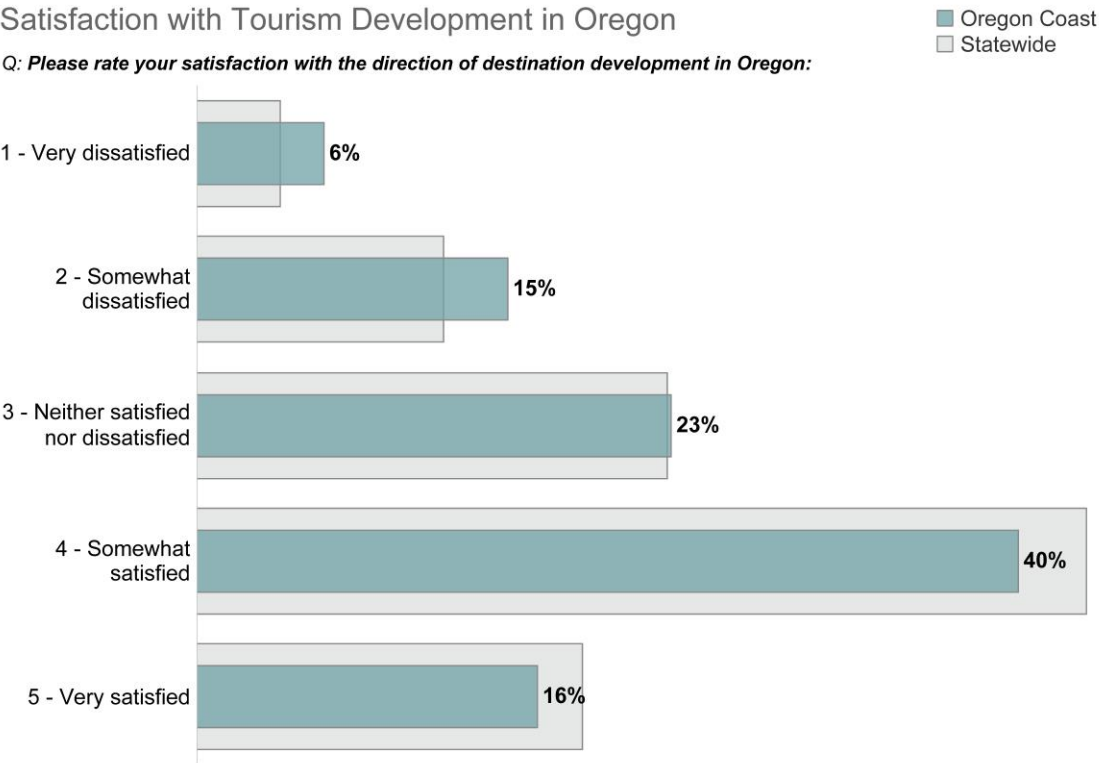
The following definition was provided to survey respondents:

"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."

Statewide, 62% of respondents were satisfied with the direction of tourism development in Oregon (selected 4 or 5 on a five-point scale), while 16% were unsatisfied (selected 1 or 2). Twenty-three percent were neutral (selected 3, neither unsatisfied nor satisfied). For the Oregon Coast, 56% were satisfied, 21% were unsatisfied, and 23% were neither unsatisfied nor satisfied. The average among respondents in Oregon Coast was lower (3.5) than the average among respondents statewide (3.6). Satisfaction for both the statewide sample and the Oregon Coast has increased by .2 since 2023. However, the Oregon Coast's average rating of satisfaction was the lowest of all regions.

Satisfaction with Tourism Development in Oregon

Q: Please rate your satisfaction with the direction of destination development in Oregon:



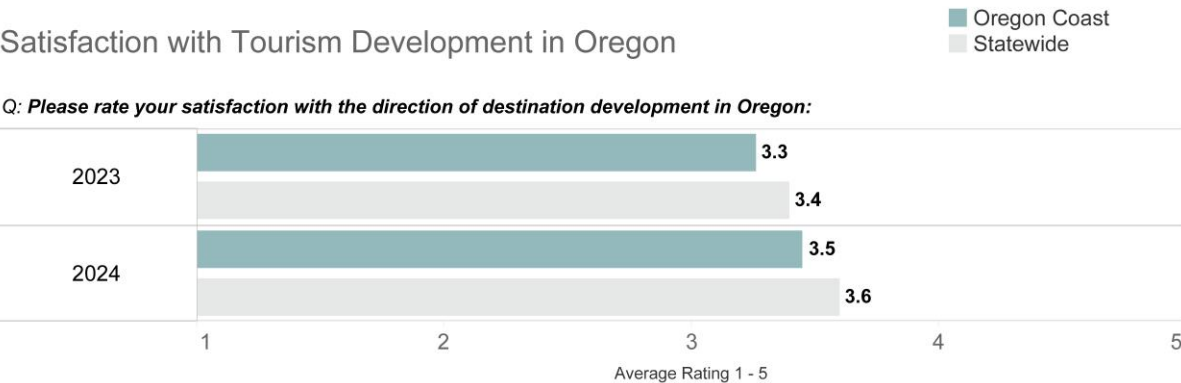
Note: "Destination Development" refers to overall tourism development in Oregon. The following definition was provided to survey respondents: "Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing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

Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Satisfaction with Tourism Development in Oregon

Q: Please rate your satisfaction with the direction of destination development in Oregon:



Note: "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."

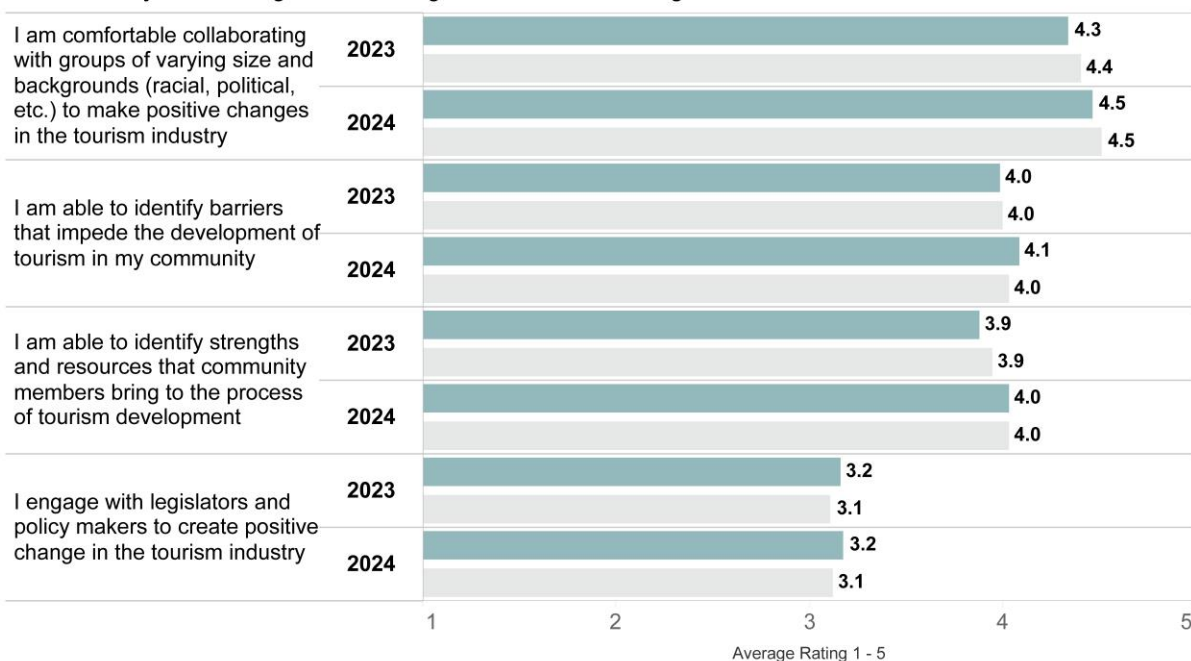
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Respondents were asked to rate their agreement with four statements that measured their advocacy for tourism. The statement with the greatest support among the statewide sample and respondents in Oregon Coast was, "I am comfortable collaborating with groups of varying size and backgrounds (racial, political, etc.) to make positive changes in the tourism industry," with an average rating of 4.5 on a five-point scale, up from 2023. Respondents, both statewide and on the Oregon Coast, agreed least with the statement, "I engage with legislators and policy makers to create positive change in the tourism industry," with an average rating of 3.1 statewide and 3.2 for the Oregon Coast.

Advocacy for Tourism in Oregon

Q: Please rate your level of agreement or disagreement with the following statements:

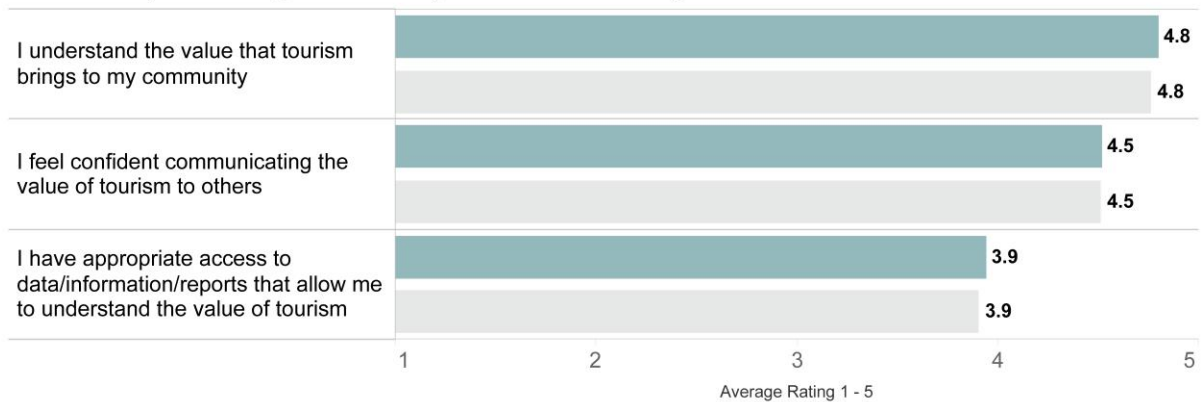


Source: RRC

Respondents were also asked to rate their level of agreement with three statements that measured perceived value of tourism. Average ratings of the value of tourism were the same for statewide sample and Oregon Coast. Both rated all three statements highly, with "I have appropriate access to data/information/reports that allow me to understand the value of tourism" the lowest rated at 3.9. The highest rated statement reflects an understanding that tourism benefits Oregon as a whole, at a 4.8 on a five-point scale: "I understand the value that tourism brings to my community" was rated equally high in both samples.

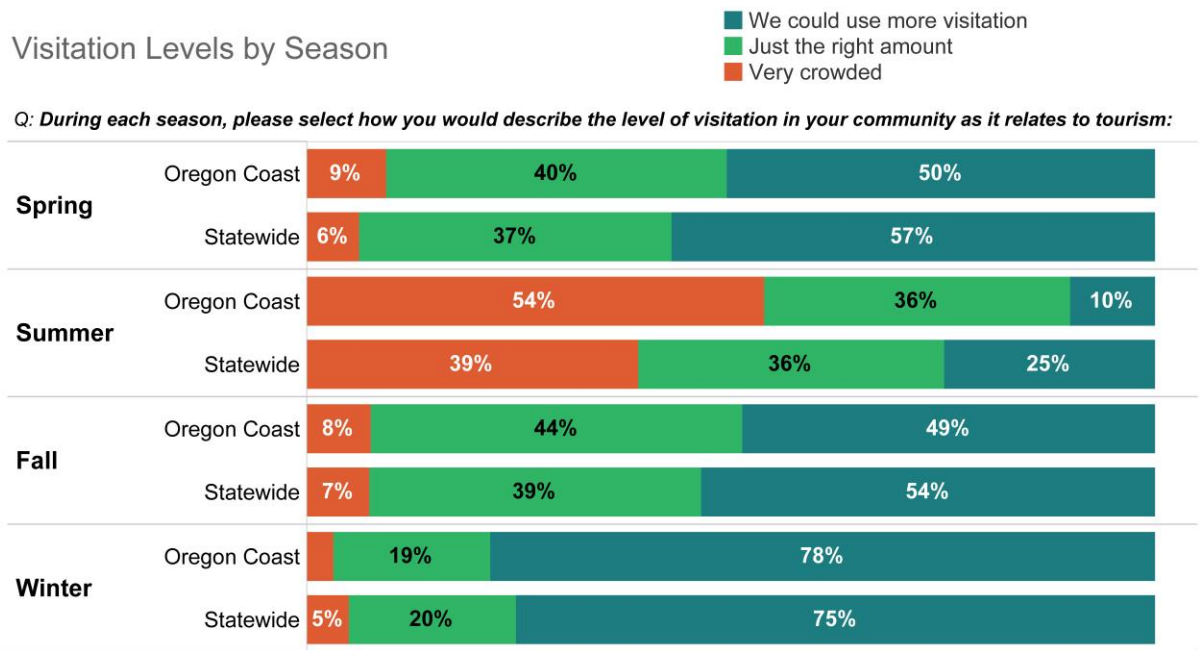
Value of Tourism in Oregon

Q: Please rate your level of agreement or disagreement with the following statements:



Source: RRC

Respondents were asked to characterize the number of visitors their community receives during each of the four seasons. Statewide, 6% of respondents said there were too many visitors in the spring, followed by 39% in summer, 7% in fall, and 5% in winter. Compared to the statewide sample, a higher proportion of respondents in Oregon Coast indicated that there are too many visitors in the summer (54%) and too few visitors in the winter (78%). Compared to 2023 results, Oregon Coast respondents were more likely to indicate that their community was “very crowded” in all seasons with summer jumping from 36% saying very crowded in 2023 to 54% in 2024.

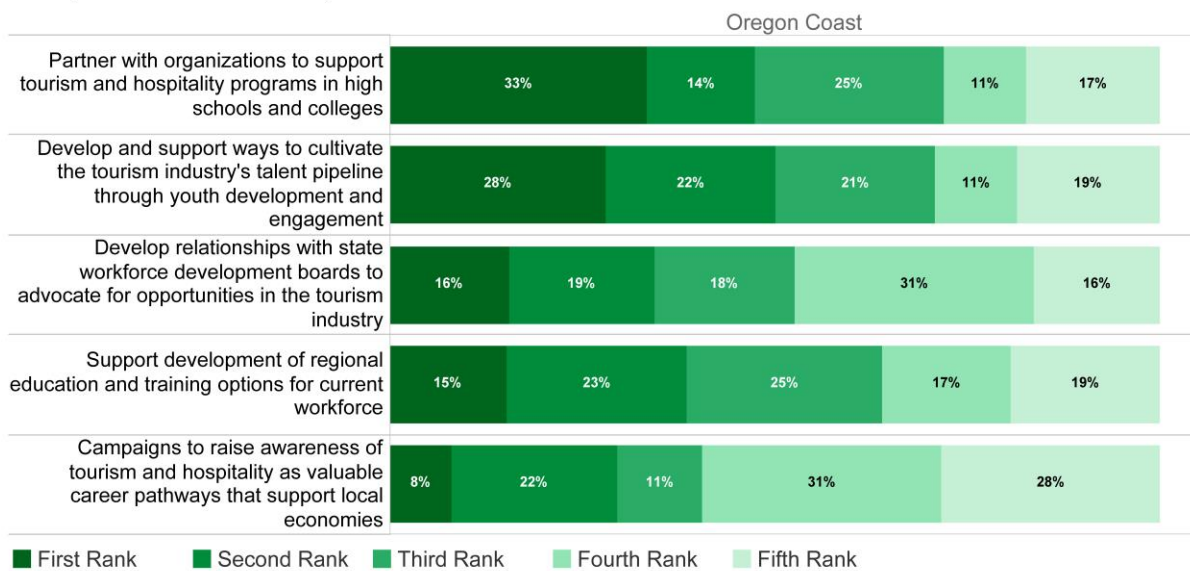


Source: RRC

Respondents were asked to rank, from highest to lowest priority, various educational and career opportunities designed to help develop, attract, and retain industry workforce. Oregon Coast respondents placed "Partner with organizations to support tourism and hospitality programs in high schools and colleges" as their top priority, with 33% ranking it first among the five options. The next top-ranked priority for Oregon Coast was "Develop and support ways to cultivate the tourism industry's talent pipeline through youth development and engagement" at 28%.

Educational and Career Opportunities (Regional)

Q: Please rank (from highest priority to lowest priority) the following educational and career opportunities designed to help develop, attract and retain industry workforce.



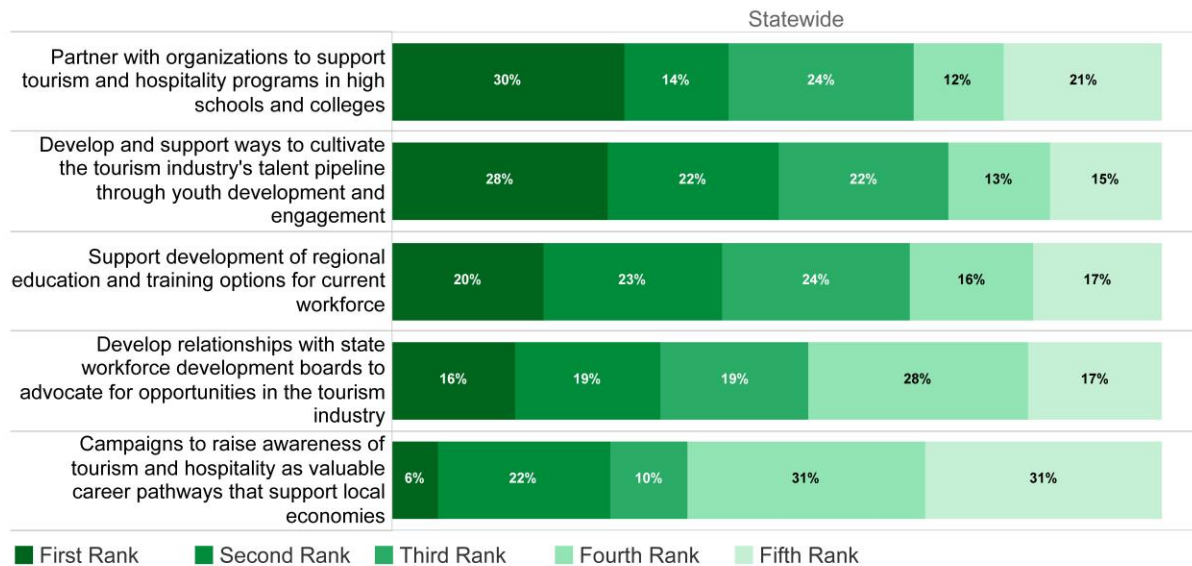
Note: Responses sorted in descending order by "First Rank".

Source: RRC

The statewide sample ranked "Partner with organizations to support tourism and hospitality programs in high schools and colleges" and "Develop and support ways to cultivate the tourism industry's talent pipeline through youth development and engagement" as their first-ranked priorities at 30% and 28%, respectively.

Educational and Career Opportunities (Statewide)

Q: Please rank (from highest priority to lowest priority) the following educational and career opportunities designed to help develop, attract and retain industry workforce.



Note: Responses sorted in descending order by "First Rank".

Source: RRC

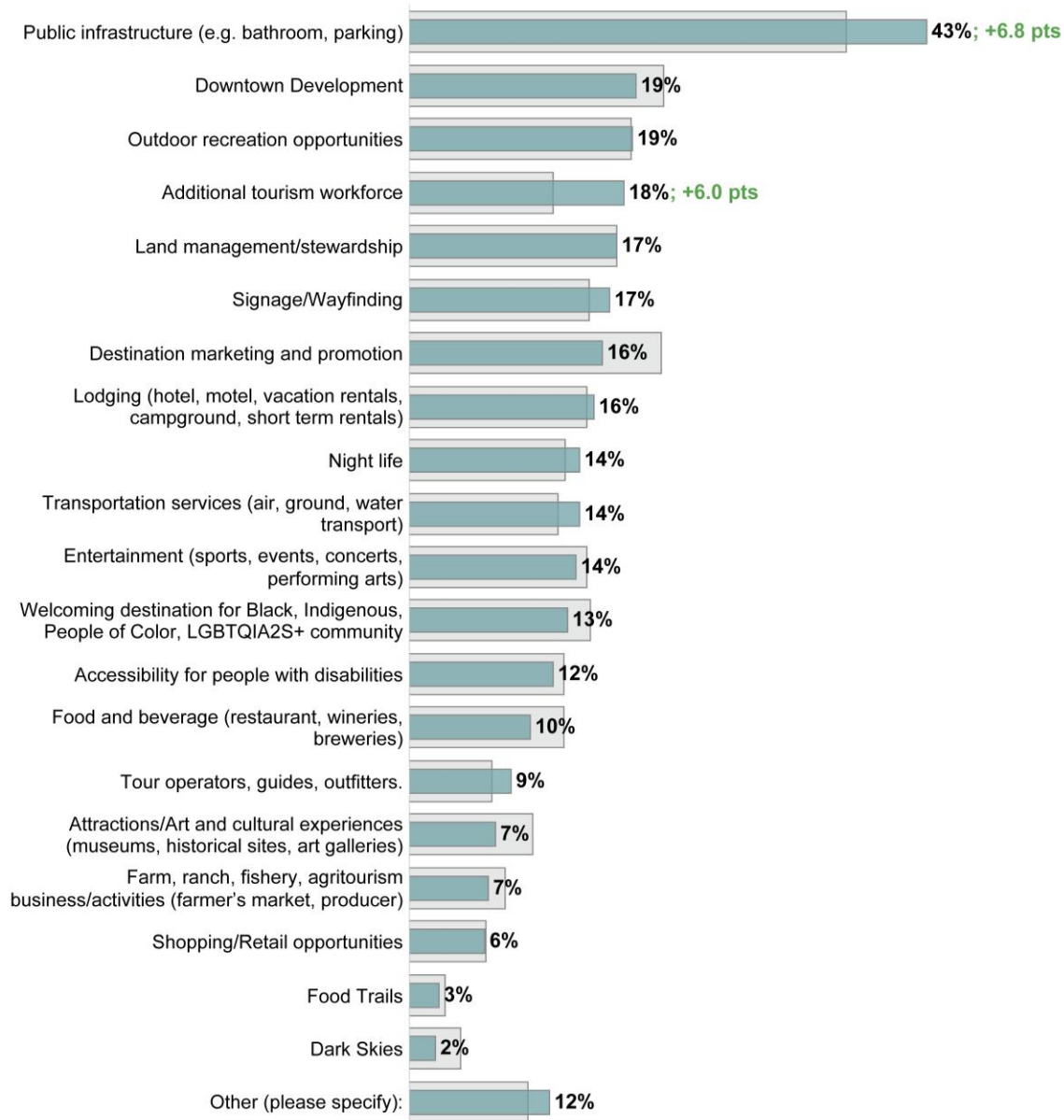
AREAS OF FOCUS

The top areas that the statewide sample said their community needs to focus on to improve the resident and visitor experience were public infrastructure (37%), destination marketing and promotion (21%), downtown development (21%), and outdoor recreation opportunities (19%). The top priority for the Oregon Coast is also public infrastructure (43%), but to a greater extent than the statewide sample. Downtown development (19%), outdoor recreation opportunities (19%), and additional tourism workforce (18%) were all rated highly in terms of focus areas to improve the resident and visitor experience for the Oregon Coast.

Areas of Focus

■ Oregon Coast
■ Statewide

Q: Please identify three areas that your community needs to focus on to improve the resident and visitor experience. (Select up to three)



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

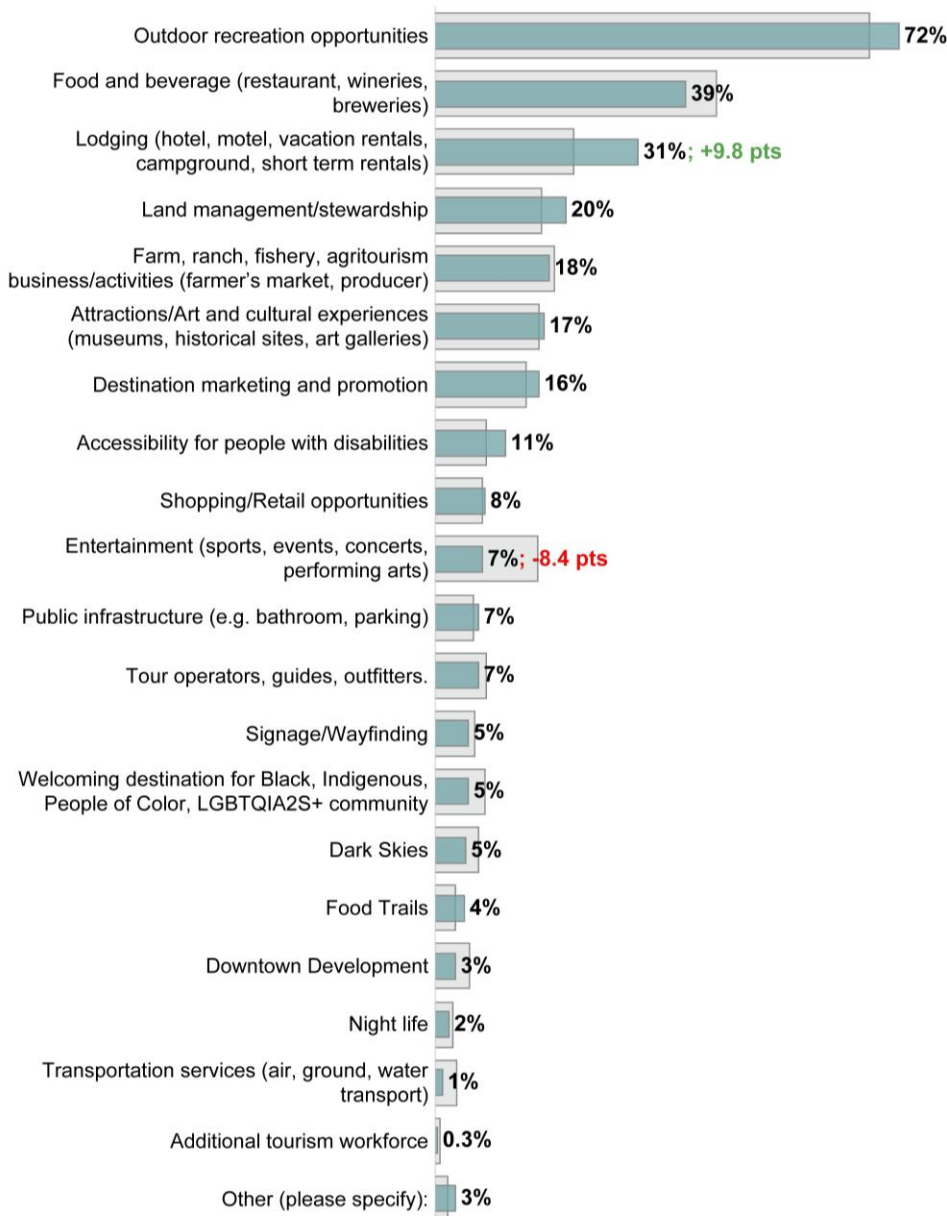
Source: RRC

Using the same set of answer options to those immediately above, the following figure portrays areas that respondents felt are strengths in their community. The top three areas that respondents from Oregon Coast consider as strengths in their community are outdoor recreation opportunities (72%), food and beverage (39%), and lodging (31%). In comparison to the statewide responses, respondents in the Oregon Coast region were more likely to identify lodging as a strength and were less likely to identify entertainment as a strength.

Community Strengths

■ Oregon Coast
■ Statewide

Q: Please identify three areas that are a strength for your community. (Select up to three)



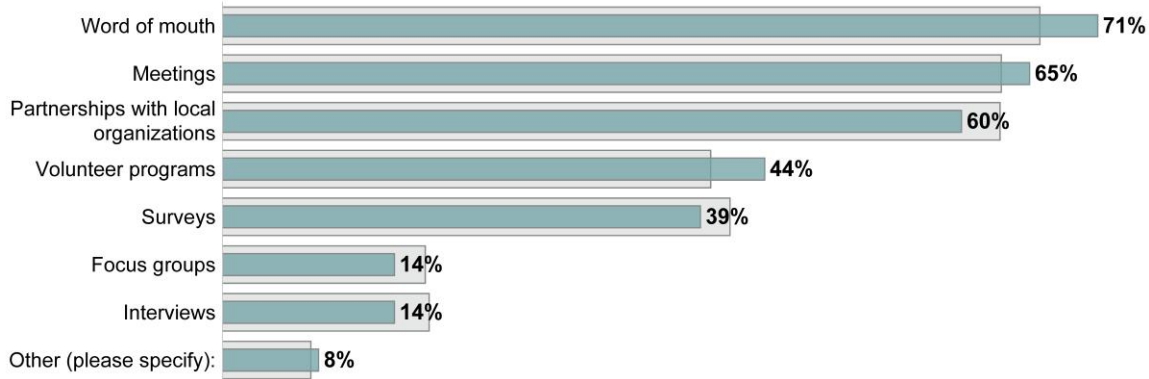
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

When communicating and engaging with the local community, the Oregon Coast is largely consistent with the statewide sample, using word of mouth (71%), meetings (65%), and partnering with local organizations (60%) to reach out to the community. Compared to the statewide results, the Oregon Coast is more likely to use word of mouth or volunteer programs to engage with their local communities.

Local Community Engagement

Q: *What methods have you used to engage with your local communities in the past 12 months?*



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

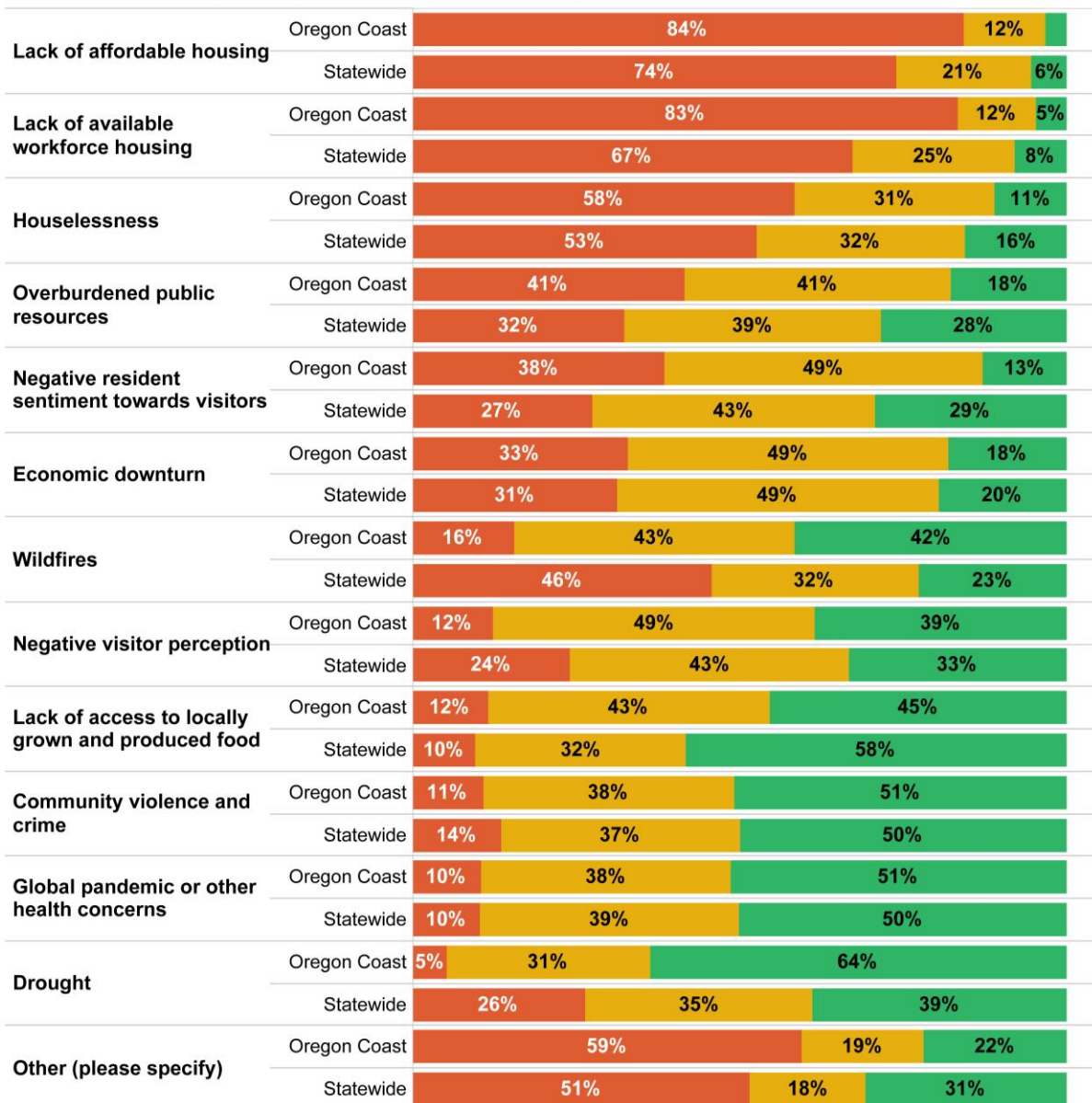
Source: RRC

The survey asked respondents to rate the challenges the community currently faces, and the level of risk associated with each challenge. The top three challenges statewide were identified by respondents as a lack of affordable housing (74%; "high risk"), a lack available workforce housing (67%), and houselessness (53%). Much of the response from the Oregon Coast identified similar challenges. Lack of affordable housing (84%), workforce housing (83%), and houselessness (58%) were identified as greater challenges for the Oregon Coast than the statewide sample. However, wildfires and drought are seen as much lower risks compared to statewide perceptions.

Risks to Tourism in Your Community

Response
■ Low risk
■ Medium risk
■ High risk

Q: Which of the following challenges does your community currently face?



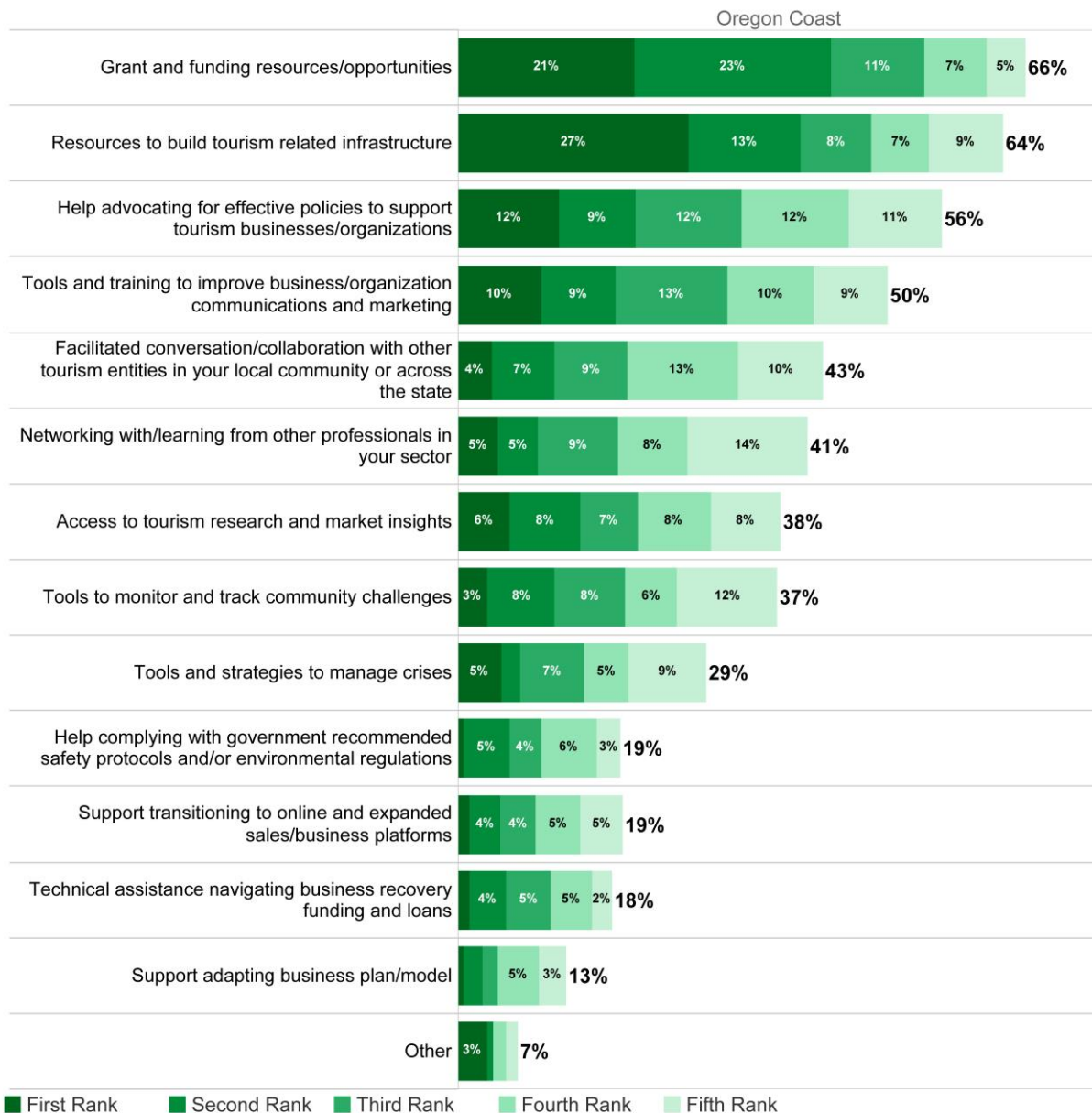
Note: Categories sorted in descending order by the percent of regional respondents selecting "High risk".

Source: RRC

The highest rated strategy statewide and in Oregon Coast was grant and funding resources/opportunities (72% and 66%, respectively, identified this among their top five resources or programs). Resources to build tourism-related infrastructure (64%) and help advocating for effective policies to support tourism business/organization (56%) were among the next highest rated for the Oregon Coast. The resources or programs that were identified as the lowest priority for the Oregon Coast were support adapting business plans/models (13%) and technical assistance navigating business recovery funding and loans (18%).

Resources & Programs (Regional)

Q: Which of the following resources or programs would best assist your business/organization or community in the face of the challenges identified above?



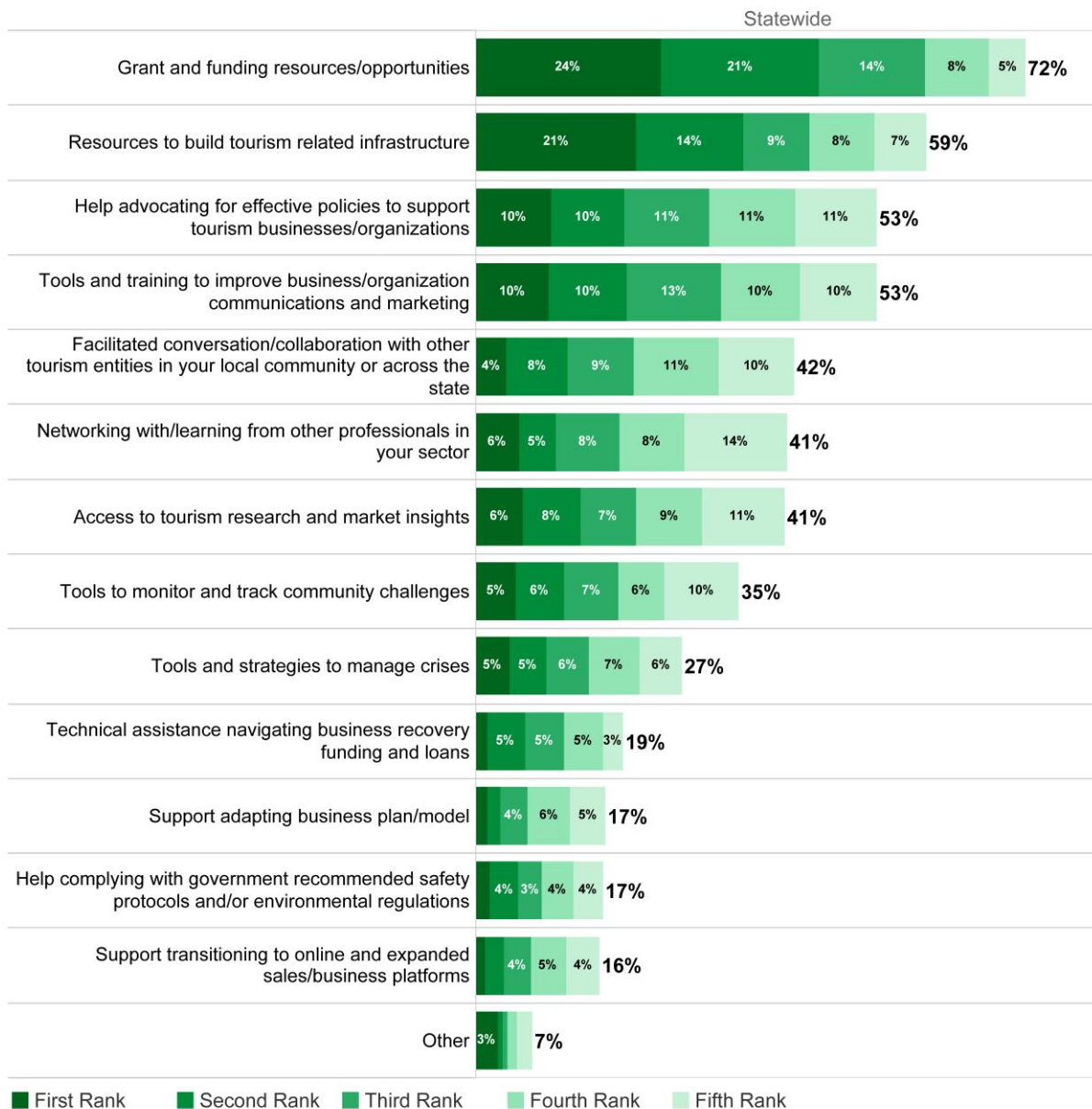
Note: Responses were recorded for the top five resources or programs respondents identified, with the sum of these five choices noted on the far right.

Source: RRC

Across the statewide sample, grant and funding resources/opportunities was the highest rated, with 72% of respondents identifying this among their top five resources or programs. Following were resources to build tourism-related infrastructure (59%), help advocating for effective policies to support tourism businesses/organizations (53%), and tools and training to improve business/organizations' communications and marketing (53%).

Resources & Programs (Statewide)

Q: Which of the following resources or programs would best assist your business/organization or community in the face of the challenges identified above?



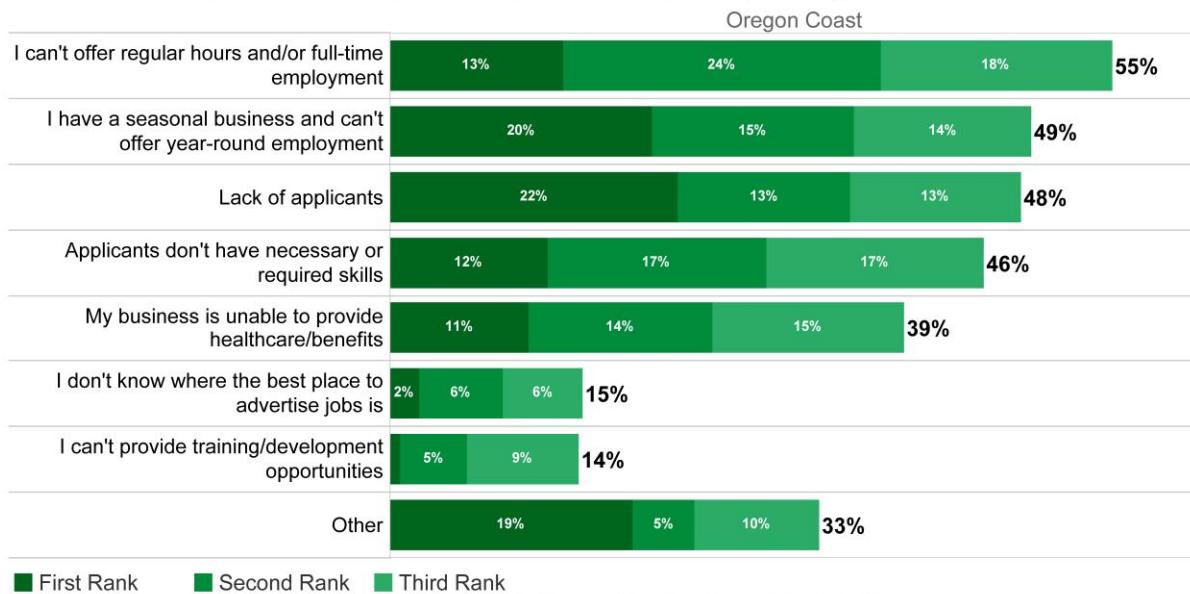
Note: Responses were recorded for the top five resources or programs respondents identified, with the sum of these five choices noted on the far right.

Source: RRC

Respondents were asked to identify the three greatest challenges they faced in attracting and/or retaining tourism workforce in the area. More than half of Oregon Coast respondents ranked "I can't offer regular hours and/or full-time employment" (55%) followed by "I have a seasonal business and can't offer year-round employment" (49%) among their top three challenges in the area. The lowest rated challenge by Oregon Coast was "I can't provide training/development opportunities" at 14%. Examples of challenges related to workforce housing mentioned in the "other" category primarily mention affordable/lack of housing.

Tourism Workforce Challenges (Regional)

Q: What are the three greatest challenges you currently face in attracting (and/or) retaining tourism workforce?



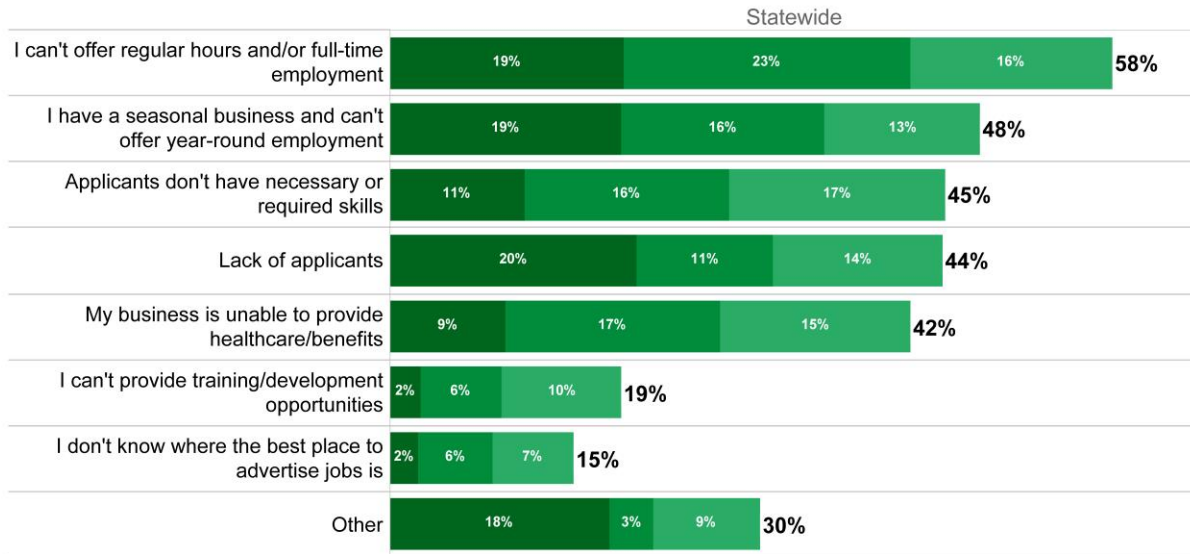
Note: Responses were recorded for the top three challenges respondents identified, with the sum of these three choices noted on the far right.

Source: RRC

The statewide sample was similar to regional findings, with the greatest share of respondents ranking "I can't offer regular hours and/or full-time employment" (58%) and "I have a seasonal business and can't offer year-round employment" (48%) among their greatest challenges. Similarly, "I don't know where the best place to advertise jobs is" (15%) was seen as relatively minimal in terms of tourism workforce challenges.

Tourism Workforce Challenges (Statewide)

Q: What are the three greatest challenges you currently face in attracting (and/or) retaining tourism workforce?



■ First Rank ■ Second Rank ■ Third Rank

Note: Responses were recorded for the top three challenges respondents identified, with the sum of these three choices noted on the far right.

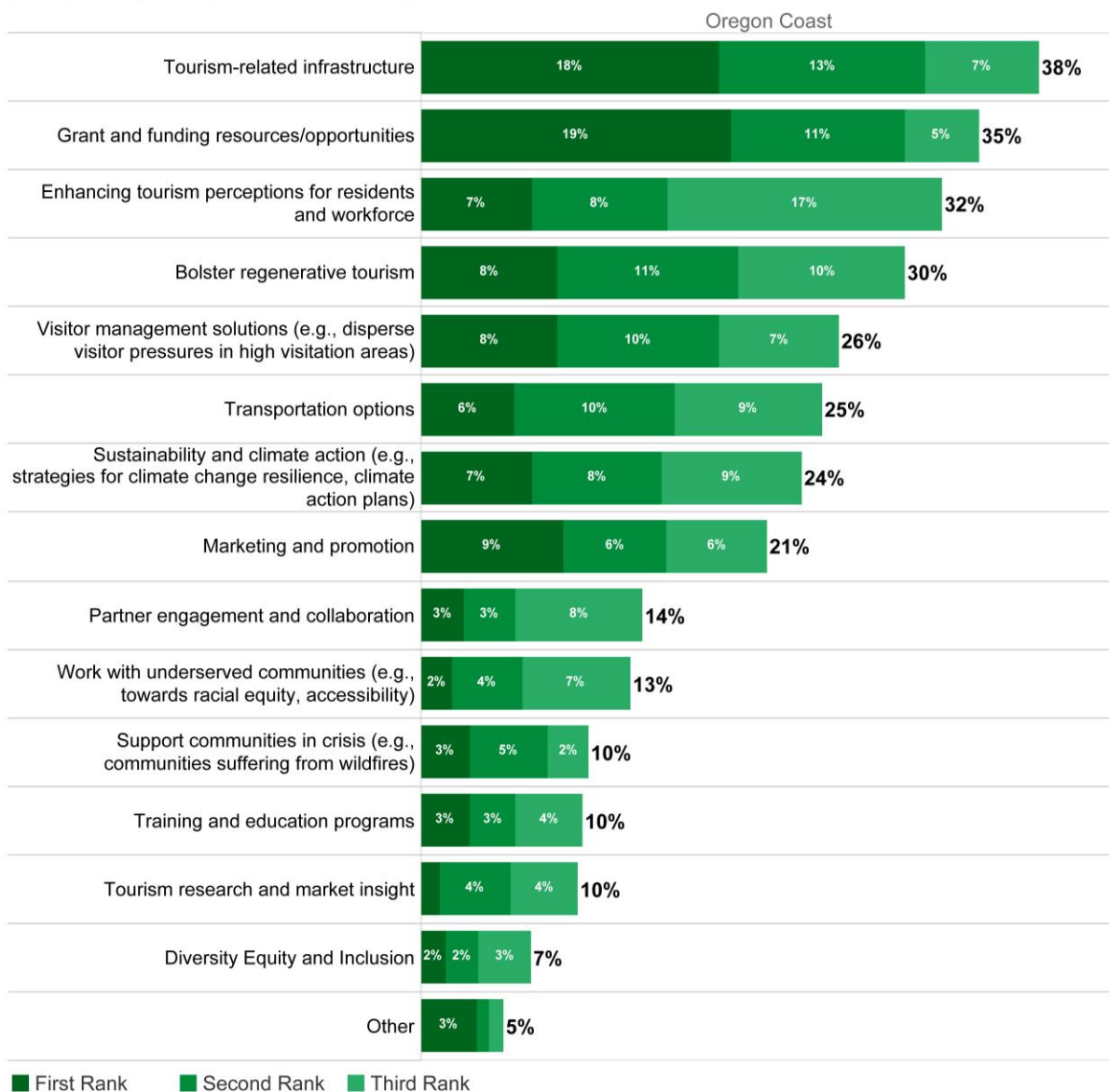
Source: RRC

As in prior iterations of the Oregon Tourism Industry Partner Survey, respondents were asked to identify the three areas that should be emphasized for tourism planning over the next 2-5 years.

Oregon Coast respondents identified tourism-related infrastructure as the top priority, with 38% of respondents identifying it among their top three priorities. Grant and funding resources/opportunities was the second most identified priority (35%), followed by enhancing visitor perceptions for residents and workforce (32%). Compared to 2023, marketing and promotion fell from 34% to 21%, the most major change.

Long-Term Tourism Planning (Regional)

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years. (Rank top three priorities within this list)



Note: Responses were recorded for the top three plans respondents identified, with the sum of these three choices noted on the far right.

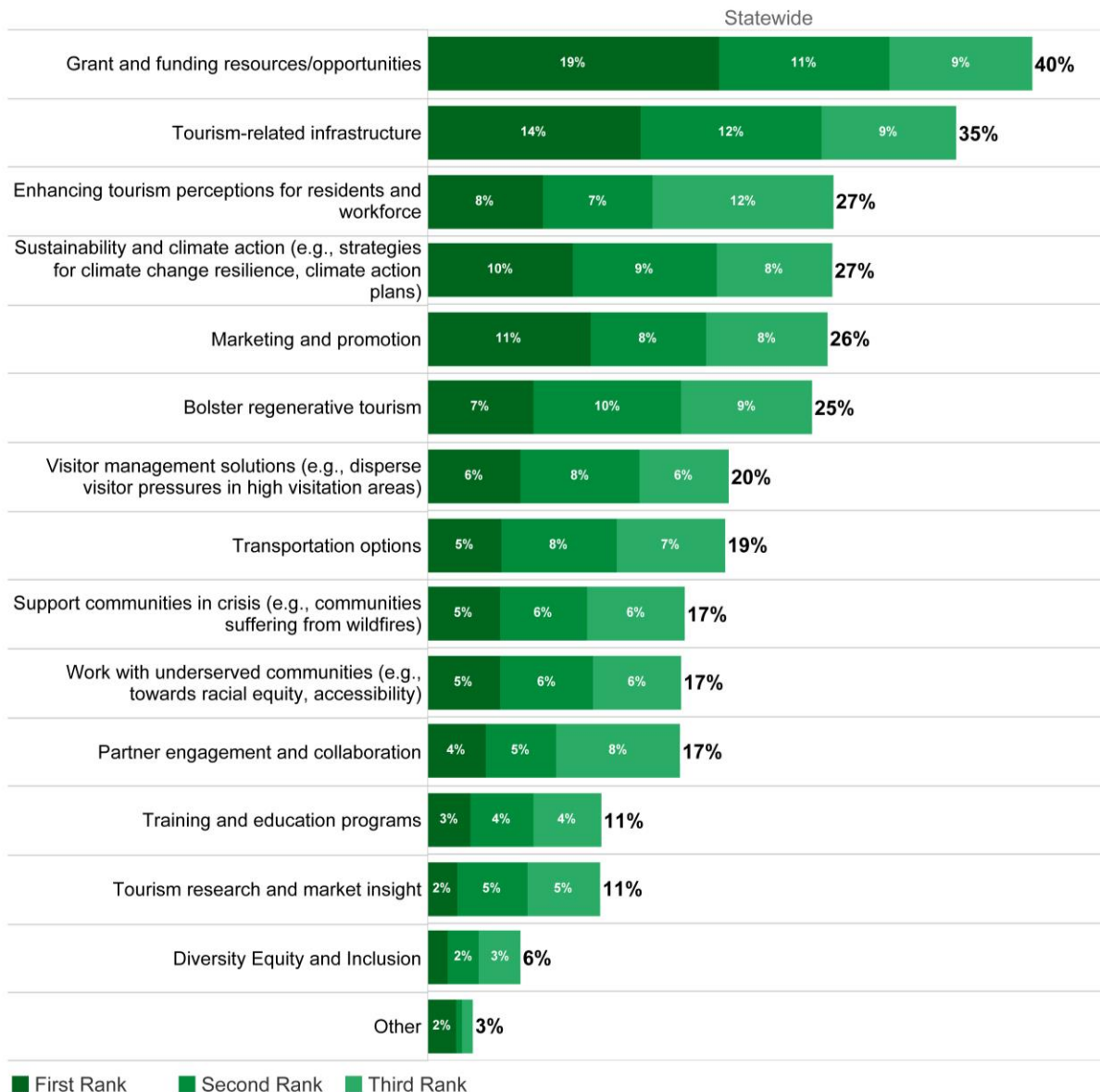
Source: RRC

The top priorities identified in the statewide sample were grant and funding resources/opportunities (40%), tourism-related infrastructure (35%), enhancing tourism perceptions for residents and workforce (27%), and sustainability and climate action (27%).

Relative to 2023, many of the same areas of focus were among the top priorities for respondents, with the exception of marketing and promotion, which was cited as a priority for 45% of the respondents in 2023 (down to 26% this year).

Long-Term Tourism Planning (Statewide)

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years. (Rank top three priorities within this list)



Note: Responses were recorded for the top three plans respondents identified, with the sum of these three choices noted on the far right.

Source: RRC

REPRESENTATION OF AND COMMUNICATION WITH UNDERSERVED COMMUNITIES

Historically and currently underserved and under-resourced communities, including Oregonians who identify as:

- Native American, members of Oregon's nine federally recognized tribes, American Indian, Alaska Natives
- Black, African, African American
- Latina, Latino, Latinx, Hispanic
- Asian
- Pacific Islander (including Compact of Free Association Citizens)
- Immigrants, Refugees, Asylum-Seekers, Deferred Status Holders, Temporary Protected Status
- Undocumented, Deferred Action for Childhood Arrivals (DACA), "Dreamers", Non-Immigrant Visa Holders
- Linguistically diverse, English language learners (ELL)
- Economically Disadvantaged
- People with disabilities
- LGBTQIA2S+
- Farmworkers, Migrant Seasonal Workers

Definition provided by State of Oregon

(https://www.oregon.gov/das/Docs/DEI_Action_Plan_2021.pdf)

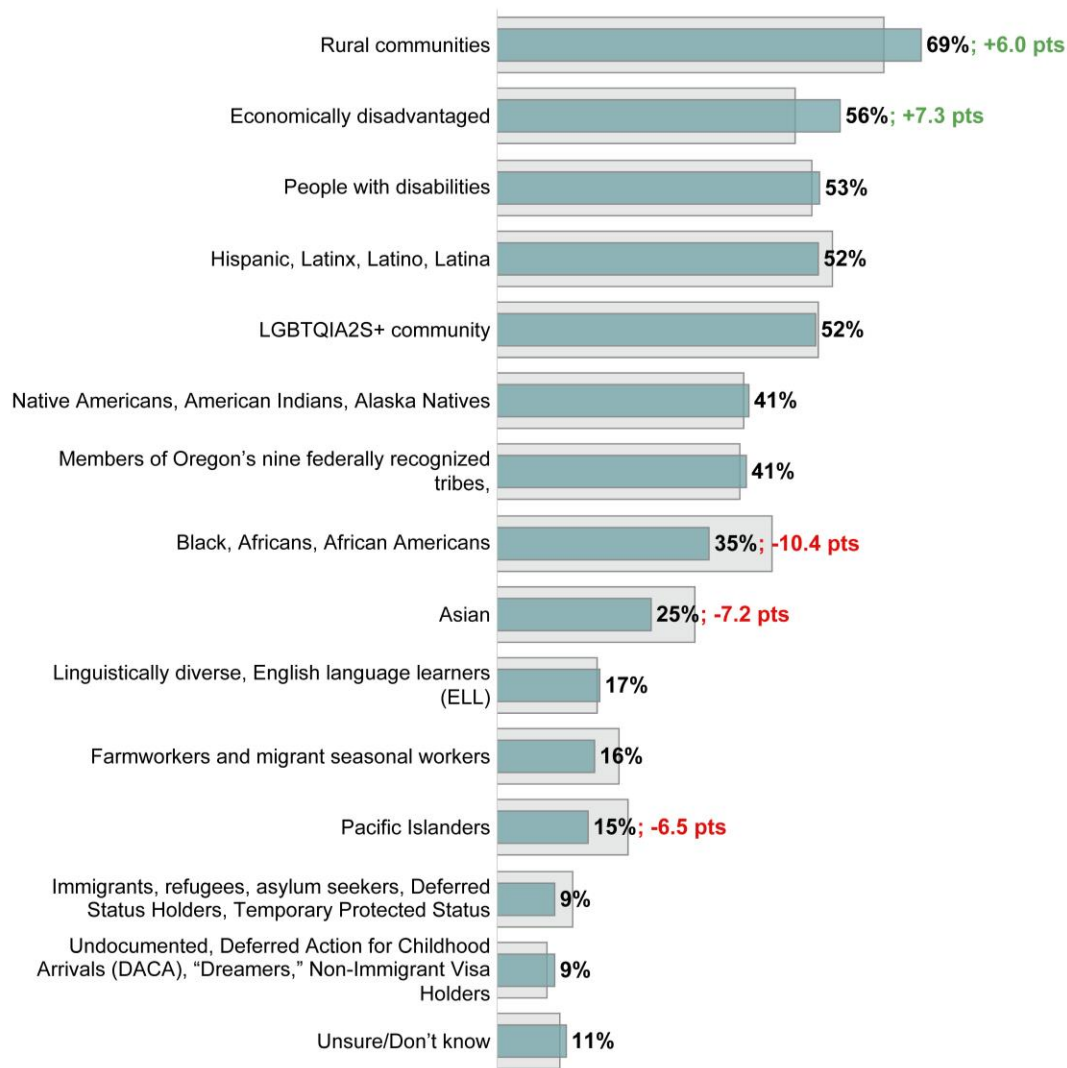
Of those underserved and under-resourced communities, Oregon Coast respondents self-reported having the most engagement with rural communities (69%); economically disadvantaged individuals (56%); people with disabilities (53%); Hispanic, Latinx, Latino, Latina (52%); and the LGBTQIA2S+ community (52%).

Conversely, the lowest self-reported underserved and under-resourced communities were undocumented, Deferred Action for Childhood Arrivals (DACA), "Dreamers," non-immigrant visa holders (9%); immigrants, refugees, asylum-seekers, deferred status holders, temporary protected status (9%); and Pacific Islanders (15%).

Engaging with Underserved Communities

■ Oregon Coast
■ Statewide

Q: Which of the following underserved communities have you engaged with in the past two years?



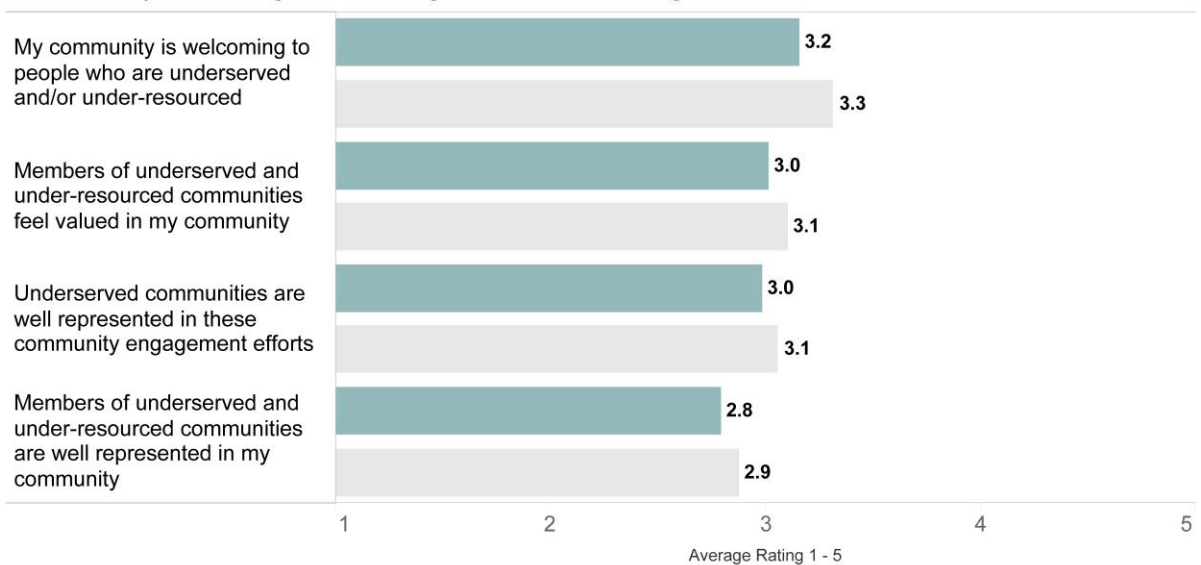
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Respondents were asked to rate their agreement with four statements that measured their representation of underserved communities in the area. Overall, respondents from the Oregon Coast showed slightly lower levels of agreement with the statements on underserved communities. The highest rated statement for both samples was "My community is welcoming to people who are underserved and/or under-resourced," at 3.2 on a five-point scale for the Oregon Coast. The lowest rated for both samples was the statement "Members of underserved and under-resourced communities are well represented in my community," at an average rating of 2.8 and 2.9 for Oregon Coast and the statewide sample, respectively.

Representation of Underserved Communities

Q: Please rate your level of agreement or disagreement with the following statements:

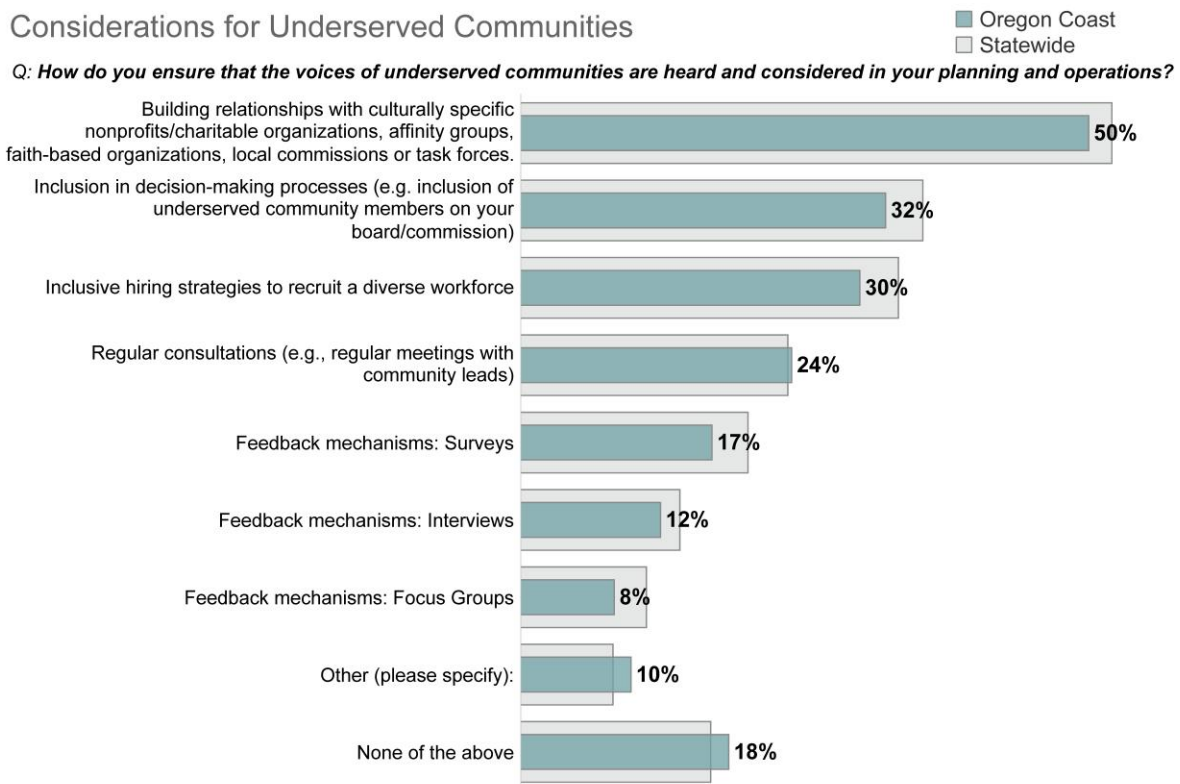


Source: RRC

When asked what considerations respondents make to ensure that the voices of underserved and under-resourced communities are heard, half of Oregon Coast respondents cited building relationships with culturally specific nonprofits/charitable organizations, affinity groups, faith-based organizations, local commissions or task forces. About one-third of Oregon Coast respondents also included these communities in the decision-making process (32%) followed by use of inclusive hiring strategies to recruit a diverse workforce (30%).

Responses from the Oregon Coast were largely in line with the statewide sample with a slightly higher share of those that use none of the above listed considerations.

Considerations for Underserved Communities



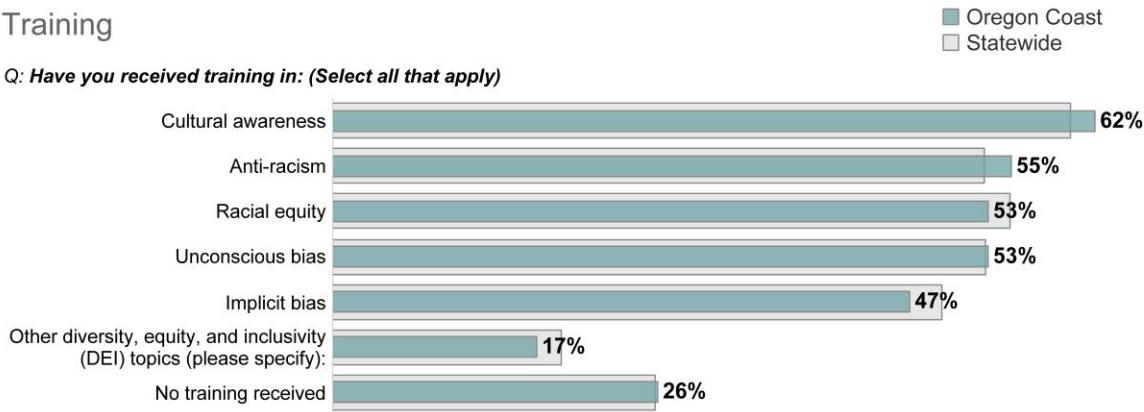
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

A majority of Oregon Coast respondents reported having training in cultural awareness (62%), anti-racism (55%), racial equity (53%), and unconscious bias (53%), with slightly less than half of trainings provided by their current employer.

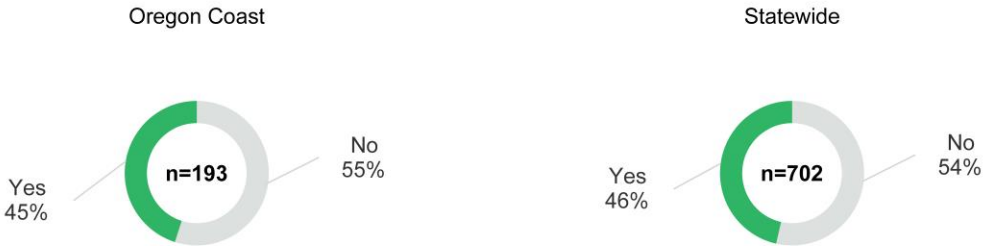
Training

Q: Have you received training in: (Select all that apply)



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Q: Was this training provided by your current employer?

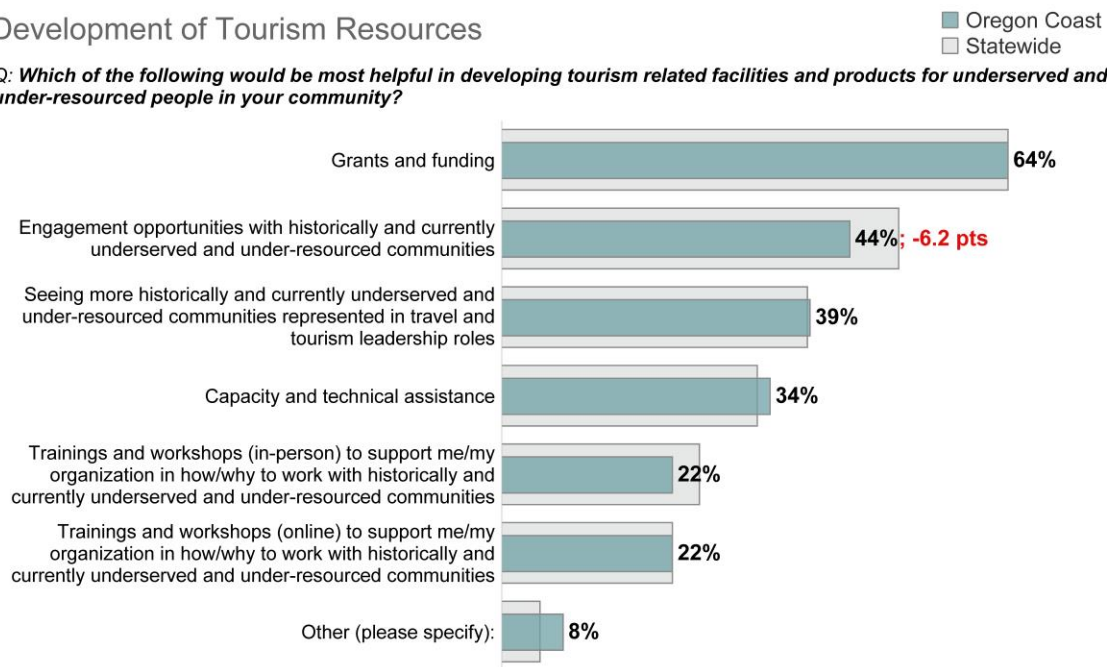


Source: RRC

When asked what type of resources would be most helpful in developing tourism-related facilities and products for underserved and under-resourced people, Oregon Coast respondents cited grants and funding (64%) and engagement opportunities with historically and currently underserved and under-resourced communities (44%). However, Oregon Coast respondents cited engagement opportunities with historically and currently underserved and under-resourced communities less than the statewide sample.

Development of Tourism Resources

Q: Which of the following would be most helpful in developing tourism related facilities and products for underserved and under-resourced people in your community?



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

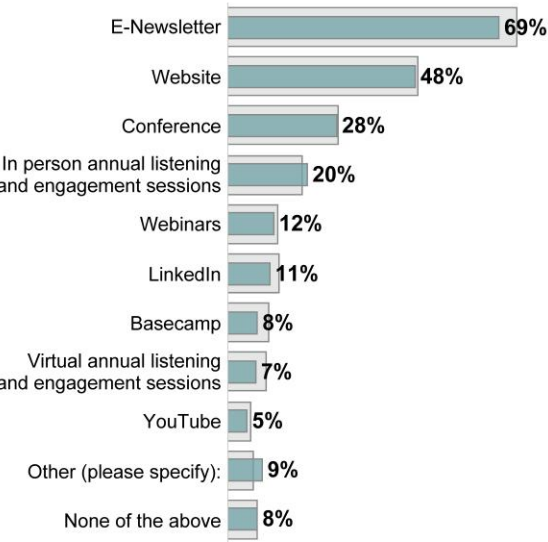
Source: RRC

INDUSTRY ENGAGEMENT AND COMMUNICATIONS

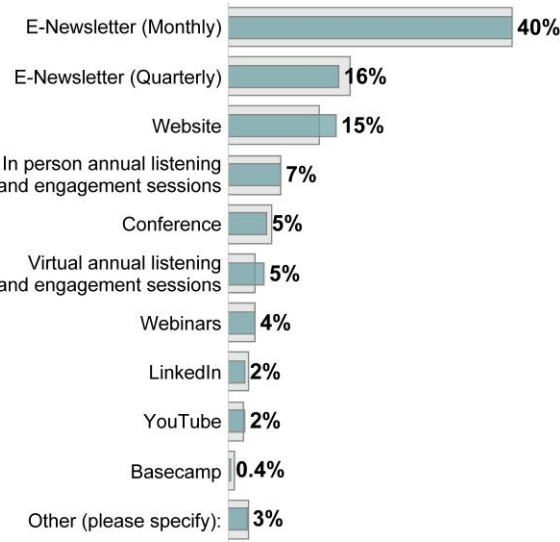
Sixty-nine percent of Oregon Coast respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter, followed by their website (48%). By a large margin, e-newsletters (monthly or quarterly) are considered the best way for respondents to receive information.

Tourism Communication Methods

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



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



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.











Source: RRC

OREGON COAST QUESTIONS

Each Regional Destination Management Organization (RDMO) had the opportunity to ask a series of custom questions of specific interest to their partners. 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.

Oregon Coast - Engagement with DMOs











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

Rating Category	Avg.	n=	1 - Not at all engaged	2 - Slightly engaged	3 - Somewhat engaged	4 - Moderately engaged	5 - Extremely engaged
Your local Destination Management Organization (DMO)(e.g., Explore Lincoln City)	3.2	223	 24%	 10%	 21%	 17%	 28%
Your Regional DMO - Oregon Coast Visitors Association (OCVA)	3.0	222	 19%	 20%	 17%	 24%	 20%

Source: RRC

Oregon Coast - Satisfaction with DMOs

Q: *Please rate your level of satisfaction with the services of the following Destination Management Organizations*

Rating Category	Avg.	n=	1 - Extremely dissatisfied	2 - Somewhat dissatisfied	3 - Neither satisfied nor dissatisfied	4 - Somewhat satisfied	5 - Extremely satisfied
Your local DMO	3.7	199	 4%	 9%	 32%	 24%	 31%
The OCVA	3.8	191	 3%	 5%	 31%	 28%	 32%

Source: RRC

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:

- *Previously you indicated "Public Infrastructure" as an area that your community needs to focus on to improve the resident and visitor experience. Please describe why you believe this needs to be a priority.*
- *Previously you indicated "Welcoming destination for Black, Indigenous, People of Color, LGBTQIA+ community" as an area that your community needs to focus on to improve the resident and visitor experience. Please describe why you believe this needs to be a priority.*
- *Previously you indicated "Farm, ranch, fishery, agritourism business/activities" as an area that your community needs to focus on to improve the resident and visitor experience. Please describe why you believe this needs to be a priority.*
- *Previously you indicated "Land management/stewardship" as an area that your community needs to focus on to improve the resident and visitor experience. Please describe why you believe this needs to be a priority.*
- *Previously you indicated "Transportation services" as an area that your community needs to focus on to improve the resident and visitor experience. Please describe why you believe this needs to be a priority.*
- *Previously you indicated "Bolster Regenerative Tourism" as an area that needs to be emphasized for longer term tourism planning over the next 2-5 years. Please describe why you believe this needs to be a priority.*
- *Previously you indicated "Sustainability and climate action" as an area that needs to be emphasized for longer term tourism planning over the next 2-5 years. Please describe why you believe this needs to be a priority.*
- *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.

Previously you indicated "Public Infrastructure" as an area that your community needs to focus on to improve the resident and visitor experience. Please describe why you believe this needs to be a priority.

Availability of public restrooms & adequate parking. The lack of public restrooms is of most concern & problematic for small businesses.

Balance between short term rentals and long term housing
Basic services need maintenance : Roads, water, sewer, beach accesses
Because of the houseless issue, a lot of the public bathrooms are locked. Also when travelers want to revisit a place they can't seem to find parking near by.
Because the infrastructure (waste management, telecommunications, road) in Tillamook County is old, non as accessible as it should be and in many cases non-existent b/c it's a mostly rural, nature-based destination.
Because the more we get second homes built, the more impact there is on our water, wastewater, streets and on our parks. And making sure we have the parks maintained to better provide good experiences for our tourists and community.
Better medical facilities. Road improvements and parking.
Boardwalks, inviting gathering places, better way finding signage, stairways, and accessible ramps to beaches—there is only one built in the whole county, and it is Harris Beach. Samuel H. Boardman could use raised, built trails to keep tourists and locals from wandering off a trail or taking a goat trail and it leading to a cliff's edge. We have only one beach access point in the county that doesn't need infrastructure before utilizing things like Mobi mats. We have some of the more expansive beaches in the whole state, and you'd better be in tip-top shape to get to them.
Bumper to bumper traffic on Hwy 18 and 101 is very slow, taking 30 minutes or more to travel 7 miles. Finding a place to park at the beach, the grocery store, mall, etc. is next to impossible during the summer months and holidays.
Cities are experiencing capacity issues with water and sewer.
Communities in our county need to provide tourism parking, camping/RV parks and tourism-related attractive venues
Community members biggest push back on some of the rec plans (e.g., trails).
Developing a nice place for visitors requires more and better bathrooms, showers, parking, and information centers
Expanding the public infrastructure to include trails for intracity connectivity. Tourism relies on access by bicycle and by foot. Rural highway shoulders are not an acceptable option.
Funding mechanisms to develop amenities are challenged in rural areas.
Having attractive infrastructure layouts is appealing to passers by.
Heavy congestion in summer months displaces locals/local workforce from enjoying the community they live in
I feel we need to focus on parking so our guest s are not parking in front of residence, front yards and blocking driveways but actually have places to park
If the water mains break, it shuts down everyone -- restaurants, motels, vacation rentals, public restrooms. Not good PR.
If you can afford land to build the city costs are to high

improve traffic flow on major roadways US101 and public walkways to help create a safe environment.
Improved facilities for visitors and residents.
In a recent study and survey we commissioned through Clarity of Place, residents and stakeholders expressed overwhelming emphasis on better parking and traffic management solutions. The overcrowding on our streets and Highway 101 makes it difficult for everyone, causing a five-minute drive to the grocery store to turn into 30-45 minutes and souring moods as the frustration of circling the block for an hour in search of a spot irritates visitors and residents alike.
Infrastructure is old, crumbling and costly to repair so it is not improved. Needs financial means to make needed improvements
It can be difficult to find parking places, camp sites, hotel rooms on the north Oregon coast during about half of the year.
It is a priority because the public infrastructure helps the people around that place and also boosts the employment rate
lack of funding for the extra summer fall and spring population funding needs for road maintaining
Lack of parking in Cannon Beach causes chaos and overcrowding in the summer. Also high need for public bathrooms
Little public infrastructure development has been done, unless TLT can pay for it. It's a poor county, with decreasing budgets.
Local transportation (such as a trolley along the waterfront) would improved mobility in our communities, but we also need improved trails and beach access for the mobility challenged.
many of our beaches barely have enough parking and it causes hazards of people parking unsafely on the side of the road (and not receiving tickets for it!).
More parking, guide loading docks that have been dredged
More public restrooms. Parking availability. Workforce housing limiting availabilty of qualfied workers.
Much of what we have is old and outdated.
Neskowin's public infrastructure is severely lacking. Our public parking in the wayside has public restrooms that are antiquated and dirty. Port-o-potties have been installed at beach access points along with dumpsters. Larger trash and recycling receptacles need to be available in the public parking lot. Neskowin has a huge number of day-visitors in the summer and our wayside is too old. Also our handicapped beach access is nonexistent.
On the north end of our community there are no parks, no public restrooms, no drinking fountains and no public parking. The beach access parking is a very limit and serious problem.

Oregon coast is over-burdened with visitors during peak season; need to expand capacity

Our community is currently seeing an increase in visitors. While public restrooms are being updated, strategically building multiple single-room gender-neutral restrooms that are also accessible could help mitigate conflict and support inclusion. I.e., Sexual assault victims may not be apt to share a gender-neutral restroom despite their support of trans people. While an able-bodied person in a rush may need to use a stall that is ADA as a disabled person searches for a stall and must wait. Sidewalks in Cannon Beach are narrow and tend to cause more frustration to those who are roaming the streets. Sidewalks are not friendly to able-bodied people, let alone those with accessibility needs or challenges. Parking is a sore subject in town, as many visitors double park and park in areas that can harm drivers and pedestrians. Especially if vehicles obstruct views.

Our infrastructure is maxed out every weekend, and our low income community can't afford to maintain it. We have hardly any budget to maintain beach accesses and public bathrooms. Multiple water/sewer issues tied into the lake, and horrible traffic and parking issues.

Our population is approximately 40,000 and certain times of the year that is over 100,000. We do not have the infrastructure to support this type of growth and maintain this infrastructure. It is not an option to burden our tax payers with this type of infrastructure development.

Our roads and bridges are terrible. Traffic even during non tourist days has become terrible and ODOT has recently made it worse with some traffic pattern changes. We also are one of the most expensive areas to live with very few jobs outside the tourism industry which doesn't seem to pay family wages

Our small coastal communities' services are stretched thin during peak season. More robust cellular networks as well as more sanitary facilities (public restrooms, garbage/recycling bins) are needed in my opinion.

Our visitors frequently overwhelm our parking and restroom availability. Space to expand these resources is very limited and costly. Resistance to expansion hampers progress.

Our water and sewer plants are aged and regularly break , interrupting service to tourist related entities- restaurants, lodgings, public toilets, etc. of course locals are inconvenienced too.

Our small has boomed with visitors and seems like its overcrowded and cant support parking and restrooms are necessary for successful outdoor recreation

Parking and bathroom stresses, ADA accommodations need to be improved, access roads to the coast need improvement.

Parking and pedestrian safety is an issue in several locations.

Parking and restrooms are always complained about (lack of). Along with visitors, locals would access trails; development would be welcome.
Parking and road congestion can be a challenge during tourist season.
Parking and tsunami preparedness/towers
Parking, the locals are upset that cars are parked on the street in front of their homes but in town there is nowhere to park
Parking, waste management, traffic concerns and accidents
People who travel want a strong internet connection (5G) for searching destinations and navigation. Transportation options and more walkable areas near lodging are highly sought after by tourists. Increasing public safety by providing structures/shelters for homeless and enforcing the law with people who commit crimes (theft, vandalism, assault, etc). For locals or people who may need to relocate to this area for work need better and more access to quality schools and healthcare.
Public bathroom maintenance & trash receptacles are greatly needed.
Public Bathrooms and Bathhouses for the Beach and Downtown area of Gold Beach
Public parking, and public toilets and public transportation. The bus isn't advertised at all, it's difficult to find stops and schedule
Public transportation, facilities that are not taking away from the community.
Resiliency of basic infrastructure (water, sewer, power, transportation) to natural disasters and climate change is a problem across the coast. Improving this will help foster long-term sustainability of community wellbeing and ability to serve tourism demand.
Restrooms would be nice; however, they are costly. Trash and recycle bins are needed as well to clean up our public areas.
Road conditions and signage is not good in my area, Charleston, Oregon in Coos County. There is no funding for trash pickup or beautification.
Road conditions, water infrastructure needs, and improvements/readiness for earthquakes/other natural disasters are a huge need in our communities and the cost for the necessary improvements is far beyond what our local tax base can afford. Our county population doubles on the average day due to visitors, however our roads and water and sewer infrastructure is not fit for that amount of people and the strain is typically felt by residents, who then have to try to pay for improvements but the average income here and tax base does not match the need. If we're going to continue to have tourism as our main industry, we need to have the physical infrastructure to get them here and have a local workforce that is physically able to work and live here.
roads and bridges on the coast are aging and failing. Many places were not built for large groups of guests which causes issues with parking, trash, water use/sewage.
Some regulations to protect the residents so visitors do not take advantage of private areas. Keeping things clean, noise pollution, criminal activities, we need more police &

strict law enforcement for our area so we are all safe. Also more wildlife officers to protect our Forrest & water ways for those who live there.
South Coast needs wayfinding signs and public bathrooms.
Stop raising tourism tax's
Survival of locally owned businesses which do not have deep pockets and basically have to survive by income from visitors.
The City has a lot of tourism. Bringing people in isn't the highest priority, it's how to serve visitors and residents. It's about how to have revenue generated by visitors to be allowed to be used to offset the impacts of those visitors.
The lack of visitor parking is a major concern. The lack of affordable housing for our workers is inhibiting the availability of workers.
The parking lots and streets are completely full of cars in Cannon Beach in the Summer.
The road conditions are atrocious. The heavy traffic is not suited for what is available. One example that I am familiar with is the Astoria Bypass, talked about for over 40 years and desperately needed
there isn't much public parking at the beach
There are a number of pedestrian areas in our community that could have enhanced walk-ability and would be beneficial to the safety of both visitors and community members.
There are not many bathrooms or trash cans around town. There are no water fountains. We at least have benches now. There are not many gathering places, with water and bathrooms available.
There is a lack of public facilities at recreational areas. No restroom or trash cans seem to increase litter along the trail
There is a lack of workforce housing. Rents are so high that most people cannot afford what is being built. Jobs need to be able to afford housing or vis versa. There are many houses turned into vacation rentals when they could be rented for long term to the workforce. People must have roommates to afford any type of housing in the area.
There is an obvious lack of trash can on the beach and recycling dumpsters in Oceanside.
There is none. No public restrooms, limited parking and only 1 large park.
To many small business that can't afford wages for additional help.
Traffic and limited transit options create congestion.
Traffic can be challenging. I would like to see gender neutral bathrooms in park facilities. We need public transit for safety and accessibility
trash, congestion, wayfinding, restrooms, parking all effect both the resident and visitor experience.
use of lodging tax is restricted and visitors use our streets, restrooms, water and wastewater, beach accesses. We need assistance to maintain these elements of public infrastructure

Visitor traffic, parking and bathroom needs all become a huge burden for locals and business owners during high visitation in the North Coast range.
we need more restrooms, sidewalks on 101, filtered water fountains, and trash bins
We are currently looking at the development of a Parks and Recreation District to better utilize city, county, and state parks, increase their funding, and maintain them sustainably.
We are often overrun with visitors at key sites that technically do not have parking lots. This leads to risky driving situations on HWY 101. In addition, because there is high usage and non-trail head locations there are no facilities which leads to little and a build up of human waste.
We can't get medium or high density housing because it puts too much pressure on our water and sewer systems. Medium and high density housing is essential for a workforce. Our current medium and high density housing is wildly expensive because it's so limited. It would singlehandedly fix the problem, but it would certainly help. Also, I would love our lifeline to the interior (Hwy 6) to get the attention it needs for repairs and safer navigation!
We do not currently have the infrastructure to expand our capacity for visitors. Without infrastructure in place, attempting to draw more visitors will cause them to have a poor experience. We need bathrooms, TRASH CANS (literally, I can never find a trash can at any public space), parking (some "parking" is just a tiny turn out on the side of a cliff only space enough for one vehicle), transportation.
We have old roads and infrastructure that has not been expanded/improved at the same pace as population and tourism growth in our region. Concerns about too many cars for our roads and parking areas to handle. Parking, bathrooms, alternate routes, etc.
We lack adequate parking areas, transportation options, public restrooms, trash cans, composting facilities.
We need areas that are conveniently located that encourage people to stop, take a break, go to the restroom and include signage that shows how to get to the beach, must see locations, has brochures available. I would also like to see this be a place where we can emphasize trail safety and stewardship. We have visitors centers, and one rest stop but I think we need more than what we have.
We need to be more accessible
We need winter demand generators and this gap needs to be filled by conference space or sports facilities that will attract visitors in the winter
Without the physical issues addressed both the residents and tourist will experience shortages and negative experiences resulting in a poor view of our area.
Yachats needs bathrooms and parking. High priority. Businesses are so strained as it is during peak tourism months.

Previously you indicated "Welcoming destination for Black, Indigenous, People of Color, LGBTQIA+ community" as an area that your community needs to focus on to improve the resident and visitor experience. Please describe why you believe this needs to be a priority

As a member of the LGBTQ community, there is still a strong undercurrent of homophobia and racism in our rural, conservative area.

As a member of the LGBTQIA2S+ community in Tillamook, I can speak first-hand about the fear that comes along with being "out" in public. While there are some companies that have pride flags in their windows, the community at large feels unwelcoming. Though this is a smaller complaint, I have felt unsafe displaying pride flags or similar because I know my neighbors do not approve, and as a woman who lives alone, I feel I have to ignore that part of myself to keep myself safe in this area.

Because our town is more accepting of diversity, relative to other destinations on the coast, I believe that there is an opening to seize this opportunity.

Because the coast lacks diversity these groups may not feel welcomed because there aren't people that look like them. But diversity is what makes the US great and we want these groups to feel welcomed because they are.

Because these people are historically marginalized. I know that a lot of the older conservative, law enforcement and military moved to Oregon to retire in a very racially homogenous place. We have very few people who feel comfortable expressing themselves in public. The community seems to be tolerant, but not accepting.

Because visitors to our part of the Oregon Coast (and I think the Oregon Coast in general) have a tendency to be mostly white, and I want to explore why that is. And my part of the Oregon Coast has a tendency to also be very intolerant of the LGBTQ+ community and as a queer member of this community, I would love that to change.

Change isn't an easy or easily welcomed practice; however, 25-30% of the population is of Latin or indigenous descent, and truthfully, there is still a feeling of 'otherness' to those who operate and live in our community, if they are fortunate to do so. There has been an increase in visitors that are People of Color, which has been heartwarming and beautiful to see; however, as it is a seasonal occurrence, the town itself lacks sensitivity in including those in events that are 'traditional' year-round. There is still a very blended mix of conservative and liberal ideology and practice in town that isn't always tolerant of the LGBTQIA+ community. It's not a regular occurrence but it does exist, making it a bit more challenging to believe that everyone will receive the hospitable treatment they deserve when exploring our community.

I think it is a bigger issue than Oregon can solve.

I think there is room to be more inclusive in marketing materials, informational resources, and to investigate via research/interviews/focus groups how folk from BIPOC and LGBTQIA+ feel on the Oregon coast when visiting.

In order to stay relevant- more young people identify as LGBTQ+ than in any previous generation. Additionally, many locals lack access to education around LGBTQ+ issues so even if they want to be supportive and welcoming, they may not know how. When I visit McMinnville and Portland I see more LGBTQ+ inclusivity and I know that we can do better
It does not seem like we are very deversified in our population here visiotrs/locals
My community is quite rigid and conservative. Moving into the future, we need to become more inclusive of any and all non whites to succeed.
Our city is constantly growing and there are areas that have chosen to resist in this growth of inclusivity with these different communities. This is what makes us special, and individual, but it shouldn't divide the community. Whether it's through Art, or gatherings, or simply respecting the region we're in, can make a change.
Our region doesn't have a way to welcome these populations. Often tourism is the first time you experience them being featured and welcomed. Seeing videos or materials reflecting this population does equal good for locals and tourists.
Our rural communities do not have enough exposure to these communities and therefore lack understanding.
Our town is 99% white and conservative. We need a more diverse population!
Promoting a welcoming environment to all community members is an area where all communities can improve.
Right now, it feels as if our community is very.....well, WHITE. A third of our population is Spanish-speaking, with very little representation for them. Bilingual fliers are posted here and there, but for the most part there is nothing. Marketing to BIPOC and LGBTQIA+ visitors should be our next area of focus. There seems to be a mindset of, "They know we're here and they'll show up" but we can't assume that's the case. We must SHOW members of these communities that we want them to visit.
The Oregon coast is segregated based on the reservation system and undoing the way colonialism has damaged indigenous access to the coast is imperative
These communities are not well represented or visiting our market and I'm not sure if they feel unwelcome or unsafe, but if we build a place where everyone can show up and feel welcome then I believe there would be more people of these communities showing up.
This is predominately a white community. We have witnessed discrimination by shopkeepers
To make the Southern Oregon coast a welcoming and safe destination for all travelers visible diversity within our volunteer and intern interpretive programming 1. connects with visitors in BIPOC, LGBTQIA+ communities 2. offers opportunities for families from underserved communities to elevate their appreciation for the area. 3. Training

underserved people to be present in the parkland and assist visitors can foster a sense of purpose and leadership

We are one of the whitest regions of the nation and have not reckoned with that truth. Our visitors are diverse from all over the world. We are generally unwelcoming and uninformed to other cultures and ways of being.

We have a small population of various ethnic groups and it doesn't appear that we promote bringing people of color into our community. I would like to see more people of color making our area a vacation destination, as currently we do not appear to be that welcoming. Need to have more draw to our area for various groups.

Previously you indicated "Farm, ranch, fishery, agritourism business/activities" as an area that your community needs to focus on to improve the resident and visitor experience. Please describe why you believe this needs to be a priority

Access to local food, travel for food/beverage trails, and access to farmers markets are critical, especially for emergency situations - we are an island with flooding and other disasters, and the coast will not be a priority in recovery.

Ag and fishing are primary industries in Tillamook. Visitors may want to understand them.

Badly under-represented

More education into it for both locals and tourist would help create more opportunities for jobs and tourism on the coast

Our coastal community currently does not have any farm, ranch, fishery, or agritourism. I believe this is a priority to bring jobs to the area and increase recreational opportunities for people with a variety of physical capabilities.

Our neighbors who farm, ranch, and work at the Port live here full time, and they work incredibly hard to bring some of the highest quality food on the planet to market. More people need to know about it.

Policy issues around use of ag and timber lands need to be evaluated and probably modified to support the opportunities and market demand for agritourism.

Small farms and ranches need to be supported to provide good quality foods to our surrounding communities. With all the development of store food products that have a bunch of crap in them, people are looking for non-bioengineered clean foods. What is happening is that the state and government offices are doing everything they can to damper and kill the small farms for more government processed foods. The demand for clean foods is huge and we are fighting to keep local farms, etc open to accommodate the growing demand for good food.

Take advantage of existing "attractions," such as fishing and ranches/farms.

These businesses/activities provide authentic experiences to both residents and visitors and give purpose and meaning to a destination/community.

We have very little local agriculture and need to have a Farmers Market to support the lack of local produce

We need fish hatcheries to produce higher numbers of fish

With the bountiful natural resources here, they should be promoted. Let them enjoy and recreate responsibly

Previously you indicated "Land management/stewardship" as an area that your community needs to focus on to improve the resident and visitor experience. Please describe why you believe this needs to be a priority

A larger focus on how tourists can help to preserve our area will help tourists engage in being a part of our land stewardship. Helping out and benefiting our area and going beyond just a leave no trace mentality. We need to have everyone engage in leaving things better than when we got here.

A trip to Lone Ranch Beach will show you how desperate the need is for maintenance of our parks. All of the picnic tables have rotted away, the paths are overgrown and the paved path to the beach is coming apart. Many pull outs along the Samuel Boardman Corridor are falling into disrepair.

As a number 1 priority our environment and resources are the source of all jobs and tourist activities

As more people come to our town, we need to continue crafting stewardship messages to inform them of safety and best practices in our natural spaces including state parks, the beach, and around wildlife.

Because we need to spread out the visitors in smaller locations and Yachats ridge is a space sitting there that could be a state use park but there is no one government agency or owner to pay for it- so it sits- wasted recreational space that could double as an emergency gathering space.

Because proximity to unspoiled land and sea are the basis for our entire tourism industry.

Cleaning up the land in which residents and visitors use is key to new and returning visitors.

Help developing parks

I serve on the Board of the Wild Rivers Land Trust and land management and stewardship of the land is what we do. We protect property in perpetuity and hope to have access to school groups interested in conservation.

It would help with the homeless problem and make areas more desirable.

It's a conundrum. We need affordable housing but we need to take better care of our public spaces and our watershed protection for water quality and quantity.

More people are visiting public land while fire risk increases and land management agencies lack funding to build new trails and rec infrastructure. This is a big risk and an

opportunity for the tourism industry to provide funding for development and management.
Oregon beach is why people come here
Our federal lands are not being managed for recreation and what we do have is deteriorating.
Our parkland is challenged by overuse by visitors. Interpretive Programming elevates resident appreciation of their home territory and gives them a role in promoting stewardship to neighbors and visitors alike.
Over tourism is a problem. We lack the trails and public land amenities needed to disperse visitors and reduce risky behavior of visitors.
Protecting the Oregon coast from bad future development and protecting existing communities from poor adaptations to climate change is imperative to maintaining livable communities and the coast remaining a desirable destination.
Resources need to be managed to address climate change and that affects tourism
Same answer as above. Get the state and government off our lands and let us grow our own good, healthy food!
Some federal agencies are behind in rec planning due to budget cuts, staff turnover, and other federal priorities.
Some locals have enjoyed unspoiled beauty for years. More people equals more impact and less access to those areas. It is a touch balancing act.
Some of our favorite trails have trees that have fallen and it is not easy to walk. Also garbage is dumped at young river falls. They need a garbage can that is picked up regularly
Sustainable tourism is of paramount importance. Education of resource protection and enhancement is critical to local residents, employees and visitors.
take care of our lands for all to enjoy
The coastal community and trails that are all around our area need to be kept up and available to visitors
Tourists need to respect the natural beauty of where they are visiting and minimize the negative impact they are having on where residents of the communities they are impacting live year round.
Visitor management - which impacts are land management. Some of our parks and recreation areas are being overrun and impacted by over visitation. Visitors need to be educated about stewardship - pack in/pack out; leave only footprints, take only photos. Respect and courtesy to others, etiquette and so much more ... we have LOTS of newbies to outdoor recreation that are damaging the resources and ruining the experience for others. So much outreach and education needs to be done and tourism hasn't even scratched the surface of the education - it needs to continuous and on a

regular basis. SAFETY - we must do a better job of protecting our visitors as well. LOTS of outreach that needs much better attention.

Visitors tend to "love it to death" here and heavy emphasis need to be made that they do so in an educated manner.

We are in an environmentally sensitive area - Ocean, river, estuary and wetlands. Pressure to build and develop natural areas is overwhelming, but runs contrary to best practices by scientists and conservation goals

We have a number of interactive promotions with some of our community partners, however overuse on trails has created impacted areas that are damaged unfortunately. There are also trails that aren't supposed to be hiked for safety reasons, but people still access.

We have lots of natural resources here that need to be protected and maintained so visitors and residents can continue to enjoy them in a safe way. There needs to be better management of trails, not only for visitors but for liability reasons for our local municipalities. Continued efforts on reducing litter and keeping areas safe for local wildlife. I think there needs to be some dedicated planning and coordination on what stewardship truly means and how it looks in action in communities and how all people can be good stewards at all levels of income.

We need to promote stewardship, otherwise our land and outdoor rec attractions become over utilized, and maintenance is deferred.

Without land stewardship our area would be overdeveloped.

Previously you indicated "Transportation services" as an area that your community needs to focus on to improve the resident and visitor experience. Please describe why you believe this needs to be a priority

During the peak of our summer season there is a palpable lack of parking in our communities. Lack of public transportation is a factor in that as well. The north coast as a whole would greatly benefit from having more transport options, I believe. Additionally, having more parking, perhaps outside of city centers with public transportation to the tourist areas may help.

Fuel prices burden regional travel especially in rural markets. Destination markets often have multiple tourism opportunities within driving distance but if it becomes cost prohibitive to drive then many tourist tend to limit their experiences to a confined area.

I think more people would visit if this area was easier to get to and get around in. Lower airfare rates, expand railroad to provide an Amtrak route from Eugene, Portland/Seattle, San Francisco or Sacramento. More walkable areas near amenities. Rentable e-bikes, scooters. Rideshare options and public transportation such as a bus and maybe a downtown street car or trolley system.

If visitors don't rent or drive to the coast there is limited accessibility as there isn't a great service from the valley or PDX to the coast. Once you get here, the bus system is great for daytime travel but not after-hours or weekends.
Intracity bus service is a great amenity. Providing more frequent service can assist the workforce and the tourism industry.
It is awful
Many employees don't have transportation within our county and cannot afford gas. Housing prices are so high there needs to be support in other areas.
Mass transit is still lacking for both locals and tourists. Plus, regular transportation from the valley to the coast would be awesome
Most coastal residence are acutely concerned about safety on the roads that cross the coast range and would like to see efforts to decrease accidents.
need more opportunities for public transit
Not everyone here has a car or have limitations to getting around the area. Many are senior who no longer drive, people with a physical/emotional challenge and they do not have many options for getting around. Also, there is no bus or other service that takes people all the way up the coast and that is a problem for many.
On a end of a tour, I ask them what they would like to see in the future in these towns. Almost always they say Uber or Lyft. "One person Taxi's are not enough".
Our public transit system is inconsistent and minimal. Many service industry workers face transportation challenges which stresses local business owners and workers. I also see strong potential for public transit to benefit community safety and local tourism because it allows people to enjoy night life and bar culture here safely.
people who don't drive have a hard time getting here
Poor public transportation options on the north coast. Only poor bus service. No trains.
Rental car agencies, shuttle or tour companies are non existent in our Florence region. This makes visiting the coast expensive and difficult to navigate unless someone rents a vehicle by the airport that they may fly into. Drive-in visitors would benefit by having shuttles and other modes of getting around within our communities. Often sites and points of interests are not within walking distance., Think: pedi-cab service, ebike rentals, electric car rental services and local shuttles that stop at points of interest.
Road options are limited along the coast. traffic cannot be dispersed to a variety of roads within a network and there is often only one primary route in and out of an area.
Roads are not designed for the amount of visitor traffic coming into the community and fatality and serious injury accidents are increasing.
The geography of our area is long (north to south) and narrow (west to east.) This creates the need for housing near the workplace, and the need for robust transportation options. Right now, the only way to effectively commute on the coast is by POV. The public transit options and private options (like cab companies) are inadequate.

there is minimal public transportation on the coast
There is a bus system, but so few drivers, routes are severely limited.
There is no public transit like you have developed in major populated areas. There is also a lack of regular air service 7 days a week (Except seasonally) out of the south coasts regional airport.
To encourage people to not bring their cars.
Too many cars on the road and leakage due to lack of walking/biking facilities.
Transportation to and from the airport is needed on the Oregon Coast Coast.
We don't have a rental facility for cars so we need to go out or area to rent.
We have a large county and public transportation services to the rural communities is lacking.
We have no local public transportation. Our board has been trying to encourage the City to invest in a trolley during peak season (as has been done in Pacific City).
We need an alternative to hwy 101, emergency vehicles cannot get through.
We need transportation services that disincentivize single-vehicle use and incentivize active and public transportation, which improves the visitor experience, mitigates congestion, and responds to resident's frustration with overtourism.

Previously you indicated "Bolster Regenerative Tourism" as an area that needs to be emphasized for longer term tourism planning over the next 2-5 years. Please describe why you believe this needs to be a priority.

Also, an existing attraction, perhaps more "events" with trail clean-up and Oregon Trail participants.

Because if we do not pursue a regenerative approach, nothing else on this list will frankly matter.

Because young people (the future) may decide to stay in this area to work and live, if we can interest them in activities here. So many leave the area to live where there is better pay in the I-5 and other populated areas.

Bolstering regenerative tourism is our main value system/focus area. To address resident concerns and feedback, and to abide by our mission, we want to not only reduce the negative impacts of tourism, but be active stewards of our land and encourage visitors to actively restore and regenerate the resources of this destination, as well.

Changing the mindset of outdoor recreation visitors to not just USE outdoor assets, but help sustain them (and learn about them in the process)

Climate change is real, any effort in any sector needs to be regenerative.

ENCOURAGE PEOPLE TO RETURN - NOT JUST VISIT ONCE

Everyone who lives and visits our isolated coast needs to understand that we need to leave it better than when we got here.

helping people understand the natural world connects them to it personally and engages concern and care for our natural spaces
Historically our area has attracted repetitive tourist families. Coming here to visit at least once annually becomes their life style. They are our best supporters of beach enjoyment.
I am not sure if "Regenerative Tourism" will continue to be the term used, I've heard some debate on public perceptions of that term, regardless, I think creating opportunities for tourists to make positive impacts environmentally, economically, or socially is a great untapped resource for improving our local communities. I think if it is structured and set up in partnership with local nonprofits and businesses that regenerative tourism efforts can "raise the tide for all boats" and improve resident sentiment of tourists.
I believe the culture of Oregon tourism should be synonymous with regenerative practices. That Oregon should be know for its sustainable and regenerative practices so much so that it becomes one of the main reasons people visit our State.
I think regenerative tourism can be mutually beneficial to the community AND the Tourist. I believe the majority of the population on this planet is concerned about the future, our climate and most desire to feel like they're doing something positive for those things. If you can do it while on vacation- bonus!.
I think teaching our tourists and guests about the importance of respecting the area they are in and the people that live here full-time will help their experience
I would argue that 90% of our visitors are here for our natural environment and beautiful resources. I think it's important that the visitors are aware of how important it is to leave the area better than you found it. That's why we started our charitable arm.
If people come to do a tour and then conduct some volunteer work on a trail we get the economic benefit from the stay and the work on the rec asset.
If residents see "tourists" giving-back in a meaningful way, residents may resent tourist less if they see them as giving and not just taking.
If residents who live and residents who work/own businesses feel like visitors are respecting our town and leaving it better than they found it, there wouldn't be a negative sentiment around tourism in our area. Creating opportunities for regenerative tourism to exist could enhance the relationship or mind frame that locals have around the tourist/visitors who drive our economy.
It is a strong priority in our city's new comprehensive plan. We want to draw visitors that care about preserving the environment here.
It's sustainable and people are really interested in these opportunities
Just like having kids grow gardens to show where their food comes from, having a destination event to help environmentally will be critical with the younger generation.

Keeping folks on trails and keeping those trails clean is a priority for public and environmental safety. Same for planting and cleaning wildlife areas, rivers and estuaries and beaches - plan a visit and hike, kayak and clean up at the same time - include lunch and snacks, provide bus transportation to/from the site.

Let's use what we have vs always adding something new.

Many tourists are allowed to come to the coast and appreciate the beauty that surrounds them. However, they are not always given the option to learn why we make the efforts we do to preserve the coast and thus are at a loss of how to best help our efforts.

Not just having tourism be about "taking" from a place

Not supporting large projects like the Port Containter project and center around funding regenerative solutions such as aquaculture tours

Oregon State Parks are visited mostly by seasonal guests. We need to brainstorm ways to get these guests back in different seasons...

Oregonians value natural beauty and tend to be outdoors oriented. I think if people can easily incorporate enhancing or improving an outdoor space into a fun vacation they will do it. I think many people want to help, but they aren't sure how.

Our forest paths and beaches, although pristine by most standards, do have trash. Locals do twice yearly cleanups but engaging the tourists to help out would be great.

Outdoor recreation is a huge asset. Encouraging people to care for where they are or journey to can enhance visitor experiences while maintaining and even improving local parks and trails.

Reduce negative visitor impacts and increase positive impacts on the natural resources our tourism depends on

Regenerative practices can ensure that our region continues to be desirable to those that live and visit here now and in the future.

Repeat business is important.

Since I am in the tourism business any help to improve information that we receive will help.

So people take part in revitalizing and maintaining the space they come to visit and ad wear and tear to - so they can help maintian it with destination environmental activities or projects.

Teaching people how to be good stewards of the land. It is "the People's coast" our coast we all need to take care of it. Remove invasive species, removing trash...

The biggest difficulty I see is lack and cost of housing. Many of the houses in the area are sold as vacation rentals, leaving the folks who work here few places to live, and even fewer they can afford. While tourists bring money into businesses on the coast, that doesn't always get distributed to the workers and residents. Even when it does, during the shoulder season, the lack of visitors leaves many people without jobs, or means to

keep their housing. Finding a way to channel some of that tourist money into supporting residents with living expenses and housing could be an excellent way to improve public attitudes toward tourists.

The coast and other areas of Oregon face many threats to ocean health and landscape degradation. Raising the awareness and assistance from local residents through training and recruitment can help offset some of these threats and expand the awareness of these issues among visitors and residents alike

This form of tourism prioritizes the well-being of local communities. It involves local residents in decision-making processes and ensures that tourism benefits are equitably distributed, enhancing the quality of life for local

This type of approach provides collaboration and can support local culture as well as improve the ecosystem. "Voluntourism" could be promoted and would provide a unique experience for the visitor while also helping local organizations share their culture and/or improve their landscape. This also created a deeper connection than traditional tourism.

Tourists are often quite damaging to the local ecosystem here but much of the tourism available is ecological, so to create long term sustainable tourism it must be regenerative

Visitors can be a source of assistance, interaction and provide time and labor to make positive changes in our area. In return programs that benefit our community can make visitors engage in a worthy and educational activity.

we don't want to damage our resources

We are a town full of wonderful vistas, attractions and beaches. But maintaining signs, landscaping, facades, trails requires a lot of work when Mother Nature seeks to reclaim them all. Our volunteers are aging out of their ability to do the physical labor involved and the city's public works department is stretched thin.

We are not yet "over touristed" and we don't want to get to that point, but being ahead of the curve in ensuring visitors to our part of the coast are taking care of the places they visit is a very good strategy.

We have abundant outdoor recreation that isn't tapped into by local business besides fishing and UTV.

We have to have this mentality moving forward. Leave no trace isn't enough, we need to engage visitors to leave things better and this will offset the huge influx of tourists we have in peak season. This will also help with local sentiment on tourism

We need stronger year round tourism and attraction promoting

We need to be good stewards of this land.

We're at a point where we need to find ways to make our actions have a positive change on our environment rather than continuing to take from it.

Previously you indicated "Sustainability and climate action" as an area that needs to be emphasized for longer term tourism planning over the next 2-5 years. Please describe why you believe this needs to be a priority.

Again, if we do not pursue a sustainable approach and our environment is destroyed, nothing else matters.

As the population grows so does the lack of concern for our environment. One example is, being an ocean front business looking at how much plastic and garbage is just found on the beach whether it be in microplastic form or just the insensitivity on the visitors part as to what plastics and garbage actually do to our environment and all of our bodies. Looking at how microplastics/garbage is eaten by fish, we eat the fish. We now have those elements in our bodies. There is so much more in our local forest and rivers etc.,

Being a lodging operator in a coastal community, our beaches are very important to us as we go into climate change. There is fear of oceans rising and bigger and storms that will damage the coastline and the homes there

Being on the Coast we need to have fire safety due to climate change along with teaching our tourists about our challenges too.

Climate change is a hot button issue for many people. Embracing proactive moves is not only the right thing to do but would also send a message to visitors regarding our commitment to change.

Climate change is affecting the world. Making an effort to be sustainable is the only sensible thing to do

Climate change is real, we are on the precipice of not having a world at all in just a couple of decades. If we want to change that, then every sector needs to be focused on sustainability and climate action.

Climate denial is strong and the coast will feel its affects first. Tourist impacts do not help. Educate them while get are here.

Climate is changing and, at this point, we can only hope to slow its rapid progression. Wildfires are an important issue in our rural area.

Climate threats are pervasive. There is a need for building and acting on a consensus for strategies that mitigate these threats. This can be examined down to the level of specific impacts on wildlife species and ways to address the threats for each species and the landscape.

Focusing on sustainable messaging is a way to educate locals and visitors to visit responsibly by preserving our natural resources. Working with Trailkeepers of Oregon is a great way to expand the sustainability message.

Have to get back to this survey-do not have time to complete right now

How do we keep the City maintained and clean? Managing the things that cause negative impacts on our environment.

If we don't manage for sustainability and address climate change, we are contributing to both problems

If we don't take care of what we have we won't have it anymore. Property owners should be required or incentivized to reduce trash, pollution generated from its use - e.g., shampoo and conditioner bars wrapped in paper or boxes instead of plastic - reusable ice buckets instead of plastic; use of products that are environmentally safe when it goes down the drain. Use of native plants instead of invasive; use of recycled water for grounds maintenance. Reduce and re-use should be a way of life, even when on vacation. Landfills need to be upgraded to include the ability to recycle all things - not just number 1 and 2 jugs.

It's no secret at the Oregon coast as some of the most fragile ecosystems in the state. Many of these ecosystems are at the mercy of large-scale climate disruptions outside of our control. We'd like to see more regional preventative measures in addition to broader advocacy for climate action.

It's attractive and necessary

It's obvious we need to plan ahead for climate change. The visiting seasons will shrink and expand depending on the fires each summer.

It's the most pressing issue of our time and impacts (like 101 falling into the ocean, increased shellfish closures, wildfires, and droughts) will negatively impact the visitor experience.

More visitors more damage to the area! Trash, pollution, destruction of natural areas all need to be monitored. As the oceans rise we need to prepair & make adjustments before they actually happen. Now would be perfect!

Oregon's most beautiful resources need to be treasured in recognition of climate change and preserved for next generations. The fragile ecosystem is impacted, when intentional preservation is not part of the plan

Our area has a lot of natural resource extraction, like logging, that can negatively impact the natural beauty of our area as well as damage our native fish and wildlife.

Our beaches and oceans are bearing the brunt of plastics and other marine debris.

Our town, esp outdoor rec, is well loved. Unless we address sustainability and climate action, we will lose these public amenities.

Recycling is a huge issue along the Oregon Coast. We need funding, so that recycling is offered, versus everything going into a landfill.

Reducing emissions, responsibly engaging with the environment and wildlife will help to ensure that the beautiful natural resources tourists like to visit are around for a long time.

Same as above!

Same as above. Lincoln City is in a UNESCO biosphere region, and we have an Oregon marine reserve right offshore, along with Devil's Lake and 8 miles of beach, and more!

See answer above. This place is a gem and we need to keep it that way.
So that Oregon can serve as a climate leader and so that tourism investments provide benefits to residents - economically and for public health
Stewardship development and management is a key focus for Cannon Beach. However, with a dire need for positive, creative conversation and innovative solution-based interactions with organizations, long-term planning in developing 'non-violent communication' that fosters productive and forward-thinking planning and execution regarding Sustainability and climate action along the coast. I.e. Surfrider's Oregon Beaches Forever Campaign and locals.
The burden of maintaining and protecting the lands, the waters and the wildlife of our community falls largely on the relatively small number of full-time residents. Visitors and part-time residents must be encouraged and educated to help.
The coast will be under water from sea level rise, salmon will die from rising ocean temperatures, and extreme weather events will effect the whole state. So if climate action is not in the forefront of tourism orgs minds there won't be a place for people to travel to due to climate change.
The coast will continued to be impact by climate change and will impact tourism in likely negative ways. Travel also contributes to climate change so while we need to increase tourism for our livelihoods, it is a negative feedback loop.
The Oregon coast depends on ecotourism and much of what is attractive to tourists is also being threatened by climate change, such as beach erosion, trash, seafood, and temperate rainforests
Things have to change or our natural resources will be in danger.
Tourism significantly contributes to greenhouse gas emissions, primarily through transportation and accommodation
Trails are a climate-friendly transportation option. Tourists often seek the experience of hiking or riding in nature, not just accessing a destination. More paved trails can provide reliable options for travel.
Water levels on the Columbia River.
We're on the right track right now as it is but I would like to see the work continue. People can't visit if there is nowhere to travel to.
Wildfires are here to stay, and we need to be proactive in planning to prevent them and managing them.

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

Arts Committee Member. The regional people are not as active.

Attend OCVA and Travel Oregon events and conferences. Collaborate with fellow DMOs in Lincoln County regularly.

Being in Cannon Beach have been on board of the Cannon Beach chamber of commerce which is our DMO. Tried to get involved with the Oregon coast visitors association just to feel like because of the industry I am in there is no support. I have approached several times and never heard back from the organization to become involved. I feel the director has a bias against short-term rentals.
Both are amazing! Top notch staff.
Curry county doesn't have much of a DMO
Didn't even know ocva
Do not sense an interested level of support from either organization.
Engagement with these groups is the role of another staff member.
I actively serve on TCVA Stewardship Committee and communicate with employees of both TCVA and OCVA on a regular basis.
I am not engaged in my role in land use planning, but the City I work for does have an economic development team that is engaged.
I am on city council so follow our local DMO closer than I do the regional or state.
I am on the Board of Directors of TSOC, so lots of engagement there. Have some knowledge of OCVA, but not much engagement.
I feel, and have felt for the last 11 years of running my business that lumping the entire coast together as a region does a disservice to coastal businesses. Our communities repeat travelers come primarily from the East-they don't come from other regions of the coast. Not being a part of the Southern OR region is a hindrance to my business and makes me less inclined to engage with OCVA. I work hard to be included in Rogue Valley marketing areas because I see a return on that investment. Engaging with Astoria for example, is a waste of effort and funds in my experience.
I have not always supported the direction of our local DMO as I do not firmly believe they represent the best interest of the community
I just don't have the time. Between work and family and other volunteer commitments I have
I just joined the BOD for Newport Chamber of Commerce. I try to attend and participate in as many OCVA events or conferences as possible
I must not be traveling in the correct circles to be aware of tourism-related development.
I receive newsletter s from both groups, have collaborated to promote events with our establishment, attended workshops and trainings, personally know the staff.
I should get a 6 out of 10
I think we need better quality tourism not more tourism and the local organizations seem to just be advertising rather than reforming

I WAS IMPRESSED WITH OCVA'S EFFORTS WITH SEAFARE INITIATIVES, BUT I HOPE THAT PUBLIC FUNDING CONTINUES TO SUPPORT TANGIBLE SOLUTIONS ALONG WITH NETWORKING.
I work 6 days a week in my business and cannot engage more frequently.
I work for OCVA:)
I would say that I am extremely engaged as far as reading all posts and emails from my DMO. I think we're extremely engaged but not sure what our DMO thinks. We/I try to dig in at any marketing and resource opportunity that I can with my DMO's. - Driftwood Shores
I'm unaware of any in our area.
I'm employed by the local DMO and work regularly with OCVA in my role at the Chamber.
I'm extremely engaged w/ my DMO b/c I'm employed by them! I'm not so engaged w/ our RDMO b/c ummmm my teammates have experienced challenges in partnering with them in the past.
I'm not sure.
In my previous job with Parks & Recreation, I worked closely with Explore Lincoln City and OCVA to secure funding for accessibility and trail improvement projects, and promote local events & facilities.
In the high season, I am busy and not able to attend as many meetings. I want to be involved but I can't always make it ,
It is next impossible to engage with our local DMO.
I've been forced (in a good way) to be involved due to our chamber imploding. I'm just now starting to learn more and be more engaged.
Keep state out of county stuff
Local chambers and DMOs in our area are totally focused on generating more business and do not seem to have adopted the perspective that OCVA has espoused regarding responsible visitation and stewardship. We have had better success communicating directly with selected local businesses
Local DMO is handled through the Chamber of Commerce and they seem to run into many roadblocks from their board of directors. Many not wanting to focus on more than just the Chamber duties. The board doesn't actually help promote all of yachats, many members being vocally opposed to tourism in general.
Local support through is great! They visit often and so does OCVA team. We have no partnerships with Lincoln City
Love Explore Lincoln City as it focuses on the outdoors!
My work is not directly within the tourism industry. We coordinate well with DMOs when we have mutually reinforcing activities and have a great relationship with both levels of leadership.

N/A
Never have even heard of these organizations
No time to directly engage and I feel there is a disconnect between my needs as a home owner who rents their home and the DMO. We care about not allowing ruthless business owners destroy our coast but do DMO care? I have in mind the Maxwell mountain project in Oceanside. What is currently "in the making" is an aberration... An ugly construction on unsafe ground, that will bring too heavy traffic to an unincorporated city that does not have any plan to provide parking for staff that wants a high end restaurant that locals will not be able to go to... all non sense ecologically and on a business level... set to fail and leave an "ugly trace". How can DMOs help us preserve our coast?
No time to finish this now
Not aware of these resources.
Not sure how to engage
OCVA does a great job at being engaged with the coast and addressing and working hard to implement initiatives that create a wholesome coast for everyone to enjoy and engage with.
OCVA is an amazing partner and asks for my agencies opinion frequently. Explore Lincoln City has not reached out to collab, but I may reach out in the future.
OCVA is engaged with the local area through call, events and availability.
Our DMO is part of the City so we work closely with them. ELC is well connected with OCVA. My dept is somewhat.
Our management team regularly attends local DMO and RDMO board meetings
Our P&R Dept works closely with both the local and regional DMO's. They are crucial in supporting not only the marketing, but the infrastructure of the MANY visitors we get to our beach, beach accesses, parks and open spaces.
Our RDMO provides headlines, but no actionable steps, and very limited engagement.
Perhaps my own fault, but I don't find it easy to find information on these organizations. Explore lincoln city had a pretty good website, I find very little information from Newport and lots of complaints about Bayfront parking inconveniences and policing during the wine and seafood thing. Depoe Bay chamber has been abandoned per my understanding and we didn't even do the salmon bake. I do see OCVA posts on linkedin and it seems like the team is going to lots of events and working hard, but I'm not sure I see how that impacts us directly.
Regional DMOs seem active in setting strategy and leadership. Local DMO often seem stuck in marketing and small grant making.
The Central Coast doesn't get as much engagement with our DMO. We often feel forgotten, especially see the Southern Oregon Coast get a lot more attention, and they are less than an hour away.

They are involved in most of our activities
They seem to represent mainly the Bandon/Coos Bay area, Brookings feels like an afterthought.
Time is a limiting factor.
TSOC and OCVA are phenomenal partners.
very engaged with central and north coast conservation activities
Very good and great ratings
Visit Tillamook Coast is not been collaborative - no one from VTC even showed up for a recent state Tourism workshop and research presentation. VTC does not use local resources or engage with local media. They play favorites and are not inclusive. New management is needed here. Oregon Coast Visitors Assoc. is a GREAT organization to work with - responsive and engaged in the community. OCVA has been supportive and shares information and stories with local media.
Visitor center, which we manage, gets a lot of help from our DMO. Our online marketing guru works with OCVA extensively.
We are highly involved with our DMO's attend meetings contribute funds and collaborate on initiatives.
We are learning more about these resources as we stock our visitors center and develop our Discover Port Orford branding. Our web guru has been engaged with OCVA quite a bit.
We communicate and collaborate, but not as robustly as we could
We have a membership with the Lincoln City Chamber of Commerce - their website is not very functional. I work for a church/school so we aren't tourism, but the occasional visitor. We are a community based church and try to stay in touch.
We have strong relationships with all of our DMO's in our Region. OCVA is our State RDMO, and we have a very proactive relationship with them, and we are fortunate to have them all.
We provide brochures for our services but are never contacted for any other information by them.
We stay engaged but limited time is a factor.
We talk regularly and each organization has sponsored events the other organization has produced. There are projects that the RDMO has funded in the county that align with our priorities and work plans. Each organization promotes the others work in e-newsletters.
Well, I represent the local DMO and I sit on the board of OCVA and TSOC!!
Why
Word of mouth, answering surveys, listening and trying to give my positive (sometimes negative) opinions. In the past I was involved in community non-profits like the (now

gone) Charleston Community Enhancement Corp, the still active Charleston Merchant's Assn. and the Charleston Fishing Families Non-profit.

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

Another I'm not sure.

Far too many cooks. Esoteric ideas never survive implementation.

Have not worked with any of them

Have not yet used their services and would welcome a visit.

I am the ED of the local DMO. OCVA is a strong partner but does not offer funding or sponsorships for our local events and meetings.

I feel that the staff do a tremendous job promoting our area and are cognizant of sustainable tourism methods as well as responsible marketing. They do the best they can given the limitations of our rural, repressed area.

I feel they focus on marketing with the goal to increase tourism... increasing is not always the goal.

I have managed my current hotel for four years and no one has reached out to us.

I love that both TCVA and OCVA prioritize sustainable tourism.

I love the direction that Explore Lincoln City and OCVA are heading in tourism. I see a lot on tourism management, sustainability, meaningful engagement on the coast, supporting the business community.

I put down 1 on local DMO who was our chamber. The support was bad but they are no longer are DMO and the city is now handling things.

I would like more opportunities to join in on advertising/marketing with OCVA

It should be a 6 out of 10

Just recently learned of this resource and looking for ways to be informed and engage and receive available resources for our community

Lack of vision in local DMOs. Leadership and strategy from OCVA.

Local DMO does nothing that I am aware of and wasn't even admitting that they were the DMO for some time. Also it just changed and not in a good direction.

Local DMO isn't currently being allowed to flourish due to old ideas in their board. Dysfunctional and non communicative

Local DMO wants to do more, but restricted by funding, slow decision making, retraining municipal leadership every couple of years, etc.

Local office is over 100 miles away

Lots of positive public input regarding the Arts Committee decisions.

N/A

No regular access to information related to DMOs.

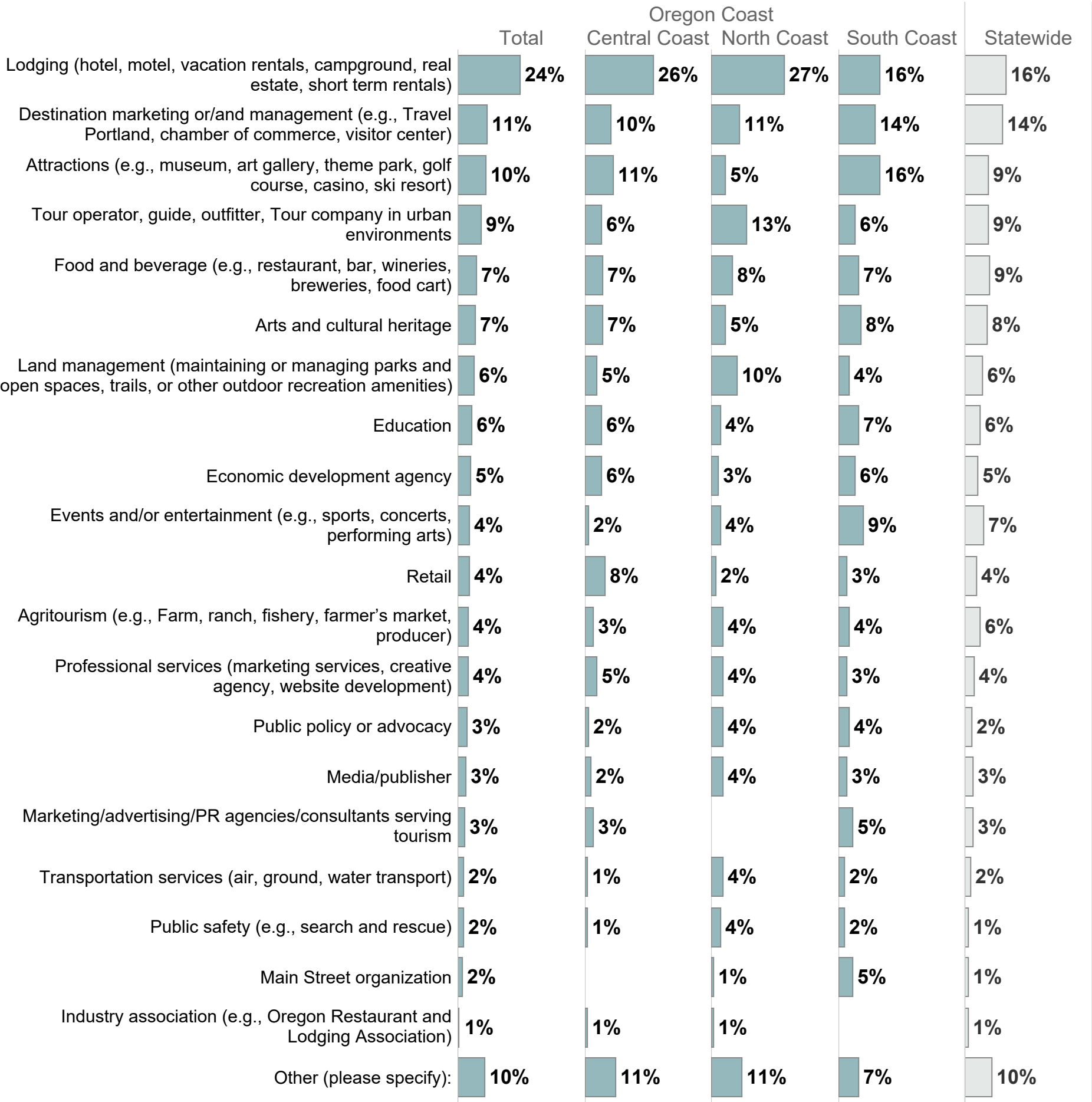
Not familiar enough with OCVA to have opinion
Number One? Our DMO is nothing but a personal bank account and popularity pawn in this town. They ping pong fund ownership back and forth between the City and the "Chamber" while continuing to mis-spend, misuse, reallocate and hide TTL funds and no one in the region will respond to the continued abuse. Our local DMO spends most of the marketing funds available promoting their own businesses, their friends businesses and routinely shuts other businesses they perceive as competition out of newsletters, business lists and Event calendars. So in order to access DMO funds, I now must join my local 'chamber of commerce' to benefit from any of those tourist dollars. Is that what you all intended? If so- shame on you. We are more warmly welcomed in the Rogue Valley than in our own town and I know for a fact, we are not the only business here who feels this way.
OCVA has been very supportive of our projects and ideas to improve our town's offerings. They also put on a great annual conference that discusses many of the challenges and opportunities facing the Oregon Coast.
OCVA is remarkably involved, active and visible in my community, with productive actions being a constant priority. The local Chamber of Commerce acting as a DMO far exceeds the usual interaction with visitors, residents and local government.
Often DMO work outside the local purview and we don't see their efforts unless we travel or they share out.
Our DMO is extremely engaged. OCVA doesn't engage with our industry as much. They seem to focus on outdoors.
Our DMO's in our Region and RDMO- OCVA, are always open to ideas and collaborations. We work well together in both reactive and proactive situations.
Please invite me to meet with you.
RDMO has lots of headlines, no action steps. We don't rely on them for anything.
Regarding my rating for the local DMO, my employer, it doesn't speak to the quality of our work but rather the fact that we can always do more. A five rating is something to work towards, always.
See previous comments.
See prior comments - Thumbs down for local DMO - Visit Tillamook Coast Thumbs UP for OCVA!!
Seems the North Coast & South Coast get more attention than our Central Coast marketing wise. Why might this be?
Staff works well together. Also, what was noted in the previous question.
The know and understand what our area needs and how to balance that with tourism demands. They are good partners and have the best interests of the region at heart in their approaches.
There is no talk of these organizations in our area

They are leadership and direction is not necessarily reflective of the critical needs of building and supporting local community.
They do great, professional work
They're just fantastic to work with! Very collaborative and supportive,
Too much marketing and not enough management and development
we need to concentrate on year long family wage jobs
We are happy with our engagement with our local and regional DMO's we can always find ways to collaborate better and more often
We are the local DMO so not a fair question
We are the local DMO.
We are unsure what our local office is actually doing other than reposting local posts on Facebook. Tourism numbers were down in Brookings this year. Advertising is being focused on Grants Pass/Medford when most of our summer guests come from Chico, Redding and Reno. Most of our visitors are seniors and childless couples, a lot of the advertising including the mascot "Cliff" are geared towards families with young kids. Our town does not have much to offer for young families. The Southern Oregon Coast is an expensive place to visit. Advertising needs to be geared towards young active professionals.
We feel both are doing a good job. Perhaps a bit more personalized attention would be welcomed.

APPENDIX: OREGON COAST SUB-AREA COMPARISONS

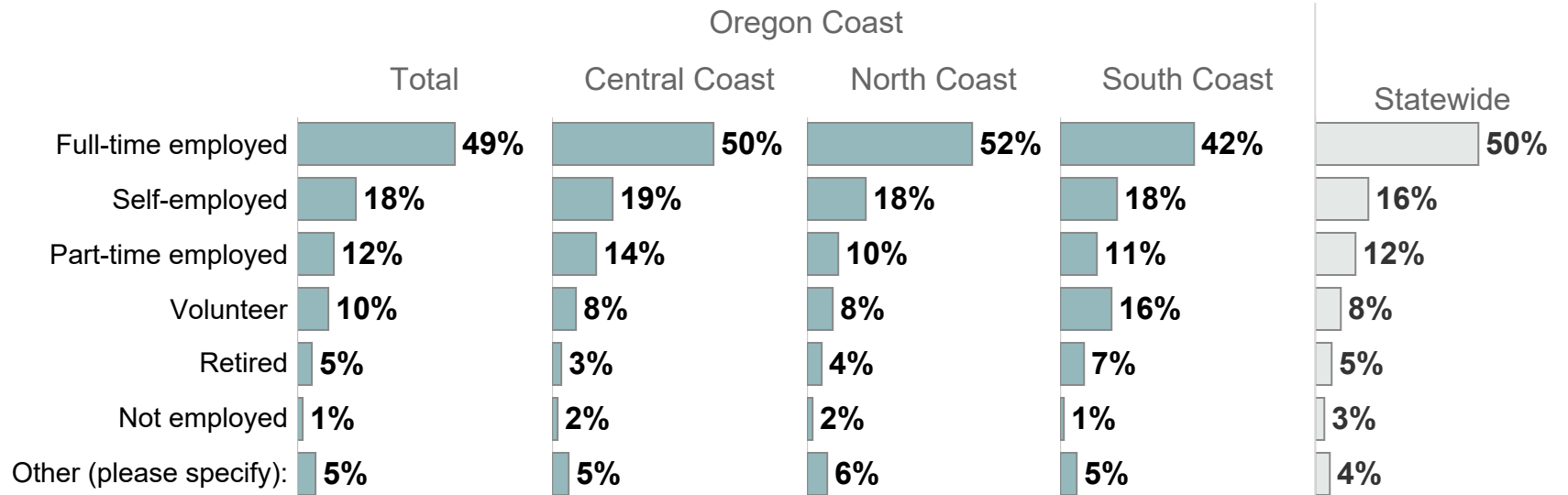
Industry Sector

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

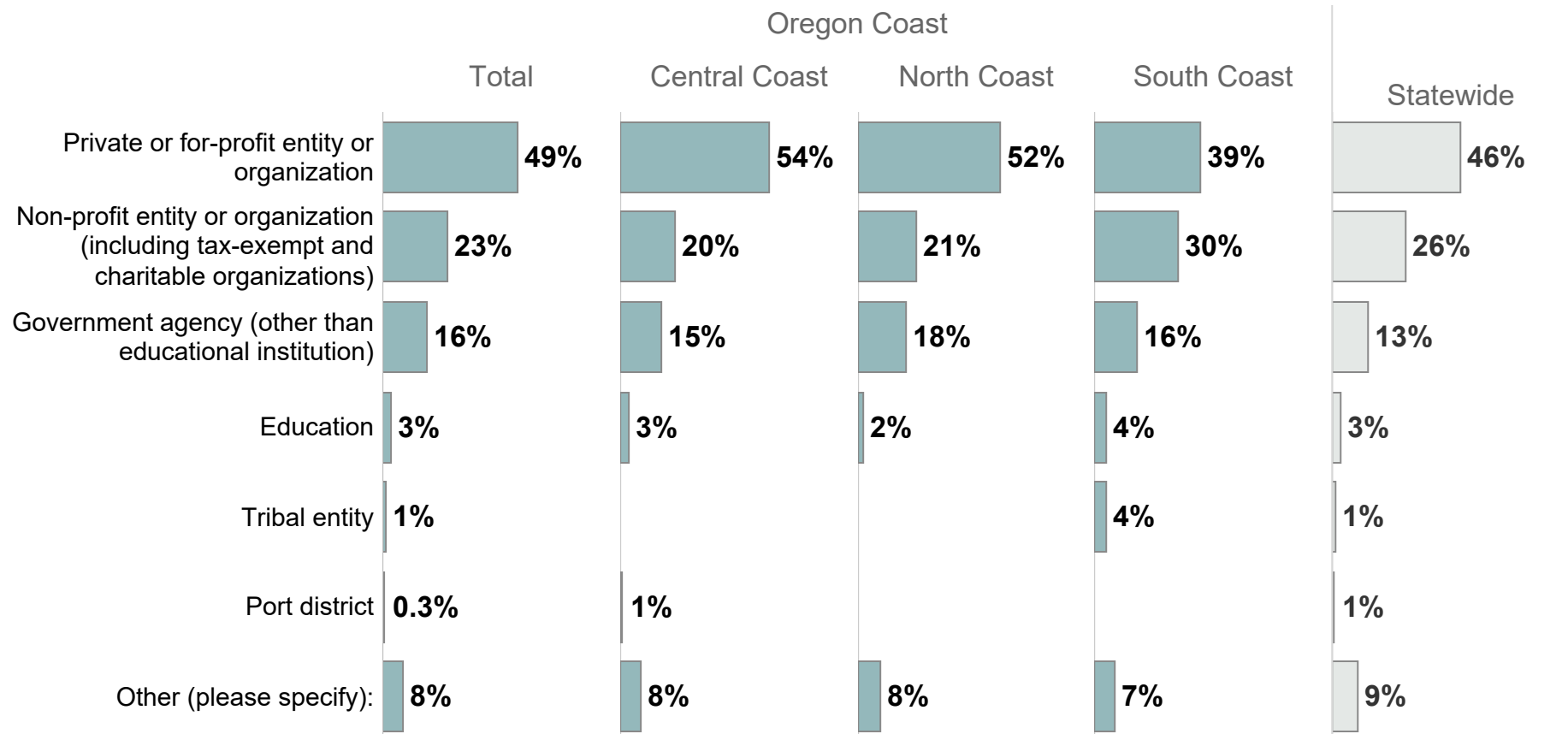


Entity Type & Employment Status

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

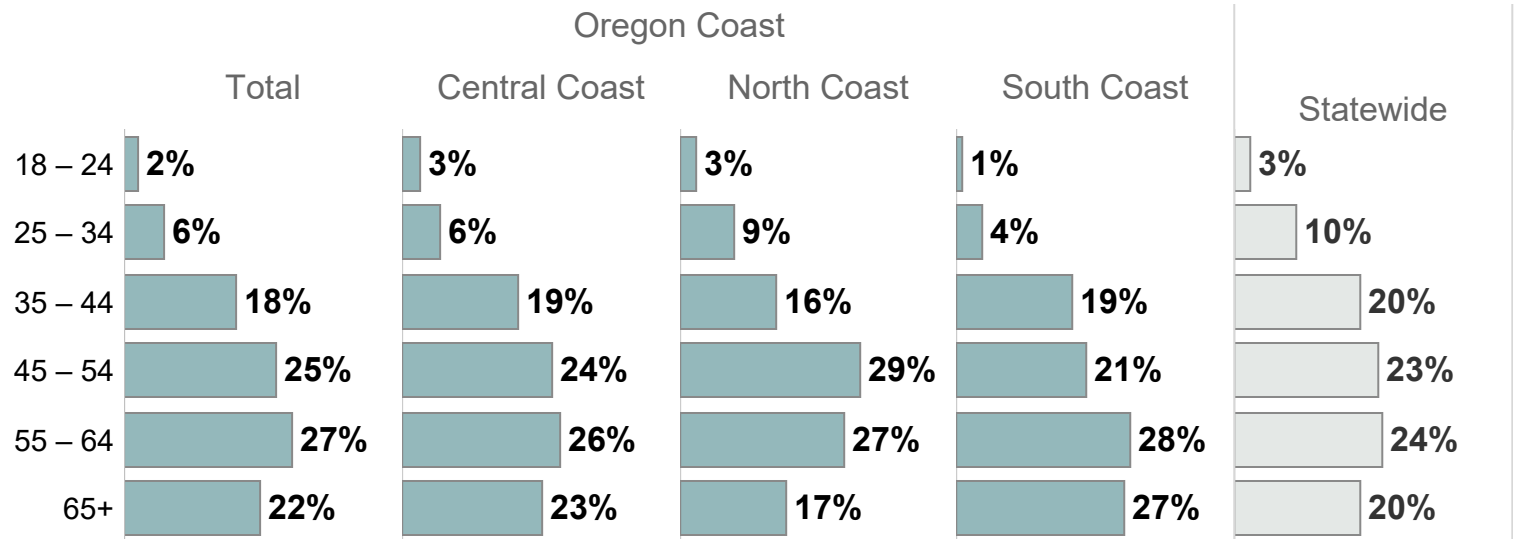


Q: *Which entity type best describes your business/organization?*

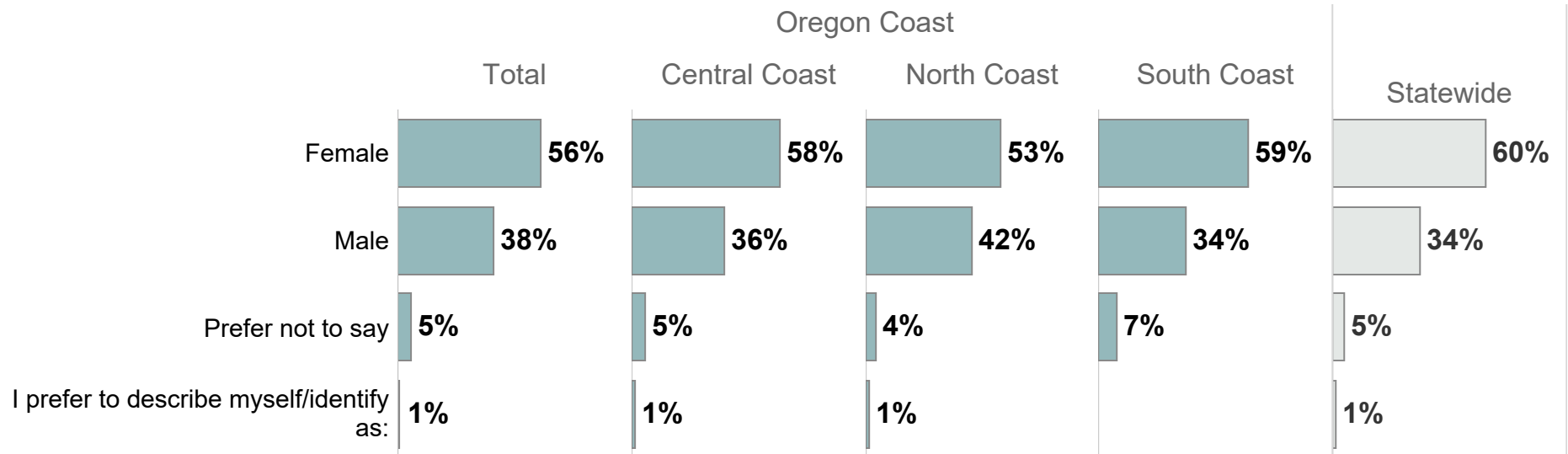


Age & Gender

Q: *What is your age?*

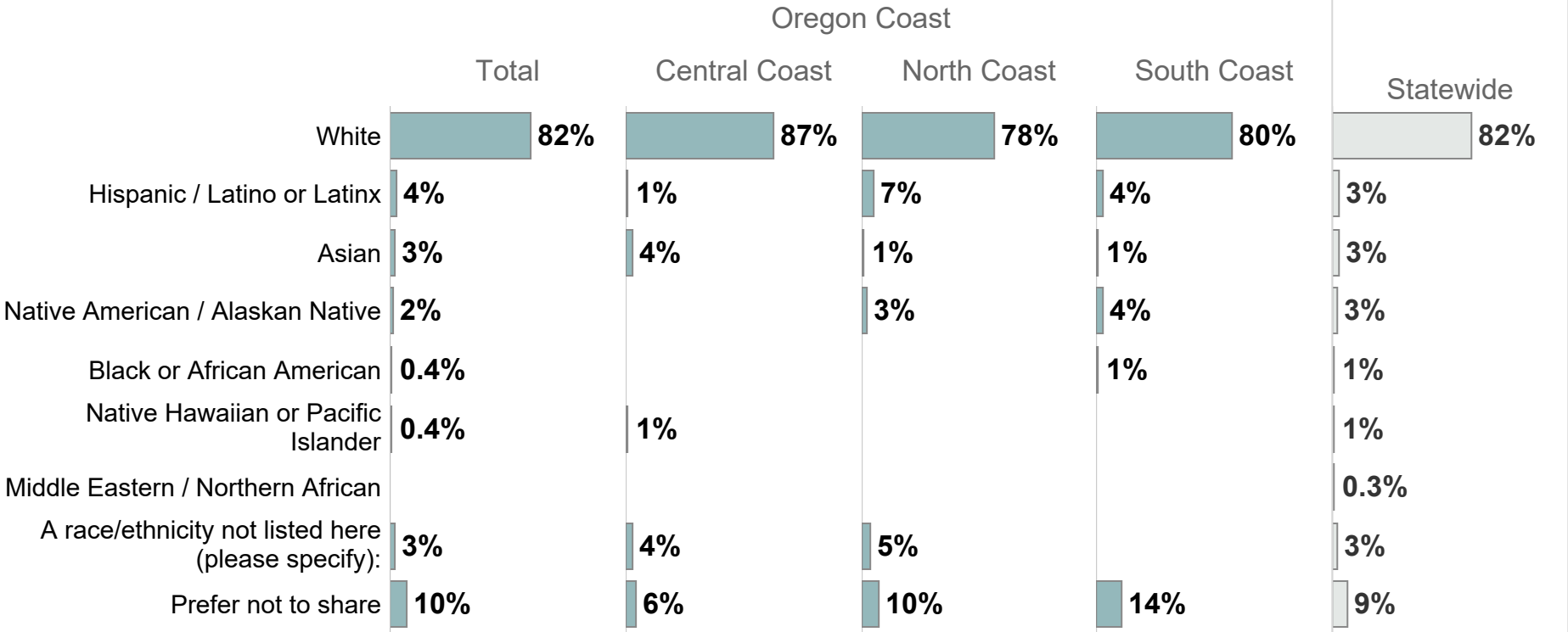


Q: *What is your identified gender?*

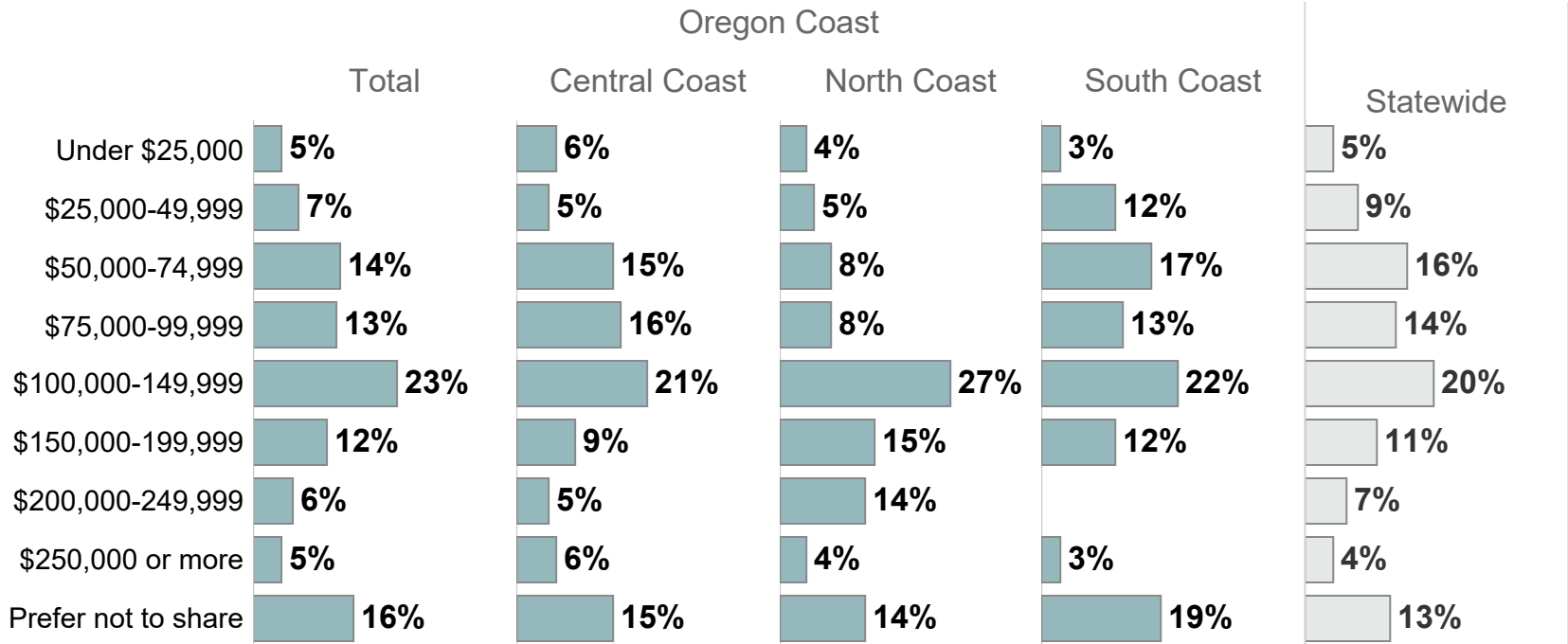


Race & Household Income

Q: Which of the following best describes you?

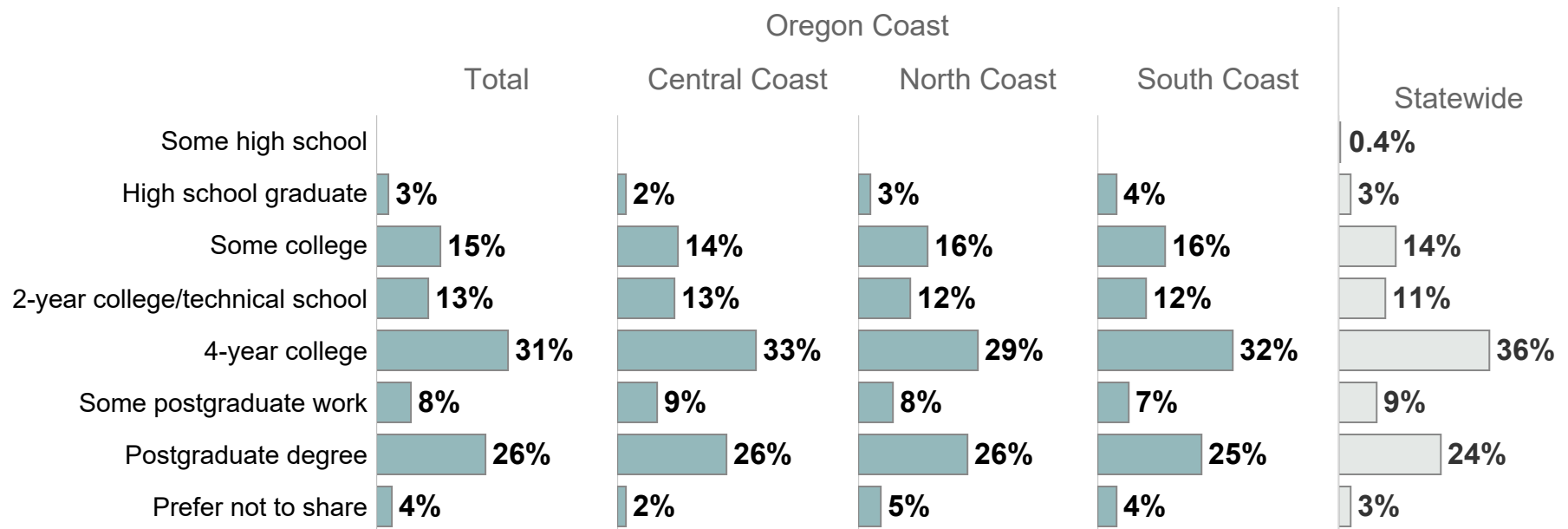


Q: Which of these categories best describes the total gross annual income of your household (before taxes)?



Education

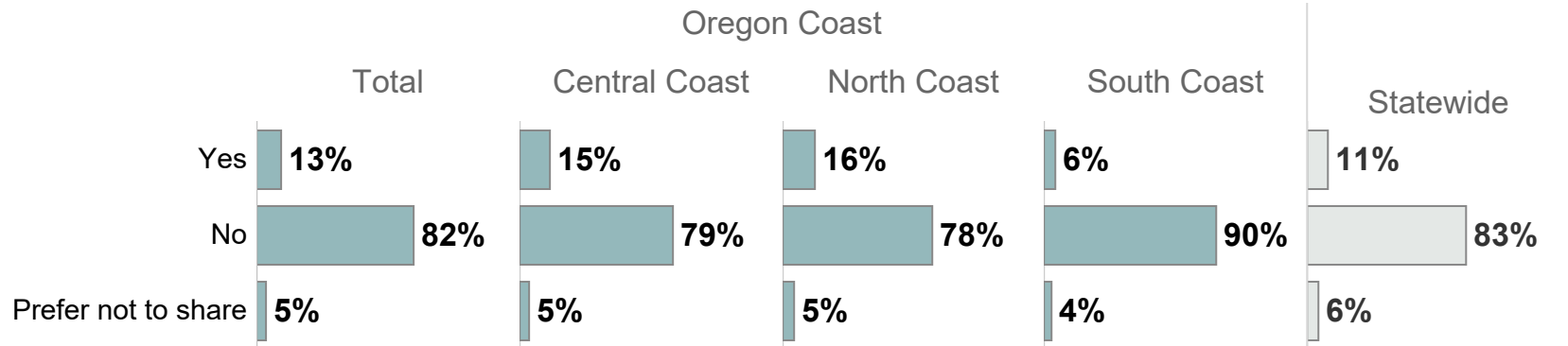
Q: *Which option best describes your education?*



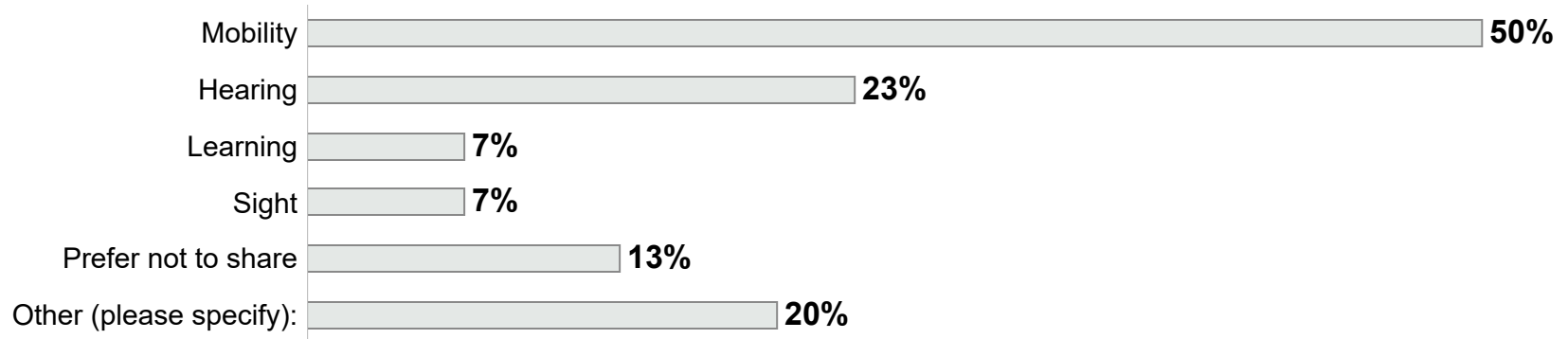
Source: RRC

Presence of Disabilities

Q: *Do you have a disability?*



Q: *Which of the following best describes these disabilities?*

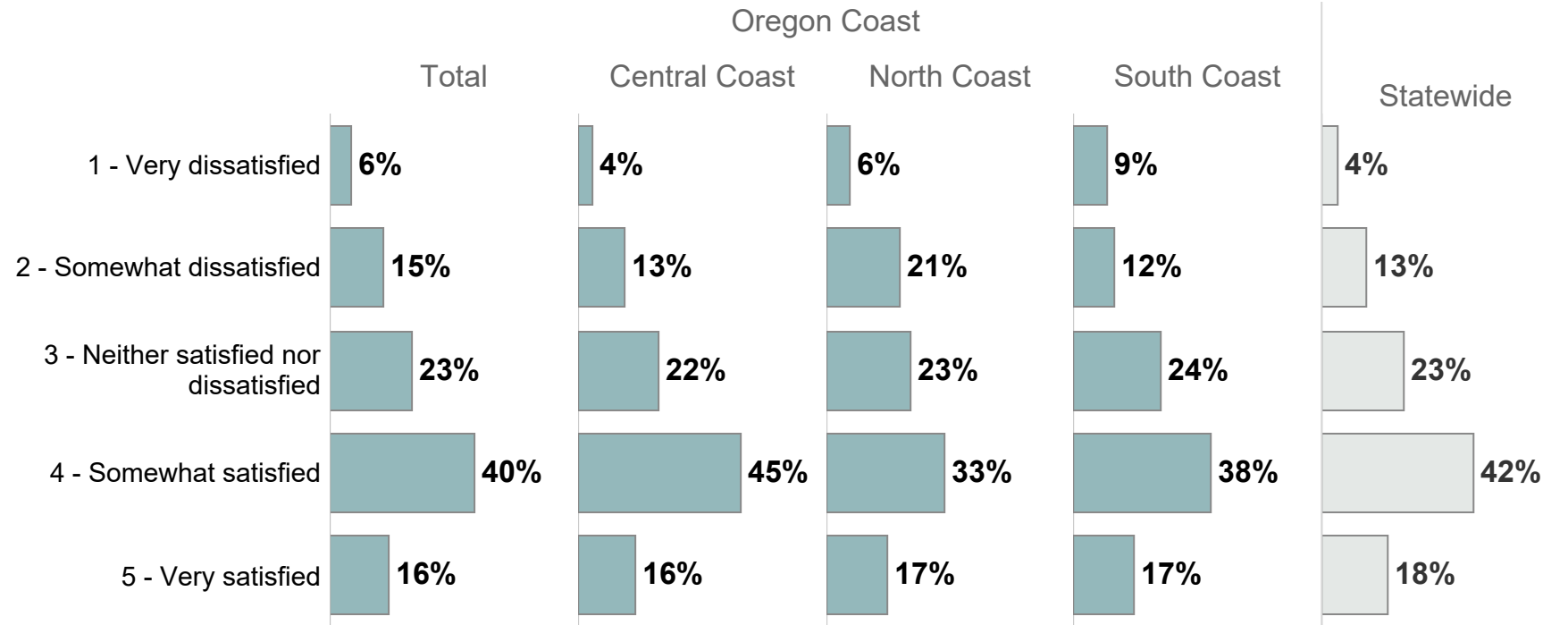


*Only displaying statewide sample due to insufficient sample size within regions.

Source: RRC

Satisfaction with Tourism Development in Oregon

Q: Please rate your satisfaction with the direction of destination development in Oregon:

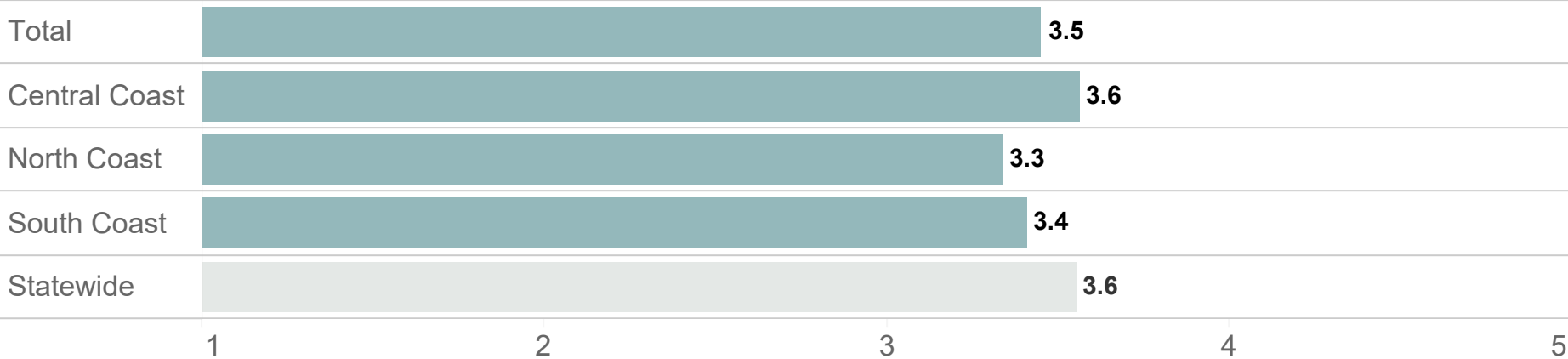


Note: "Destination Development" refers to overall tourism development in Oregon. The following definition was provided to survey respondents: "Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing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

Source: RRC

Satisfaction with Tourism Development in Oregon

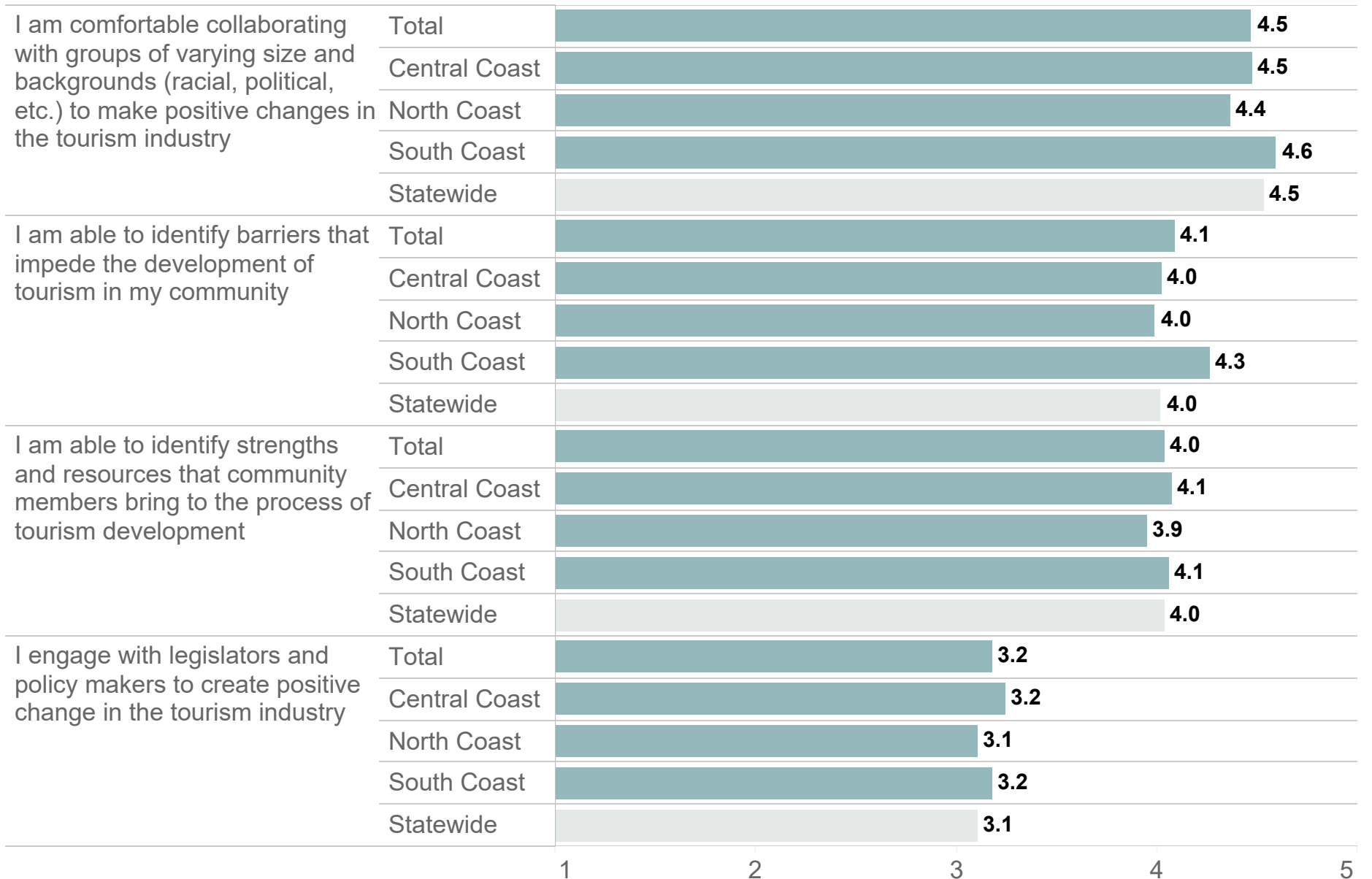
Q: Please rate your satisfaction with the direction of destination development in Oregon:



Note: "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."

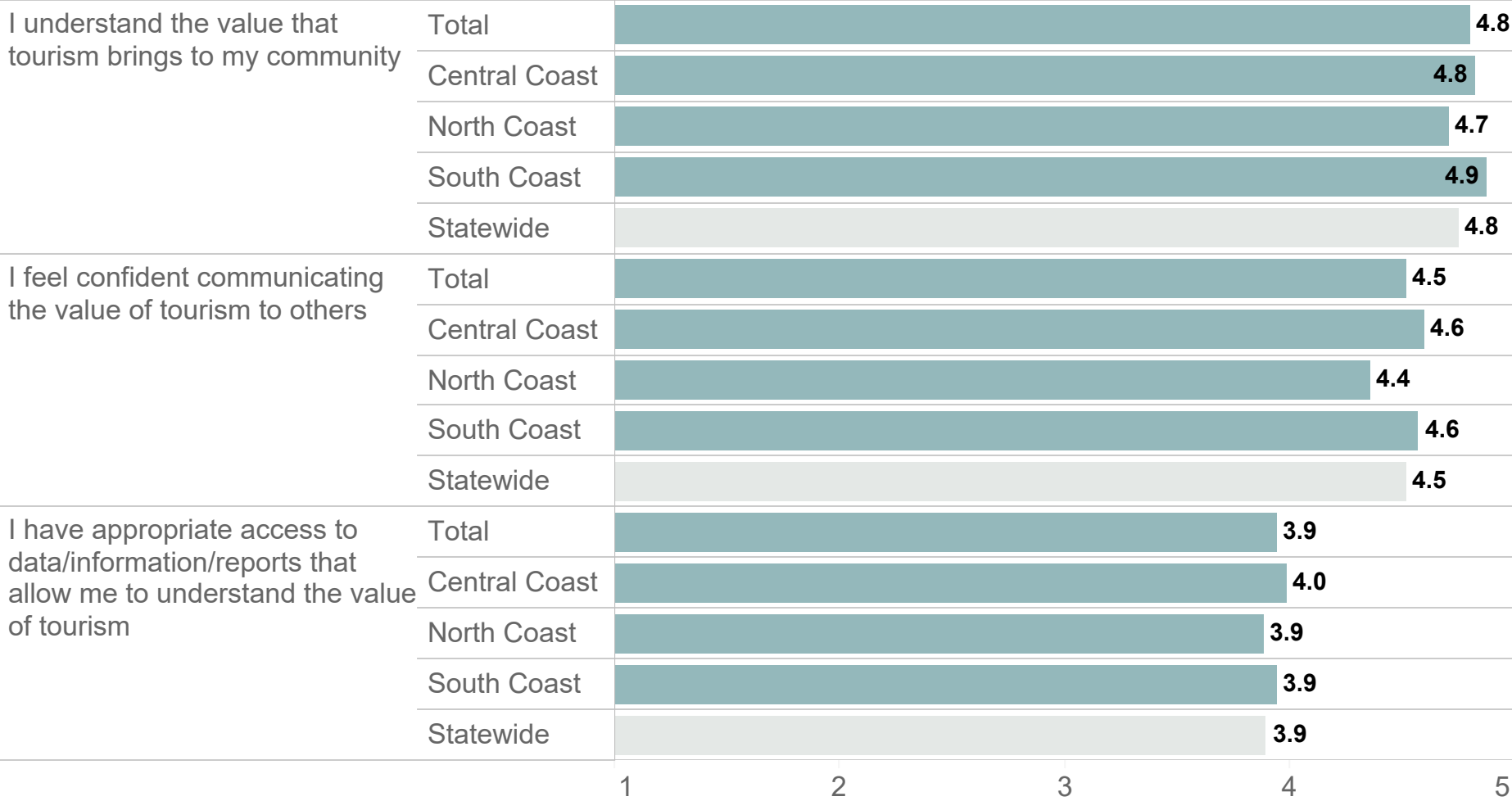
Advocacy for Tourism in Oregon

Q: Please rate your level of agreement or disagreement with the following statements:



Value of Tourism in Oregon

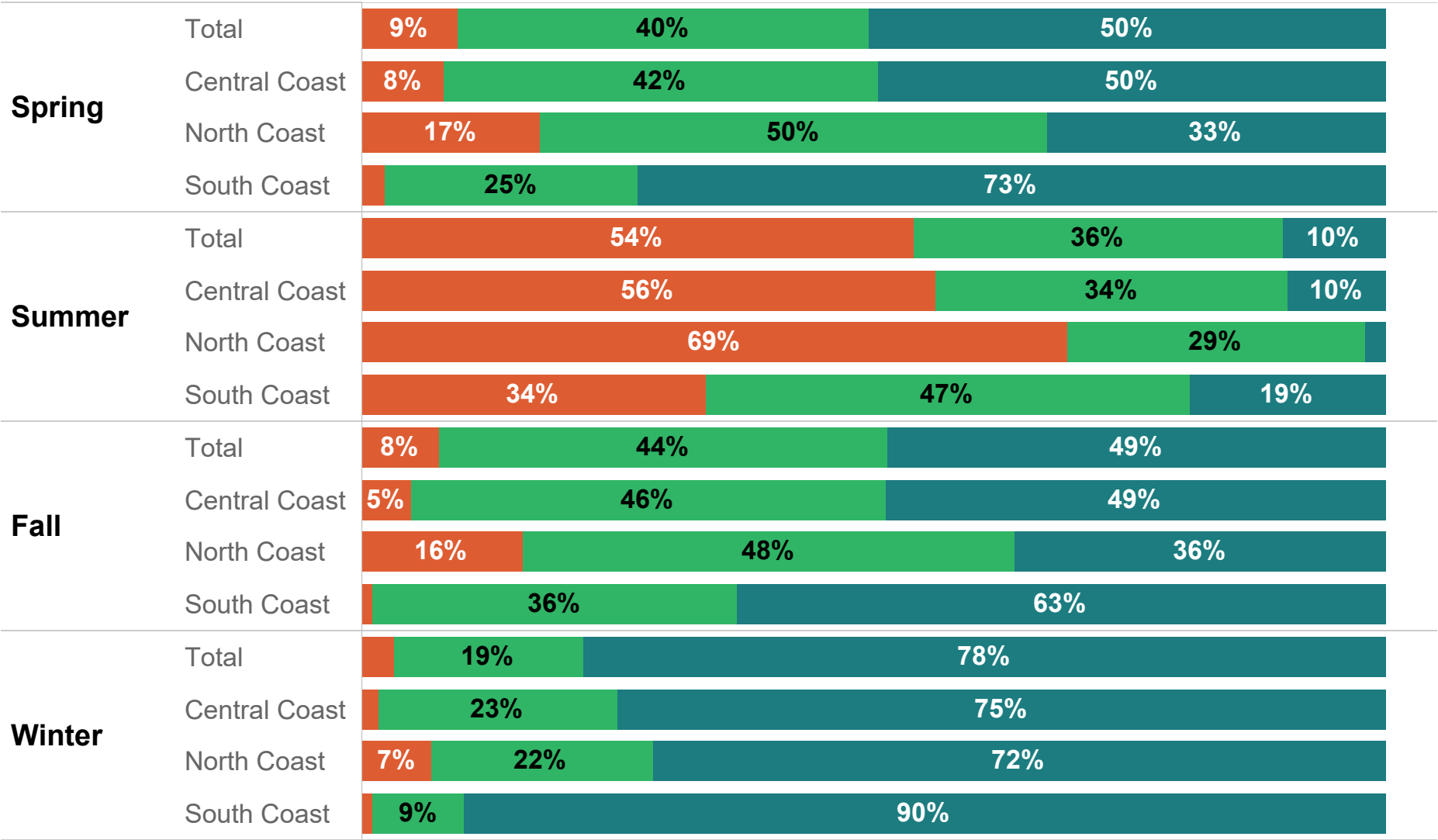
Q: Please rate your level of agreement or disagreement with the following statements:



Visitation Levels by Season

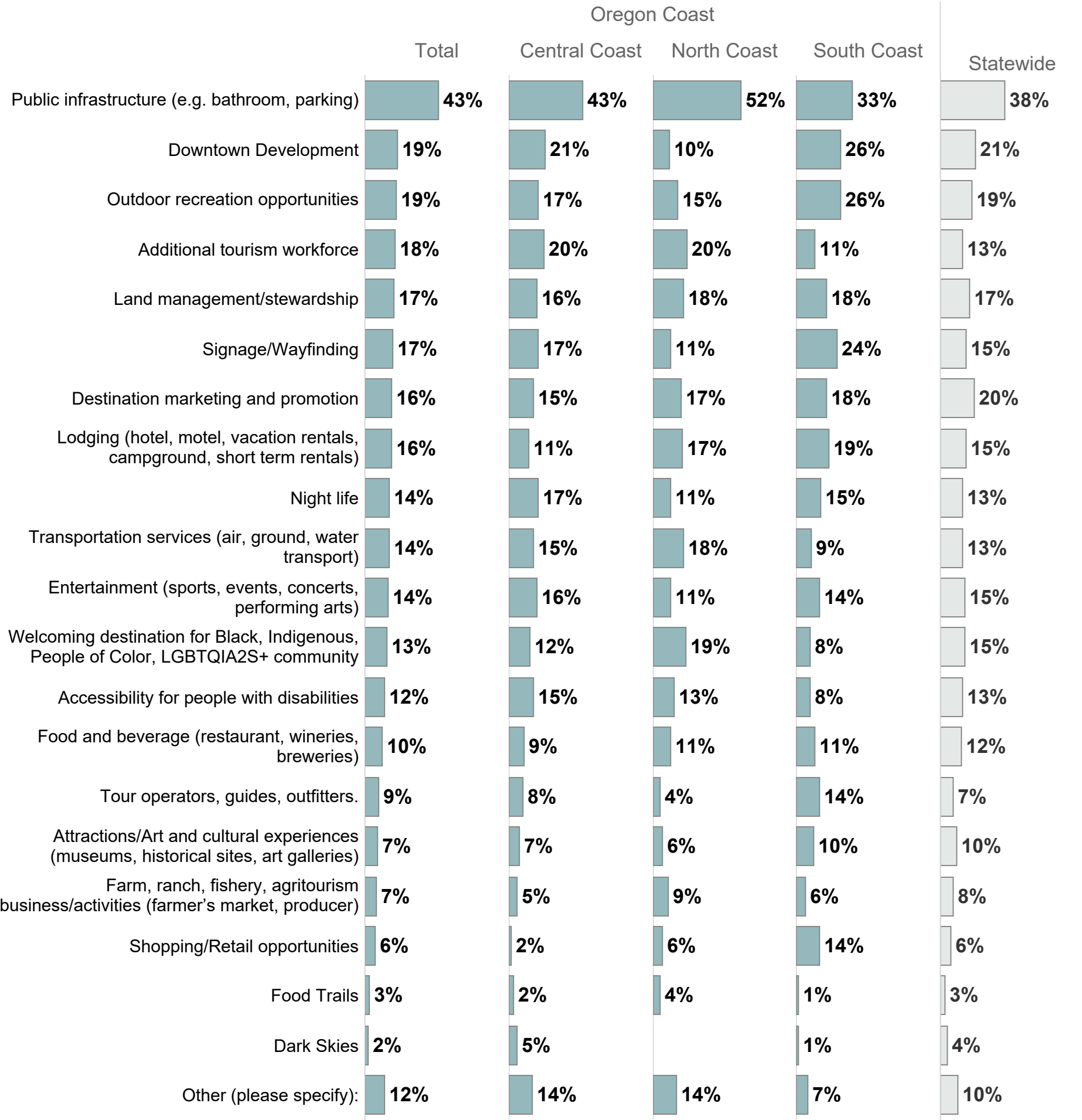
- We could use more visitation
- Just the right amount
- Very crowded

Q: During each season, please select how you would describe the level of visitation in your community as it relates to tourism:



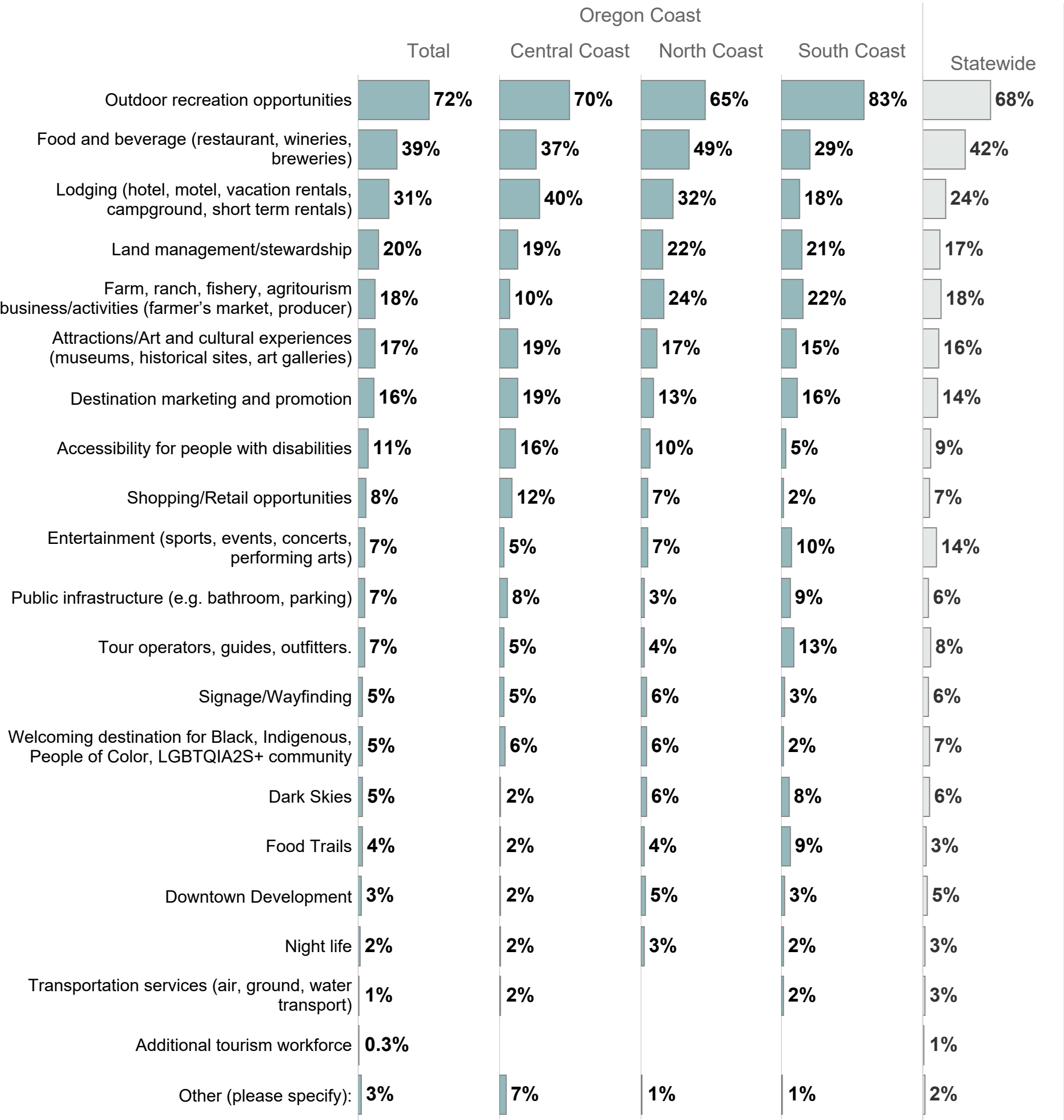
Areas of Focus

Q: Please identify three areas that your community needs to focus on to improve the resident and visitor experience. (Select up to three)



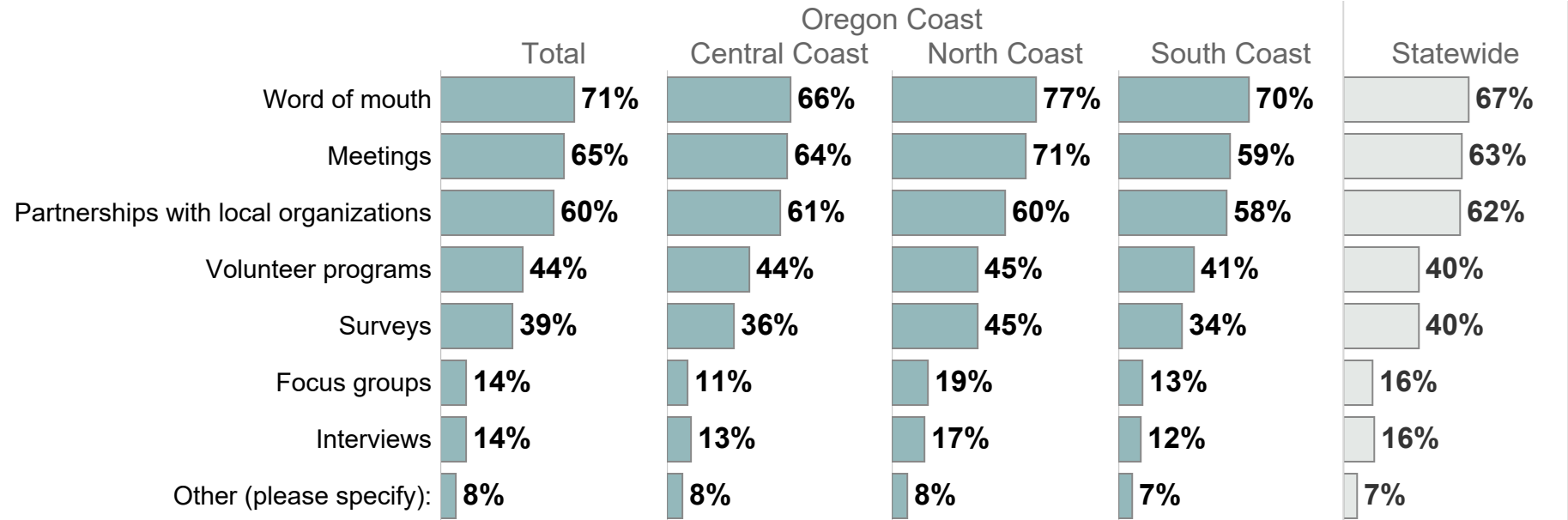
Community Strengths

Q: Please identify three areas that are a strength for your community. (Select up to three)



Local Community Engagement

Q: *What methods have you used to engage with your local communities in the past 12 months?*

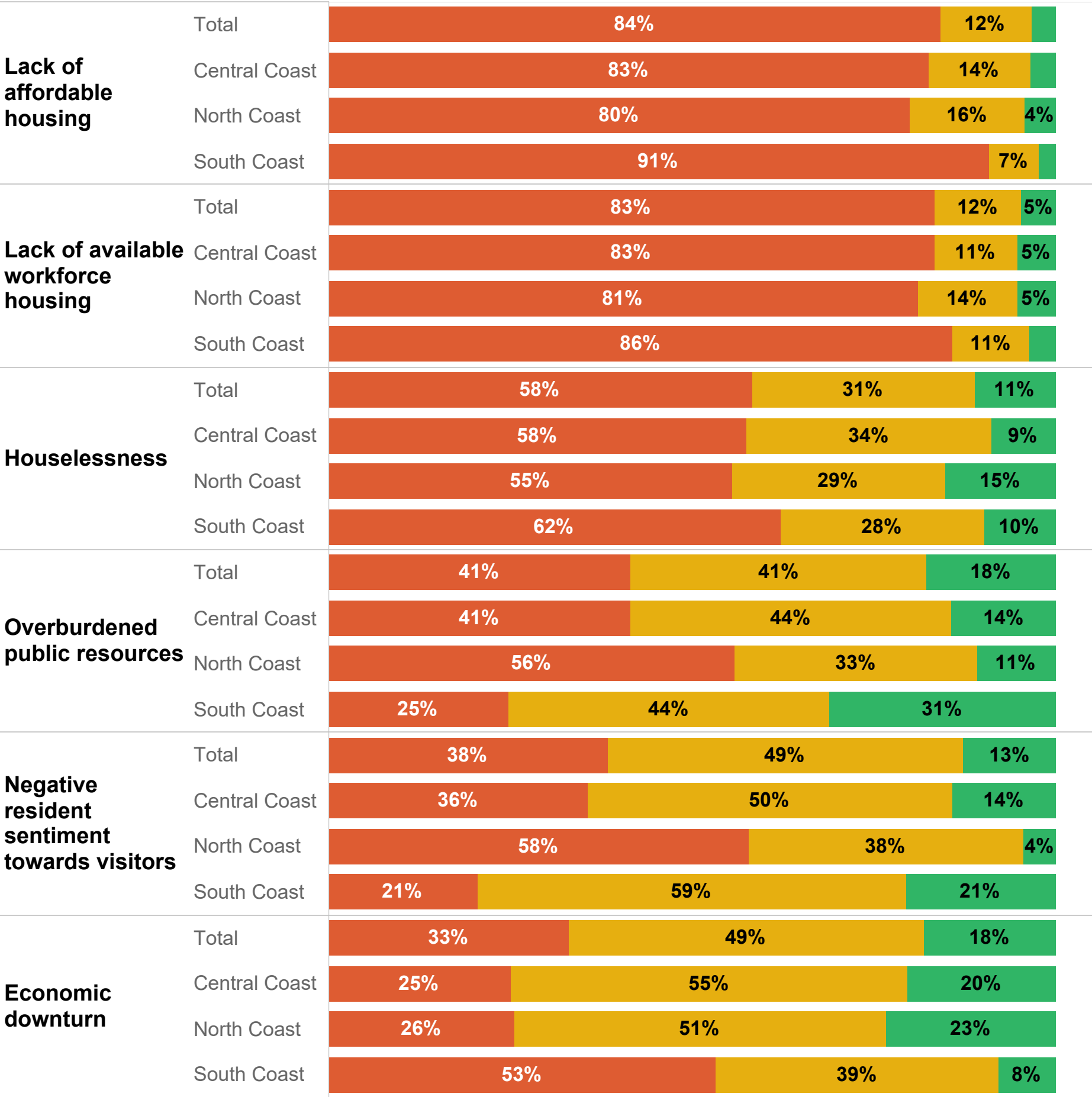


Source: RRC

Risks to Tourism in Your Community (1 of 2)

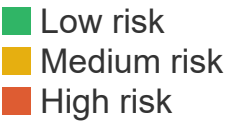
- Low risk
- Medium risk
- High risk

Q: Which of the following challenges does your community currently face?

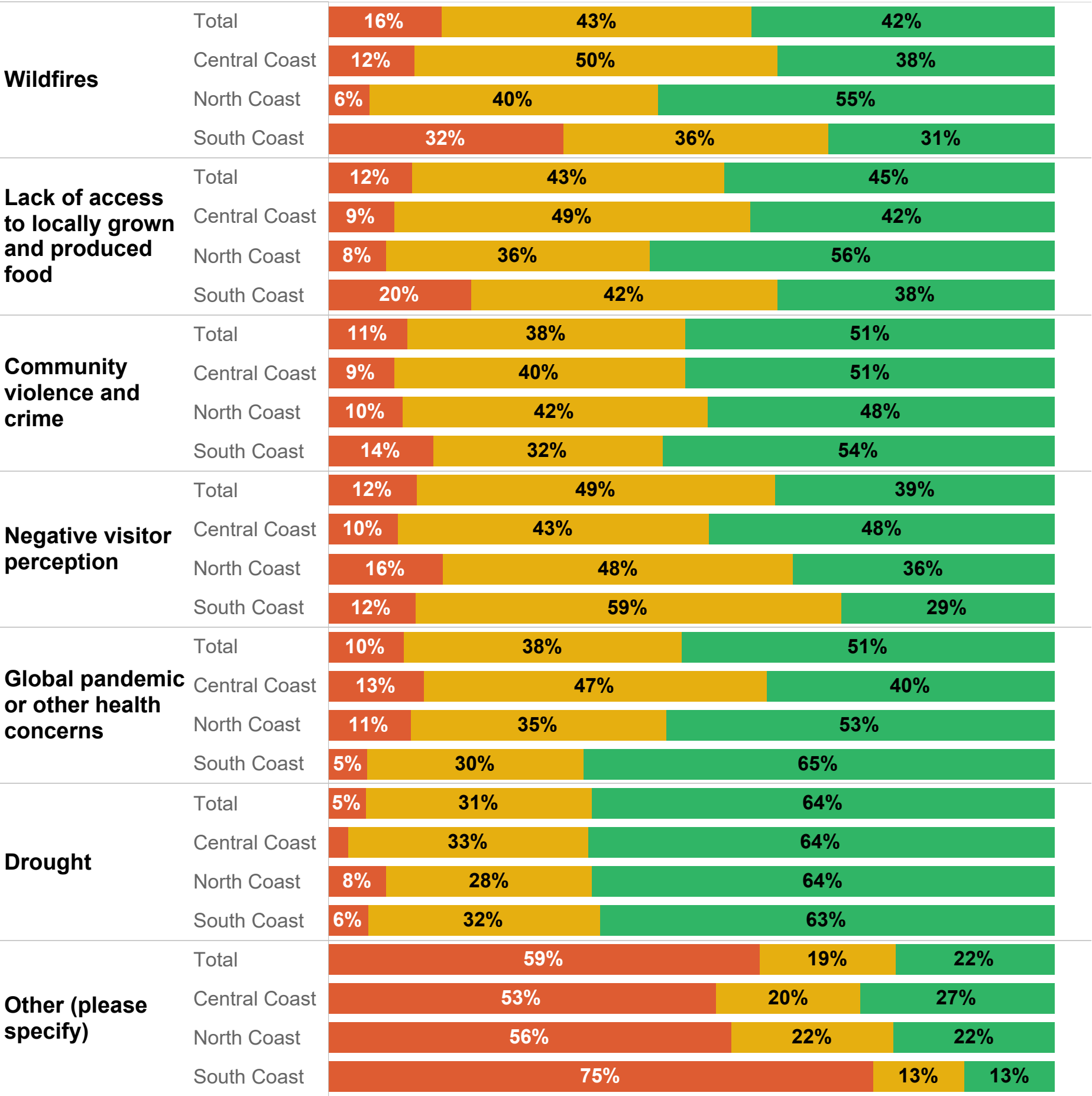


Note: Categories sorted in descending order by the percent of regional respondents selecting "High risk".

Risks to Tourism in Your Community (2 of 2)



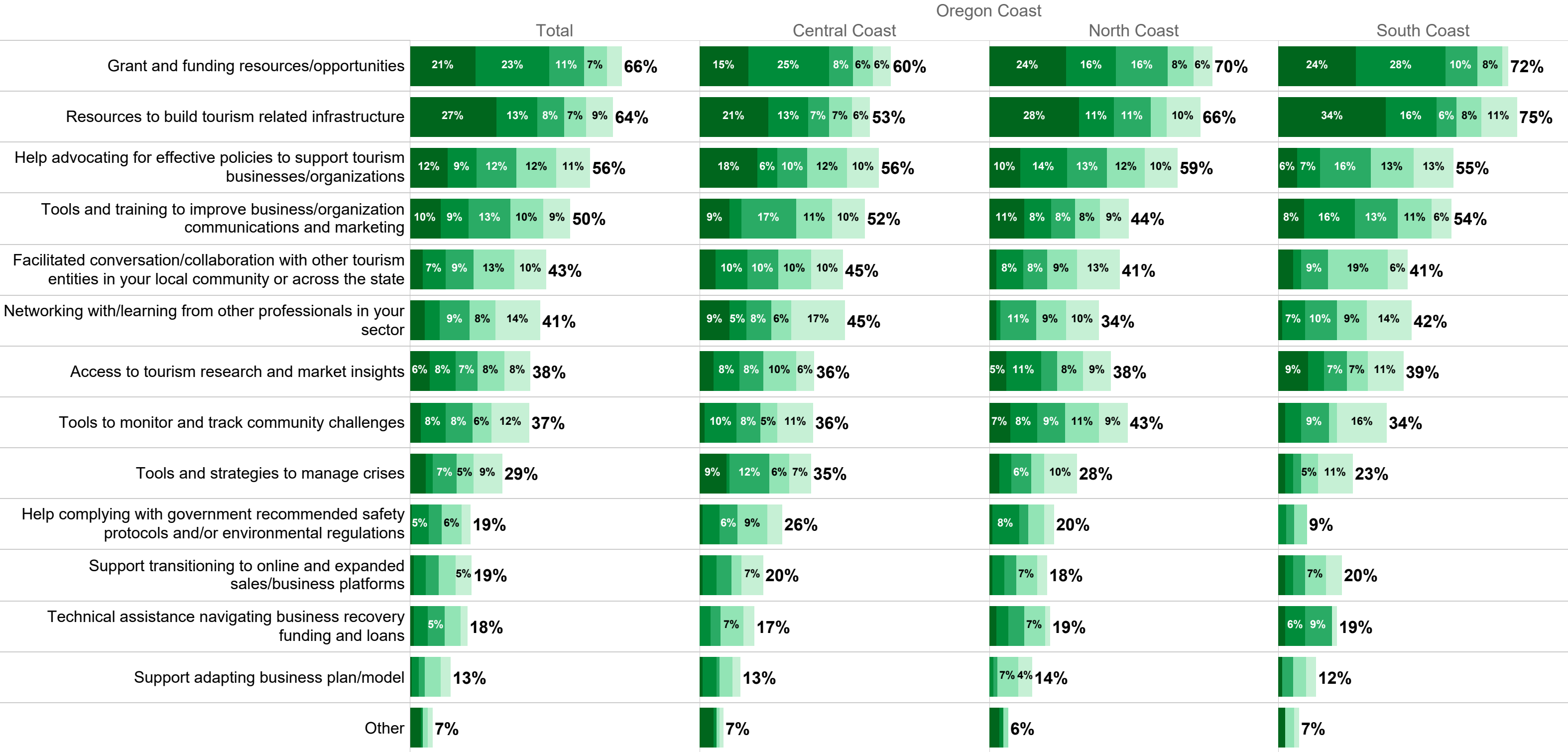
Q: Which of the following challenges does your community currently face?



Note: Categories sorted in descending order by the percent of regional respondents selecting "High risk".

Resources & Programs (Regional)

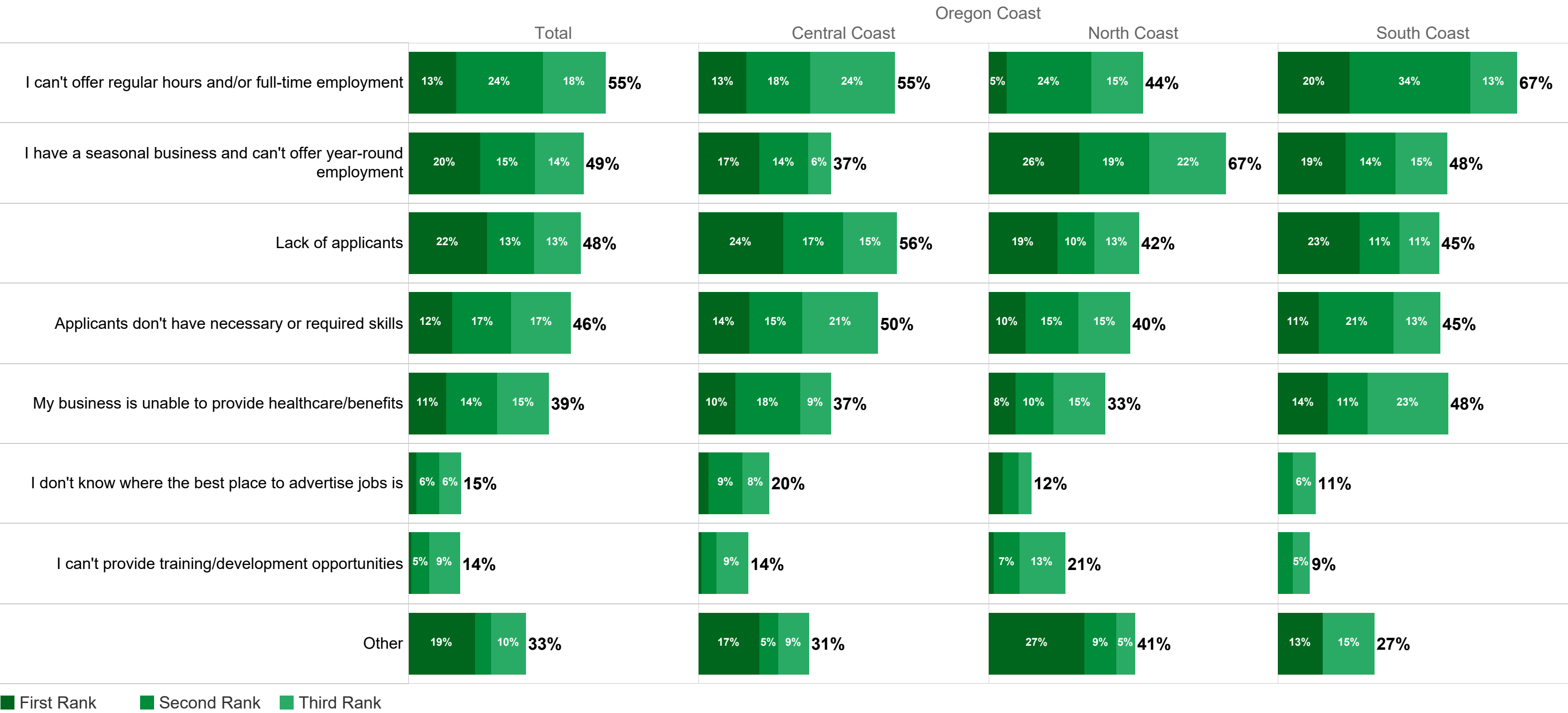
Q: Which of the following resources or programs would best assist your business/organization or community in the face of the challenges identified above?



■ First Rank ■ Second Rank ■ Third Rank ■ Fourth Rank ■ Fifth Rank
Note: Responses were recorded for the top five resources or programs respondents identified, with the sum of these five choices noted on the far right.

Tourism Workforce Challenges (Regional)

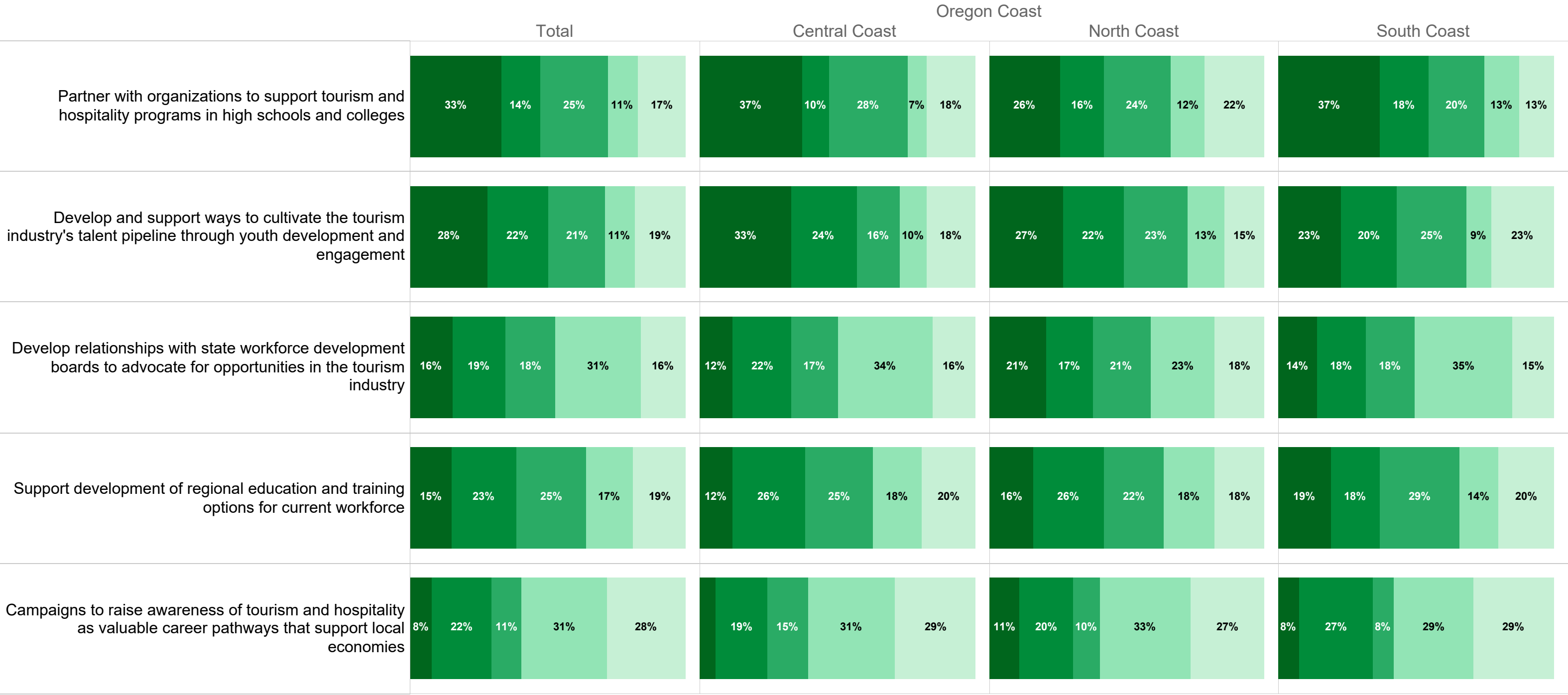
Q: *What are the three greatest challenges you currently face in attracting (and/or) retaining tourism workforce?*



Note: Responses were recorded for the top three challenges respondents identified, with the sum of these three choices noted on the far right.

Educational and Career Opportunities (Regional)

Q: Please rank (from highest priority to lowest priority) the following educational and career opportunities designed to help develop, attract and retain industry workforce.

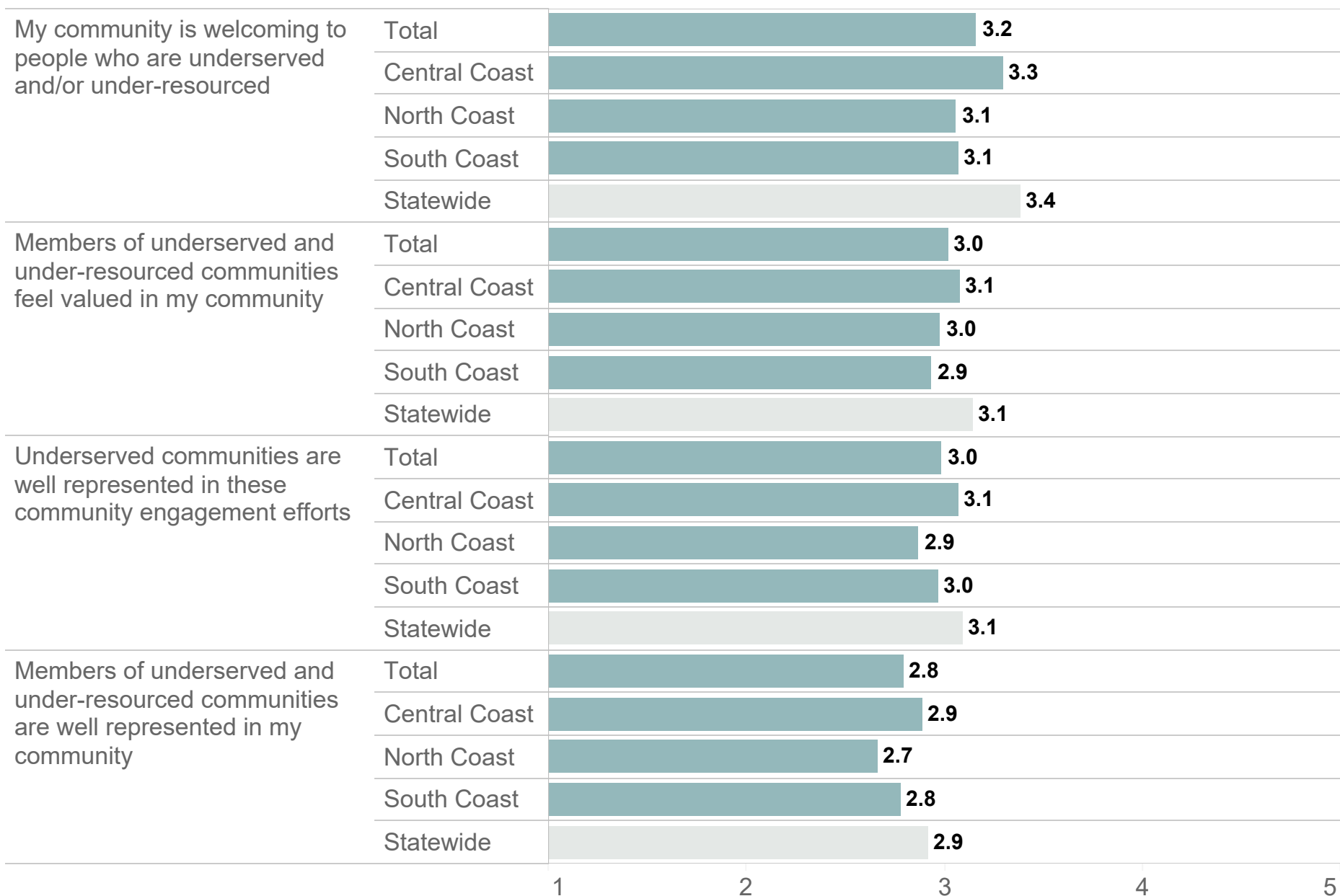


■ First Rank ■ Second Rank ■ Third Rank ■ Fourth Rank ■ Fifth Rank

Note: Responses sorted in descending order by "First Rank".

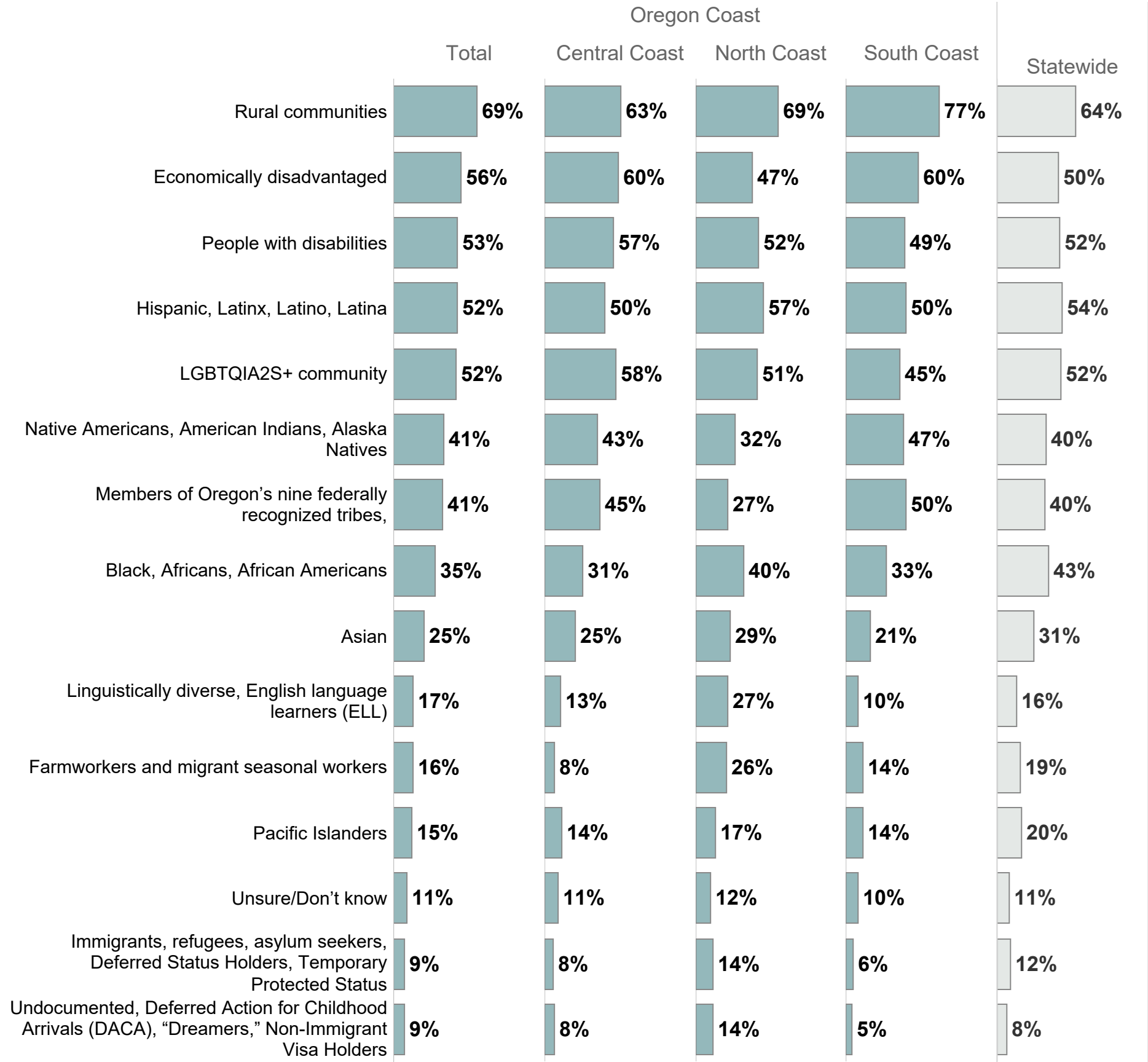
Representation of Underserved Communities

Q: Please rate your level of agreement or disagreement with the following statements:



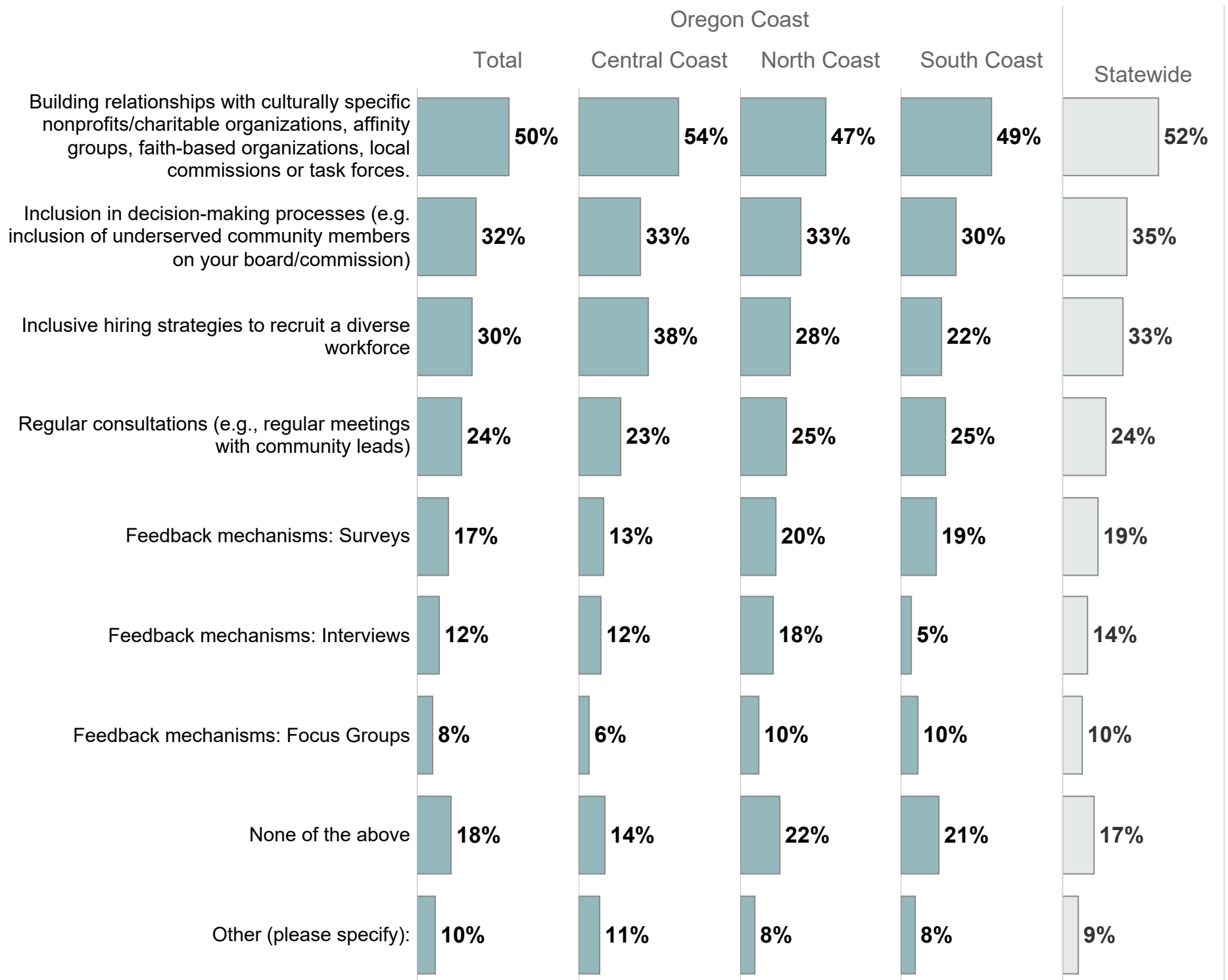
Engaging with Underserved Communities

Q: Which of the following underserved communities have you engaged with in the past two years?



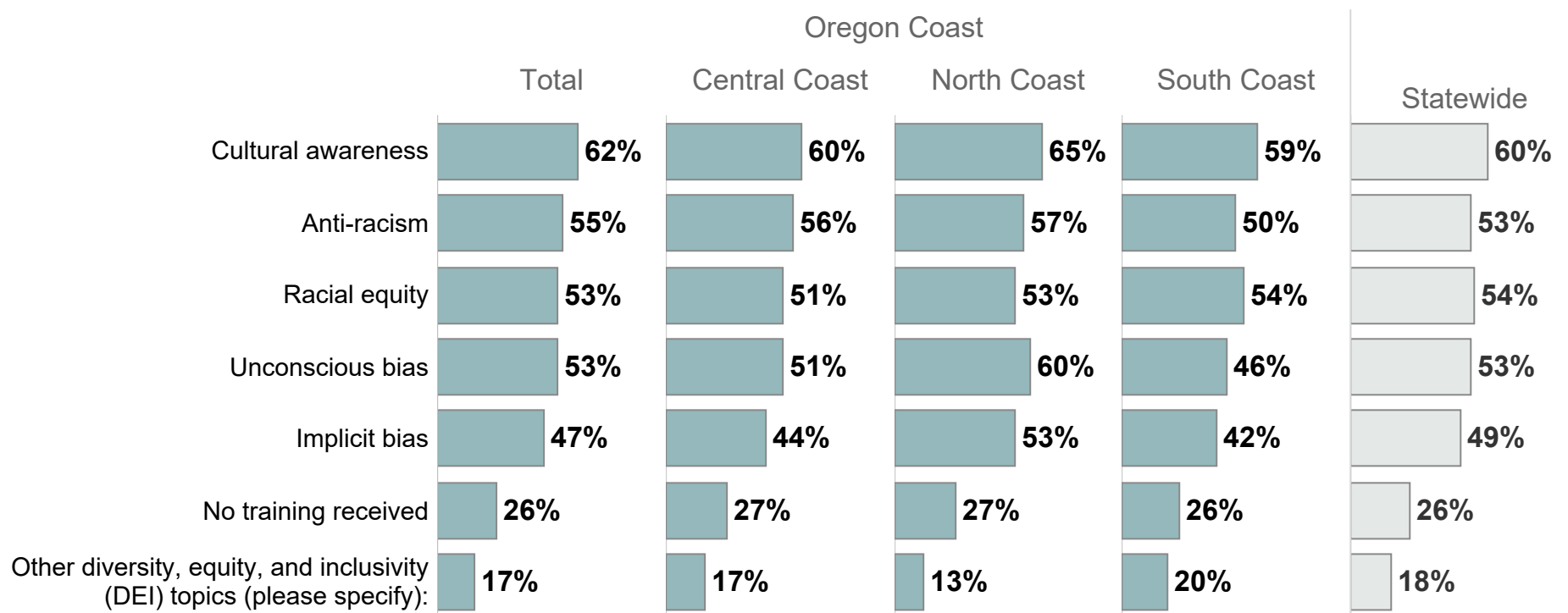
Considerations for Underserved Communities

Q: How do you ensure that the voices of underserved communities are heard and considered in your planning and operations?

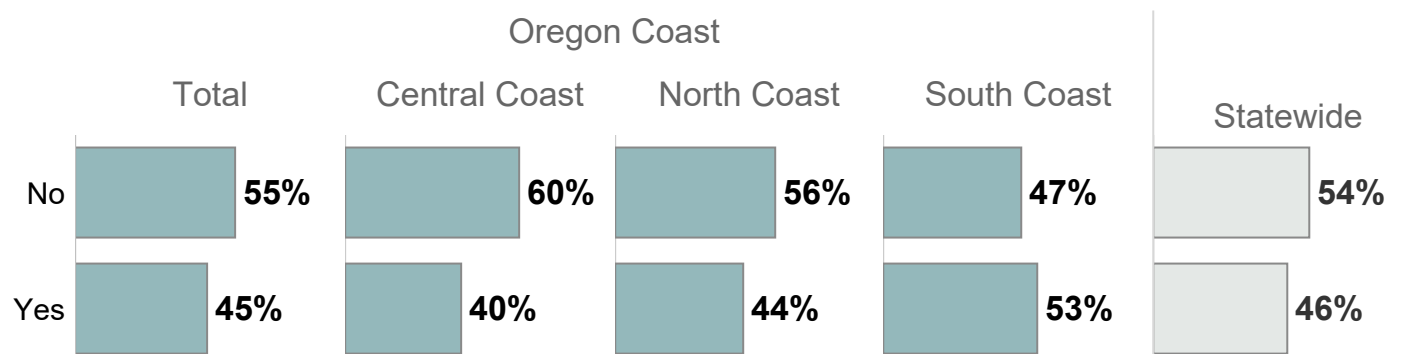


Training

Q: *Have you received training in: (Select all that apply)*



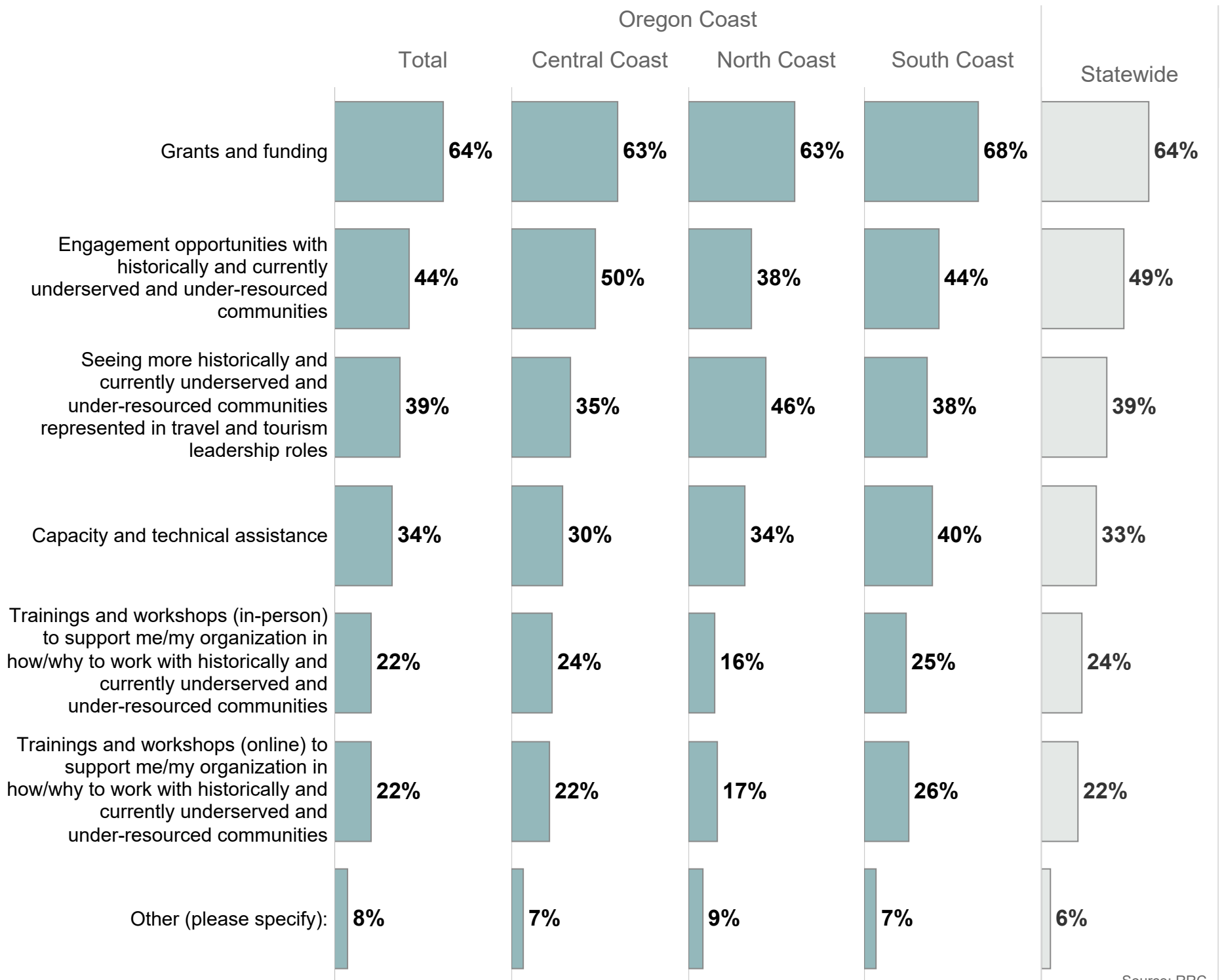
Q: *Was this training provided by your current employer?*



Source: RRC

Development of Tourism Resources

Q: Which of the following would be most helpful in developing tourism related facilities and products for underserved and under-resourced people in your community?



Source: RRC

Long-Term Tourism Planning (Regional)

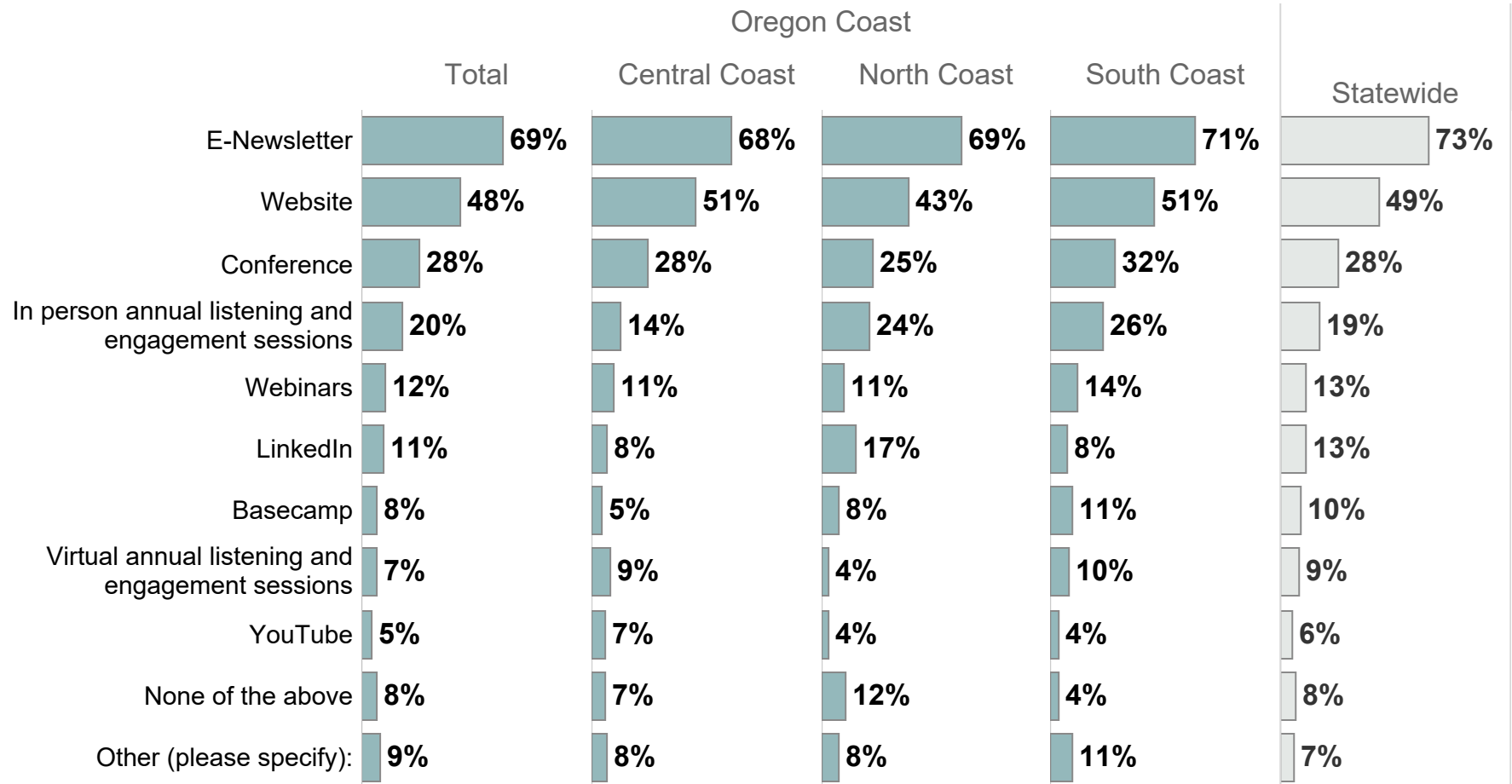
Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years. (Rank top three priorities within this list)

	Total				Oregon Coast				North Coast				South Coast			
Tourism-related infrastructure	18%	13%	7%	38%	13%	16%	6%	35%	24%	13%	8%	44%	21%	8%	7%	36%
Grant and funding resources/opportunities	19%	11%	5%	35%	21%	10%	5%	36%	8%	13%	4%	25%	30%	10%	4%	44%
Enhancing tourism perceptions for residents and workforce	7%	8%	17%	32%	8%	8%	18%	34%	10%	6%	12%	28%	11%	20%		34%
Bolster regenerative tourism	8%	11%	10%	30%	10%	11%	7%	28%	6%	10%	12%	28%	10%	13%	13%	35%
Visitor management solutions (e.g., disperse visitor pressures in high visitation areas)	8%	10%	7%	26%	11%	8%	12%	30%	11%	16%	7%	34%	6%	3%		11%
Transportation options	6%	10%	9%	25%	5%	12%	3%	20%	8%	8%	14%	30%	4%	10%	12%	26%
Sustainability and climate action (e.g., strategies for climate change resilience, climate action plans)	7%	8%	9%	24%	4%	7%	8%	19%	11%	10%	13%	34%	7%	7%	4%	18%
Marketing and promotion	9%	6%	6%	21%	7%	4%	7%	18%	7%	5%	4%	16%	14%	11%	7%	32%
Partner engagement and collaboration		8%		14%	7%			9%	7%	7%		15%	7%	10%		19%
Work with underserved communities (e.g., towards racial equity, accessibility)	4%	7%		13%	4%	7%	9%	20%	5%	4%		10%	6%			6%
Support communities in crisis (e.g., communities suffering from wildfires)	5%			10%	7%	8%		16%	4%			5%	6%			9%
Training and education programs		4%		10%	4%	3%		8%		7%		10%	7%	3%		11%
Tourism research and market insight	4%	4%		10%		6%		9%	5%			8%	6%	3%		11%
Diversity Equity and Inclusion		3%		7%		5%		9%	4%			5%	3%			6%
Other	3%			5%	5%			6%	5%			7%	1%			1%

Note: Responses were recorded for the top three plans respondents identified, with the sum of these three choices noted on the far right.

Tourism Communication Methods

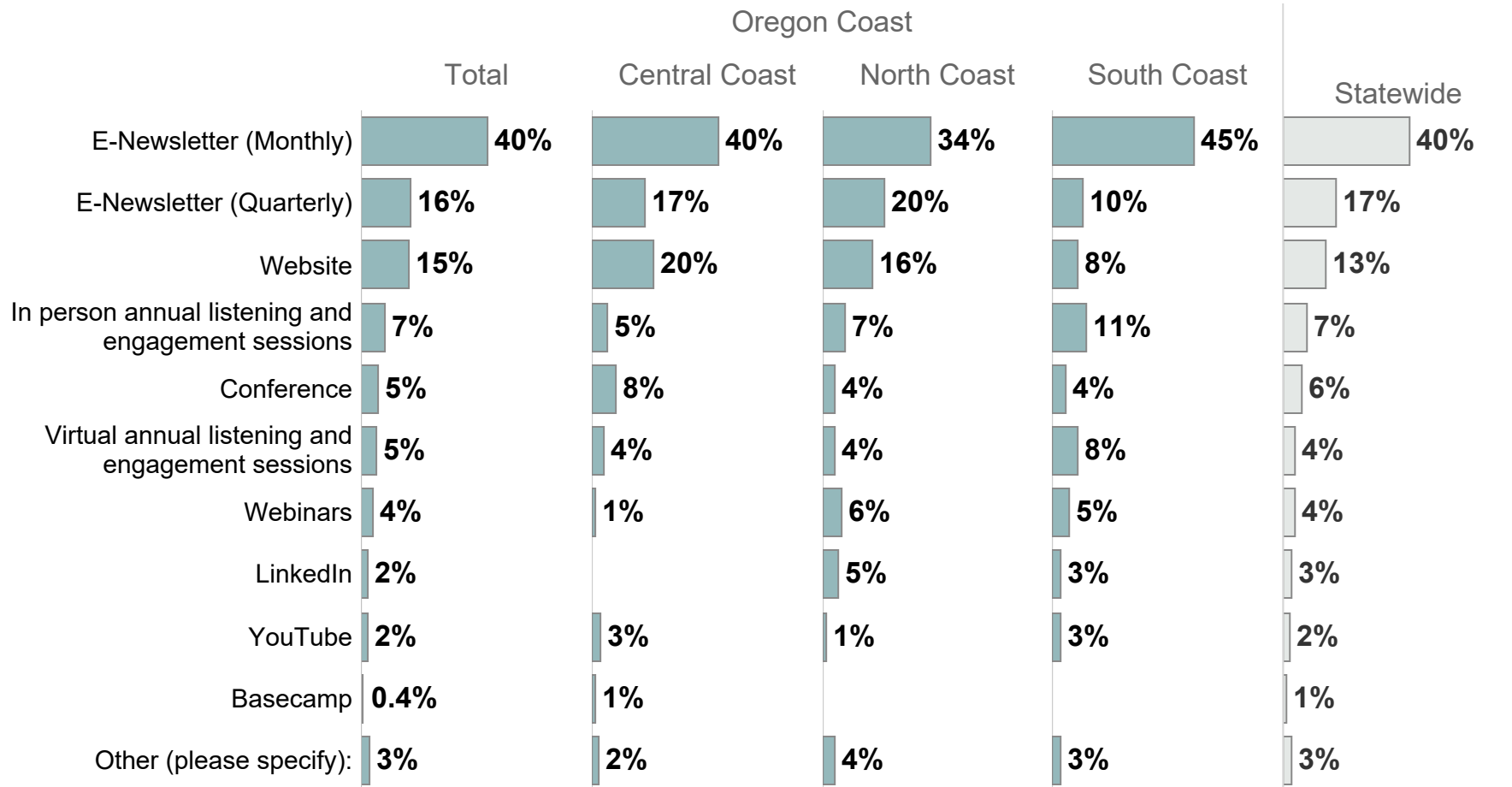
Q: How do you currently receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization (RDMO)?



Source: RRC

Tourism Communication Methods

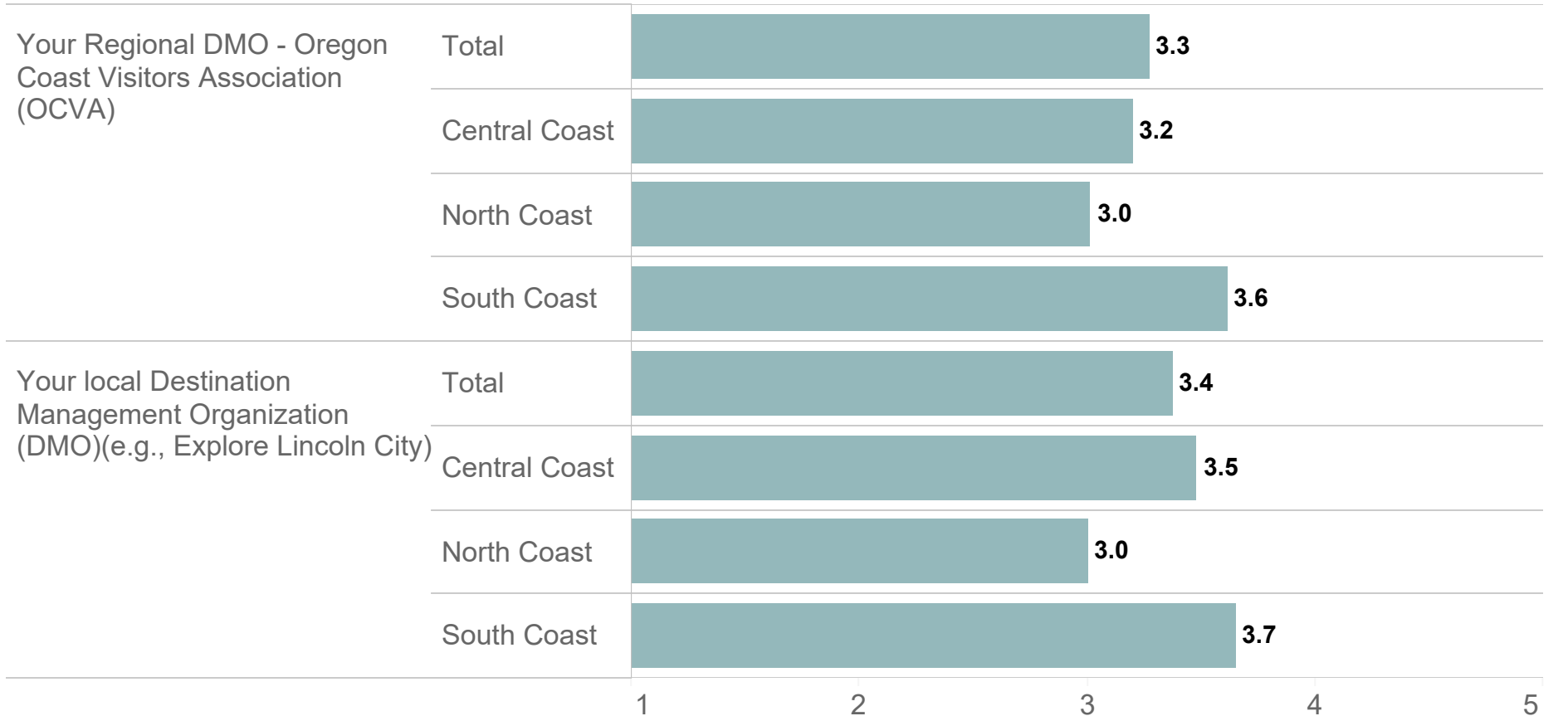
Q: What is the best way for you to receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization (RDMO)?



Source: RRC

Oregon Coast - Level of Engagement

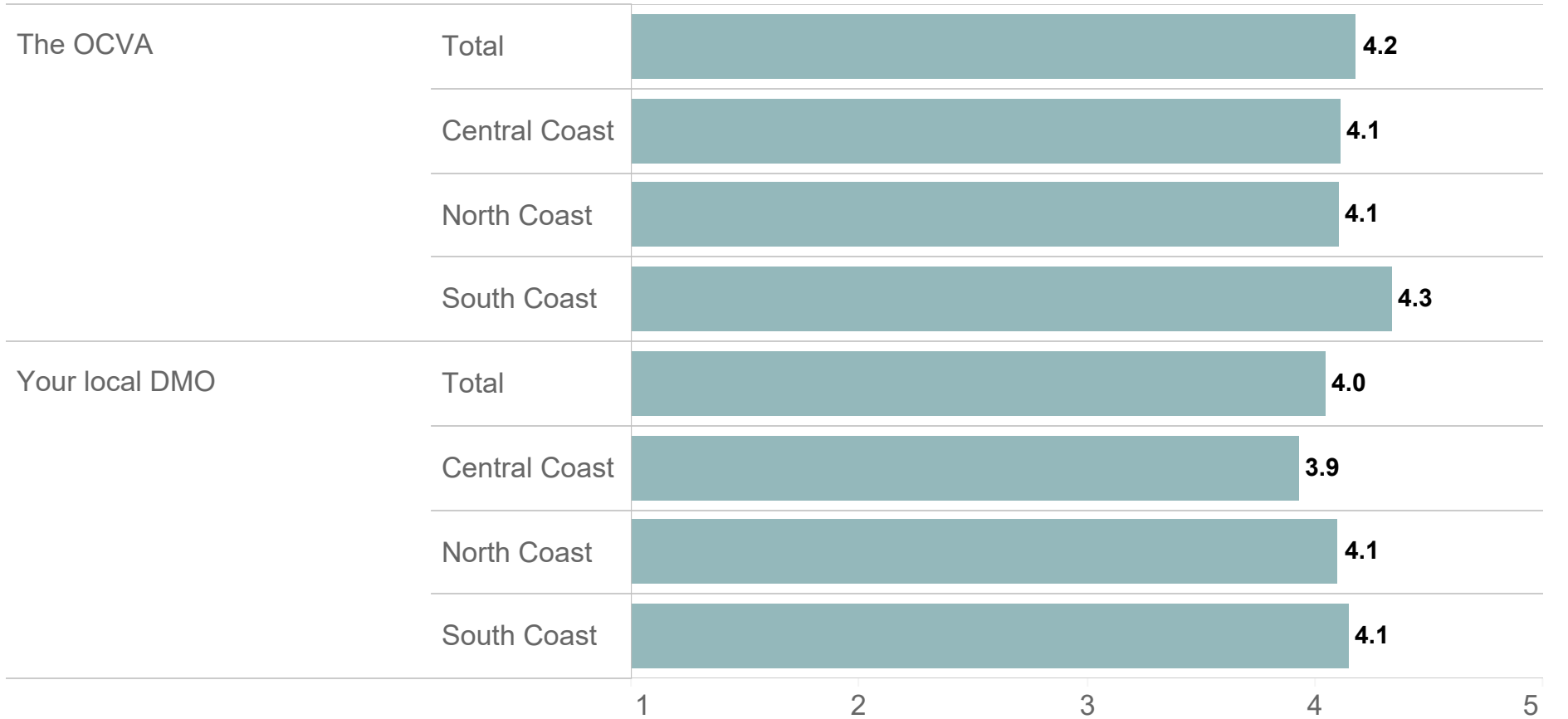
Q: Please indicate your level of engagement with the following organizations:



Source: RRC

Oregon Coast - Satisfaction with DMOs

Q: Please rate your level of satisfaction with the services of the following Destination Management Organizations



Source: RRC