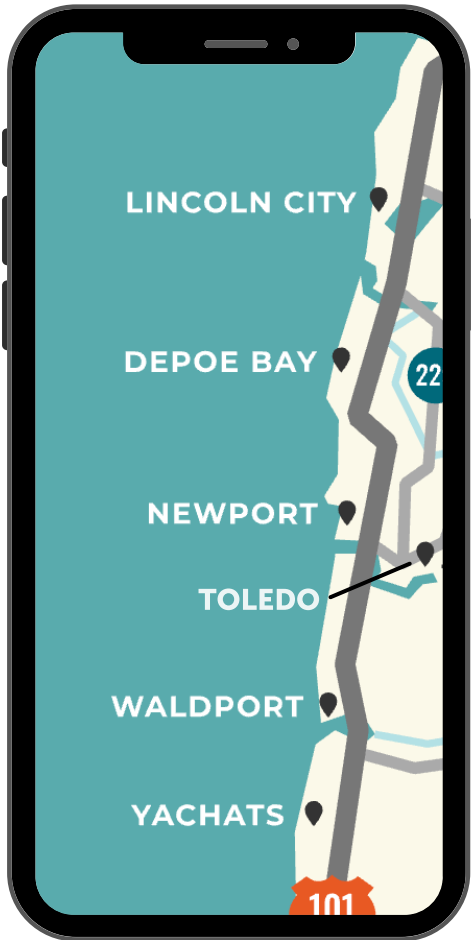




LINCOLN COUNTY



SUMMARY

Our interviews and survey research found that Lincoln County could be described as an advanced tourism industry environment with communities that strongly support local tourism and its economic benefits, but stakeholders and residents have the following top concerns: community livability; peak season tourism capacity; and environmental impacts.

KEY PARTNERS:

Local Government (County Board + City Councils)
Chambers of Commerce and DMOs
Regional + State DMOs (Travel Oregon + OCVA)
Land Management Agencies (OPRD, ODFW, ODOT)

1.

COMMUNITY
LIVABILITY

2.

PEAK SEASON
TOURISM
CAPACITY

3.

ENVIRONMENTAL
IMPACTS

LINCOLN COUNTY: COMMUNITY LIVABILITY

KEY FINDINGS:

Research found that maintaining community livability is a top concern for Lincoln County stakeholders and residents as the Central Oregon Coast experiences increasing local tourism.

Vacation Rentals & Short-Term Rentals

- Interviews and survey results identified Vacation Rentals (VRs) and Short-Term Rentals (STRs) as an increasing local livability issue in Lincoln County and its communities.
- VR/STR concerns include neighborhood disruption, occupancy limits, local housing availability, and overall regulation. These community concerns have prompted resident petition campaigns to limit VRs/STRs and create new county codes to mitigate local impacts.
- Community VR/STR concerns have been widely exacerbated by the 2020 inland Lincoln County wildfires that destroyed nearly 300 homes where tourism industry and other workers could find more affordable housing.

Bolstered Public & Recreational Resources Support

- Growing concerns for bolstered or improved public resources and recreation support assets such as community restroom facilities and trash collection, particularly during Covid-19 pandemic.
- Survey results revealed strong priorities to bolster or improve public and recreational support resources that enhance both local livability and visitor experiences.
- Surveys and interviews also cited increasing community concerns for bolstered or better supported local parks, boat launches, public piers and docks, and site monitoring for safe and responsible use during peak-season tourism.

Key Public Affairs Impact:

Joining efforts to bolster or improve community public resources and recreational assets maintains local livability and enhance all experiences.

Potential Key Partners:

Lincoln County Board of Commissioners; Lincoln City, Newport, Toledo, Waldport and Yachats City Councils.

POTENTIAL SOLUTIONS:

Vacation Rentals & Short-Term Rentals

- 1.** Engage in opportunities with county and local elected bodies to clarify specific community and neighborhood VR/STR issues, and offer potential support or solutions to mitigate specific problems.
- 2.** Develop, refine or amplify consistent community-level messaging that appropriately communicates VRs/STRs concerns are an important public issue for effective resolution and management by local elected officials.
- 3.** Leverage civic and local media opportunities to clarify at the community level that vacation destination tourism overall contributes to local economic activity and visitor spending that benefits the entire community.

Bolstered Public & Recreational Resources

- 1.** Engage, collaborate and coordinate with local key partners to specify locations or assets for immediate additional support or solutions to help mitigate peak season tourism impacts.
- 2.** Projects could include bolstered public restroom facilities or support, additional waste receptacles, recreational host programs, and developing visitor use or monitoring programs to identify locations or projects for additional support.
- 3.** Develop, improve or amplify regional and local messaging campaigns to educate and reinforce responsible, appropriate use of public and recreational resources while visiting Central Oregon Coast communities.

“Lincoln City survives through tourism and it impacts everyone. I would like to see a better balance of workforce housing and vacation rentals.”

--2018 Oregon Tourism Engagement Survey
-- Respondent comment

LINCOLN COUNTY: PEAK SEASON TOURISM CAPACITY

KEY FINDINGS:

Research found growing community and resident concerns about peak season tourism capacity pressures that challenge local transit infrastructure and other public services.

Peak Season Infrastructure & Capacity Challenges

- Growing county and community concerns about increasing July-August peak season tourism that significantly impacts local traffic, congestion, parking availability, and overall community capacity.
- Interviews and survey responses revealed growing peak season pressures on limited transportation infrastructure and public services (fire, emergency, water treatment), significantly impacting livability and visitor experiences.
- Stakeholder and resident surveys also revealed priorities to expand off-season tourism to ease peak season pressures and sustain a year-round tourism economy.

Seasonal Impacts on Recreational Resources & Assets

- Increasing community concerns about peak season demand on local recreation area assets such as on-site restrooms, parks, trailheads, and viewpoints with more usage and other impacts.
- Survey results revealed growing local priorities to expand shoulder season tourism to help reduce peak season pressures on popular recreational resources.
- Survey responses also emphasized more local coordinated marketing efforts to help mitigate and manage increasing tourism impacts while sustaining a thriving destination management region.

Key Public Affairs Impact:

Mitigating peak season pressures and expanding off-season tourism can retain support for tourism and its local benefits.

Potential Key Partners:

Travel Oregon, ODOT, ODFW, OPRD, Lincoln City, Newport, Toledo, and Waldport City Councils; Lincoln City, Greater Newport, Toledo, and the Waldport Chambers.

POTENTIAL SOLUTIONS:

1. Engage and collaborate with local key partners on potential options to help mitigate specific peak season capacity and local infrastructure pressures (traffic reduction, public resources demands, and recreational assets support).

Support could include:

- 1) Provide and amplify increased public transportation support and advocacy;
- 2) Provide funding to partner on specific community projects (restrooms support, community care signage)
- 3) Partner on program planning and funding for local recreational resources support (parks, trailheads, boat launches, etc.).

2. Develop, refine or amplify national and regional marketing to encourage visitation during Oct.-March shoulder season to enjoy more open, relaxed and serene Oregon Coast experiences (e.g., "Explore Like a Local, Live Like a Local" off-season tourism campaign).
3. Engage and collaborate with local chambers and key tourism industry leaders on creative activities to attract off-season visitation and support a year-round tourism economy.

LINCOLN COUNTY: ENVIRONMENTAL IMPACTS

KEY FINDINGS:

Research found consistent community and resident concerns about reducing tourism impacts on natural and scenic environments that make the Central Oregon Coast attractive and appealing.

Natural and Environmental Impacts

- Interviews and survey responses emphasized issues of increasing visitor impacts at local scenic and natural attractions, particularly from Covid-19 pandemic social constraints.
- Resident surveys also revealed notable Lincoln County sentiments that tourism contributes more negative than positive environmental effects in local communities.
- Interviews also revealed increasing community and resident concerns stemming from recurring unsafe or irresponsible visitor behaviors (litter, trampling natural environment, neglecting environmental impacts) at local public, scenic or nature-based sites.
- Additionally, survey responses noted rising stakeholder and resident concerns that negative resident and tourist interactions at natural and scenic settings diminish both visitor and resident experiences.

Key Public Affairs Impact:

Minimizing natural environment impacts maintains local livability and enhances all experiences.

Potential Key Partners:

Key partners to help mitigate increased natural and scenic resources impacts would be Oregon Parks & Recreation, Oregon Dept. of Fish & Wildlife, Travel Oregon, local Visitor Centers, and local outdoor tourism industry leaders.

POTENTIAL SOLUTIONS:

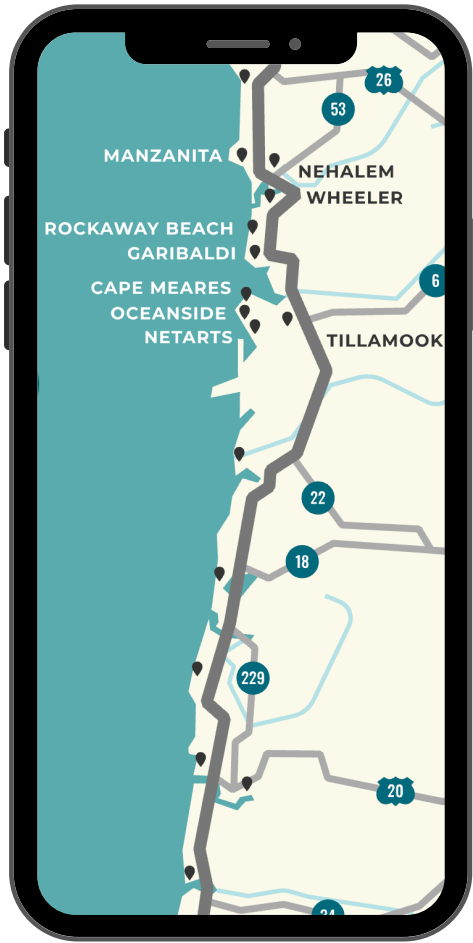
1. Engage and collaborate with key partners to coordinate and amplify regional and local messaging to convey responsible and safe enjoyment of local natural and scenic resources.
2. Develop, refine or expand a storefront window signage campaign to inform and encourage mutual care, enjoyment and appreciation of local natural environment amenities.
3. Improve or expand natural amenity access or on-site programs to foster appreciation and enjoyment of nature-based recreation without natural and scenic environment degradation. These programs could also monitor visitor impacts and support.
4. Improve or expand effective Trail Ambassador/Beach Host programs to emphasize shared resident and visitor experiences in natural resource settings.
5. Amplify and reinforce local public service campaigns celebrating residents' and visitors' mutual appreciation of the Oregon Coast's natural and scenic environment, and its unique, friendly and appealing communities.

"Nebel said that (raising Newport's TRT) would allow the city to perform maintenance and repairs at facilities that cater to visitors; enable expansion in landscaping, litter collection and other maintenance tasks; (and) create new spaces that the public has been asking for such as more off-road trails."

*-- Spencer Nebel, Newport City Manager
Newport News Times, April 21, 2021*



TILLAMOOK COUNTY



SUMMARY

Research revealed that Tillamook County could be described as a transitioning tourism industry market with communities that increasingly recognize the growing local tourism industry and its economic benefits, but stakeholders and residents have concerns about the following top issues: increasing visitor & public resources impacts; effective tourism policies & business support; and enhanced nature-based recreation.

KEY PARTNERS:

- Local Government (County Board + City Councils)
- Chambers of Commerce and DMOs (Visit Tillamook Coast)
- Regional + State DMOs (Travel Oregon + OCVA)
- Economic Development Agencies
- Land Management Agencies (OPRD, ODFW)

1.
PUBLIC
RESOURCES
IMPACTS

2.
TOURISM
POLICIES &
BUSINESS
SUPPORT

3.
ENHANCED
NATURE-
BASED
RECREATION

TILLAMOOK COUNTY: PUBLIC RESOURCES IMPACTS

KEY FINDINGS:

Research revealed community and resident concerns about increasing peak season tourism and visitor impacts that challenge local public resources and recreational assets.

Bolstered Public Resources and Recreation Support

- County and community concerns to bolster or improve local public resources impacted by increasing peak season tourism, particularly during Covid-19.
- Interviews noted improved or better support for public restrooms, county parks, boat launches, beach accesses and trailheads, as well as rural directional or safety signage (particularly Oregon Route 6 vicinity) to reduce adverse impacts and improve experiences.
- Stakeholder survey research further underscored consistent preferences to bolster or improve county and community public resources as the top primary long-term priority, as well as the top secondary short-term priority.

Safe and Preserved Scenic and Environmental Assets

- Growing concerns for preserving natural and scenic assets such as local beaches, bays, headlands and trails, and reinforced messaging that conveys safe, responsible and sustainable outdoor recreation.
- Increasing community concerns with recurring nature-based recreation impacts due to neglected personal safety and environmental restrictions (visitors beyond boundaries; careless activities during outdoor recreation).
- Stakeholder survey research further identified increasing local priorities to bolster nature-based attractions from increasing impacts such as overburdened on-site restrooms, regularly congested trailheads and parking lots, and overall outdoor recreation preservation.

Key Public Affairs Impact:

Bolstering support for local public assets and environmental resources improves livability and enhances all experiences.

Potential Key Partners

Tillamook, Garibaldi, Manzanita, Rockaway and Wheeler City Councils; Tillamook Coast Visitors Association; Oregon Parks & Recreation; and local chambers and business leaders.

POTENTIAL SOLUTIONS:

1. Engage, collaborate and coordinate with local key partners to specify locations or assets for immediate additional support or solutions to help mitigate peak season tourism impacts.
2. Engage and collaborate with community leaders to identify long-term public resources projects that could receive potential funding to improve local livability and visitor experiences (e.g., OCVA help fund additional permanent receptacles, waste removal, or improved restroom facilities).
3. Explore potential volunteer or intern programs to research seasonal visitor usage, apply strategies and solutions, and monitor sites for effective results.
4. Develop, improve or amplify regional and local visitor messaging encouraging safe and responsible use of local public assets while visiting Tillamook County and its communities (e.g., OCVA provide communications campaign for safe public resources use; engage County Board, ODOT to improve visitor directional and recreational signage for rural areas).

"I think there are bright spots like Manzanita's pilot trash pick-up program...where we invite people to help us "Be Kind to the Coast" and participate in loving and taking care of this place and its residents. "

-- Travel Oregon 2020 Tourism Stakeholder Survey comment

TILLAMOOK COUNTY: TOURISM POLICIES & BUSINESS SUPPORT

KEY FINDINGS:

Research identified growing priorities to improve local tourism policies and business funding to support tourism sustainability and enhance visitor and resident experiences.

Effective Local Tourism Policies and Business Support

- Growing concerns for improved regional and local tourism development policies and needed funding support tourism-related businesses to sustain a growing tourism economy.
- Increasing community priorities to advocate sustainable local tourism and financial assistance for tourism businesses, particularly during Covid-19 pandemic.
- Interviews noted growing concerns for effective local tourism policies and management, particularly in Garibaldi, Nehalem, Rockaway and Wheeler where increased tourism impacts retiree and vacation residence communities.

Industry Growth & Long-Term Planning

- Growing county and community concerns for managing tourism growth and long-term planning to sustain an increasing year-round industry.
- Interviews and stakeholder surveys revealed county and community priorities to further develop shoulder season tourism to help moderate peak season growth, while improving and sustaining year-round tourism.
- Other long-term tourism growth and planning priorities included increased agri-tourism development and other local seasonal activities to sustain and manage growth, and enhance year-round resident and visitor interactions.

Key Public Affairs Impact:

Improving local tourism policies and long-term planning enhances community livability and sustains industry growth.

Potential Key Partners:

Potential partners could be Tillamook Coast Visitors Association, Travel Oregon, Tillamook County Board of Commissioners, area economic development agencies, local city councils, local chambers, and tourism business leaders.

POTENTIAL SOLUTIONS:

- 1.** Engage and pursue opportunities to collaborate with Tillamook County and community officials on strategies for effective local tourism policies and management, and funding to sustain growing tourism businesses. Strategies could include targeted community-based tourism policies development and support, local tourism advocacy, and marketing funding.
- 2.** Engage with local chambers and tourism-related businesses to collaborate on creative strategies and campaigns to increase shoulder season visitation and sustain year-round tourism economies.
- 3.** Develop, improve or reinforce national and regional marketing messaging inviting tourism visitation during Oct.-March shoulder season to enjoy more relaxed, intimate and serene Tillamook Coast experiences.

TILLAMOOK COUNTY: ENHANCED NATURE-BASED RECREATION

KEY FINDINGS:

Research found increasing community and stakeholder priorities to maintain and preserve nature-based recreational resources for mutual visitor and resident enjoyment, and to foster shared appreciation of local natural resources.

Nature-Based Recreation and Maintaining Quality of Life

- Stakeholder and resident concerns to preserve nature-based recreational resources (trails & hiking, beaches & estuaries, and bays & boating) for enhanced visitor and resident experiences, while sustaining local quality of life.
- Increasing community and stakeholder preferences to improve visitor and resident recreational interactions to foster more positive and mutually enjoyable natural and scenic environment activities.
- Growing community priorities to increase nature-based recreation programs that create opportunities for residents and visitors to engage, interact and appreciate local environmental and scenic resources.
- Stakeholder and resident survey responses also emphasized increasing priorities to enhance local recreational experiences to encourage preservation of quality natural resources and community livability.

Key Public Affairs Impact:

Joining efforts to maintain and improve nature-based recreational resources enriches both community and visitor quality of life.

Potential Key Partners:

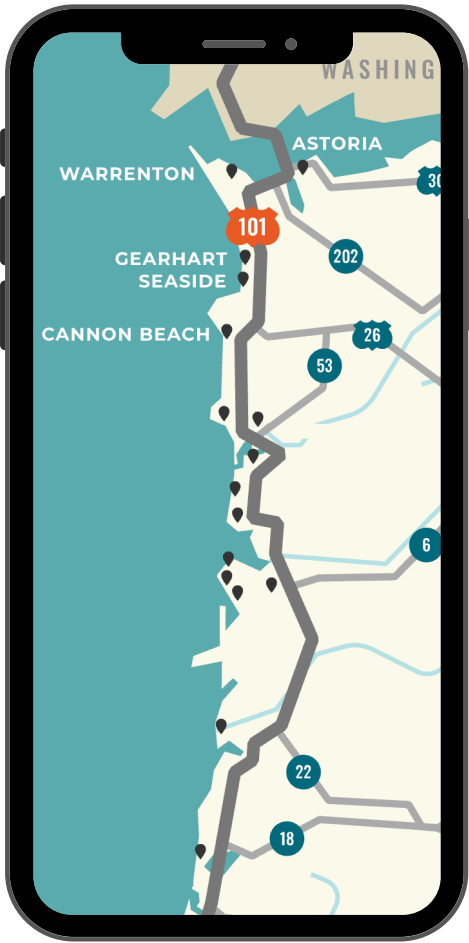
Potential partners for improving and enhancing nature-based recreational experiences would be Tillamook Coast Visitors Association, Oregon Parks and Recreation, Oregon Department of Fish & Wildlife, Travel Oregon, community city councils, and community chambers visitor centers.

POTENTIAL SOLUTIONS:

- 1.** Engage and collaborate with county and community leaders, state recreational resources managers, and other environmental stakeholders to develop or expand preservation strategies that encourage quality nature-based recreation while minimizing natural resources impacts.
- 2.** Diversify or expand local hosted programs that welcome and assist visitors at nature-based recreation sites, fostering mutual nature enjoyment and appreciation. These programs could also monitor site use and support needs.
- 3.** Reinforce or amplify regional and local public service campaigns encouraging care for the Tillamook Coast's scenic natural environment, and its unique, friendly and appealing communities, (e.g., "Handle With Care and Enjoy Many Happy Returns" campaign).
- 4.** Leverage local visitor centers, tourism businesses, and other popular community locations to prominently display and distribute useful recreational content (e.g., window poster campaign, brochures, flyers) that encourages responsible, safe and mutual enjoyment and appreciation of local natural attractions.



CLATSOP COUNTY



SUMMARY

Our research supports that Clatsop County is an advanced tourism industry environment with communities that strongly value local tourism and its economic importance, but communities and residents identify the following top tourism concerns: peak season traffic and visitor capacity; natural, environmental and cultural resources concerns; community affordability impacts.

KEY PARTNERS:

- Local Government (County Board + City Councils)
- Chambers of Commerce and DMOs (Visit Tillamook Coast)
- Regional + State DMOs (Travel Oregon + OCVA)
- Economic Development Agencies
- Land Management Agencies (OPRD, ODFW)

1.
PEAK SEASON
TRAFFIC &
VISITOR
CAPACITY

2.
NATURAL,
ENVIRONMENTAL
& CULTURAL
RESOURCES
CONCERNS

3.
COMMUNITY
AFFORDABILITY
ISSUES

CLATSOP COUNTY: PEAK SEASON TRAFFIC & VISITOR CAPACITY

KEY FINDINGS:

Research found Clatsop County peak season traffic and capacity issues significantly impact North Coast communities, creating resident concerns with seasonal tourism growth and preferences to expand off-season tourism.

Peak Season Traffic & Community Capacity Issues

- Growing Cannon Beach, Seaside-Gearhart, and Warrenton-Hammond-Astoria area issues with increasing peak season local traffic, off-street parking, and overall transit congestion pressures, especially during Covid-19.
- Interviews notably cited Cannon Beach as a prime example of peak season traffic and capacity pressures with residents, business leaders, elected and city officials all identifying vehicle congestion and parking as major local tourism issue.
- Stakeholders, residents, and media and business leaders in the Seaside and Gearhart communities also identify peak season traffic, particularly on Highway 101 through Seaside, as a top local tourism challenge.
- Stakeholder and resident survey responses also identified increasing peak season traffic in the Astoria-Warrenton communities where Highway 101 congestion can extend across key bridges, particularly in the event of accidents.
- Survey research also revealed peak season community capacity concerns with stakeholder and resident preferences to expand off-season tourism and help ease increasing seasonal impacts.

Key Public Affairs Impact:

Seasonal traffic and community capacity challenges can diminish overall support for the local tourism industry.

Potential Key Partners:

Key partners to help ease peak season traffic and community capacity issues could be ODOT, Travel Oregon, the Clatsop County Board, and the Astoria, Cannon Beach, Gearhart, Seaside, and Warrenton City Councils, and local chambers.

POTENTIAL SOLUTIONS:

1. Engage and collaborate with key local elected bodies and state officials to explore or expand regional transportation strategies or solutions that could help mitigate specific peak-season traffic issues and seasonal impacts.

Seasonal/Long-Term Strategies Could Include:

- a) Collaborate on community research, planning and potential funding for specific traffic solutions to ease local traffic flow and reduce congestion.
- b) Develop, refine or amplify regional and local messaging for increased alternate transportation use and seasonal traffic reduction advocacy.

2. Increase or reinforce national and regional marketing campaigns inviting and encouraging visitation during Oct.-March shoulder season for more serene and relaxed North Coast experiences.
3. Engage and collaborate with local chambers and key tourism leaders on creative strategies and activities to attract off-season visitation and support a year-round tourism economy.
4. Develop, refine or amplify national and regional marketing to encourage visitation during Oct.-March shoulder season to enjoy more open, relaxed and serene Oregon Coast experiences (e.g., "Explore Like a Local, Live Like a Local" off-season tourism campaign).
5. Develop, improve or increase national, regional and local peak-season marketing messaging encouraging visitation during the Sept.-Nov. and Feb.-April shoulder seasons to enjoy more relaxed and serene Oregon Coast experiences.

CLATSOP COUNTY: NATURAL, ENVIRONMENTAL & CULTURAL RESOURCES CONCERNS

KEY FINDINGS:

Clatsop County communities and residents reveal growing concerns about preserving and maintaining popular natural amenities and cultural resources to retain local quality of life and mitigate seasonal tourism impacts.

Natural Resources Preservation and Support Concerns

- Interviews and survey research revealed increasing community and resident priorities to preserve and maintain popular natural and environmental attractions, including local beaches, rivers and estuaries, trails, and cultural sites.
- Stakeholders and resident survey research also strongly identified increasing tourism as associated with negative natural, environmental and cultural impacts including resources overuse, litter, careless trampling, and neglect of posted environmental and safety warnings.
- Stakeholders and resident surveys also emphasized concerns to reinforce public messages encouraging care of local nature-based recreation and scenic resources, particularly from Covid-19 tourism impacts.

Enhance Nature-Based Recreation Programs

- Growing community and resident concerns that increasing tourism impacts local natural amenities and prompts monitoring, maintenance and visitor support at local popular natural attractions (beaches, trails, rivers).
- Interviews and stakeholder surveys revealed that Clatsop County residents prioritize nature-based recreation programs that engage visitors while reducing concerns about negative resident sentiments toward visitors.

Key Public Affairs Impact:

Reducing impacts at local natural, environmental or cultural recreation resources enhances local livability and sustains overall positive support for local tourism.

Potential Key Partners:

Potential key partners to help mitigate impacts at natural and scenic amenities could be Oregon Parks & Recreation, Oregon Dept. of Fish & Wildlife, Travel Oregon, local visitor centers, and local outdoor tourism industry leaders.

POTENTIAL SOLUTIONS:

1. Engage and collaborate with potential key partners to develop, improve or increase regional and local messaging to convey responsible and safe enjoyment of local natural and scenic resources.
2. Develop or improve local group or hosted programs to help visitors appreciate and enjoy nature-based recreation while reducing natural and scenic environment degradation. These programs could also monitor visitor impacts and support.
3. Improve or expand effective Trail Ambassador and Beach Ambassador programs to increase resident and visitor engagement in shared nature-based recreation settings.
4. Develop or reinforce local public service campaigns celebrating residents' and visitors' mutual appreciation of the North Oregon Coast's natural and scenic environment, and its unique, friendly and appealing communities.

"Our concern remains one of capacity: it wears down facilities, overtaxes restrooms and trash, and can make it harder to protect health."

*-- Chris Havel, Oregon Parks and Recreation Department
--The Astorian, April 5, 2021*

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CLATSOP COUNTY: COMMUNITY AFFORDABILITY ISSUES

KEY FINDINGS:

Research revealed increasing stakeholder and resident concerns about community affordability, particularly for tourism industry and other support workers.

Local Housing Availability & Community Affordability

- Media and business leader interviews emphasized that increasing local housing affordability and availability issues have significantly impacted the local tourism industry and will be key challenges to maintain the county's current tourism economy.
- Resident survey results revealed that county respondents strongly support that increased tourism significantly impacts local housing availability and community affordability.
- Stakeholder surveys also revealed priorities to leverage funding resources and pursue effective solutions to help support the local tourism industry. These priorities could include identifying funding to pursue affordable housing solutions for industry and other support workers.
- Business leader interviews also revealed that local tourism businesses have recently pursued private, affordable housing for industry workers, particularly during peak-season tourism. Combined spending on local affordable housing could be a model for other coast communities.

Key Public Affairs Impact:

County and community housing availability and affordability issues adversely impact industry and other workers that support increasing local tourism.

Key Potential Partners:

Potential partners in addressing local community affordability issues would be the Clatsop County Board of Commissioners, Astoria, Cannon Beach, Gearhart, Seaside, Warrenton city councils, and Cannon Beach, Seaside, and Astoria-Warrenton Chambers.

POTENTIAL SOLUTIONS:

1. Engage and collaborate with appropriate local stakeholders (County Board, city councils, local chambers, and other tourism stakeholders) on creative approaches or initiatives for additional affordable local housing for tourism and support workers.
2. Leverage local media and civic opportunities to advocate for more housing availability and affordability for workers, while providing balance that increasing tourism significantly contributes to community revenue and local spending.
3. Amplify or reinforce in regional and local media that the tourism industry is important to local economic activity and is an invested partner in finding local affordability options that enhance workforce and community livability for all.