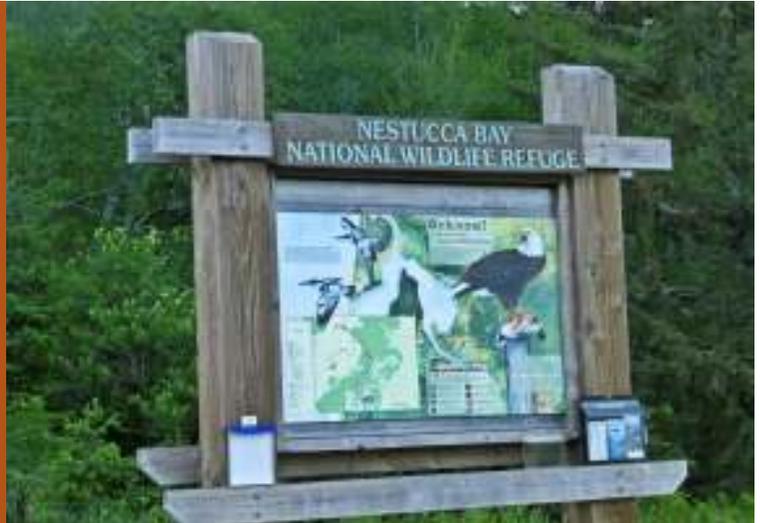


# Tillamook County Tourism

## Asset Mapping Report



Total Destination Marketing

June 2014

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## Introduction

The Asset Mapping Report has been prepared for Tillamook County Tourism Advisory Committee to assist in decision-making related to the preparation of the County's tourism development and brand strategies. It will also provide guidance for future marketing and setting priorities for product development and tourism investment.

Asset mapping is an important phase in the research conducted by TDM to uncover key assets, opportunities and gaps in Tillamook County's range of tourism products and experiences. The report is NOT intended to present an inventory of all tourism assets in the County.

People want to experience and interact with nature and nature-based experiences are at the core of the Oregon tourism experience. The most prominent Tillamook County tourism assets are centered on the region's diverse natural environment. The County's scenic coastline includes four relatively pristine bays and nine rivers. There are 13 State Park areas and 6 County Parks/Campgrounds for residents and visitors to enjoy. The County also embraces four National Wildlife Refuges and a part of Siuslaw National Forest. The state of Oregon owns 44% of the land inside the County boundaries, mostly as part of the Tillamook State Forest. The County's Parks Department runs a system of 21 boat launches and 10 day use areas.

The objectives for the asset mapping project are:

- i. To identify Tillamook County's current tourism assets, priority products and tourism strengths.
- ii. To conduct a County-wide assessment of key tourism locations, experiences, facilities, services and amenities that meet market needs.
- iii. To identify gaps, needs and opportunities requiring attention to meet visitor market interests.
- iv. To provide background information to assist in establishing priorities for product development and infrastructure investment.

These challenges were addressed by matching County tourism assets with Oregon Coast visitor needs and values, local community values, and the success factors for nature tourism destinations. Accompanying the report are the Appendices which provide background data and detailed information on the County's tourism assets. The information in the Appendices are:

**Appendix 1:** Tillamook County Assets Mapping Spreadsheet contains an inventory of assets in alphabetical order providing details on their name, location, product type and experience type.

**Appendix 2:** Tillamook County Priority Assets provides spreadsheets of identified tourism assets which are arranged according to their fit with the leading demand drivers and visitor interests reported in the 2011 Oregon Coast Visitor Market study, conducted by Longwoods International.

**Appendix 3:** Tillamook County Comprehensive Excel Spreadsheet provides an expanded list of tourism assets indicating types, key characteristics, special status, websites and more.

## Methodology

This Asset Mapping Report was created following extensive asset identification which involved:

### 1. Advanced desk research

- Review relevant Tillamook County and Oregon websites, online travel site reviews, Google images/maps, social media comments and activity reviews
- Review destination brochures, publications and hard-copy promotional materials and maps

### 2. Analysis of existing visitor markets research relating to the Coast and Tillamook County

- Travel Oregon – Oregon Coast Overnight Travel Study 2011, prepared by Longwoods International for Travel Oregon
- Geotourism: The New Trend In Travel prepared by Travel Industry Association of America for National Geographic Traveler
- Special interest and other research findings relevant to Tillamook County assets
- Supplementary local market insights and data from available research
- Customer and community surveys conducted by TDM for Tillamook County branding strategy

### 3. Asset nominations by Local Coordinators and Tourism-related Asset Managers

- Distribution of worksheets to five County-appointed, local coordinators
- In-depth interviews and meetings with State Parks, State Forestry and County Parks managers and directors
- Discussions with visitor center staff and other knowledgeable tourist advisors

### 4. County-wide reconnaissance trips

- Conducted site inspections for 7 days, over 200 sites, in both wet and sunny conditions
- ‘Secret shopper’ style discussions with customer service staff

### 5. Prepare draft inventory of assets

- Prepare an Excel spreadsheet of assets
- Distribute the Excel spreadsheet to coordinators to obtain additions and feedback
- Review feedback from coordinators and update the spreadsheet

### 6. Identify priority assets, gaps and opportunities

- Asset categorization and prioritization according to market research and needs criteria
- Identify key tourism strengths that match priority markets
- Identify leading ‘natural icons’ and existing or potential flagship attractions
- Identify gaps and needs in regard to quality infrastructure, facilities, services and amenities

## Nature Tourism Success Factors

Guiding the identification of Tillamook County's tourism assets is the need to not only meet customer needs and wants, but to also align with the factors that are influencing the success of coastal and nature-based destinations that have been identified in national and international studies.

Our past research conducted in Australia and other international locations into nature tourism provides some important insights into what nature tourism visitors want. These studies involved surveying potential visitors, as well as recent travelers who had taken part in nature-based activities. The results demonstrate that Tillamook County is in an ideal position to meet the requirements to become a leading nature-tourism destination. Among the key findings were:

### The Top Five Drivers for Nature Tourism

#### 1. The lure of the beach

- People love going to the beach.
- Where a beach is not available then some form of water is a must.
- Getting into the water, however, is not as popular.

#### 2. A room with a view

- Visitors want spectacular views and accommodation in harmony with the environment.

#### 3. The great outdoors

- Visitors want an unspoiled natural setting to pursue their favorite activities in the great outdoors.

#### 4. Food with a view

- Visitors from the cities want to eat well, in a natural setting and in the open air.

#### 5. Animals in nature

- Visitors want to see animals in their natural environment.

Source: Quantitative research, Tourism New South Wales, 2001

### What Comprises the Ideal Nature Getaway?

Irrespective of the various ages, interests and socio-economic backgrounds of the visitors surveyed, they shared a consistent vision of their ideal nature-based getaway. It was:

- A place with forest and water (preferably a beach).
- Relatively unspoiled and not overdeveloped.
- A location with enough people around for security, but not overcrowded.
- Quiet with fresh air.

Source: Quantitative research, Tourism New South Wales, 2001

### Who are the Oregon Coast's Visitors?

It is important that a review of the area's tourism assets relate to the needs and wants of the region's key markets. The market research available specifically in regard to Tillamook County is very limited. The Oregon Coast market research conducted by Longwoods International on behalf of Travel Oregon provides the most comprehensive and relevant information. The study provides insights into customer needs, behavior, and demographics. Note: This study relates to the entire Oregon Coast, but does provide valuable information relevant to Tillamook County.

#### Market Size and Structure

- Total Overnight Trips to Oregon = 28.8 Million
- Total Overnight Trips to the Oregon Coast Region = 9.8 Million
- 2011 Coast Region Spending = \$1.4 Billion
- Average Nights Spent on the Coast = 2.7

#### Visitor Profile

- Male 43%/ Female 57%
- Married 68%
- No children 69%
- Age 25-64
- Household Income \$50,000+
- College graduate / Some college 72%
- Portland 54%; Eugene 10%; Seattle 10%

### What Are Oregon Coast Visitors Looking For?

- Beach/Ocean
- Waterfront
- Shopping
- Casino
- Camping
- Resorts
- Hiking/Backpacking

#### Specific Activities of Interest

- Historic places
- Cultural activities/attractions
- Fine dining/Exceptional culinary experiences;
- Whale watching and wildlife viewing

Source: Oregon Coast Visitor Market Research; Longwoods International 2011

## Geotourism and Tillamook County

While the Longwoods Study provides insights into the demographics and current activities of visitors, a study conducted by National Geographic Travelers provides deeper insights into the values and preferences of markets that are important to Tillamook County. Specific clusters of potential visitors known as “geotourists” should be considered when assessing how well the County’s tourism assets meet the needs of these high value visitors.

The term geotourism emerged in 1995 and was given greater impetus through the research conducted by National Geographic Traveler and the Travel Industry Association of America. These principles of geo-tourism have now been adopted in thirty-nine countries and used to guide their sustainable tourism programs.

Geotourism is defined as:

*“Tourism that sustains or enhances the geographical character of the place being visited – its environment, culture, aesthetics, heritage, and the well-being of its residents”.*

There are strong links between the values of Tillamook County residents and geotourism values. Geotourists are a perfect match for Tillamook County because they share many common values with local residents who do not want tourism to negatively impact their quality of life, heritage or the region’s pristine natural environment.

Several of the following beliefs expressed by geotourists confirm their match with the values held by Tillamook County residents.

- 71% of geotourists said it is important to them that “their visits to a destination not damage its environment”
- 61% agree that their travel experience is better when the destination preserves its natural, historic, and cultural sites and attractions
- 58% support controlling access to National Parks and public lands for preservation and protection
- 53% consider their travel experience is better when they have learned about their destination’s customs, geography, and culture

Source: Geotourism: The New Trend In Travel; Prepared by Travel Industry Association of America for National Geographic Traveler

## Asset Mapping

## Driving and Navigation

ISSUES	OPPORTUNITIES
<p>Shortage of <b>roadside viewing sites, interpretation</b> or accessible lookouts to enjoy areas of outstanding beauty such as Three Arch Rocks, Tillamook Bay, Netarts Bay and other spectacular locations. This shortage of safe viewpoints negatively impacts one of the most popular activities – The Three Capes Scenic Route.</p>	<p>In conjunction with relevant partners, conduct a County-wide assessment to identify viewing and interpretation needs at key sites.</p> <p>Enhance the vehicular and pedestrian accessibility, interpretation and advance warning signage.</p>
<p><b>Highway 6</b> along the Wilson River is highly scenic, yet has virtually no viewpoints to safely stop and experience its dramatic scenery.</p>	<p>Actively support efforts to have the Highway designated a State Scenic Drive and create suitable viewpoints at scenic points of interest along the route.</p>
<p><b>The Tillamook Forest Center</b> is a potentially attractive stop and gateway to the region, but its name generates uncertainty as to what it offers. Additionally, the Forestry Center can be missed due to inadequate highway signage.</p>	<p>Consider developing this location as a gateway information and interpretive center.</p> <p>Improve advance warning signage on Hwy 6.</p> <p>Support a name change for the Forest Center</p>
<p><b>Three Capes Scenic Route</b> is closed and incomplete at its northern end. This leaves the Route only accessible when traveling Hwy 101 southbound by backtracking into Cape Meares from Tillamook and Netarts.</p>	<p>Introduce attractively designed directional, advance warning and identification signage for the Route which reflects the importance of this drive.</p> <p>Introduce appropriate icons for the wide range of activities, wildlife and experiences available along the Route.</p> <p>Ensure prominent signage for the ‘Three Capes Scenic Route’ in Downtown Tillamook.</p>
<p><b>Paving and road surface</b> conditions for the Scenic Route section between Netarts and Pacific City are sub-standard.</p>	<p>Upgrade the quality of the road surface to match the higher quality and status of the Route’s scenic experience.</p>
<p><b>Directional signage in Downtown Tillamook</b> is disjointed, cluttered and in some cases faded to the point of illegibility.</p>	<p>Ensure Downtown Tillamook wayfinding and signage improvements are focused on the needs of tourists unfamiliar with the area.</p>
<p>The inadequate condition and <b>quality of roads</b> in the county was a regular source of complaint in all community and stakeholder research.</p>	<p>Maintain close contact with City, County and State authorities to ensure optimal quality of local roads.</p>

The newly developed **Kilchis Point Reserve** and its trails lack identification and advance warning signs when approaching from the South. The Reserve represents a significant new addition to the County's experiences.

Support the installation of signs on Hwy 101 identifying the Kilchis Point Reserve.

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The diverse topography of Tillamook County makes it an ideal location for soft adventure activities. The region already has only a number of soft adventure operators and outfitters offering activities and services such as fishing, hunting, surfing, hang gliding, deep sea fishing and dory charter, river and sea kayaking. These are generally small (often seasonally affected) businesses that do not have broad distribution and sale of their products. However, when their role in the visitor experience is fully understood and acknowledged, they do represent many benefits of importance to those communities in which they operate.

### **The Benefits of Adventure Operators and Outfitters**

These businesses enable communities to develop a more professionally based tourism industry and capture many benefits that may otherwise elude the community. The simplest way to illustrate this point is that when such experiences are available and made known to visitors, they not only increase the reasons to make a visit, but also extend the time and spending of visitors. Importantly, it may influence return visitation and the degree to which the destination gains social media buzz.

Having something to do for a half or full day, rather than stay an hour, can mean the difference between a visitor either staying longer or returning home without the need for an overnight stay - and depriving the community of valuable income.

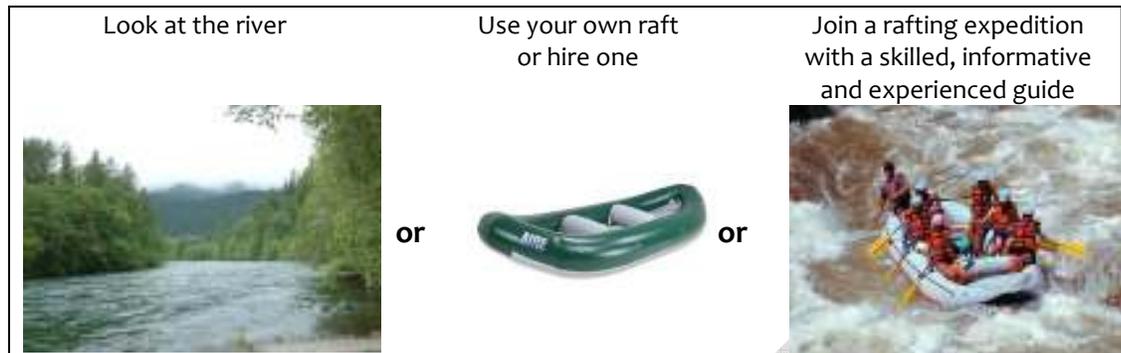
The range of benefits to communities includes:

- Attracting incremental business that the community may not have otherwise welcomed
- Attracting high yield visitors who usually buy other local services
- Increased length of stay
- Promoting the community through their marketing, thus complementing the destination's marketing
- Increased economic and employment opportunities
- A more personalized and authentic experience
- Increased interest from interstate and international visitors
- More small and micro businesses for small communities

### **Adventure Operators and Outfitters Add Value**

A challenge for places that rely on nature-based tourism is one of generating economic benefits for their community. Forests, rivers, lakes and trails are usually free of charge or may involve a small parking, entrance or use fee, as in the case of County Parks, State/National Parks and some other categories of Federal/State land management agencies.

## Case example – Rivers



The river in its natural form can be considered a commodity and not generate any direct economic benefit. A visitor might bring his own raft from home and in this case makes no direct, local economic contribution through the of the river. When the visitor hires a raft from a local outfitter, an economic contribution is made. However, when the visitor joins a rafting expedition that may include a mini-bus transfer, a meal, seat on the raft, the personal involvement of a skilled and experienced guide, and an informative commentary about the river, he is purchasing a value-added experience. He has purchased more than a ride on the river, he has purchased a sense of security, an adventure he might not attempt without expert assistance, and a level of engagement that has created a memorable experience.

Adventure operators and outfitters not only add value to the visitor’s experience, but also add to the greater economic well-being of their communities. The added economic value is generated through the local payments for supplies, services, equipment, and the payment of wages to local staff.

All areas and communities in the region offer some form of soft adventure activities, but very few have been commercialized by outfitters or operators. They represent opportunities for growth for small and medium sized tourism business operations. The following illustrates many of the region’s current soft adventure opportunities.

All-terrain vehicles Beachcombing Bird watching Boating Camping Canoeing Crabbing, clamming Cycling Diving Dune buggies Fishing – deep sea Fishing – river and lake Golf Hang gliding	Hiking Horse riding Houseboating Hunting Jet boating Kayaking Kite boarding Mountain biking Orienteering Parasailing Railroad excursions Rock climbing Running in natural settings Sailing	Sandboarding Sea kayaking Speed boating Stand-up paddle Star gazing Storm watching Surfing Tidal pool viewing Wakeboarding Walking trails Waterskiing Whale watching Whitewater rafting Wildlife viewing
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ISSUES	OPPORTUNITIES
<p>Many in the local tourism industry, do not appreciate, and are not taking advantage of the natural environment. They could be <b>adding considerable value to the experiences</b> of their guests. The region’s tourism businesses must embrace the natural environment that sets the place apart.</p>	<p>Establish outreach and educational programs to provide the skills and ideas to add value for visitors by providing experiences that enable them to better enjoy the natural environment. There is the need to create new, exciting experiences involving nature that differentiate the region, support the brand, and create buzz.</p>
<p>The <b>Tillamook Forest Center</b> has the potential to present more interactive and thrilling experiences. It could become a hub for forest adventures, as well as gateway information and interpretive center.</p>	<p>Support development of a canopy walk extending to, and over, part of the Wilson River, a zip-line down an adjacent mountain, rope suspension bridge over river rapids, and an underwater fish viewing and interpretation bay.</p>
<p>The number of passengers on the <b>Oregon Coast Scenic Railroad</b> is rising year by year and its themed rides are also gaining in popularity.</p>	<p>Support this not for profit railroad to further elevate its status and the quality of its visitor experiences. Immediate areas of opportunity include boosting its marketing and market profile, developing beneficial new partnerships, and helping to attract more volunteers. There is a need to improve on board services, specifically a quality sound and public address system to service each carriage. Also explore imaginative ways to improve interpretation, training, and educational themes.</p>
<p>The <b>Salmonberry Trail</b> has enormous potential. It will not only directly link the Portland area with Tillamook County, but will generate its own promotional value because of its significance as an iconic hiking, cycling and trail.</p>	<p>Actively support the proposed Salmonberry Rails to Trails project.</p>
<p>Lack of a <b>pedestrian and bicycle trail</b> to more easily observe the Three Graces.</p>	<p>Expedite the development of the proposed connecting bayside walking and cycling trail between Garibaldi and Rockaway Beach.</p>
<p>Insufficient dedicated, <b>safe cycling trails</b> providing high quality experiences by linking communities to areas of natural significance. An added benefit from trails is that they encouraging the use of cycles and walking will assist to a small degree in reducing some peak season traffic</p>	<p>Cycle tourism is growing rapidly in Oregon and is a major focus for Travel Oregon. Increase the focus on providing outstanding cycling trails that include the region’s outstanding natural sites.</p>

congestion.	
<b>Garibaldi cycle and walking trails</b> are not readily evident and visitors.	Encourage the development and promotion of additional well signed bayside walking, running and cycling trails in Garibaldi.
The <b>boat ramps</b> at the Netarts Bay boat launch area are congested at peak launch times causing issues for kayak tour operators and recreational boat users.	Consider expanding the most popular boat launch ramps to allow for separate launch sites for motorized and non-motorized craft uses.
<b>Trailheads</b> throughout the County are frequently not well signposted from roads.	Ensure that trailheads are clearly identified in promotional material and on site.
In many locations the <b>advanced warning and identification signage</b> is inadequate for nearby trailheads and walking trails and can be too easily missed.	Improve advanced warning and identification signage, if possible using icons featuring hiking and other key activity symbols.

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## Asset Mapping

## Wildlife Encounters

Wildlife is abundant around the County, including hundreds of species of birds and fish, large elk populations, deer, bear, cougar, bobcats, foxes, and all manner of small mammals. A bird watcher's paradise (Tillamook Bay has up to 140 resident species), some 250 different species have been counted over the years. While wildlife encounters are usually considered to be soft adventure, the abundance of wildlife and its importance to tourism in the region, warrant it being treated separately.

ISSUES	OPPORTUNITIES
<p>There is no regularly <b>scheduled whale watching cruise</b> available from Garibaldi.</p> <p>Such a service could potentially develop over time into a major driver for the County and be used to lead County marketing efforts in conjunction with other major natural assets.</p>	<p>Encourage a high quality, regularly scheduled and fully interpreted whale watching and marine life cruise from Garibaldi.</p> <p>Provide this venture with co-operative marketing support and make it central to the advertising and marketing for the region.</p>
<p>Despite having many whale watching vantage points along the Coast, Cape Meares is the only place with significant <b>interpretation of the whale migrations</b>.</p>	<p>Investigate the introduction of interpretive panels at popular viewing points along the coast.</p> <p>Investigate the introduction of a volunteer program to interact with people clamming and crabbing on the beaches to aid conservation.</p> <p>Introduce interpretive displays featuring whales and the County's diverse marine life at the Maritime Museum.</p>
<p>Wildlife is one of the most popular of all nature-tourism experiences for visitors of all ages. Throughout the county there are numerous opportunities for <b>viewing the abundant wildlife</b> in natural habitats –land-based, terrestrial and marine.</p>	<p>Develop approaches to better marketing, interpreting and road signage to integrate wildlife as a core attractor for the region and as a competitive advantage. Increase availability of information in regard to wildlife viewing.</p>
<p>Despite having <b>abundant wildlife</b> and many opportunities to encounter it, there are very few obvious viewing sites or tourism operators to enhance wild life viewing experiences.</p>	<p>With nature-tourism partners investigate the opportunities for enhancing wildlife viewing experiences. Better designate and identify wildlife viewing areas.</p>

<p>Stakeholders expressed the concern that Tillamook County’s pristine bays could become <b>over-fished and depleted</b> of marine life because of takes and catches by people that breach legal requirements and practices.</p>	<p>Investigate the introduction of a volunteer program to interact with people clamming and crabbing on the beaches to aid conservation.</p> <p>Support all efforts and measures to successfully retain sustainable management of these popular assets, including targeted education and enforcement activities.</p>
<p>Few of the sites where wildlife can be viewed have advanced <b>warning signs or interpretation</b>.</p>	<p>Use signage, wildlife symbols and interpretation panels to enhance visitor experiences at key locations. Use icons on signs to identify the wildlife available at the site.</p>

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ISSUES	OPPORTUNITIES
<p>Lack of readily <b>accessible restrooms</b> on or near many beaches, including Manzanita, Pacific City and Netarts. The community consultations pointed to the need for rest room facilities at certain coastal/beach areas.</p>	<p>Encourage the provision of rest room amenities at high visitation beaches.</p>
<p><b>Beach access points</b> along the coast are not always signed, easy to locate or safe and comfortable to traverse.</p>	<p>Support the installation of beach access signs where needed. Conduct a review of beach access points to ensure that they are safe and easy to traverse.</p>
<p>Research and consultation revealed complaints in regard to traffic and parking difficulties during peak seasons. This was most evident in Pacific City. However, one of the <b>beach car parking lots</b> is unusable because it is covered with sand.</p>	<p>Ensure that all parking areas are fully operational during peak periods to reduce illegal parking and increase visitor (and resident) satisfaction.</p>
<p>The consultation process revealed that in some beach locations, most notably in Pacific City, <b>trash along sidewalks</b> can be a problem.</p>	<p>Ensure that visitor areas are tidy and have sufficient trash management systems in place.</p>

**Lodging and Conference Facilities**

The dominant form of lodging in the region is vacation homes. Most of the hotels and motels are operated independently with few corporate, boutique or franchise hotels. While many properties are of a high standard, others look tired and dated. Comments concerning the need for upgrades are regularly made in online travel sites by visitors to the County. This observation was confirmed by visitor online comments. Additionally, some of the RV Parks are un-landscaped and look untidy. Tillamook Coast currently has 4,424 rooms and camp/RV sites available for visitors.

Vacation rental agencies and lodging operators indicated that visitors place their highest priority on waterfront lodging in order to be as close to the beach or water as possible. This underpins the trend revealed in international nature tourism studies (page 4). Capitalizing on this trend can lead to developments such as eco-resorts, spas and boutique lodging which attract visitors prepared to pay higher prices for compelling nature-based experiences.

Type of Establishment	# Rooms / Sites
B&Bs	33
Cabin	116
Camp Sites	1,207
Condo / Duplex	181
Hotel, Motels, Inns	740
Lodge / Hostel	21
RV Sites	1,205
Vacation Homes	910
Other	11
<b>Total</b>	<b>4,424</b>

Source: Tillamook Coast Transient Lodging Tax Report May 2014

ISSUES	OPPORTUNITIES
If Tillamook County is to achieve its goal of closing the market share gap with its nearby Clatsop and Lincoln County competitors it will need to increase <b>the number and type of lodging establishments</b> and improve the standard of many existing properties.	Develop a plan to address the need for improvements in existing properties in key locations, as well as promote investment in quality and diverse new lodging, particularly those that embrace the natural environment. Subject to a feasibility study.

<p>During consultation phases the need for a <b>conference center</b> to cater to the small meeting market (approx. 200 delegates) was raised. Tillamook, Garibaldi and Pacific City were all identified as having venues for development.</p>	<p>Investigate the market feasibility of establishing and sustaining a conference center in chosen locations.</p>
<p>There are few <b>resort standard spas</b> or <b>wellness retreats</b> similar to those found at many competitive coastal destinations. The attractive local natural qualities are ideal for locating such enterprises.</p>	<p>Investigate the introduction of spa and wellness retreats to provide a more comprehensive level of luxury services. Subject to a feasibility study.</p>
<p>Significant expanses of <b>prime coastal real estate</b> are being used for vacation homes and this trend could raise some important comparative economic benefit and yield issues if this land was used for developments that can generate higher employment and community income.</p>	<p>Consider the possible need for designating sites for tourism developments that can generate high employment and community income.</p>
<p>Some <b>RV Parks</b>, including those in attractive locations, have received mixed online customer reviews on their management approach.</p>	<p>Regularly monitor guest comments in regard to RV parks (and other local lodging) to encourage operators are aware of visitor sentiments and that visitor satisfaction is of a high standard.</p>
<p>Some of the <b>RV Parks are un-landscaped</b> and look untidy. Again, this is reinforced by the online comments of past visitors.</p>	<p>Encourage relevant RV parks to embark on a beautification, landscaping and tree planting program to match the beauty of the surrounding natural environment.</p>
<p>The <b>'luxury' yurts</b> in the State Parks are booked out 12 months ahead. There is clearly a need for more of this style of accommodation.</p>	<p>Encourage State Parks and RV Parks to add more yurts and other forms of similar 'luxury' camping.</p>
<p>Insufficient high quality, <b>nature-based, 'boutique' lodging</b> options. Research shows that for higher guest satisfaction, these should be located side-by-side in close proximity or in rows, but configured and landscaped in ways that provide a true sense of separation and isolation.</p>	<p>Investigate the introduction of high quality, nature-based, <b>'boutique' lodging</b> possibly involving forest, river, mountain, or ocean view locations.</p>

A personal and online review of online comments indicates that there are <b>tired and run-down motels</b> in the region.	Where possible encourage the refurbishing or redevelopment of relevant lodging properties.
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## Dining and Local Food

ISSUES	OPPORTUNITIES
There is the need for more <b>forest, water view or beach cafes</b> , bars, food carts, brew pubs, espresso coffee shops and restaurants that excel in providing outstanding food and drink experiences.	Encourage the introduction of more dining options in forest, waterside and ocean view settings.
There are insufficient waterfront dining options, including those that offer <b>freshly caught seafood</b> on their menus.	Encourage the development of more waterfront restaurants and cafes, and work to ensure suitable sites are available for this purpose.
The County possesses few, if any, restaurants that can readily claim to be <b>‘destination restaurants’</b> . The reputation of destination restaurants can drive custom patronage and can become strongly associated with the places in which they reside.	Attract and elevate the profile of local restaurants and chefs that possess a strong image and drawing power with source markets.
There is limited availability of <b>local artisan and craft foods</b> .	Explore how to further develop and market local artisan foods and produce to enhance visitor experiences.
Optimize use of, and promote, the quality of local <b>fresh produce, seafood and foods</b> .	<p>Encourage restaurants, cafes and food outlets to provide local fresh food experiences, such as ‘Catch of the day’ and ‘Farm to Table’ information, tasting promotions, farmers market and special events participation, etc.</p> <p>Promote special cooking and food preparation classes using local produce and celebrity chef events featuring the best of local ingredients and the region’s famous cheeses.</p>

## Shopping

The County was found to be less commercialized with a lower number of commercial tourism enterprises compared to nearby competitors. The lack of sufficient leisure shopping opportunities in Tillamook County are a serious weakness and are resulting in the leakage of shopping and dining dollars to Lincoln City and Seaside. Combined with this challenge is the need for more pedestrian friendly precincts. The County's coastal villages retain a strong small town feeling and low key ambience. However the extent of leisure/retail options is sometimes a little too low key, with visitors left looking elsewhere.

ISSUES	OPPORTUNITIES
<p><b>Insufficient shopping options</b> within the County.</p>	<p>Encourage the expansion of locally owned, boutique and specialty stores of likely interest to both residents and visitors.</p>
<p><b>Opening hours</b> of restaurants and retail outlets are inconsistent and not clearly publicized.</p>	<p>Encourage collaboration and systems within villages to address customer needs.</p>

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**Gateways and First Impressions**

First impressions start at the entrance to the city. Appearances really count when it comes to attracting visitors and the economic well-being they can bring to places. Visitors are attracted to, and spend more time in places that are attractive, clean, welcoming, and well maintained.

Traveling north and south on Highway 101, there are no unifying gateway/welcome signs for each city, village and locality. At some locations it is possible to enter the County without knowing you have arrived in the region. To the south of Tillamook visitors traverse rural villages featuring unattractive, rundown buildings and empty shop-fronts. The cumulative effect can generate the perception (whether warranted or not) that much of the area has fallen into decline and therefore isn't an attractive place to stay. The result is that visitors may proceed to a more enticing part of the coast, despite the apparent natural beauty of Tillamook County.

ISSUES	OPPORTUNITIES
There is a lack of <b>attractive gateway and welcome zones</b> for most localities and downtown areas.	Introduce consistent branded gateway signs to welcome visitors at the entrances to each community in the County. Where possible entrances must confirm a positive sense of arrival to a place that has a nature tourism brand identity.
At some locations it is possible to enter <b>County gateways</b> without knowing you have arrived in the region.	Install branded gateway welcome signs on north, south and west entry highways to the County itself.
The connecting highway section between Tillamook Cheese Factory and Downtown is in need of <b>beautification of streetscapes</b> and the appearance of businesses.	Encourage the beautification of Highway 101 between the Tillamook Cheese Factory and Downtown.
The <b>gateway communities on Hwy 101</b> from the South are Hebo and Cloverdale. Both present less than attractive welcomes to Tillamook County and currently do not present as places worth stopping.	Investigate the potential of creating a community-based paint and beautification program aimed at assisting building owners along the main streets of Cloverdale and Hebo to restore and reinvigorate their building facades. This action will aid both villages and the entire region by creating more positive first impressions.

<p>The <b>empty store fronts</b> in some villages such as Hebo, Nehalem and Cloverdale detract from a sense of vibrancy.</p>	<p>Approach the Tillamook County Arts Network to support a County ‘Art in Store Windows’ or a museum photo display program. This could feature local artists and address the empty windows temporarily.</p> <p>Funding support has also been provided in some cases to install and use effective window lighting to illuminate the featured art after dark.</p> <p>These initiatives often attract free publicity and create interest in visiting the galleries and museums.</p>
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## Placemaking

Placemaking addresses the streetscapes, landscaping, community elements and signage that are needed to provide a quality visitor experience. These provide a sense of place, welcome and community spirit. It is easy for communities to overlook the appearance of their streets, the absence of trees, the poor lighting, trash and bad signage that may have evolved over the years. Visitors however, are much less forgiving. Where attention has been paid to the aesthetics of a place including preserving or enhancing its natural qualities and environments, it gains the reputation as a “special place” – and worthy of a longer stay or visit.

ISSUES	OPPORTUNITIES
<p><b>Lack of pedestrian friendly, leisure/shopping precincts</b> with an enticing street life and places for people to gather and spend time.</p>	<p>In conjunction with County and city planners review the best ways to introduce more walking precincts that can become successful retail, dining and leisure areas.</p>
<p>Develop imaginative new <b>waterside precincts</b> that provide shopping, dining and entertainment opportunities.</p>	<p>Support the development of the proposed interpretive park and waterside leisure precinct at Hoquarton Slough in Tillamook.</p> <p>In Garibaldi encourage the development of additional bayside walking, running and cycling trails complemented by food and drink establishments.</p>
<p>Some of the coastal villages felt disjointed and <b>lacked landscaping and a strongly integrated sense of place</b>. There were very few walking and civic precincts that include gathering places for people to linger spend time – and money!</p>	<p>Encourage intensive landscaping and tree planting (not token) in most cities to better embrace the natural environment that surrounds the cities and capture the spirit of the County’s nature tourism brand.</p>

<p>Where feasible, <b>develop imaginative new waterside precincts</b> that facilitate the enjoyment of waterside environments and hospitality services.</p>	<p>Encourage the development of the proposed interpretive park and waterside leisure precinct at Hoquarton Slough in Tillamook.</p> <p>Encourage and support dining, entertainment and specialty shopping over the water on the Garibaldi Port and Marina docks.</p>
<p>Tillamook County needs to develop visitor hubs that are precincts capable of attracting, entertaining and dispersing visitors to other parts of the county. At the moment, there are no clear <b>visitor and tourism hubs</b> for the region, with the possible exception of the Tillamook Cheese Factory.</p>	<p>With further improved infrastructure, an expanded range of visitor experiences and related development, both Downtown Tillamook and Garibaldi could potentially come to be considered as visitor hubs by visitors.</p>
<p>Many <b>local businesses lack curb appeal</b>. Unfortunately, some of these are along entrances to villages. Some have unattractive and broken business signs, poorly maintained exteriors and sites that simply look untidy. Again, this is reinforced by the online comments of past visitors (and local residents).</p>	<p>In conjunction with partners embark on a County-wide beautification project and encourage local businesses to improve their curb appeal by introducing improved signage, building refurbishment and removing trash, litter and junk.</p>

## Culture and Arts

Close collaboration between tourism and the cultural community can yield improved results for both.

ISSUES	OPPORTUNITIES
<p>There are opportunities to <b>fuse nature and art</b>.</p>	<p>Investigate, in partnership with the arts community, the introduction of imaginative environmental artworks and sculptures. This may include water and land trails. For example, using vandal resistant, sculptural works to imaginatively interpret trails and visitor sites has been put to effective use at other destinations.</p>
<p>There is very little <b>public art</b> within the County. Public art initiatives when properly conceived and executed can build civic appeal and provide additional sense of place experiences for visitors.</p>	<p>Some acclaimed artists are already resident within the County. Investigate with partners the development of a high quality sculpture garden or park. Preferably this should be located in an accessible, prominent and beautiful natural or densely landscaped civic</p>

	location. For example, in Tillamook as part of the Hoquarton Slough initiative or sculptures on the boardwalk in Garibaldi. Alternatively explore incorporation into beach and coastal walks.
From the outside, the <b>Tillamook County Pioneer Museum</b> projects little about what's inside and of likely experiences for visitors.	Explore ways using more vibrant colors, interpretive panels, and well-designed banners to make the museum and its exhibits more compelling to visitors.
Similarly, the exterior of the <b>Latimer Quilt and Textile Center</b> does not reflect the quality of the experiences inside.	Support the refurbishment of the Center's front façade and addition of information panels and banners projecting the experiences visitors can expect inside.
The contribution that the <b>cultural community</b> can make to regional tourism is not being fully exploited.	Create outreach programs to the Tillamook County cultural community to establish partnerships, integrate information, recruit their skills for local attraction development and enhancement, and provide opportunities for local artists and performers to gain exposure and sales.

Events are very important to destinations because they have the potential of attracting visitors, enhancing the lifestyle of residents, and encourage visitors to stay longer, as well as generating income for communities during off-peak. Consumer researched conducted by TDM indicates that Tillamook County is not considered to be a place to attend major events. Additionally, many stakeholders during the community consultations pointed to the value of using events to boost visitation over shoulder and off season periods.

### The Benefits from Events

The benefit from events generally takes three forms. The first is the direct spending by event attendees, participants, organizers, spectators and the media. Second, those who visit the area for a particular event and may be encouraged to return in future, which should bring longer term benefits for the region's tourism and economic development performance. Third, events can have a more comprehensive promotional impact by providing a spotlight on the city and region, causing people to consider it in a different light. Events can help to fast track the turnaround of a destination's image and build its brand identity.

### The Types of Events

Events can be considered in several categories:

**Hallmark tourism and festivals events** are usually recurring prominent events that attract visitors from beyond the region, and may have national (or even international) drawing power. They are of such significance in terms of tradition, attractiveness, image and publicity that they provide the host destination with a competitive edge. Over time, the event and the destination may become synonymous with each other. Examples of hallmark events are Portland Waterfront Blues Festival, Portland Rose Festival, Pendleton Roundup, and.

**Major events and festivals** are often held annually and attract a high number of outside visitors, generate wide media coverage and produce significant economic benefits for the host community. These events frequently have some kind of cultural significance, and may also be tied to something distinctive about the community. Examples of major events and festivals are the Britt Festival in Jacksonville, Newport Seafood and Wine Festival, and the Summer Kite Festival in Lincoln City..

**Local or community events** are intended mainly for local residents and are normally based on local, social or entertaining themes. They bring economic and social benefits because they contribute to community pride, recognition of local heritage and build relationships and sales for local organizations. Local and community events do not usually act as tourism motivators. However, they can sometimes grow to become major and hallmark events that generate wide acclaim and publicity.

**Special interest events** are generally smaller than hallmark or major events and are focused on providing experiences that are compelling to attendees with specific interests. These interests may be as diverse as unusual hobbies, activities, sports or themes intended to attract niche markets.

Examples of special interest events are Quilters Show, Craft Beer Festival, Mushroom Hunters Gathering, or a Poets Festival.

ISSUES	OPPORTUNITIES
<p>The current Tillamook County <b>calendar of events</b> has limited drawing power from outside of the region.</p>	<p>Develop a balanced portfolio of events that address seasonality and other off-peak period needs. Where possible, the events should reflect the County brand. Encourage the gradual introduction of a small number of major events and festivals to address off peak business needs.</p>
<p>There is no <b>hallmark event</b> with broad appeal, with the possible exception of the County Fair.</p>	<p>Initiate a major hallmark event that becomes identified with the region, preferably in keeping with the brand.</p>
<p>The region has a wealth of activities and attributes that can appeal to <b>special interest markets</b>.</p>	<p>Encourage small events centered on special interests, particularly those that have the capacity to be annual and off peak.</p>

DRAFT

This section does not represent a review of marketing. Instead it relates mainly to information needs of visitors while traveling through the region.

ISSUES	OPPORTUNITIES
<p>The County has many attractive tourism assets. However there is the need for <b>integration of information</b> relating to them. The Tillamook Chamber of Commerce visitor guide and website is probably the most comprehensive presentation.</p>	<p>The issues related to marketing and communications will be addressed in detail in the tourism development strategy.</p>
<p><b>Cell phone reception</b> is almost impossible in some parts of the County, including key coastal zones. In a mobile-ready world, this shortcoming prevents visitors from instantly connecting with information.</p>	<p>Evaluate the issues surrounding cell phone and Wi-Fi availability and in conjunction with relevant partners pursue possible solutions.</p>
<p>Reports of visitor information services at the <b>Rockaway Beach Visitor Center</b> not being open at times of likely visitor need arose during the consultation process. Additionally, <b>Tillamook Visitor Center</b> is somewhat undersold from the highway given its excellent information and service capabilities.</p>	<p>Develop a strategy to optimize visitor information distribution within the region.</p>
<p>The <b>many trail choices</b> in State and County Parks and forests can leave prospective hikers, cyclists and visitors confused over which might offer them the ‘Best of the Best’.</p>	<p>Increase awareness of the best walking trails. In association with relevant partners build the reputations of one or two of the best of these trails, as outstanding ‘must do’ hiking experiences. Do the same for the best of the County’s cycling trails.</p>
<p>It is somewhat difficult to <b>locate relevant outfitters</b>, guides, rental outlets and suppliers for fishing, hunting, boating and other activities.</p>	<p>Integrate practical information the suppliers information into information, communications and signage.</p>
<p>Tillamook County’s coastline has several <b>whale watching</b> vantage points from its capes and coastal mountains that attract many visitors.</p>	<p>Use this experience to enhance the County’s reputation as the most readily accessible whale watching point for Portland residents.</p>

Tourism is a truly global industry and one that is dominated by small businesses. In Tillamook County it also includes many nonprofit and volunteer organizations. Success demands the ability to not only deliver outstanding visitor experiences to increasingly discerning customers, but to conduct marketing in a very crowded, noisy and competitive world, as well as operate a business that must be responsive to a wide range of unexpected pressures.

To increase the competitiveness and professionalism of the tourism businesses and organizations in Tillamook County, the DMO must assist its partners' accessibility to affordable and effective training to enhance the skills and capabilities of people at all levels of the industry. In some cases this may simply involve explaining how the tourism industry works, how they can access customers most cost effectively through DMO programs, and how to improve service standards.

ISSUES	OPPORTUNITIES
<p>Mystery shopping and observing many <b>tourism businesses</b> in the region revealed that many could be more profitable and offer more satisfying customer experiences with a different approach to presentation, systems, management style, marketing and web sites.</p>	<p>Develop a business skills program aimed at owners and managers. Such training should be accessible, affordable and practical in terms of timing and focus.</p>
<p>Generalized conclusions about the regional <b>service standards</b> would neither be practical, advisable or accurate given the range of possibilities and variables. However, in some cases there is the need to elevate standards.</p>	<p>Conduct a review of service training needs and develop a program appropriate to Tillamook County using the Oregon Q program as a platform.</p>