



Visit

Tillamook Coast

**Tillamook Coast
Tourism 2025**

A companion strategy
for the Tillamook Coast
Brand Guidelines

September 2014

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Executive Summary

A New Era for Tourism in Tillamook County

Tourism in Tillamook County has entered a new era that will be characterized by the introduction of new attractors, events, infrastructure and a unifying, regional approach to tourism marketing.

Tourism has the potential to further diversify the Tillamook County economy and provide important benefits for residents, businesses and visitors. It aims to establish a high quality visitor economy that results in maximum benefits to residents, the environment and visitors. *Tourism 2025* draws on months of consultation with hundreds of residents, partners and stakeholders.

New Names

Tourism 2025 introduces a new name for the region, *the Tillamook Coast*. This name directly ties the region to the famed Oregon Coast, presents it as an evocative destination, and leverages the region's considerable natural environment and attractive communities.

The destination marketing organization responsible for the tourism management of the region is called *Visit Tillamook Coast (VTC)*. It will be the official face, voice and facilitator for tourism in Tillamook County.

Tourism 2025

Tourism 2025 is a tourism masterplan that provides strategic directions for the region to take optimal advantage of the opportunities that are likely to arise over the next decade. It is not a marketing plan or operational plan, but is designed to act as a guidance system in the development of more specific and tactical

annual programs and budget allocations. This is a living document that will be updated as new opportunities and challenges arise.

Win-Win for Residents and Business

An important principle underpinning Tourism 2025 is that what can be attractive to visitors can also be appealing to residents, businesses and investors. As the natural and cultural attractors are enhanced, they will be supplemented by improved amenities, signage and employment opportunities all improving the quality of life and opportunities for residents.

A Holistic Approach

Tourism 2025 adopts a holistic approach which addresses all of the elements necessary to communicate and deliver outstanding visitor experiences. Tourism is a complex economic activity where success requires cross-region and cross-agency cooperation involving public, private, and nonprofit organizations. It also involves consideration of the interests of all customer groups including visitors, government, partners, local businesses and residents.

Strategic Directions

Tourism 2025 provides the strategies, actions and tools for successful tourism development. Tourism 2025 is shaped by the following strategic priorities aimed to achieve the region's tourism goals. These priorities inform and guide the Actions for Success in Tourism 2025.

The Tourism Action Plan

1. Branding and Positioning

Develop a distinctive and compelling brand that clearly differentiates the Tillamook Coast, and is broadly adopted by partners.

- 1.1 Accurately and creatively deploy the Tillamook Coast branding strategy.
- 1.2 Encourage awareness, adoption, and use of the brand strategy by partners.
- 1.3 Create a 'Brand at a Glance' publication for partners.
- 1.4 Assist villages and cities in adopting and locally deploying the region brand.
- 1.5 Create a brand strategy for the Three Capes Scenic Loop.
- 1.6 Delegate brand oversight to a brand identity specialist.

2. Sustainable Community Tourism

Introduce sustainable tourism practices that safeguard and enhance the Tillamook Coast's environmental, economic, cultural and social well-being.

- 2.1 Consider the adoption of geotourism principles and practices.
- 2.2 Maximize governmental relationships to encourage public policy decisions that support sustainable tourism and the regional brand.
- 2.3 Develop tourism action plans for villages and selected major tourism clusters.
- 2.4 Improve the capacity of villages to optimize the benefits from tourism.

3. Nature-based Experiences

Develop nature tourism experiences that increase the desirability of the Tillamook Coast.

- 3.1 Conduct a region-wide assessment of tourism-related signage needs on main roads.

- 3.2 Conduct a region-wide assessment to identify priority viewing and interpretation needs.

- 3.3 Support efforts to have Highway 6 designated a State Scenic Byway.

- 3.4 Develop Tillamook Forest Center as a gateway information center to the region.

- 3.5 Maintain close contact with City, County and State authorities to ensure optimal quality of local roads.

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

- 3.7 Support the review and expansion of 'activity icons' for use with signs at key locations around the region.

- 3.8 Develop an integrated approach to the management and marketing of the Three Capes Scenic Loop.

- 3.9 Support development of the Oregon Coast Scenic Railroad to become a signature attraction.

- 3.10 Support the development of the Tillamook Forest Center as a forest adventure hub.

- 3.11 Encourage a region-wide focus on experiential tourism.

- 3.12 Increase access to information in regard to fishing, guides and outfitters.

- 3.13 Expand the capacity of the most popular boat launch ramps.

- 3.14 Collaborate with local enthusiasts to develop and promote geocaching trails.

- 3.15 Investigate ways to capitalize on oceanographic research.

- 3.16 Actively support the proposed Salmonberry Rails to Trails project.

- 3.17 Establish partnerships and programs to make the Tillamook Coast a bicycle friendly destination.

- 3.18 Identify and promote ‘the best of the best’ walking and cycling trails.
- 3.19 Increase the cycling trails that include the region’s outstanding natural sites.
- 3.20 Ensure that trailheads and all beach access points are clearly identified.
- 3.21 Support the introduction of regularly scheduled whale watching cruises from Garibaldi.
- 3.22 Improve identification and interpretation at key whale watching sites.
- 3.23 Improve identification and interpretation at key wildlife viewing sites.
- 3.24 Investigate the introduction of a volunteer program to interact with people clamming, tidepooling and crabbing on the beaches.
- 3.25 Encourage the provision of restroom amenities at high visitation beaches.
- 3.26 Conduct a review of beach access points to ensure that they are safe and easy to traverse.
- 3.27 Ensure that all parking areas are fully operational during peak periods.
- 3.28 Ensure that visitor areas are tidy and have sufficient trash management systems.
- 3.29 Support improvements to wayfinding and visitor-focused signage at beaches.

4. Cultural Experiences

Develop cultural tourism experiences that increase the desirability of the Tillamook Coast.

- 4.1 Encourage the arts community to investigate the introduction of imaginative environmental artworks and sculptures.
- 4.2 Support the introduction of public art programs throughout the county.

- 4.3 Encourage the Tillamook County Pioneer Museum and Latimer Quilt and Textile Center to enhance the presentation of their buildings.
- 4.4 Support the further development of arts villages.

5. Events

Develop events that address seasonality, attract new markets and energize local communities and partnerships.

- 5.1 Develop a regional events strategy and calendar of events.
- 5.2 Support the development of a hallmark event that directly supports the brand.
- 5.3 Support the development and marketing of events that are created for niche markets.

6. Village Experiences

Increase the desirability of the County’s villages as places inspiring people to visit, spend more and stay longer

- 6.1 Support improvements to the attractiveness and sense of welcome at city gateways.
- 6.2 Introduce branded welcome signs at regional gateways.
- 6.3 Improve the curb appeal of businesses along main thoroughfares and gateways.
- 6.4 Encourage the beautification of Highway 101 between the Tillamook Cheese Factory and Downtown Tillamook.
- 6.5 Introduce a beautification program to improve the appearance of gateway communities.
- 6.6 Encourage the Tillamook County Arts Network to support a County ‘Art in Store Windows’ program.
- 6.7 Encourage the introduction of more pedestrian-friendly leisure precincts.

- 6.8 Encourage intensive landscaping and tree planting (not token) in most cities to better embrace the natural environment.
- 6.9 Support the design and implementation of a comprehensive, countywide wayfinding signage system to address visitor needs.
- 6.10 Support improvements to Downtown Tillamook wayfinding and visitor-focused signage.
- 6.11 Encourage the introduction of more dining options in waterside, forest and ocean view settings.
- 6.12 Attract and elevate the profile of high quality local restaurants and chefs.
- 6.13 Optimize use of, and promote, the quality of local fresh seafood, produce, and artisan foods.
- 6.14 Encourage outdoor seating at restaurants and cafes.
- 6.16 Encourage collaboration and systems within villages to extend the opening hours of stores and restaurants.

7. Lodging and Conferences

Develop lodging and conference infrastructure that matches market needs and optimizes the natural environment.

- 7.1 Develop strategies to increase the number and type of lodging establishments, as well as improve the standards of some operators.
- 7.2 Investigate the introduction of high quality, nature-based, ‘boutique’ lodging.
- 7.3 Investigate the market feasibility of establishing and sustaining conference centers in various regional locations.
- 7.4 Encourage the introduction of spa and wellness retreats.

- 7.5 Encourage the introduction of systems to ensure high standards of guest satisfaction at hotels, vacation homes and RV parks.
- 7.6 Encourage relevant RV parks to embark on a beautification, landscaping and tree planting programs.
- 7.7 Encourage State Parks and RV Parks to add more yurts and other forms of similar ‘luxury’ camping.

8. Marketing Communications

Increase awareness and preference for the Tillamook Coast and its partners through the innovative marketing communications

- 8.1 Pursue solutions to the poor cell phone service in conjunction with County leaders and partners.
- 8.2 Produce an annual marketing plan.
- 8.3 Increase awareness and visitation through campaigns targeted at priority mass markets.
- 8.4 Increase awareness and visitation through campaigns targeted at niche markets.
- 8.5 Present a range of co-operative marketing opportunities for partners within the region.
- 8.6 Participate in co-operative marketing opportunities with external partners.
- 8.7 Work with Cities and Chambers to develop co-operative marketing agreements.
- 8.8 Advertise business location and economic development opportunities to visitors.
- 8.9 Establish a Comprehensive Tillamook Coast Tourism Website.
- 8.10 Improve the online presence of the County, Cities and tourism partners
- 8.11 Establish a comprehensive Search Engine Optimization strategy.
- 8.12 Optimize linking strategies.
- 8.13 Optimize the use of website and social media analytics.

- 8.14 Design and manage social media programs relevant to key markets.
- 8.15 Operate an online reputation management program.
- 8.16 Promote the regional brand through the webcam at Cape Kiwanda.
- 8.17 Design and distribute a Tillamook Coast Visitors Guide.
- 8.18 Design and distribute brochures for local villages.
- 8.19 Design and distribute brochure/maps on specific nature themes.
- 8.20 Design high quality detailed **tourism** maps.
- 8.21 Produce meetings and conference planning collateral sales material.
- 8.22 Develop a strategy to address the availability of visitor information throughout the region.
- 8.23 Develop a public relations program.
- 8.24 Optimize information and publicity in third party media.
- 8.25 Create a crisis management plan.
- 8.26 Develop a library of high quality images.
- 8.27 Develop a library of high quality videos.
- 8.28 Promote awareness and support for Tourism 2025 and the regional brand.
- 8.29 Implement a community relations strategy.
- 8.30 Foster a regional approach for local businesses to collaborate.
- 8.31 Encourage local residents to discover Tillamook Coast and surrounding area.
- 8.32 Demonstrate where possible how TLT dollars are benefiting the community.

- 8.33 Conduct and monitor ongoing research.
- 8.34 Conduct visitor research for each major event on the Tillamook Coast.
- 8.35 Conduct ongoing visitor satisfaction research.

9. Professional Development

Establish professional development and networking programs

- 9.1 Create a professional development program for partner managers and staff.
- 9.2 Encourage partners to adopt and deploy geotourism practices.
- 9.3 Increase the product knowledge of regional partners and staff.
- 9.4 Conduct regional outreach and orientation briefings.
- 9.5 Organize a regional trade show, seminar and networking event.

10. Partnerships

Establish partnerships and enhancement programs that are recognized for their innovation, collaboration and effectiveness.

- 10.1 Establish Product Experience Partnerships.
- 10.2 Establish a 'Nature and Three Capes Scenic Loop Partnership'.
- 10.3 Establish a 'Beach Experiences Partnership'.
- 10.4 Create outreach programs to the cultural community to establish partnerships with tourism and event organizers.
- 10.5 Consider establishing a Tourism Grants Program.

Methodology

The development of this Tourism Strategy by Total Destination Marketing involved a variety of actions which included:

- A community survey which was accessible online (441 responses).
- Personal interviews with over 50 local business and community leaders.
- Three community workshops, north, south and central, with residents, businesses and community leaders (80 participants).
- Portland online consumer perceptions research attracted 340 responses
- Informal discussions with local businesspeople in contact with visitors.
- Interviews with individuals outside of Tillamook County who have partnership relations with the city in regard to tourism or are experts in fields of interest to tourism in the County.
- On-site reconnaissance of Tillamook County and its adjacent areas to experience the region and surrounding area through the objective and unbiased eyes of a first time visitor.
- A review of relevant past reports and plans relating to Tillamook County from a tourism, economic development, recreation and leisure perspective.
- A review of web sites, web reviews and brochures relating to Tillamook County businesses and key competitors and partners to the County.

Tourism is a growing and important sector of the Oregon economy. The Central and North Oregon Coast's visitor economy is worth over \$1.29 billion (2012). A key objective of this tourism development strategy is to secure a higher share of this income for Tillamook Coast.

This is a strategic masterplan that adopts a holistic approach that analyzes all of the elements necessary to present and deliver outstanding visitor experiences in order to develop a successful visitor economy. Tourism is a complex economic activity where success requires cross-agency cooperation involving public, private, and nonprofit organizations. It also requires consideration of the interests of all customer groups including visitors, governments, partners, local businesses and residents.

This document provides a united vision and strategic directions for Visit Tillamook, its partners, investors, stakeholders and residents to increase market share, penetrate markets, deliver outstanding visitor experiences and boost visitor spending in local communities.

An important principle underpinning this strategy is that what can be attractive to visitors can also be appealing to residents and investors. As the cultural, natural and recreational attractors are improved they should also improve the quality of life for residents.

The main objectives of this strategy are:

- To provide clear strategies and leadership for tourism in Tillamook County.
- To ensure that available resources are deployed in the most effective manner.
- To establish the framework for coordination of tourism marketing and development.
- To address gaps in the County's tourism product and experience offerings.
- To identify a competitive edge to underpin the County's tourism development.
- To improve the economic yield and spending by visitors.
- To identify opportunities for economic development and business relocation associated with tourism.
- To contribute to the economic, social, cultural, and environmental well-being of residents.

Tourism is an export industry. That notion may initially seem a little strange. After all, when we think of exports we usually think of container ships or trucks, stacked full of consumer goods, machinery, agricultural produce, or raw materials leaving the area. Economists call tourism an “invisible export” because the customer must come to the source of production to consume the products. Another way to think of tourism is that it imports wealth through the “manufacturing” of visitor experiences that are mainly consumed within the host community.

With effective management the benefits from tourism can include:

- Diversifying, stabilizing, and enlarging the economic base of a community
- Stimulating entrepreneurial activity and small businesses
- Boosting existing businesses by supplementing resident spending
- Generating supplementary tax revenues
- Stimulating the sale and export of local products, e.g. agriculture, artifacts, seafood, etc.
- Enhancing the image of the place as an attractive place to live, shop, visit, study, and invest
- Generating jobs that can't be easily outsourced
- Supporting community enhancements and infrastructure that are of mutual benefit to residents and visitors

Tourists often go unnoticed in a community, particularly in large and diverse cities and counties. We sometimes hold preconceived and stereotypical images of a tourist and how they may behave.

Tourism includes travel by people* and their activities at a location that is not their normal place of employment or residence and is more than 50 miles from where they live. These trips can be for one day or over a longer period. Tourists can be considered to be:

- Those who are in **transit** to another location, but may stop before proceeding on their journey.
- People who stay **overnight** in either commercial or private lodging. These are the most lucrative visitors for a community.

Tourists can be further classified as:

- **Day trippers** who may either be staying temporarily or living in a nearby community who visit, but do not stay overnight.
- **Leisure travelers** are people on vacation or a short break for leisure purposes (including non-essential shopping trips). The majority of leisure trips are during June, July and August, i.e. during summer vacation. Most international travelers fall into this category as well and are often traveling the country for authentic American experiences.
- **Business travelers** are frequently the highest spending of all visitor segments. They may travel to attend conferences, incentive award programs, business meetings and sales visits. Many include leisure activities during their trips.
- **Visiting friends and relatives (VFR)** is one of the largest visitor segments for many communities. They are sometimes overlooked because they stay in private homes, but studies show that they performed well on profitability measures including being one of the highest spenders on shopping. They are the largest segment to stop at visitor information centers and are highly influenced by the knowledge of local residents.
- **Special interest** tourists are a subset of leisure travelers, and include those traveling individually or in groups for fishing, hunting, quilting, cycling, or culinary purposes, etc.

* State statutes and local tourism ordinances define tourism activity as "economic activity resulting from tourists." A tourist is defined as "a person who, for business or pleasure, recreation, or participation in events related to the arts, heritage or culture, travels from the community in which they reside to a different community that is separate, distinct from, and unrelated to the person's community of residence.

The legal definitions also prescribe that the person traveled more than 50 miles from their community of residence or stay overnight in the community they are visiting. Where increasing overnight stays is not reasonably attainable, bringing in visitors from outside the area and getting them to linger longer to eat, shop, recreate, learn about local culture, history, or take in agricultural or nature attractions should be considered an equal goal.

Nature-based Attractors

The Tillamook Coast’s primary attractors are nature-based, and include:

- Bays, lake and estuaries
- Beaches, coastal landscapes
- Coastal villages
- County (6) and State Parks (10)
- National Wildlife Refuges (3)
- Sea stacks
- Siuslaw National Forest (part)
- Three Capes Scenic Loop
- Tillamook State Forest
- Wildlife

The County’s other major attractors include:

- Blue Heron French Cheese Company
- Events
- Garibaldi Marina
- Garibaldi Maritime Museum
- Latimer Quilt and Textile Center
- Markets
- Pelican Pub & Brewery
- Sitka Center for Art and Ecology
- Tillamook Air Museum
- Tillamook Cheese Factory
- Tillamook County Pioneer Museum
- Tillamook County Quilt Trail
- Tillamook Forest Center

Note: An inventory of the main regional attractions is contained in Appendix 1.

Soft Adventure and Outdoor Recreation

All areas of the region offer some form of soft adventure activities. Very few have been commercialized by outfitters or operators. They represent opportunities for growth for small tourism business operations. The following soft adventure and outdoor activities are available.

- All-terrain vehicles
- Beachcombing
- Berry and mushroom picking
- Bird watching
- Boating and river rafting
- Camping
- Canoeing
- Crabbing, clamming, crawfish
- Cycling
- Diving
- Dune buggies
- Fishing – deep sea, river, lake
- Golf
- Hang gliding
- Hiking
- Horse riding
- Houseboating
- Hunting
- Jet boating - water scooting
- 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

Tourism Trends

National Tourism Trends

Since the Great Recession, the travel industry has emerged as a key driver of U.S. economic growth. The data clearly demonstrates that travel and tourism has a major economic impact not only nationally, but also within practically every state in the country. In 2012, spending in various industries directly linked to tourism - including transportation, lodging, food services, amusement parks and recreation, and retail - generated \$855.4 billion in direct economic output.

Tourism Employment

Nationwide, 14.6 million Americans (one in eight in the private sector) are employed in jobs dependent on travel and tourism. Travel is a top 10 employer in 48 states and the District of Columbia. Unlike jobs in industries such as manufacturing and information technology, tourism jobs cannot be shipped overseas.

Among workers who began their careers in the travel industry, one-third earned at least a bachelor's degree, compared to just 28 % in health care, 19 % in construction and 18 % in manufacturing.

- Of the 5.6 million Americans working part time while pursuing higher education, nearly one-third, or 1.8 million workers, work in the travel industry.
- More than half of all travel industry employees - a total of four million workers - earn middle-class wages or higher.
- Two out of five workers who first took a job in the travel industry are earning more than \$100,000 per year.¹

Oregon Tourism Trends

Tourism in Oregon is a \$9.2 billion industry. Tourism directly generates some 91,100 jobs in Oregon and indirectly creates another 41,000 jobs. The Oregon travel industry continued to exhibit moderate growth in spending, visitation and employment during 2012. Travel-generated employment increased for the second consecutive year, though it has not recovered to its pre-recession level. In general, Oregon travel industry trends reflect those of the larger U.S. travel industry.

- Statewide travel spending, \$9.2 billion, increased by 3.2 percent in current dollars during 2012.
- Overnight visitation increased by 1.5 percent. Visitor air travel to Oregon destinations (2.85 million) was up by 7 percent and is now roughly at the peak attained in 2007. Room demand, as measured by Smith Travel Research, increased by 2.6 percent.
- Preliminary estimates indicate that travel industry employment grew by 1,500 jobs, an increase of 1.7 percent following an increase of 1,600 jobs from 2010 to 2011.
- The re-spending of travel-related revenues by businesses and employees supported 41,000 additional jobs outside of the travel industry with \$1.4 billion in earnings in 2012. Most of these jobs were in various professional and business services.

¹ The Power of Travel Promotion, Spurring Growth, Creating Jobs; U.S. TRAVEL ASSOCIATION 2013

- The Gross Domestic Product of the travel industry was \$3.4 billion in 2012. Overall, the travel industry is one of the three largest export-oriented industries in rural Oregon counties (the other two being agriculture/food processing and logging/wood products).²

Oregon North Coast Tourism Trends

North Coast visitation has a direct influence on overnight stays in Tillamook Coast because of the region’s proximity to Portland Metro area. Some of the key points in regard to tourism in North Coast are:

- Visitor spending generated a total of \$622 million in 2012.
- The area welcomed 2.06 million overnight visitors, generating 5.6 million overnight stays.
- Easing the tax burden for local and state residents, area travelers generated \$24.4 million in tax revenues. Of that total, \$8.5 million was local tax revenue.
- The travel industry supports 7,030 jobs in the area.³

Tillamook Coast Trends

In 2012, Tillamook Coast attracted 1.01 million overnight visitors who generated 2.3 million overnight stays. All visitors generated \$193.1 million in spending which generated \$5.9 million in local and state taxes, as well as 2,050 jobs. The County attracted \$73 million from spending by day visitors.

Year	Overnight Trips (000)	Share % Coast*	Nights (000)	Share % Coast	Visitor Spending (mill \$)	Share % Coast	Employment
2012p	1,010	25.3%	2,378	21.1%	\$193.1	15.8%	2,050
2011	982	25.1%	2,326	21.1%	\$184.5	15.7%	2,120
2010	1,003	25.3%	2,372	21.1%	\$183.5	15.9%	2,100

Source: Oregon Travel Impacts 1991-2012; Dean Runyan Associates

*Note: “Coast” refers to Lincoln, Tillamook and Clatsop Counties

Analysis of Oregon Travel Impacts relevant to Tillamook Coast and key competitors of Lincoln and Clatsop Counties reveals:

- Lincoln County (42.4%) generated the highest market share in terms of most visitor nights compared to Clatsop (33.4%) and Tillamook Counties (24.2%).
- Lincoln County (41.4%) generated the highest market share in terms of visitor volume compared to Clatsop (34.3%) and Tillamook Counties (24.3%).
- Lincoln County (27.7%) generated the highest market share in terms of most visitor nights compared to Clatsop (47.5%) and Tillamook Counties (24.8%).
- Tillamook Coast (\$47) generated the lowest daily spending by per visitor per day compared to Clatsop (\$83) and Lincoln Counties (\$84).

² Oregon Travel Impacts 1991-2012; Dean Runyan Associates

³ Portland Economic Impact 2012; Dean Runyan Associates

Tillamook County Community Survey

The Tillamook County Community Online Survey was available to local residents and attracted a total of 441 responses. Some of the questions that gained the highest positive responses were:

- I am confident in recommending Tillamook County as a place to visit. (88.7% Highly Agree/ Disagree)
- As one of a number of industries, tourism is important to the economic mix of Tillamook County. (95.3% Highly Agree/ Disagree)
- The overall benefits from tourism in Tillamook County outweigh any negative impacts. (72.1% Highly Agree/ Disagree)
- The questions generating the lowest levels of agreement were:
- Local organizations approach the marketing of Tillamook County in a unified and co-operative manner. (9.6% Highly Agree/ Disagree)
- I prefer that tourists visit Tillamook County, but not move here. (19.4% Highly Agree/ Disagree)
- Tillamook County has a clear, meaningful and attractive identity. (28.4% Highly Agree/ Disagree)

Note: Verbatim transcripts of responses are contained in the Research Fieldwork Report

Local Tourism Stakeholders Interviews and Workshops

Interviews and workshops were conducted in the North, Central and South of the County. A total of 130 government, business, non-profits and citizens participated in these meetings.

Local stakeholders identified the following as the County's greatest tourism strengths:

- Beaches / Coast / Ocean **
- Beautiful landscape / beautiful scenery / beautiful coast / natural beauty**
- Cheese / Cheese factory
- Nature / natural **
- Unspoiled, quiet, not-overdeveloped
- Small town feel / coastal villages

** Represents the greatest number of mentions

Greatest weakness:

- Anti-tourism / growth sentiments *
- Cow smell / dairy air **
- Downtown Tillamook **
- Fragmented approach to tourism marketing and development
- Lack of cohesion / unity in tourism *
- Lack of facilities , infrastructure, amenities **
- Lack of shopping, restaurants, tourism businesses

- Roads **
- Seasonal impact on business
- Service standards
- Traffic and congestion in Summer *

What do you consider is the most important issue relating to tourism development in Tillamook County from the perspective of residents?

- A healthier attitude toward tourism and tourists
- Create more jobs, income and opportunities for small business**
- Don't generate traffic and congestion, or pressure at residents' popular places **
- Improve roads, parking and signs **
- Improve service, business prosperity *
- Restore, protect and conserve natural resources **
- Retain natural beauty**
- Retain small town feel, low impact on village lifestyles ***

What are the qualities or values that you would not want Tillamook County to lose as it develops as a tourism destination?

- Agriculture, fishing and timber industries **
- Beautiful unspoiled beaches, bays and forests ***
- Clean air, cleanliness, unpolluted
- Do not become Lincoln City or Seaside!!! **
- Friendliness
- Small town or hometown feel **

Note: Full survey information is in the Research Fieldwork Report

Portland Perceptions Research

An important element in the assessment phase was online research to uncover key consumer insights among prospective visitors to the Oregon Coast. It sought their perceptions and feelings toward Tillamook County as a destination.

A panel comprising Portland Metro residents aged 24-70, who “travel a couple times per year for pleasure” were targeted to participate. A total of 340 respondents completed the survey.

The panel was asked to indicate which destination attributes, from a list of fifteen, they most strongly associate with Astoria-Warrenton, Lincoln City, Newport, Tillamook County or “Don't Know”.

Tillamook County was most strongly associated with being:

- A place to get close to nature (39.8%)
- A place that is not over-developed and has retained its original qualities (35%)
- A place to be active in State Parks and forests (30.2%)
- A place of outstanding scenic beauty (25.6%)
- A place to be active in estuaries and bays (23.0%)
- A place with miles of unspoiled beaches (21.0%)

Tillamook County was least associated with being:

- A place to attend events and festivals (1.9%)
- A place with lots to see and do (5.9%)
- A good reputation as a visitor destination (5.9%)
- A place to reward yourself (9.4%)

Tillamook County competitors were most strongly associated with being:

- A place for fun with friends or family - Seaside
- A good reputation as a visitor destination - Newport
- A place to reward yourself - Lincoln City
- A place with lots to see and do - Newport
- A place to attend events and festivals - Newport

Tillamook County competitors were least associated with being:

- A place to be active in State Parks and forests - Seaside
- A place with capes and lighthouses - Lincoln City and Seaside
- A place that is not over-developed and has retained its original qualities - Seaside and Lincoln City
- A place to get close to nature - Seaside and Lincoln City
- A place for fun with friends or family - Astoria-Warrenton
- A place to be active in estuaries and bays - Lincoln City
- A place of outstanding scenic beauty - Lincoln City
- A place to relax and rejuvenate - Astoria-Warrenton

Note: Full survey information is in the Research Fieldwork Report

Competitors

Extensive research among stakeholders on the Tillamook Coast and with target audiences in Portland revealed perceptions and attitudes toward the Tillamook Coast's key competitors. The following provides an overview of comparisons between the Tillamook Coast and Oregon Coast competitors.

Cannon Beach	<i>Top of Mind:</i> Haystack Rock, arts/artsy <i>Strengths:</i> Arts and culture, quaint village, Haystack Rock, quality restaurants and shopping
Lincoln City	<i>Top of Mind:</i> Casino / gambling, sprawl / traffic, outlet malls and shopping <i>Strengths:</i> Beach, casino / gambling, outlet mall, shopping
Newport	<i>Top of Mind:</i> Aquarium <i>Strengths:</i> Aquarium, seafood and chowder, waterfront and harbor, whale watching
Seaside	<i>Top of Mind:</i> Beach, boardwalk, crowds and traffic, tourist trap / touristy <i>Strengths:</i> Indoor family entertainment, outlet malls and shopping, boardwalk / promenade, outdoor recreation
Astoria-Warrenton	<i>Top of Mind:</i> Historic / history, Columbia River / bridge, maritime <i>Strengths:</i> Historic sites, Goonies, museums, the wharf and waterfront, quaint downtown

The Destination Audit	SWOT - Nature-based Experiences
Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ Abundant and diverse marine/wildlife – high bird counts, migrating whales in season ▪ Diversity of beach-based and nature-based outdoor activities. Some supporting services ▪ Multiple park camping, RV, boat launch sites ▪ Natural beauty – omnipresent, diverse, rich ▪ Non-County guides bring visitors in with them ▪ Ocean/Waterfront lodging and dining options ▪ Over 50 local & outside fishing guides working Tillamook Bay and elsewhere within County ▪ Pristine beaches, bays, rivers, estuaries ▪ Some outstanding scenic hiking trails in and between leading coastal state park areas ▪ The Capes, sea stacks, mountains, rainforests, rivers and waterfalls, wildlife, many highly rated parks & reserves ▪ Three Capes Scenic Loop linking some of the County’s best natural/scenic assets ▪ Uncrowded and unspoiled beach getaways 	<ul style="list-style-type: none"> ▪ Few nature and adventure guides, outfitters, and tourism operators ▪ Insufficient use of highway ‘activity icons’ ▪ Lack of nature-based resorts, hotels, spas ▪ Lack of significant value-added experiences ▪ Lack of specific nature guides and maps ▪ Lack of widely known flagship nature trails ▪ No interpreted whale watching cruises ▪ Too few inter-connected, safe and dedicated nature trails within most communities ▪ Too few waterside/waterview dining and drinking outlets that are ‘letting nature in’ ▪ Unimproved access (beach and more), signage, interpretation, parking, visitor amenities, garbage ▪ Unimproved access, signage, interpretation ▪ Weather affecting outdoor participation opportunities and options in off seasons
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Formalize networking and project partnering between nature tourism agencies and industry ▪ Foster more opportunities for dining and staying by, or above, the water and ocean ▪ Help elevate the Three Capes Scenic Loop to a “must do” branded tourism product ▪ Improve access, visitor infrastructure/amenities ▪ Increase the number of available nature and adventure based operators, guides and outfitters. ▪ Integrate nature tourism considerations into all relevant County planning and programs ▪ Support expansion of nature adventure activities at Tillamook Forest Center ▪ Support quality nature-based lodging options ▪ Support the introduction of regular whale watching cruises out of Garibaldi 	<ul style="list-style-type: none"> ▪ Failure to conserve the natural values and diverse natural assets of the destination ▪ Failure to control insensitive development inconsistent with the values, aesthetics and quality of the natural surrounds and beauty ▪ Failure to engage in product upgrades and innovations, including revitalizing outdated and tired ocean-side lodging and facilities ▪ Lack of harmony and excellence in design in future nature-based lodging and dining facilities ▪ Loss of destination’s unspoiled and uncrowded visitor appeal and character ▪ Not matching or exceeding standards of competitor destinations ▪ Unsustainable tourism practices

The Destination Audit	Other Visitor Experiences
<p style="text-align: center;">Strengths</p> <ul style="list-style-type: none"> ▪ Abundant vacation homes for rent ▪ Active, but untapped, cultural community ▪ Breadth of assets suitable for special interest travel ▪ Close proximity to Portland ▪ Coast Guard Station and service at Garibaldi ▪ Coastal village destinations with small town feel ▪ Diverse and unspoiled natural environment ▪ Maritime Museum ▪ One million visitors yearly through Tillamook Cheese Factory ▪ Popularity of Oregon Coast and Hwy 101 ▪ Three breweries and a winery ▪ Tillamook County Pioneer Museum ▪ Unspoiled beaches are a major draw 	<p style="text-align: center;">Weaknesses</p> <ul style="list-style-type: none"> ▪ Appearance and signage confusion Downtown Tillamook and in many villages ▪ Customer service standards and limited local knowledge by front line hospitality staff ▪ Cycling is unsafe on some key roads ▪ Few tour operators, outfitters ▪ Few non-nature attractions ▪ Insufficient signage and access at some sites ▪ Lack of pedestrian-friendly retail precincts ▪ Limited number of conference/meeting facilities and indoor event spaces ▪ Need for experiential focus by local industry ▪ Need more 3-4 star or full-service lodging ▪ No active, unified year-round calendar of events ▪ No whale watching cruise operator ▪ Road access, quality, traffic congestion ▪ Some lodging properties in need of refurbishment ▪ The dairy farm smell in Tillamook ▪ Unattractive and poor sense of welcome at some regional gateways and communities
<p style="text-align: center;">Opportunities</p> <ul style="list-style-type: none"> ▪ Activate links to cultural community ▪ Develop more engaging nature-based experiences ▪ Develop special interest markets ▪ Encourage distinctive major off-peak events ▪ Increase access to beaches, viewpoints, trails ▪ Increase the number of tour operators and outfitters ▪ Salmonberry Rails to Trails Project 	<p style="text-align: center;">Threats</p> <ul style="list-style-type: none"> ▪ Anti-tourism sentiments of some local residents ▪ Natural disasters – tsunami, landslides, flooding ▪ Reduced funding for State and County Parks, National Wildlife Refuges ▪ Reduced funds available for development ▪ Reduced TLT generated for developments ▪ Road quality and congestion ▪ Smell of dairy farms in Tillamook

The Destination Audit	Marketing Communications
Strengths	Weaknesses
<ul style="list-style-type: none"> ▪ A distinctive and integral component of the internationally renowned Oregon Coast ▪ Active external marketing partners – OCVA and Travel Oregon ▪ Opportunity to reach travelers on Hwy 101 ▪ Proximity to Portland Metro and Salem markets ▪ Recognized strength in nature tourism ▪ Strong brand awareness of Tillamook Cheese ▪ VIC at Tillamook Cheese Factory ▪ Web and brochure foundation built by Tillamook Chamber of Commerce ▪ Webcam at Cape Kiwanda and elsewhere 	<ul style="list-style-type: none"> ▪ Confusing, fragmented range of commercial Oregon Coast brochures ▪ Few local partners with sizable marketing budgets ▪ Fragmented presentation of region ▪ Insufficient cross-selling and joint marketing ▪ Lack of market and customer research ▪ Limited targeting of special interest markets ▪ Limited VTC staff resources ▪ Low awareness as a place with lots to do or for major events ▪ Low internet and social media profile ▪ Low traveler awareness of Three Capes Loop ▪ No clear regional tourism identity ▪ Seasonality, limited length of stay, low spending per visitor
Opportunities	Threats
<ul style="list-style-type: none"> ▪ Access to enhanced digital platforms to provide majority of visitor information ▪ Activate the Forest Center on Hwy 6 as a gateway information center ▪ Build on platform set by Chambers ▪ Increase cooperative marketing programs ▪ Increase capacity of local partners for digital and traditional marketing ▪ Increase marketing effectiveness of local industry partners ▪ Increase earned media coverage (PR) ▪ Experience Oregon rest stop expansion on Hwy 101 ▪ Highway images and signs to divert travel to 3 Capes 	<ul style="list-style-type: none"> ▪ Constant innovation and changing marketing technologies ▪ Economic slowdown ▪ Limited understanding of tourism marketing among some stakeholders and partners ▪ Media and marketing cost inflation ▪ Natural disasters – tsunami, landslides ▪ New, quality lodging in nearby destinations ▪ Patchy and poor mobile service through County ▪ Increased and improved marketing by competitors ▪ Reduced budget through lower TLT revenue

Our Vision

Note: This is a placeholder only and is based on the views that were received during the research and consultation phases. It is intended as a draft only for TAC to review and update within the next year.

The following tourism vision statement has been created following extensive research, public consultation and input through interviews, workshops and surveys. This vision sets the path to develop a vibrant visitor economy over the next decade.

In 2025, the Tillamook Coast is recognized among Oregon's most desirable nature tourism destinations offering outstanding visitor experiences and, through sustainable tourism practices, is a valuable contributor to the environmental, economic, and social well-being of the County.

Our Mission Statement

Note: This DRAFT Mission Statement builds on the direction of the statement created by TAC for its mission as an advisory committee. Note: bold type indicated variations from original

We will improve Tillamook County's economy and resulting environmental and quality of life will improve by developing the county as an authentic, attractive tourist destination, and fostering community pride.

The following are the priority and complementary markets. Priority Markets will comprise those in which proactive marketing and development will be focused, while the Supplementary Markets are those in which the Tillamook Coast will primarily provide detailed information and periodic marketing campaigns. This prioritization will change over time as new products are introduced, and investment and market situations change. For the purposes of marketing communications the prioritization, demographic and geographic characteristics of each target audience will be refined each year according to the available budgets, opportunities, partner needs and market situation.

The profile of target visitors should be refined with the characteristics of geotourists. This information is in Appendix 6. An emphasis should be on markets that can visit outside of peak periods.

Priority Markets

Coast Getaways	<ul style="list-style-type: none"> ▪ Portland Metro Residents ▪ Other Oregon – Salem, Eugene, Bend ▪ Seattle – Tacoma – Olympia ▪ Emerging: Idaho, Utah, Eastern Washington
International / Interstate:	<ul style="list-style-type: none"> ▪ Hwy 101 Travelers
Events	<ul style="list-style-type: none"> ▪ Event organizers and attendees

Complementary Markets

Special Interest Markets <i>among these markets are:</i>	<ul style="list-style-type: none"> ▪ Birders and wildlife watchers ▪ Coach tours/Tour Operators ▪ Culinary ▪ Cyclists ▪ Fishing ▪ Learning opportunities – art, quilting, hobbies ▪ Outdoor recreation ▪ Photographers ▪ Quilters ▪ Reunions ▪ Water sports ▪ Weddings
Meetings and Conventions	<ul style="list-style-type: none"> ▪ Meeting planners and delegates, mainly Oregon-based – government, medical, leadership training
International Visitors	<ul style="list-style-type: none"> ▪ Europe, UK, Australia, Canada

Tourism 2025 provides the Tillamook Coast with the strategies, actions and tools for successful tourism development. Tourism 2025 is shaped by the following strategic priorities aimed to achieve the region's tourism goals. These strategic priorities inform and guide the Actions for Success in Tourism 2025 and provide guidance for the future operations and priorities of Visit Tillamook Coast.

1. Establish a distinctive, compelling and unifying **destination brand** that clearly differentiates the Tillamook Coast, and is broadly adopted by partners.
2. Introduce **sustainable tourism practices** that safeguard and enhance the Tillamook Coast's environmental, economic, cultural and social well-being.
3. Develop **nature tourism experiences** that increase the desirability of the Tillamook Coast.
4. Develop **cultural tourism experiences** that increase the desirability of the Tillamook Coast.
5. Develop **events** that address seasonality, attract new markets and energize local communities and partnerships.
6. Increase the desirability of the **villages** as places inspiring people to visit, spend more and stay longer.
7. Develop **lodging and conference infrastructure** that matches market needs and optimizes the natural environment.
8. Increase awareness and preference for the Tillamook Coast and its partners through innovative **marketing communications**.
9. Establish **professional development** and networking programs.
10. Establish **partnerships and enhancement programs** that are recognized for their innovation, collaboration and effectiveness.

Prioritization

The implementation of Tourism 2025 is divided into four phases:

- Immediate
- 2015 – 2016 Short term
- 2017 – 2019 Medium term
- 2020 – 2024 Long term

Objective:

Develop a distinctive and compelling brand that clearly differentiates the Tillamook Coast, and is broadly adopted by partners.

Our customers have overwhelming choice and are faced with thousands of competing messages every day. To compete in this environment the Tillamook Coast must differentiate itself in ways that are personally relevant and gain resonance with target audiences through the benefits and rewards of the region's offerings. To successfully address these challenges the VTC will adopt a branded approach. This section should be read in conjunction with the *Tillamook Coast Brand Style Guide*.

A successful destination brand fulfills a valued promise. It comprises a unique blend of physical, intangible and emotional benefits which clearly differentiate the Tillamook Coast from competitors. The brand provides a unifying umbrella to consistently present the region's leading experiences, words, imagery, products, and distinctive character as well as provide a catalyst to leverage the marketing efforts of partners.

The Tillamook Coast brand summarizes the region as a compelling destination through the phrase, "it's the natural choice." This is an experiential invitation which captures the distinctive essence of the region and spirit of the area from a tourism and lifestyle perspective.

The Destination Promise

The Tillamook Coast Destination Promise will inform and guide every message, process, decision, communication, and investment. It captures the way we want customers to think and feel about us relative to competitors. The Destination Promise is:

For those needing to escape the stresses of everyday life and seek the transformative power of nature, the untamed and unspoiled beauty of the Tillamook Coast's natural wonders are the perfect prescription for body and soul.

Only here will they find the enriching, revitalizing and adventure-filled encounters of Oregon's most diverse and varied marine and rainforest environments, all in close proximity to low-key beachfront villages that have not been overdeveloped – and within 90 minutes of Portland.

Our Commitment:

We are dedicated to preserving, enjoying and sharing our unspoiled natural environments and keeping the small town feel and low-key character of our villages while generating a sustainable visitor economy for resident employment and small businesses.

We present transformational experiences that enable residents and visitors to interact with nature in ways that are compelling, environmentally sensitive and spiritually uplifting.

The Tillamook Coast Brand Platform

The brand platform is the unifying foundation upon which to focus and prioritize the Tillamook Coast's tourism programs. It provides the rallying point to leverage the combined efforts of partners and regional partnerships. The brand platform comprises:

- Brand pillars
- Emotional benefits
- Personality

Brand Pillars

These are the leading strengths and benefits that attract our target audience to the Tillamook Coast and underpin the delivery of the Destination Promise. These brand pillars also serve as the key experience themes or clusters, and provide an important conduit for partners to play their role in delivering the brand. Importantly, they provide opportunities for customers to immerse themselves in the brand. For VTC and partners the pillars facilitate prioritization for marketing, product development, investment and partnerships. They should receive greatest prominence in brochures, advertising, Websites, sales materials, etc. Some will be emphasized more than others depending upon the target audience and the objectives that are being addressed.

Priority:

- **Natural Wonders:** Our part of the famed Oregon Coast captivates visitors because of its larger than life drama, unspoiled beauty and adventure-filled encounters. Here you will find dramatic and beautiful capes, sea stacks, bays and estuaries, mountains, rainforests, rivers and waterfalls, and wildlife.
- **Beach Traditions:** Our coastal villages, family fun and unspoiled beaches have drawn visitors for generations. Here you can relax on the beach, spend the day beachcombing, savor fresh seafood, sing by a fire on the beach, search for clams and crabs, and or just watch the sunset.
- **Outdoor Adventures:** Our waterways and forest present myriad opportunities for adventure and interacting with nature through kayaking, fishing, parasailing, hiking, wildlife watching, cycling, and many other activities.

Complementary:

- **History and Culture:** Our relationship with the ocean, bays and forests still influences our lifestyle and can be explored in villages, museums, galleries, arts & craft classes and living traditions.
- **Nature's Bounty:** Our climate, fertile valleys and waterways create the environments that have made us famous for our seafood, agriculture, artisan foods, dairy and cheese products, and opportunities for foraging mushrooming, crawfishing and crabbing.
- **Events:** The events and celebrations that add to our enjoyment of nature and the great outdoors.

Emotional Benefits

Emotional benefits reflect how we want the Tillamook Coast’s visitors to feel through their contact and experiences with the region. The emotional benefits capture how we want visitors to feel. At least one of these emotional benefits should be consistently embedded in marketing messages, images and experiences to support effective brand development.

These benefits should be delivered and reinforced in all appropriate communications, however it is not intended that they be the only benefits offered. Instead, they should be constantly monitored to ensure that they are the most powerful and appropriate reflections of how the brand makes customers feel. We want the Tillamook Coast brand to convey and provide a sense of:

- Discovery
- Freedom
- Inspiration
- Rejuvenation
- Romance
- Togetherness

Personality

These character traits shape the look and feel that will be used to express the brand. The brand ‘personality’ describes the characteristics and traits of the Tillamook Coast as if it were a person. These traits will influence the feel and tone of voice used in communications as well as the selection of type, colors, images and other visual elements which in combination elicit an emotional response.

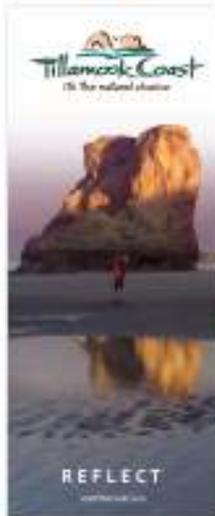
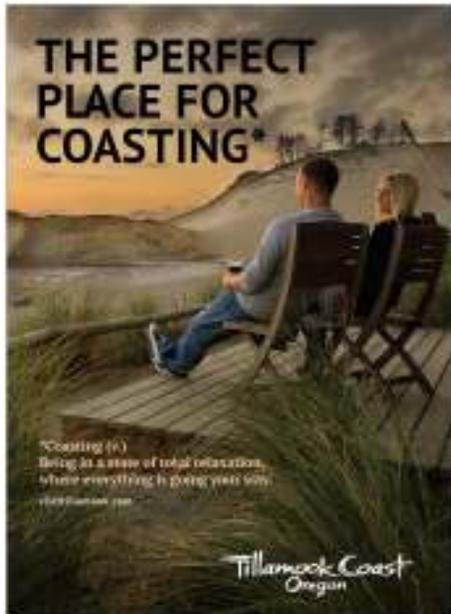
- Authentic
- Environmentally sensitive
- Inspiring
- Natural
- Relaxed
- Untamed

The Visual Identity

The following are the approved Tillamook Coast visual identities for a variety of destination marketing and organizational applications. Refer to the Brand Guidelines for detailed specifications.



The following examples demonstrate a variety of applications for deploying the brand identity.



Bringing the Brand to Life

The Tillamook Coast brand is created by more than just the actions of Visit Tillamook Coast and its marketing messages. Delivering memorable customer experiences for Tillamook Coast visitors requires a 360° focus by many partners to provide superior value through a seamless series of highly satisfying experiences and encounters. Visit Tillamook Coast cannot exercise control or influence at every one of these points. It may, however, be able to influence quality at the most critical points and encourage partners to support the objective of communicating and delivering outstanding brand experiences and help distinguish the Tillamook Coast from its competitors. The subsequent sections of this tourism development strategy outline the actions required for building the Tillamook Coast brand.

Actions:

1.1 Accurately and creatively deploy the Tillamook Coast branding strategy.

Description / Rationale	Priority	Lead Organization
The Tillamook Coast brand presents a unifying rallying point around which we can present the region's experiences. It sets the directions for using one look, one voice, common themes, images and words. The brand will work at its best when it is endorsed and used as a unifying banner for our public, private, and nonprofit partners. This will strengthen its meaning and relevance. Achieving this requires constant outreach, education, oversight and coaching . Ultimately, success involves attention to the systems, processes, people, regulations, resources, and priorities that underpin the brand and the region's customer experiences. The brand must become much more than a logo and tagline. The remainder of this tourism strategy addresses many of these issues.		

1.2 Encourage awareness, adoption, and use of the brand strategy by partners.

Description / Rationale	Priority	Lead Organization
The success of the Tillamook Coast brand will be strongly influenced by the degree to which the strategy is fully adopted and implemented. Key organizations and individuals must understand the brand, support consistent brand messages, as well as demonstrate a clear commitment to the brand as being a high priority for the region's tourism development. It is necessary to ensure that new VTC appointees and partners are always aware of the brand and the ways in which they can help (or hinder) its development. This included adoption of the name, the Tillamook Coast by government and other stakeholders.		

1.3 Create a 'Brand at a Glance' publication for partners.

Description / Rationale	Priority	Lead Organization
In order to ensure accurate, creative and consistent use of the brand, a concise Our Brand at a Glance publication should always be available, rather than the		

Description / Rationale	Priority	Lead Organization
full Brand Style Guide. It should be combined with outreach programs and be available to provide guidelines for using the brand identity system and the tourism strategy. This concise brand toolkit should outline the rationale for the brand, how to use the logo, tagline, exact colors, key words, key experiences and other critical brand elements.		

1.4 Assist villages and cities in adopting and locally deploying the regional brand.

Description / Rationale	Priority	Lead Organization
Provide assistance to villages and cities in supporting, adopting and using the regional brand to the greatest extent possible. At a minimum this will involve delivering outstanding experiences that support the brand. It may also extend to adopting the brand visual identity to influence local designs for local marketing efforts. Consideration should be given to installing regional welcome signs featuring the brand visual identity at regional gateways.		

1.5 Create a brand strategy for the Three Capes Scenic Loop.

Description / Rationale	Priority	Lead Organization
The Three Capes Scenic Loop is one of the most important regional attractors. It also impacts many private and public organizations, yet there are great inconsistencies in the way the drive is marketed, signposted and projected. There are even inconsistencies in the name used to list and describe it. A basic brand strategy for the route should be developed to provide accuracy and consistency for the ways it is promoted. It should be developed and managed as a destination brand including a style guide for conveying its visual and verbal identity.		

1.6 Delegate brand oversight to a brand identity specialist.

Description / Rationale	Priority	Lead Organization
The responsibility for being the brand identity specialist should be allocated to a VTC staff member. This person is responsible for reviewing and approving all new executions of the brand. This will be an extra delegation of responsibility for an already existing position. This person should have a strong understanding of the region's marketing, good interpersonal skills, and be assertive, yet persuasive in dealing with brand partners. Alternatively, these responsibilities may be split between several individuals, e.g. designer, copy writer and marketer, to effectively use their skills and cover visual and verbal communications as well as the experiential content of the brand.		

Objective:

Introduce sustainable tourism practices that safeguard and enhance the Tillamook Coast’s environmental, economic, cultural and social well-being.

Tourism has the power to significantly change the character, environment, economic and social well-being of places. Global economists forecast continued tourism growth worldwide at between 3-6% annually, depending upon the destination and its visitor source markets. This accelerating growth may cause negative impacts in some locations.

The Tillamook Coast research identified that residents are concerned about the preservation of the natural environment and their way of life, yet there is also desire to increase the development of tourism. Balancing these potentially conflicting goals will require a sustainable approach toward tourism management in the region. This approach is aligned with the indicators developed by the Tillamook County Futures Council. Refer to Appendix 6 for more information on sustainable tourism and geotourism.

2.1 Consider the adoption of geotourism principles and practices.

Description / Rationale	Priority	Lead Organization
Through a consultative process involving residents, leaders, and partners, define a set of geotourism principles and practices (possibly in conjunction with Travel Oregon and National Geographic) that the region should follow to achieve a balanced triple bottom line. Investigate the establishment of a Community Sustainability Council under the auspices of Visit Tillamook Coast. The Council should represent broad community (and regional) interests and is intended to not only promote geotourism assets but also be a catalyst for local communities to discover their own geotourism assets, approach and principles to optimize economic, community and environmental benefits from tourism. The Council should monitor sustainability and ensure that visitor capacity is appropriately managed, while still encouraging maximum benefit from visitation (local spending, year-round visitation etc.).		

2.2 Maximize governmental relationships to encourage public policy decisions that support sustainable tourism and the regional brand.

Description / Rationale	Priority	Lead Organization
Ensure that sustainable tourism principles, brand values and harmonious development principles are optimized in government planning , development approvals, policy, infrastructure and urban design. Reinforce the identity of villages through design standards, architecture, landscaping, public art and pedestrian precincts. For example, significant expanses of prime coastal real estate are being used for vacation homes, and other purposes. If this trend continues there could be a reduction in the sites available for restaurants, resorts and retreats with water views. Encourage the designation of specific sites or zones for tourism developments that can generate higher employment and community income.		

2.3 Develop tourism action plans for villages and selected major tourism clusters.

Description / Rationale	Priority	Lead Organization
<p>Develop tourism action plans for all key villages, enabling them to gain optimal leverage from opportunities presented by the VTC and the Tillamook Coast brand. The plans should identify the differentiating themes or positioning for each village within the regional brand structure to establish its “role” in the regional brand. They should provide guidance for future grants, but importantly whenever VTC or other partners include these places in brochures, websites, advertising, etc. there is a strategic toolkit to ensure focus and consistency. No doubt there will be many other applications. Development of these action plans for each village or location should identify opportunities and gaps for linking products and experiences to the regional brand and marketing. The plans should address experience related issues and enable communities to halt leaking tourism dollars, boost visitation, increase visitor satisfaction and increase benefits for the local community.</p>		

2.4 Improve the capacity of villages to optimize the benefits from tourism.

Description / Rationale	Priority	Lead Organization
<p>Constantly monitor the functionality and performance of key villages in regard to their visitor readiness and capacity to capitalize on the regional brand and Tourism 2025. In conjunction with government and other partners such as EDC, work with villages to develop the visitor attractors, infrastructure and services for successful tourism and economic growth, while following sustainable tourism principles to ensure optimal balance with community values and benefits.</p>		

Objective:

Develop nature tourism experiences that increase the desirability of the Tillamook Coast.

Nature-based tourism represents a competitive advantage for the Tillamook Coast and is the foundation of the Tillamook Coast brand. Nature-based tourism is tourism that relies on experiences directly related to the natural environment. It is not a niche market simply catering to avid nature enthusiasts. An emphasis should be on those capable of generating year-round visitation.

Driving and Navigation

Throughout the region there are many scenic roads and highways providing ready access to the abundant beaches, forests, rural vistas and villages. However, the quality of roads, signage and inadequate viewpoints are among the major weaknesses identified in research.

Signage systems serve vital roles. They inform, guide, and motivate travelers. They are also important in shaping the identity of a place through their style, colors, lettering, content, aesthetics, and placement. Good signage can contribute significantly toward the satisfaction of visitors.

3.1 Conduct a region-wide assessment of tourism-related signage needs on main roads.

Description / Rationale	Priority	Lead Organization
In conjunction with Cities, County, partners and ODOT initiate a region-wide assessment of directional signage needs , particularly as they relate to visitor navigation to villages and key sites off Hwy 101. Consider how the signage system guides visitors through the region to major destinations, e.g. in Tillamook there is no mention of Pacific City or Garibaldi at key traffic points.		

3.2 Conduct a region-wide assessment to identify priority viewing and interpretation needs.

Description / Rationale	Priority	Lead Organization
There is a shortage of roadside viewing sites, interpretation and accessible lookouts to enjoy areas of 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 Loop.		

3.3 Support efforts to have Highway 6 designated a State Scenic Byway.

Description / Rationale	Priority	Lead Organization
Highway 6 along the Wilson River is highly scenic, yet has virtually no viewpoints to safely stop and experience its dramatic scenery. Actively support efforts to have Highway 6 designated a State Scenic Byway. This should coincide with efforts to develop suitable viewpoints at scenic points of interest along the Loop.		

3.4 Develop Tillamook Forest Center as a gateway information center to the region.

Description / Rationale	Priority	Lead Organization
The Tillamook Forest Center is a potentially attractive gateway to the region. However, its name generates uncertainty as to what it offers and signage is inadequate. Develop the Center as an information and interpretive center. Improve advance warning signage on Hwy 6. Support a name change.		

3.5 Maintain close contact with City, County and State authorities to ensure optimal quality of local roads.

Description / Rationale	Priority	Lead Organization
The inadequate condition and quality of roads in the County was a regular source of complaint in all community and stakeholder research. Maintain close contact with City, County and State authorities to ensure optimal quality of local roads most often used by visitors.		

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

Description / Rationale	Priority	Lead Organization
The newly developed Kilchis Point Reserve and its trails lack identification and advance warning signs, using relevant activity icons, when approaching from the South on Highway 101. 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.		

3.7 Support the review and expansion of 'activity icons' for use with signs at key locations around the region.

Description / Rationale	Priority	Lead Organization
In conjunction with the County and ODOT, review the use of activity icons to supplement signs at key locations around the region. These represent activities such as wildlife viewing, fishing, hiking, camping, etc. The icons should also be used in brochures, websites, and maps to further aid precise visitor navigation.		

3.8 Develop an integrated approach to the management and marketing of the Three Capes Scenic Loop.

Description / Rationale	Priority	Lead Organization
Three Capes Scenic Loop is one of the region's most popular attractions and is dependent on multiple attractions with multiple "owners" who are not actively collaborating in the management and marketing of the Loop as a unified attraction. Develop an integrated approach to the management and marketing of the Three Capes Scenic Loop with a plan to optimize integration of natural areas, businesses and villages into a management and marketing framework. Address all experience issues in regard to branding, roads, access, signage, viewing bays, interpretation, visitor maps, wildlife viewing, outfitters, opening times, information and integration with villages and other partners. Consider introducing a visitor passport in product/marketing initiatives. It should be treated as a product in its own right.		

Experience Development

Memorable visitor experiences involves more than the ad-hoc encounters with a physical location and associated activities – no matter how beautiful it may be. Research shows that visitors do not want to simply see things and be passive observers. They want to be engaged and immersed in what is happening. Successful visitor experiences provide a higher level of engagement with the sense of place, culture, natural environment and local people. Experiences engage all senses, and can make connections on a physical, emotional, spiritual, social or intellectual basis. The more these are combined, the more satisfying and memorable the experience.

3.9 Support development of the Oregon Coast Scenic Railroad to become a signature attraction.

Description / Rationale	Priority	Lead Organization
The number of passengers on the Oregon Coast Scenic Railroad is rising year by year and its themed rides are also gaining in popularity. 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 market profile, create 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/entertainment themes.		

3.10 Support the development of the Tillamook Forest Center as a forest adventure hub.

Description / Rationale	Priority	Lead Organization
The Tillamook Forest Center has the potential to present more interactive and thrilling experiences. It could become a hub for forest adventures and trails, as well as gateway information and interpretive center. Subject to feasibility, 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 salmon viewing and interpretation bay.		

3.11 Encourage a region-wide focus on experiential tourism.

Description / Rationale	Priority	Lead Organization
Develop workshops, seminars and coaching programs to assist owners and managers make the transition from a commodity-minded approach to an experiential tourism. Establish programs to provide the hands-on skills and ideas to add value for visitors by providing experiences that enable them to better enjoy local villages, the region and businesses. This may uncover investment opportunities to add new, exciting products and experiences that will support the brand, and create buzz. The challenge is to creatively orchestrate processes, activities and partnerships that touch the customer's sense of sight, touch, smell, hearing and taste. It should reveal ways to satisfy visitors' desire for immersion, exhilaration, learning, understanding and active engagement.		

3.12 Increase access to information in regard to fishing, guides and outfitters.

Description / Rationale	Priority	Lead Organization
The region is already a popular fishing destination. However, it is not optimizing its potential due to inadequate readily available information for customers and insufficient guides (at certain times). Facilitate networking, training and development of the guiding and outfitting infrastructure throughout the region. Ensure that there is deep and current information on the VTC website related to fishing and boat hire, and that fishing and licensing information is readily available for visitors once in the area. Consider convening an annual outdoor operators, outfitters and guides forum to jointly explore areas of mutual interest such as cooperative marketing and information sharing initiatives and other industry wide networking and development possibilities. Some of the same issues exist in regard to hunting guides.		

3.13 Expand the capacity of the most popular boat launch ramps.

Description / Rationale	Priority	Lead Organization
Consider expanding the most popular boat launch ramps to accommodate separate launch sites for motorized and non-motorized craft uses. For example, the boat ramps at the Netarts Bay boat launch area are congested at peak launch times causing issues for kayak tour operators and recreational boat users. Similar issues may exist at Garibaldi and Bay Ocean.		

3.14 Collaborate with local enthusiasts to develop and promote geocaching trails.

Description / Rationale	Priority	Lead Organization
Geocaching is a GPS-oriented treasure hunt through a series of geocaches that geocachers follow on a tour of the area. Introduce a geocaching route where at stops visitors can be introduced to activities, interesting facts and stories.		

3.15 Investigate ways to capitalize on oceanographic research.

Description / Rationale	Priority	Lead Organization
As oceanographic scientific research off the Tillamook Coast expands, investigate opportunities to provide visitor experiences through guided interpretation and online programs.		

Cycle and Walking Trails

3.16 Actively support the proposed Salmonberry Rails to Trails project.

Description / Rationale	Priority	Lead Organization
The Salmonberry Trail has enormous potential. It will not only directly link the Portland area with Tillamook County and the Oregon Coast, but will generate its own promotional value because of its significance as an iconic hiking and cycling trail. Encourage the development of tourism experiences and operators in conjunction with the trail, including linkages to lodging, dining and gathering places.		

3.17 Establish partnerships and programs to make the Tillamook Coast a bicycle friendly destination.

Description / Rationale	Priority	Lead Organization
Develop and support community-wide strategies, policies and programs to ensure that the Tillamook Coast is recognized as a popular, welcoming and safe destination for cyclists. This should be supplemented through outreach, awareness and education programs . Encourage government, non-profits and local businesses to become more cycle focused including signage, trails, cycle cleaning stations, cycle repairs and service. Encourage businesses to join the “Bicycle Friendly Business” (BFB) under Travel Oregon’s ‘Bicycle Friendly Business’ recognition program.		

3.18 Identify and promote ‘the best of the best’ walking and cycling trails.

Description / Rationale	Priority	Lead Organization
Create a stronger identity for the region as a great hiking and cycling destination by identifying and promoting the region’s “Ten Wild Walks” and “Ten Wild Rides”. And its best “Coastal Walks”. These should be integrated into brochures, web sites, maps, and signage and be built into “must do” trails for cyclists, hikers and runners.		

3.19 Increase the cycling trails that include the region’s outstanding natural sites.

Description / Rationale	Priority	Lead Organization
Cycle tourism is growing rapidly in Oregon and is a major focus for Travel Oregon. Increase the focus on providing cycling trails that include the region’s outstanding natural sites. Ensure dedicated, safe cycling trails providing high quality experiences are easily accessible linking communities to areas of natural significance. An added benefit from trails is that they encourage the use of cycles and walking and may assist to a small degree in reducing some peak season traffic congestion. Several trails requiring attention are between Garibaldi and Rockaway Beach and ensure safe travel along Highway 101.		

3.20 Ensure that trailheads and all beach access points are clearly identified.

Description / Rationale	Priority	Lead Organization
In many locations the advanced warning and identification signage is inadequate for trailheads and walking trails and can be too easily missed. Encourage introduction of advanced warning and identification signage, if possible using icons featuring hiking and other key activity symbols.		

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.

3.21 Support the introduction of regularly scheduled whale watching cruises from Garibaldi.

Description / Rationale	Priority	Lead Organization
There is no regularly scheduled whale watching cruise from Garibaldi. Such a service could potentially develop over time into a major tourism driver and be used to lead marketing efforts in conjunction with other major natural assets. Encourage a high quality, regularly scheduled and fully interpreted whale watching and marine life cruise from Garibaldi during the peak periods of the whale migration. Consider providing this venture with co-operative marketing support and make it central to the advertising and marketing for the region.		

3.22 Improve identification and interpretation at key whale watching sites.

Description / Rationale	Priority	Lead Organization
Visitors seek out the whale watching vantage points along the Coast. Cape Meares is the only place with significant interpretation of the whale migrations . Support the introduction of interpretive panels at other popular whale watching viewing points. Also investigate the addition of interpretive exhibits featuring whales and the County's diverse marine life at the Maritime Museum and Tillamook Forestry Center.		

3.23 Improve identification and interpretation at key wildlife viewing sites.

Description / Rationale	Priority	Lead Organization
Wildlife is one of the most popular of all nature tourism experiences. Throughout the region there are numerous opportunities for viewing the abundant wildlife in natural habitats –land-based, aerial, and marine. However, there are very few obvious viewing sites or professional guides. Introduce better marketing, interpreting and advanced warning signage to better activate wildlife, guides and interpretation as a core attractor. Increase availability of information in regard to wildlife viewing. Identify the ‘best of the best’ to highlight in marketing communications.		

3.24 Investigate the introduction of a volunteer program to interact with people clamming, tidepooling and crabbing on the beaches.

Description / Rationale	Priority	Lead Organization
Stakeholders expressed the concern that Tillamook County's pristine bays could become over-fished and depleted of marine life because of takes and catches by people that breach legal requirements and practices. In conjunction with partners, investigate the introduction of a volunteer program to interact with people clamming and crabbing to aid conservation. Support all efforts and measures to successfully retain sustainable management of these assets, including targeted education and enforcement activities.		

Beach Traditions

Beaches are one of the major motivators for travel to the Tillamook Coast. The region has many uncrowded and undeveloped beaches, many of which are near small villages and lodging

overlooking the ocean. Some have been drawing visitors for over one hundred years and are traditional escapes from city life.

3.25 Encourage the provision of restroom amenities at high visitation beaches.

Description / Rationale	Priority	Lead Organization
The community consultations pointed to the need for rest room facilities at certain coastal/beach areas . There is a lack of readily accessible restrooms on or near many beaches, including Manzanita, Pacific City and Netarts.		

3.26 Conduct a review of beach access points to ensure that they are safe and easy to traverse.

Description / Rationale	Priority	Lead Organization
Beach access points along the coast are not always signed, easy to locate or safe and comfortable to traverse. Support the installation of beach access signs where needed and when necessary support construction of safe access.		

3.27 Ensure that all parking areas are fully operational during peak periods.

Description / Rationale	Priority	Lead Organization
Research and consultation revealed complaints in regard to traffic and parking difficulties during peak seasons. In Pacific City, one of the beach parking lots is unusable because it is covered with sand. Ensure that all parking areas are fully operational during peak periods to reduce illegal parking and increase visitor (and resident) satisfaction.		

3.28 Ensure that visitor areas are tidy and have sufficient trash management systems.

Description / Rationale	Priority	Lead Organization
The consultation process revealed that in some beach locations, most notably in Pacific City, trash along sidewalks, roads and beaches can be a problem. Ensure that visitor areas are tidy and have sufficient trash management systems in place.		

3.29 Support improvements to wayfinding and visitor-focused signage at beaches.

Description / Rationale	Priority	Lead Organization
Ensure wayfinding and signage improvements are focused on the needs of visitors at regional beaches. Where appropriate these should include activity icons. At present many signs are missing, disjointed, cluttered and in some cases faded to the point of illegibility.		

Objective:

Develop cultural tourism experiences that increase the desirability of the Tillamook Coast.

The Tillamook Coast has the opportunity to foster stronger links between tourism and culture to increase its competitiveness, attract new markets and extend visitor’s length of stay. Close collaboration between tourism and the cultural community can yield improved results for both. Cultural tourism conforms to the growing trend for visitors to seek learning, enlightenment and more enriching experiences. To develop cooperation and synergy between these two similar, yet disparate, industries you must ask: what does the tourism industry have to gain from the arts? And what do the arts have to gain from tourism?

What do the Arts have to gain from Tourism?	What does the Tourism Industry have to gain from the Arts?
<ul style="list-style-type: none"> ▪ A strategic way to develop audiences. ▪ Tourist spending can have a regenerating effect on the venues and host communities. ▪ Extra revenues can be generated utilizing spare facilities and capacity. ▪ Larger audiences can enhance and broaden the base of potential sponsors. ▪ Cost savings in research, marketing, and product development. ▪ The perspective of visitors can challenge and enrich everyone’s experience. ▪ Shared expertise: market knowledge, distribution, marketing skills, and ideas. ▪ Shared resources: databases, distribution systems. ▪ A wider audience pool can assist in developing experimental, fringe, or minority interest activities. 	<ul style="list-style-type: none"> ▪ The arts can enhance and differentiate the destination brand. ▪ The arts can be a catalyst for increased visitation. ▪ The arts can add value to a visit, and add to visitor satisfaction, length of stay, and the possibility of a repeat visit. ▪ The arts can be a catalyst for re-imagining a destination or place. ▪ The arts can assist destinations to better manage seasonality issues. ▪ Tourism marketing creativity, innovation, and flair can be invigorated through an association with the arts. ▪ Arts partnerships can enhance tourism product development ▪ The arts can enhance the public relations coverage for destinations.

4.1 Encourage the arts community to investigate the introduction of imaginative environmental artworks and sculptures.

Description / Rationale	Priority	Lead Organization
<p>There are opportunities to fuse nature and art. 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 weather and vandal-resistant sculptural works to imaginatively interpret trails and visitor sites has been put to effective use in other destinations.</p>		

4.2 Support the introduction of public art programs throughout the county.

Description / Rationale	Priority	Lead Organization
<p>Expand public art within the County. Public art initiatives, when properly conceived and executed, can build civic appeal, enhanced interpretation and</p>		

Description / Rationale	Priority	Lead Organization
create a distinctive sense of place. Some acclaimed artists already reside 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 location. For example, in Tillamook as part of the Hoquarton Slough initiative or sculptures on the boardwalk in Garibaldi. Also explore incorporation into beach and coastal walks.		

4.3 Encourage the Tillamook County Pioneer Museum and Latimer Quilt and Textile Center to enhance the presentation of their buildings.

Description / Rationale	Priority	Lead Organization
From the outside, the Tillamook County Pioneer Museum and Latimer Quilt and Textile Center project little about what’s inside and the likely experiences for visitors. Explore ways of using more vibrant colors, interpretive panels, and well-designed banners to make these buildings and their visitor experiences more compelling.		

4.4 Support the further development of arts villages.

Description / Rationale	Priority	Lead Organization
In association with the cities of Nehalem and Wheeler, the Tillamook County Arts Network, and the Economic Development Council explore actions to further develop the villages of Nehalem and Wheeler as the County’s twin, ‘Nehalem Bay Arts Villages’ . The process might include assistance with business and professional development, as well as fostering additional artist and business partnerships. The aim is to expand the cultural experiences (including culinary), as well as arts related products and businesses to form engaging cultural tourism destinations.		

Objective:

Develop events that address seasonality, attract new markets and energize local communities and partnerships.

Events are very important to destinations because they have the potential of attracting visitors, enhancing the lifestyle of residents, and encouraging visitors to stay longer, as well as generating income for communities during off-peak times. Consumer research conducted by TDM indicates that Tillamook County is not considered to be a place to attend major events. Additionally, during community consultations, stakeholders 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 four 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. And fourth they can be a catalyst for off-peak visitation.

Note: Visit Tillamook Coast staff should not have responsibility for the management and operation of any events.

5.1 Develop a regional events strategy and calendar of events.

Description / Rationale	Priority	Lead Organization
<p>In conjunction with the cultural community, develop an events strategy to create a balanced portfolio of events that address seasonality and other off-peak period needs. Where possible, the events should reflect the brand.</p> <p>The strategy should include a comprehensive inventory of events providing an understanding of range, product lifecycles, market readiness and critical operational issues. This should include a major events calendar to assist the scheduling of events and also identify opportunities and challenges for events to be expanded, extended and attract new markets.</p> <p>It should include developing several signature events that will underpin the brand and generate awareness and off-peak visitation. The strategy should:</p> <ul style="list-style-type: none"> ▪ Identify opportunities, weaknesses and gaps ▪ Optimize events to full potential for the city ▪ Capitalize on opportunities created by the brand strategy ▪ Consider transitioning some events to a more contemporary and visitor-oriented theme. ▪ Optimize event integration with the community, businesses and villages ▪ Address issues that will ensure the region is event-friendly for organizers 		

5.2 Support the development of a hallmark event that directly supports the brand.

Description / Rationale	Priority	Lead Organization
Investigate the feasibility of establishing at least one hallmark event . This might best be achieved by reinstating some of the events that have been popular in the past but have lapsed, e.g. Seafood and Jazz Festival. It may be possible to unify these events under the umbrella of an event theme, such as The Big Nature Festival. It could run over several weeks during the off-peak season and embrace music, seafood, nature for special interests, and local cultural programs.		

5.3 Support the development and marketing of events that are created for niche markets.

Description / Rationale	Priority	Lead Organization
The region has a wealth of activities and attributes that can appeal to niche markets and support events based on these special interests . These may include cultural programs, hobbies, culinary, heritage, sporting and ethnic interests. This will involve VTC taking a pro-active role in regard to sales and marketing to win sporting, and other events, to the region in the face of stiff competition.		

Objective:

Increase the desirability of the County’s villages as places inspiring people to visit, spend more and stay longer

The largest population center in the region is Tillamook (pop. 4,935). Throughout the region there are many small villages that provide a small town feel. Many of the villages are in close proximity to areas of major tourism interest, such as beaches, but lack walkable, concentrated leisure-shopping precincts to hold visitor interest and capture discretionary spending. The result is ‘leakage ‘of visitor dollars to competitor cities outside of the region. There is the need to encourage the adoption of urban design, landscaping and streetscaping principles that are inspiring and match the outstanding beauty of the natural environment.

At present the Tillamook Coast does not possess visitor hubs that are precincts capable of attracting, entertaining and dispersing visitors to other parts of the county, with the exception of Manzanita and Tillamook Cheese. 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. The enhancements in this section will contribute to extending length of stay of visitors, generating added income in villages and contribute to more economically sustainable communities.

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.

6.1 Support improvements to the attractiveness and sense of welcome at city gateways.

Description / Rationale	Priority	Lead Organization
There is a lack of attractive gateway and welcome zones for arriving visitors. 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.		

6.2 Introduce branded welcome signs at regional gateways.

Description / Rationale	Priority	Lead Organization
At some locations it is possible to enter the County without knowing you have arrived in the region. Introduce branded gateway welcome signs on north, south and west entry highways. In some cases these may be enhanced with landscaping.		

6.3 Improve the curb appeal of businesses along main thoroughfares and gateways.

Description / Rationale	Priority	Lead Organization
Many local businesses lack curb appeal . 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). 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. Signage.		

6.4 Encourage the beautification of Highway 101 between the Tillamook Cheese Factory and Downtown Tillamook.

Description / Rationale	Priority	Lead Organization
The connecting highway section between Tillamook Cheese Factory and Downtown Tillamook is in need of beautification of streetscapes and the appearance of businesses.		

6.5 Introduce a beautification program to improve the appearance of gateway communities.

Description / Rationale	Priority	Lead Organization
The gateway communities on Hwy 101 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. Introduce a community-based paint and beautification program aimed at assisting building owners along the main streets of Cloverdale and Hebo (and others if needed) to restore and reinvigorate their building facades. This action will aid both villages and the entire region by creating more positive first impressions.		

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.

6.6 Encourage the Tillamook County Arts Network to support a County ‘Art in Store Windows’ program.

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

6.7 Encourage the introduction of more pedestrian-friendly leisure precincts.

Description / Rationale	Priority	Lead Organization
There is a lack of pedestrian friendly, leisure/shopping precincts with an enticing street life with places for people to gather and spend time. In conjunction with County and city planners review the best ways to introduce more walking precincts that can become successful retail, dining and leisure destinations. Opportunities to achieve this may exist at Hoquarton Slough in Tillamook and Garibaldi docks. Where appropriate create pedestrian-friendly, relaxing gathering places that feature sidewalk or boardwalk dining and drinking, specialist shopping, live performances and distinctive public art.		

6.8 Encourage intensive landscaping and tree planting (not token) in most cities to better embrace the natural environment.

Description / Rationale	Priority	Lead Organization
Some of the coastal villages lack landscaping and a strongly integrated sense of place . There are very few precincts that include gathering places for people to spend time – and money! 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.		

Wayfinding

Wayfinding signage plays an important role in encouraging people to spend money by effectively guiding them through cities and towns to desired locations. They can also play an important role in encouraging people to spend money in one place rather than another. In addition to providing clear directions, signage is important for wayfinding, identity and the creation of attractions by linking venues to form coherent and attractive trails and touring Loops. Well designed, branded wayfinding can play an important role in communicating the brand and presenting a more unified region.

6.9 Support the design and implementation of a comprehensive, countywide wayfinding signage system to address visitor needs.

Description / Rationale	Priority	Lead Organization
Review both directional signs and wayfinding throughout the region to provide optimal guidance for tourists and residents, and present a unified destination. A		

Description / Rationale	Priority	Lead Organization
more comprehensive wayfinding system should be designed to better identify directions to attractions, public facilities and services, as well as points of interest.		

6.10 Support improvements to Downtown Tillamook wayfinding and visitor-focused signage.

Description / Rationale	Priority	Lead Organization
Ensure that the wayfinding signage in villages is focused on the needs of visitors unfamiliar with the area, as well as residents. The wayfinding needs in Downtown Tillamook are particularly acute and impact the rest of the region. The system is disjointed, cluttered and in some cases faded to the point of illegibility.		

Dining and Local Food

The Longwoods’ Research into the Oregon Coastal Visitor Market found that ‘exceptional culinary experiences’ are an activity of special interest. The Portland primary source market has a focus on fresh regional foods and a more imaginative and diverse north-west cuisine. Worldwide a desire to enjoy fresh caught seafood, preferably on or overlooking the water is a universal desire. The availability of quality dining experiences can have a significant influence on visitor satisfaction, business development and the generation of added income and employment for destinations.

6.11 Encourage the introduction of more dining options in waterside, forest and ocean view settings.

Description / Rationale	Priority	Lead Organization
There is the opportunity for more water view, forest or beach cafes , bars, food carts, brew pubs, espresso coffee shops and restaurants that excel in providing outstanding food and drink experiences.		

6.12 Attract and elevate the profile of high quality local restaurants and chefs.

Description / Rationale	Priority	Lead Organization
The region possesses few, if any, restaurants that can claim to be ‘destination restaurants’ . The reputation of destination restaurants can drive custom patronage and can become strongly associated with the places in which they reside. Attract and elevate in communications the profile of local restaurants and chefs that possess a strong image and drawing power with source markets.		

6.13 Optimize use of, and promote, the quality of local fresh produce, seafood and artisan foods.

Description / Rationale	Priority	Lead Organization
Encourage restaurants and food outlets to provide fresh local food experiences, such as ‘Catch of the day’ and ‘Farm to Table’, tasting promotions, farmers market and special events participation, etc. 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. There is		

Description / Rationale	Priority	Lead Organization
limited availability of local artisan and craft foods . Explore how to further develop and market local artisan foods and produce to enhance visitor experiences.		

6.14 Encourage outdoor seating at restaurants and cafes.

Description / Rationale	Priority	Lead Organization
Encourage the addition of outdoor seating opportunities at restaurants and coffee shops, wherever practical. It should particularly be encouraged when there are attractive outlooks toward natural settings, with the option of added protection and heating in winter weather.		

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, Cannon Beach and Seaside. Combined with this challenge is the need for more pedestrian friendly precincts. These “imported” dollars often provide the additional income to help local businesses remain financially viable - year-round. The Longwoods’ 2011 research conveys that as a Oregon Coast visitor experience, ‘shopping’ rates second only to ‘beach and waterfront’ as a visitor activity for overnight visitors.

6.15 Encourage the expansion of locally owned, boutique and specialty stores.

Description / Rationale	Priority	Lead Organization
Insufficient shopping options within the County. Encourage the expansion of locally owned, boutique and specialty stores of likely interest to both residents and visitors.		

6.16 Encourage collaboration and systems within villages to extend the opening hours of stores and restaurants.

Description / Rationale	Priority	Lead Organization
Opening hours of restaurants and retail outlets are inconsistent and not clearly publicized. Encourage collaboration and systems within villages to address customer needs. Where there is a chronic problem, consider removing the business from information sources.		

Objective:

Develop lodging and conference infrastructure that matches market needs and optimizes the natural environment.

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. 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. Capitalizing on this trend can lead to developments such as eco-resorts, retreats, spas and boutique lodging which attract visitors prepared to pay higher prices for compelling nature-based experiences.

7.1 Develop strategies to increase the number and type of lodging establishments, as well as improve the standards of some operators.

Description / Rationale	Priority	Lead Organization
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 the number and type of lodging establishments , and improve the standard of many existing properties. Develop a plan to increase investment in quality and diverse lodging, particularly those that embrace the natural environment. Subject to the feasibility of each location.		

7.2 Investigate the introduction of high quality, nature-based, ‘boutique’ lodging.

Description / Rationale	Priority	Lead Organization
Insufficient high quality, nature-based, ‘boutique’ lodging options. Research shows that for higher guest satisfaction, these should not 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 relative isolation. Investigate the introduction of high quality, nature-based, ‘boutique’ lodging possibly involving forest, river, mountain, or ocean view locations.		

7.3 Investigate the market feasibility of establishing and sustaining conference centers in various regional locations.

Description / Rationale	Priority	Lead Organization
During consultation phases the need for a conference center to cater to the small meeting market (under 200 delegates) was raised in various communities, notably Tillamook, Garibaldi and Pacific City. Representatives in each expressed an interest in developing conference venues. The market and operational feasibility in regard to each location should be conducted.		

7.4 Encourage the introduction of spa and wellness retreats.

Description / Rationale	Priority	Lead Organization
There are few resort standard spas or wellness retreats similar to those found at many competitive coastal destinations. The attractive local natural qualities are ideal for locating such enterprises. Investigate the introduction of spa and wellness retreats to provide a more comprehensive level of luxury services preferably in natural settings. Subject to a feasibility studies.		

7.5 Encourage the introduction of systems to ensure high standards of guest satisfaction at hotels, vacation homes and RV parks.

Description / Rationale	Priority	Lead Organization
An online review of online comments indicates that there are tired and run-down motels in the region. Where possible encourage the refurbishing or redevelopment. Some RV Parks including those in attractive locations have received mixed online customer reviews. Regularly monitor guest comments in regard to lodging and RV parks to ensure operators are aware of visitor sentiments and that visitor satisfaction is of a high standard.		

7.6 Encourage relevant RV parks to embark on a beautification, landscaping and tree planting programs.

Description / Rationale	Priority	Lead Organization
Some of the RV Parks are un-landscaped and look untidy. Again, this is reinforced by the online comments of past visitors. Encourage relevant RV parks to embark on a beautification, landscaping and tree planting program to more intensely match the beauty of the surrounding natural environment.		

7.7 Encourage State Parks and RV Parks to add more yurts and other forms of similar ‘luxury’ camping.

Description / Rationale	Priority	Lead Organization
The ‘luxury’ yurts and cabins in the State Parks are often fully booked 12 months in advance. There is clearly a need for more of this style of accommodation. Encourage State Parks, RV Parks and interested operators to add more yurts, cabins and other forms of similar ‘luxury’ camping in attractive natural locations.		

Objective:

Increase awareness and preference for the Tillamook Coast and its partners through the innovative marketing communications

Tillamook Coast’s marketing must be carefully integrated by aligning all online and off-line actions, including web marketing, collateral, social media, public relations, and other communications. When the Tillamook Coast brand platform is consistently, correctly and creatively conveyed to the right target audiences at the right time, it should trigger the desired emotions, appeal to customer logic, and encourage the required actions. An emphasis should be on generating off-peak visitation.

Marketing programs should be established each year in consultation with key partners and documented in a marketing plan that takes into account:

- A focus on priority and niche markets and their best product matches
- Capacity to generate off-peak visitation, increased spending and length of stay
- Increased total visitor nights, rather than simply increased numbers of visitors
- Geotourists who match the values of local residents

Mobile Reception

8.1 Pursue solutions to the poor cell phone service in conjunction with County leaders and partners.

Description / Rationale	Priority	Lead Organization
<p>Cell phone reception is almost non-existent in some parts of the County, including key coastal zones. This is not only an issue in regard to tourism information, but an important safety issue (accidents, tsunamis, fire, flooding). In a mobile-ready world, this shortcoming also prevents visitors from instantly connecting with information. Develop a coordinated approach to encourage improved mobile coverage in the County. Engage government, elected officials, first responders, tourism, community and business leaders. Evaluate the issues surrounding cell phone and Wi-Fi availability and pursue solutions in conjunction with these partners.</p>		

Integrated Marketing

8.2 Produce an annual marketing plan

Description / Rationale	Priority	Lead Organization
<p>Produce an annual Marketing Plan that reflects the County’s current priorities and market trends. This plan should include a comprehensive online marketing plan that integrates all digital marketing programs with defined goals and objectives. This should include an annual media plan and co-operative prospectus for partner involvement. The plan should also leverage co-operative opportunities with external organizations such as OCVA and Travel Oregon. It should also have a focus on boosting off-peak visitation.</p>		

8.3 Increase awareness and visitation through campaigns targeted at priority mass markets

Description / Rationale	Priority	Lead Organization
Develop integrated marketing campaigns featuring broadcast, print and digital media that are timed to address specific regional business needs, i.e. boost early summer visitation or generate off-peak business.		

8.4 Increase awareness and visitation through campaigns targeted at niche markets

Description / Rationale	Priority	Lead Organization
<p>Conduct cooperative marketing campaigns in conjunction with key partners to increase travel to the region, particularly during off-peak periods. These activities should be treated as “micro-campaigns” that optimize all tools and partnerships available. At times, these campaigns may be linked to special interest events, associations or affinity groups with an interest in the region. Ensure that detailed, easy to find information is available on the VTC web site. Target niche markets, may include:</p> <ul style="list-style-type: none"> ▪ Birders and wildlife watchers ▪ Cyclists ▪ Outdoor recreationists: kayakers, fishing, off-road ATVs, photographers ▪ Meetings and conventions ▪ Quilters ▪ Reunions, Weddings 		

Co-operative Marketing

A cooperative marketing approach will open opportunities for VTC through collaboration with partners within the region and with partners outside of the region, such as Travel Oregon, OCVA and other organizations that can provide leverage to reach special interest markets.

A co-operative marketing approach with internal partners will allow VTC to generate additional revenue, gain support to launch more campaigns and create greater impact for the region. It should be noted that this program, while potentially highly rewarding for VTC and its partners, can be time-consuming for staff. Prior to commencing this, the VTC must ensure sufficient staff resources are allocated. The process will involve program creation, sales, education of prospective participants, follow-up, managing participation of individuals, administration and financial management, and evaluation and reporting.

VTC should set the agenda for the marketing of the region and, in doing so, structure programs that provide opportunities to “come on board”. Villages from within the region should be dissuaded from launching independent advertising and promotional campaigns, which in many cases are ineffectual and can contribute toward fragmentation. VTC, on the other hand, should facilitate a range of co-operative marketing opportunities for members and villages that will assist everyone to reach their individual goals through collaboration.

8.5 Present a range of co-operative marketing opportunities for partners within the region.

Description / Rationale	Priority	Lead Organization
Visit Tillamook Coast has the opportunity to create a co-operative marketing prospectus that incorporates cost effective opportunities for partners to reach target audiences through VTC programs, such as advertising, both online and publications. It must be built around the marketing strategies devised by VTC and will allow members to stretch their marketing budgets by reaching their priority markets at a fraction of the cost of doing it alone.		

8.6 Participate in co-operative marketing opportunities with external partners.

Description / Rationale	Priority	Lead Organization
VTC and its partners have the opportunity to reach target audiences cost effectively and with increased impact by collaborating with Travel Oregon and Oregon Coast Visitors Association. These opportunities may include online marketing, advertising, trade shows, publications, and information distribution. Opportunities may be presented to collaborate with other organizations to cost effectively reach special interest markets.		

8.7 Work with Cities and Chambers to develop co-operative marketing agreements.

Description / Rationale	Priority	Lead Organization
TVC should develop with partners, particularly Cities and Chambers, agreements that present several marketing activities for one price in a package. Rather than attempt to sell a lot of small activities individually, they should be “bundled” according to the targeted markets and objectives to be addressed.		

8.8 Advertise business location and economic development opportunities to visitors.

Description / Rationale	Priority	Lead Organization
Consider the opportunities created by Tourism 2025 and nature tourism for the region’s economic development marketing. Communicate through tourism communications, i.e. brochures and websites, to encourage organizations and small businesses that are compatible with the Tillamook Coast’s tourism brand to relocate or start an operation in the County .		

Online Marketing

8.9 Establish a comprehensive Tillamook Coast tourism website.

Description / Rationale	Priority	Lead Organization
Maintain a mobile-ready (responsive design) tourism web site that is highly interactive and is the portal for regional marketing not only for visitor information, but also featuring a blog, deep information, community event calendar, and providing opportunities for partners to reach audiences. The site should be integrated with social media programs and Tillamook Coast’s YouTube channel.		

8.10 Improve the online presence of the County, Cities and tourism partners.

Description / Rationale	Priority	Lead Organization
The current web presence of some Cities and the County is not helping the region put its best foot forward. Work with Cities, the County and partners to improve the overall digital presence of the region and its businesses, which will not only aid the local visitor economy, but also attractively present the County as a place to live, work and invest. Similarly, the web presence of many tourism partners is of mixed standards, some are not commerce-ready, and not designed to “make the sale”. Introduce training, coaching and mentoring programs to assist interested organizations get to the next level in online marketing.		

8.11 Establish a comprehensive Search Engine Optimization strategy.

Description / Rationale	Priority	Lead Organization
Ensure that all aspects of the website are operating at optimal performance levels for search engine optimization . By focusing on specific keywords and phrases relevant to priority audiences, the region can achieve high rankings in Organic Search results. This should be supported by “Pay per Click” advertising. Re-marketing with Google Analytics will also allow the region, through cookie tracking, to follow-up with those who visit the website and have shown interest but may not have completed their actions, e.g. order a brochure.		

8.12 Optimize linking strategies.

Description / Rationale	Priority	Lead Organization
Maximize links to the Visit Tillamook Coast website from key external and internal partner sites. It is particularly important for local partners such as hotels, attractors and events to provide links from their web sites.		

8.13 Optimize the use of website and social media analytics.

Description / Rationale	Priority	Lead Organization
Conduct monthly analysis of the website and social media performance to set goals and objectives for marketing accountability. This should include its relationship to the online metrics of local partners. Consider providing key partners with a monthly report of responses allowing them to optimize their online marketing in association with Visit Tillamook Coast.		

8.14 Design and manage social media programs relevant to key markets.

Description / Rationale	Priority	Lead Organization
Activate a social media strategy to engage and convert target audiences. This should initially involve Facebook, Instagram, YouTube, and Twitter.		

8.15 Operate an online reputation management program.

Description / Rationale	Priority	Lead Organization
Develop an online reputation management program in close consultation with key industry partners to monitor, manage, provide feedback and follow-up to online comments and complaints. This should embrace Tripadvisor, Expedia, Yelp, Orbitz, Hotels.com and other review sites and online travel agencies.		

8.16 Promote the regional brand through the webcam at Cape Kiwanda.

Description / Rationale	Priority	Lead Organization
There are several webcams throughout the region. However the webcam at Cape Kiwanda is of most significance to the entire region because it is frequently shown on KGW, News Channel 8 in Portland. Because of its regional brand significance, support the upgrade and ongoing maintenance of the webcam at Cape Kiwanda. This should be used to convey the identity of the region by encouraging television announcers to use the term, “on the Tillamook Coast” when referring to Cape Kiwanda. Video from all webcams should be available through the VTC website.		

Publications

8.17 Design and distribute a Tillamook Coast Visitors Guide.

Description / Rationale	Priority	Lead Organization
Produce a regional visitor guide , initially based on the platform set by Tillamook Chamber of Commerce, to accurately reflect the brand and highlight key experience themes, lead assets, facilities and amenities. It should be supported by a series of quality maps focused on specific themes, such as trails, wildlife, and Three Capes Scenic Loop. Among the information priorities are: <ul style="list-style-type: none"> - Natural wonders, experiences, scenic lookout and wildlife viewing sites - Beach traditions - Water-side and oceanfront dining and lodging - Walking, water and cycling trails, plus available outfitters and guides. Consider paid advertising by appropriate local partners, but advertising should not dominate the design or presentation. A PDF version should be online.		

8.18 Design and distribute brochures for local villages.

Description / Rationale	Priority	Lead Organization
A brochure should be available for each relevant village to outline the local activities and services for visitors. The publication in some cases may include more than one village. These should be a companion to the regional guide . A template should be created, inspired by the regional brand, for each village to cost-effectively produce a quality publication.		

8.19 Design and distribute brochure/maps on specific nature themes.

Description / Rationale	Priority	Lead Organization
Design brochures with detailed maps specifically produced for: <ul style="list-style-type: none"> ▪ Three Capes Scenic Loop ▪ Wildlife ▪ Ten Wild Coastal Walks and Rides and Trails – on the coast and inland ▪ Tillamook Coast Adventures 		

8.20 Design high quality detailed tourist maps.

Description / Rationale	Priority	Lead Organization
Design high quality, detailed maps to convey and integrate the region’s assets , themes and sub-destinations, including travel times and distances. Importantly, maps should be designed with a strong visitor needs and experiential focus, e.g. wildlife, Three Capes Scenic Loop, trails, etc. Investigate the most appropriate mapping systems to integrate into the website.		

8.21 Produce meetings and conference planning collateral sales material.

Description / Rationale	Priority	Lead Organization
Research and produce a guide or manual for meeting planners. This should be funded through co-op partner participation. This information will help in servicing enquiries from planners . The information should also be available on the VTC website.		

Information Services

The easy availability and accessibility of visitor information is a strategic priority. This information must be attuned to the needs of visitors at critical points in their decision making. The region is at a disadvantage in optimizing the use of mobile phones because of the poor cell phone reception in many key parts of the County. Instead, the use of physical distribution outlets in the region will be required for the foreseeable future. Satisfying discerning visitors can make a difference in regard to selection of destinations, length of stay, repeat visits, and referrals to others.

8.22 Develop a strategy to address the availability of visitor information throughout the region.

Description / Rationale	Priority	Lead Organization
Create a visitor information strategy with Chambers of Commerce, Cities and partners to optimize the provision of in-person visitor information. The strategy should address the needs at southern, northern and eastern gateways. It should also consider expansion of the Tillamook Chamber’s kiosk outlets, identify seasonal outlets, and address training needs of staff where required. This should be combined with prominent presentation of local information for guests at hotel check-in and ensuring that frontline personnel are knowledgeable about the region. Review the placement and priority being given at lodging and RV parks to local and regional visitor information over		

information concerning elsewhere along the Coast. Also ensure distribution of VTC's brochures at critical Hwy 101 locations.		
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Earned Media

These activities include the positive coverage generated through promotional efforts other than advertising, i.e. paid participation. Earned media often refers to publicity, editorial features, and social media activities.

8.23 Develop a proactive public relations program.

Description / Rationale	Priority	Lead Organization
Public relations should play a prominent role in leading the marketing and community communications. A comprehensive and specific public relations strategy should be developed as an element of the overall marketing plan. Create an online public relations campaign aligned to a social media editorial calendar. Utilize the power of leading travel bloggers and print journalists. Distribute quarterly PR Web press releases online and activate a comprehensive media center within the website. Also assist Travel Oregon to publicize the region's key experience and events.		

8.24 Optimize information and publicity in third party media.

Description / Rationale	Priority	Lead Organization
The region relies on a wide variety of third party media , websites and publications to distribute information about experiences and facilities. There are several organizations such as Travel Oregon, OCVA, AAA and a variety of others that are in touch with prospective visitors. Review as many third party web sites, blogs and commercial guidebooks and travel publications (Lonely Planet, Fodor's, Frommer's, etc.) as possible to ensure that all references to the Tillamook Coast are as positive, accurate, and comprehensive as possible – and accurately reflect the brand. Updates and corrections should be communicated directly to each outlet. This may be managed by a capable volunteer.		

8.25 Create a crisis management plan.

Description / Rationale	Priority	Lead Organization
Maintain a crisis management plan for a wide range of contingencies that may negatively impact Tillamook Coast tourism and the brand. Visit Tillamook Coast should be integrated into the crisis management plans of the County, Cities, and other organizations, as appropriate.		

8.26 Develop and maintain a library of high quality images.

Description / Rationale	Priority	Lead Organization
The Tillamook Coast's marketing communications should be led by a small number of very high quality brand images or "hero" shots that convey the region's brand essence – <i>the natural choice</i> . Over the first three years, they should be used exclusively to break through the competitive 'clutter'. A range of secondary images should support these "hero" shots, but they should not		

Description / Rationale	Priority	Lead Organization
lead marketing initiatives. The people in the images must be active, credible and fun loving and be captured in natural, engaging and credible ways. Images should capture the Tillamook Coast's sense of discovery, freedom, inspiration, rejuvenation, romance, togetherness against a backdrop of natural wonders. High quality photography has the capacity to be one of the most potent and versatile communication elements in the region's brand toolkit. Photography should present its special sense of place and character.		

8.27 Develop and maintain a library of high quality videos.

Description / Rationale	Priority	Lead Organization
Create engaging, HD quality brand-related videos for online marketing through the website and the creation of a Tillamook Coast YouTube channel. Encourage residents and visitors to upload their relevant Tillamook Coast videos.		

Community and Partner Relations

The success of this strategy is dependent upon the support of key customer groups which include government, business, non-profit and residents. They should be regarded as customers because while many play an integral role in the local tourism industry, in many cases this is a discretionary role that does not compel them to support the organization and its operations. A customer focus will assist in ensuring a strong, relevant, and consistent relationship that is of maximum benefit to the development of tourism in the County.

8.28 Promote awareness and support for Tourism 2025 and the Regional Brand.

Description / Rationale	Priority	Lead Organization
Conduct a launch and outreach program to local stakeholder groups to generate awareness, understanding and support for Tourism 2025 and the regional brand. For tourism partners this should include providing a clear understanding of how they can be involved and benefit directly from VTC programs. This should be supported by production of a concise and attractive <i>Guide to Tourism 2025</i> and <i>The Tillamook Coast Brand At a Glance</i> publication.		

8.29 Implement a community relations strategy.

Description / Rationale	Priority	Lead Organization
Develop a community relations strategy to engage and inform residents of tourism programs, improvements, new developments and successes with the view to improving the region's image and building community pride. Keep residents informed of the economic and social benefits of tourism that Visit Tillamook County s generating.		

8.30 Foster a regional approach for local businesses to collaborate.

Description / Rationale	Priority	Lead Organization

Description / Rationale	Priority	Lead Organization
Most prospective (or actual) visitors do not distinguish between city or county boundaries. The strongest results will be obtained when stakeholders adopt a genuine region-wide collaborative approach . Maintain an active outreach program to engage all businesses and Cities. To facilitate this inclusive approach, conduct periodic briefings, meetings and networking events at a variety of locations. The objective should be to foster not only participation in Visit Tillamook Coast activities, but for organizations to network and collaborate independently between themselves.		

8.31 Encourage local residents to discover Tillamook Coast and surrounding area.

Description / Rationale	Priority	Lead Organization
In conjunction with local media, introduce residents to their city and to become ambassadors (on-line and off-line) for the area’s recreational opportunities, events and attractions.		

8.32 Demonstrate where possible how TLT dollars are benefiting the community.

Description / Rationale	Priority	Lead Organization
Where possible, publicize the use of lodging tax income when that revenue is used in visible community-related projects, e.g. a sign “Tillamook Coast Lodging Tax Dollars at Work” may be appropriate on trails, etc. These actions should be supported by local media coverage.		

Research

Gaining an understanding of visitors and residents, and their motivations, attitudes and behavior can lead to greatly improved results. It is important to constantly monitor visitor satisfaction, market trends and seek ways of improving the experiences that are extended to visitors. Insights into visitor needs and behavior can provide valuable information for future strategies, resource allocation and product development. As budgets allow, conduct research to obtain information relevant to:

- Demographics
- Economic impact
- Intention to return to the region
- Motivation for visiting
- Satisfaction with visit
- Sources of information used
- Spending
- Visitor behavior, trip planning and purchase decisions

8.33 Conduct and monitor ongoing research.

Description / Rationale	Priority	Lead Organization
The following studies should be conducted : <ul style="list-style-type: none"> ▪ County tourism economic impacts – analysis of Tourism Oregon Economic 		

Description / Rationale	Priority	Lead Organization
Impacts study every two years <ul style="list-style-type: none"> ▪ Brand awareness study – every two years ▪ Visitor intercept surveys - annual to assess visitor profiles, behavior and satisfaction ▪ The trends in lodging occupancy levels – monthly Smith Travel Research reports 		

8.34 Conduct visitor research for each major event on the Tillamook Coast.

Description / Rationale	Priority	Lead Organization
Initiate a research program to gain insights into the spending, economic impact, demographics, behavior, points of origin, motivations and satisfaction of visitors to major events and sports tournaments. It may be possible to conduct this in conjunction with Tillamook Bay Community College.		

8.35 Conduct ongoing visitor satisfaction research.

Description / Rationale	Priority	Lead Organization
Provide ongoing opportunities for visitors to offer feedback on their experiences by making a simple satisfaction survey or feedback form readily available in hard copy and online. Discuss visitor satisfaction results and feedback at every Board meeting.		

Objective:

Establish professional development and networking programs

Tourism success demands the ability to not only deliver outstanding visitor experiences to increasingly discerning customers, but to simultaneously conduct business in a very crowded, noisy and fast changing world. Those destinations and businesses that foster a continuous learning culture and recognize the value of training and skills development are more likely to be more profitable. To transition away from simply selling a product, such as a hotel room or meal, to presenting engaging experiences is fundamental to building the Tillamook Coast brand and increasing regional prosperity.

Professional Development

Destination programs that focus exclusively on attracting more visitors and do not address the quality of visitor experiences or business management are likely to encounter less than optimal performance and fail to maximize the benefits from tourism. Developing a great destination brand involves consistently delivering on your Destination Promise, and this starts with the management and staff involved at the visitor interface – it’s a culture. This culture begins with a commitment from senior management and owners and should filter through all visitor touchpoints to consistently exceed customer expectations. Achieving this requires enhanced business and marketing skills, as well as delivering outstanding quality and comprehensive knowledge of the region’s experience for the enjoyment of guests.

9.1 Create a professional development program for partner managers and staff.

Description / Rationale	Priority	Lead Organization
Consider developing a professional development program in conjunction with Tillamook Bay Community College for improving executive and business skills of owners, managers and staff. These programs should be accessible, affordable and practical in terms of timing and focus. Identify partner training and education needs in regard to tourism and destination development. Programs could include: tourism 101, business management, internet / social media marketing, cost control for lodging and restaurants, tourism marketing and sales, experience design and delivery, and customer service. It may be desirable to make these mobile outreach programs in some cases to eliminate as many barriers to successfully reaching partners as possible.		

9.2 Encourage partners to adopt and deploy geotourism practices.

Description / Rationale	Priority	Lead Organization
To support the long-term viability of the region’s nature tourism brand, conduct outreach, training and coaching programs to assist partners in adopting and deploying geotourism practices . This should follow the regional adoption of geotourism principles and establishing a Geotourism Stewardship Council.		

9.3 Increase the product knowledge of regional partners and staff.

Description / Rationale	Priority	Lead Organization
Ensure that front-line tourism and hospitality staff, as well as executives, are knowledgeable about regional attractions , services and events to aid cross-selling, visitor satisfaction and optimize visitor length of stay and spending. Conduct a review of service training needs and develop a program appropriate to Tillamook County using the Oregon Q program as a platform. This may also be addressed in conjunction with partners and through sales visits, information and familiarizations. It may be possible to address through a volunteer trainer who visits partner businesses.		

9.4 Conduct regional outreach and orientation briefings.

Description / Rationale	Priority	Lead Organization
VTC will host outreach briefings and orientations where partners, including Cities, can obtain updates on regional programs as well as receive information on a range of professional development issues that will assist them in their business. It should also provide opportunities for participation in VTC marketing.		

Networking

Facilitate networking opportunities for partners to meet each other from across the region, as well as meet other members of the local tourism industry. The objective is to enable them to explore joint business opportunities, exchange ideas and experiences, and to encourage cross marketing.

9.5 Organize a regional trade show, seminar and networking event

Description / Rationale	Priority	Lead Organization
Organize an annual regional trade show, seminar and networking event where partners can meet, network and exhibit. This not only provides the forum for participants to meet and explore the offerings of other operators, but for tourism and hospitality personnel and residents to discover the range of local tourism products and employment opportunities within the region. Tourism Week in May might be an opportune time for the event.		

Objective:

Establish partnerships and enhancement programs that are recognized for their innovation, collaboration and effectiveness.

Successful tourism requires collaboration and a seamless delivery of experiences between public, private and nonprofit organizations, and visitors. Optimizing its benefits will require the long-term advocacy, support, funding and collaboration of many individuals and organizations within the Tillamook Coast and further afield. Tourism on the Tillamook Coast is entering a period of transition where there is the need to introduce new attractors and experiences, enter new markets and unify regional stakeholders. The region’s tourism performance will be most effective through partnerships and concerted collaborative efforts on the part of all stakeholders. A united approach is essential for benefits to flow to all partners. Visit Tillamook Coast must assert itself as the leader for the tourism industry and as a valued marketing partner for all of its local tourism stakeholders.

Product Experience Partnerships

In order to develop an expanded range of new products and establish them in marketing channels, Visit Tillamook Coast should introduce Product Experience Partnerships for priority experiences. It is envisioned that these partnerships will provide a mechanism for tourism, nonprofit, association, government and business organizations to collaborate closely to attain their shared vision. This will enable these organizations to be successful much more quickly and more cost effectively than if they were to work independently.

The objectives of the Product Experience Partnerships include:

- Leverage of resources, expertise and energy
- The development of new tourism products
- The delivery of outstanding visitor experiences
- Increasing the competitiveness of each partner and the County in specific markets
- Increasing visitor arrivals and extending their length of stay
- Improving the tourism performance of each member entity

The role of the Product Experience Partnerships is to create self-sustaining networks of responsible tourism providers marketing under unifying themes. While the Product Experience Partnerships will initially be focused on a limited number of key entities, it is envisioned that, as appropriate, the Partnerships will be expanded to embrace other entities with an interest in developing, packaging and marketing those themes. The first objective is to get the product right.

10.1 Establish Product Experience Partnerships.

Description / Rationale	Priority	Lead Organization
Tillamook Coast should introduce Product Experience Partnerships to aid development of key regional assets . These Partnerships will provide a mechanism for tourism, nonprofit, association, government and business organizations to collaborate closely to attain their shared vision.		

10.2 Establish a ‘Nature and Three Capes Scenic Loop Partnership’.

Description / Rationale	Priority	Lead Organization
The region’s most popular attractions are nature-based and the most popular “product” is the Three Capes Scenic Loop . The Loop is dependent on multiple attractions with multiple “owners’ who, at the moment, are not actively collaborating in the management and marketing of the Loop as a unified attraction or branded product. The Partnership should focus on issues to manage and market visitor experiences along the Loop and ensure an optimal level of integration with nearby villages and businesses.		

10.3 Establish a ‘Beach Experiences Partnership’.

Description / Rationale	Priority	Lead Organization
One of the region’s most important drivers of visitor demand relate to beach experiences . Stakeholders include Cities, County, lodging and other businesses. The Partnership should focus on issues to manage and market beach experiences, as well as bring strong focus to product development initiatives.		

10.4 Create outreach programs to the cultural community to establish partnerships with tourism and event organizers.

Description / Rationale	Priority	Lead Organization
The contribution that the cultural community can make to regional tourism is not being fully exploited. Create outreach programs to the region’s cultural community to establish partnerships, integrate information, recruit their skills for local attraction development and enhancement, engage in more imaginative placemaking programs, and provide opportunities for local artists, designers, landscape designers and performers to gain exposure and sales. The objective should be to establish a Cultural Product Experience Partnership once sufficient products have been established.		

Tourism Enhancement Fund

Fundamental to the success of *Tourism 2025* is the introduction of enhanced tourism infrastructure, quality visitor experiences, marketing and attractors that can drive tourism demand. To address this need, Visit Tillamook Coast will establish a Tourism Enhancement Fund to provide grants and investments for appropriate tourism development initiatives.

10.5 Consider establishing a Tourism Grants Program.

Description / Rationale	Priority	Lead Organization
Consider establishing a grant program to provide assistance for approved marketing and product development projects that are aligned with the VTC objectives and regional brand. A set of criteria and weighting for evaluating applications should be established. Where appropriate, the criteria should encourage applicants to generate funding from other sources to leverage the Partnership funds. Consideration should also be given to establishing grant programs directed toward: The Product Experience Partnerships are eligible for grants for specific		

Description / Rationale	Priority	Lead Organization
<p>development and marketing initiatives.</p> <p>Selected major events and festivals may be eligible for assistance in their development phase through marketing. This includes special interest markets, where there is strong tourism potential to draw from outside of a fifty mile radius and where attendance will result in increased overnight stays.</p>		

Appendix 1.

Tillamook County Travel Impacts

Analysis of the visitor spending impacts in Tillamook County, prepared for Oregon Tourism Commission (OTC) by Dean Runyan Associates, provide valuable insights into visitor spending and or the economic influence of tourism. The Oregon Travel Impacts 2002-2012 (OTC) provide the following insights:

	Tillamook	Lincoln	Clatsop
Visitor Spending Impacts (2012p)			
▪ Amount of Visitor Spending that supports 1 Job	\$94,410	79,160	85,510
▪ Employee Earnings generated by \$100 Visitor Spending	\$31	\$28	\$28
▪ Local & State Tax Revenues generated by \$100 Visitor Spending	\$3.10	\$4.80	\$4.40
Visitor Volume (2012p)			
▪ Additional visitor spending if each resident household encouraged one additional overnight visitor (in thousands)	\$1,214	4,026	2,915
▪ Additional employment if each resident household encouraged one additional overnight visitor	13	51	34
Visitor Shares			
Travel Share of Total Employment (2011)*	16.1%	21.2%	20.8%
Overnight Visitor Day Share of Resident Population (2012p)**	25.2%	24.9%	24.2%

*Source: Bureau of Economic Analysis and Bureau of Labor Statistics. Estimates by Dean Runyan Associates.

**Annual Overnight Visitor Days divided by (Resident Population)*365.

Visitor Spending by Items Purchased

Spending \$ million	2002	2004	2006	2008	2010	2011	2012p
Accommodation	17.2	18.5	32.7	34.3	35.4	34.6	36.4
Food & Beverages	33.1	35.3	47.1	48.9	51.1	51.1	54.3
Food stores	18.0	19.6	22.4	24.1	23.4	24.1	25.0
Ground Transport & Fuel	7.2	9.5	14.8	17.5	15.2	17.3	17.7
Art, Recreation, Entertainment	22.5	23.3	30.7	30.5	30.2	29.6	30.9
Shopping	25.1	24.7	29.8	27.8	28.2	27.9	28.9
Destination Spending	123.0	130.9	177.5	183.2	183.5	184.5	193.1

Table##

Source: Oregon Travel Impacts 1991-2012, Oregon Tourism Commission

Visitor Spending by Type of Traveler Accommodation

Spending \$ million	2002	2004	2006	2008	2010	2011	2012p
All Overnight	62.4	67.1	98.1	107.1	107.4	107.6	112.9
Hotel, Motel, B&B	24.8	26.1	53.9	59.9	62.0	60.9	65.3
Private Home (VFR)	3.7	4.0	4.4	4.7	4.7	4.9	5.2
Other Overnight	33.9	37.1	39.8	40.8	40.8	41.9	42.5
Campground	24.2	26.5	28.3	28.6	28.6	29.1	29.5
Vacation Home	9.7	10.6	11.5	12.2	12.2	12.7	12.9
Day Travel	60.6	63.7	79.5	76.0	76.0	76.9	80.2
Spending at Destination	123.0	130.9	177.5	183.5	183.5	184.5	193.1

Table XX
Source: Oregon Travel Impacts 1991-2012, Oregon Tourism Commission

Tax Revenues Generated by Visitor Spending

Spending \$ million	2002	2004	2006	2008	2010	2011	2012p
Local Taxes	0.6	0.8	1.2	1.0	1.0	1.1	1.1
State Taxes	2.6	2.9	4.0	4.2	4.1	4.6	4.8
Local and State Taxes	3.2	3.7	5.2	5.2	5.1	5.6	5.9

Table XX
Source: Oregon Travel Impacts 1991-2012, Oregon Tourism Commission

Visitor-Generated Employment by Industry Sector (Jobs)

Jobs Created	2002	2004	2006	2008	2010	2011	2012p
Accommodation & Food	1,000	970		1,290	1,270	1,270	1,240
Arts, Recreation, Entertainment	350	360		460	460	480	440
Retail	330	340		390	340	340	340
Ground Transport	20	20		30	20	20	20
Other Travel	20	20		10	10	10	10
Total Direct Employment	1,710	1,710		2,170	2,100	2,120	2,050

Table ##
Source: Oregon Travel Impacts 1991-2012, Oregon Tourism Commission
*Other Travel includes resident transportation to other Oregon destinations, and travel agencies.
**Retail includes gasoline.

Expenditures by Individual Overnight Visitors

	Travel Party		Per Person		Party	Length of
	Per Day	Per Trip	Per Day	Per Trip	Size	Stay (Nights)
Hotel, motel	\$237	\$394	\$97	\$161	2.5	1.7
Private Home	\$51	\$132	\$20	\$52	2.6	2.6
Other Overnight	\$97	\$277	\$29	\$84	3.3	2.8
All Overnight	\$139	\$315	\$47	\$112	2.9	2.3

Table ##

Source: Oregon Travel Impacts 1991-2012, Oregon Tourism Commission

Visitor Nights Generated

	Person Nights (000)			Party Nights (000)		
	2010	2011	2012	2010	2011	2012
Hotel, motel	661	636	676	269	259	276
Private Home	247	246	258	96	96	101
Other Overnight	1,464	1,444	1,444	443	437	437
All Overnight	2,372	2,326	2,378	809	793	813

Table ##

Source: Oregon Travel Impacts 1991-2012, Oregon Tourism Commission

Key Points

- Visitors in Tillamook County generated 2,37 million visitor nights from 1.01 visitors with an average length of stay of 2.35 days, and spent \$112.9 million.
- Overall spending by visitors to Tillamook County grew only by 8.1% between 2006 and 2012.
- Spending by visitors on accommodation only grew by 10.2% between 2006 and 2012.
- Direct employment in tourism in Tillamook County is most evident through the Accommodation & Food sectors which were responsible for directly generating and sustaining 1,240 jobs.
- Visitors in Tillamook County staying in Hotel & Motels spent \$97 per person, per day, while visitors staying in private homes spent \$20 per day and Other Overnights Stays spent \$29 per person.

The following market share calculations have been developed on comparisons between Tillamook County and Lincoln County (including Lincoln City and Newport) and Clatsop County (including Astoria, Warrenton, Seaside and Cannon Beach).

Market Share – Volume and Spending

Visitor Nights (000)

	2010	2011	2012p	Market Share 2012
Tillamook	2,372	2,326	2,378	24.2%
Lincoln	4,176	4,126	4,147	42.4%
Clatsop	3,177	3,171	3,271	33.4%

Table ## Source: Oregon Travel Impacts 1991-2012p, Oregon Tourism Commission

Market Share – Visitor Volume (000)

	2010	2011	2012p	Market Share 2012
Tillamook	1,003	982	1,010	24.3
Lincoln	1,725	1,705	1,716	41.4
Clatsop	1,368	1,367	1,419	34.3

Table ## Source: Oregon Travel Impacts 1991-2012p, Oregon Tourism Commission

Market Share – Day Visitor Spending (\$million)

	2010	2011	2012p	Market Share 2012
Tillamook	76.0	76.9	80.2	24.8%
Lincoln	86.0	88.0	89.6	27.7%
Clatsop	141.3	145.7	153.1	47.5%

Table ## Source: Oregon Travel Impacts 1991-2012p, Oregon Tourism Commission

Market Share – Per Person Spending by Overnight Visitors

	Spending Per Person / Per Day	Spending Per Person / Per Trip
Tillamook	\$47	112
Lincoln	\$84	204
Clatsop	\$83	191

Table ## Source: Oregon Travel Impacts 1991-2012p, Oregon Tourism Commission

Market Share – Spending by Type of Accommodation

Market Share – Campground Visitor Spending (\$ million)

	2010	2011	2012p	Market Share 2012
Tillamook	28.6	29.1	29.5	32.6%
Lincoln	37.9	38.3	38.8	42.8%
Clatsop	21.7	22.1	22.4	24.6%

Table ## Source: Oregon Travel Impacts 1991-2012p, Oregon Tourism Commission

Market Share – Hotel / Motel Visitor Spending (\$ million)

	2010	2011	2012p	Market Share 2012
Tillamook	62.0	60.9	65.3	11.8%
Lincoln	258.0	263.2	268.0	48.4%
Clatsop	200.1	207.3	220.0	39.8%

Table ##

Source: Oregon Travel Impacts 1991-2012p, Oregon Tourism Commission

Market Share – Vacation Home Visitor Spending (\$ million)

	2010	2011	2012p	Market Share 2012
Tillamook	12.2	12.7	12.9	26.3%
Lincoln	21.4	22.2	22.5	45.9%
Clatsop	12.9	13.4	13.6	27.8%

Table ## Source: Oregon Travel Impacts 1991-2012p, Oregon Tourism Commission

Key Points

- Lincoln County (42.4%) generated the highest market share in terms of most visitor nights compared to Clatsop (33.4%) and Tillamook Counties (24.2%).
- Lincoln County (41.4%) generated the highest market share in terms of visitor volume compared to Clatsop (34.3%) and Tillamook Counties (24.3%).
- Lincoln County (27.7%) generated the highest market share in terms of most visitor nights compared to Clatsop (47.5%) and Tillamook Counties (24.8%).
- Tillamook County (\$47) generated the lowest daily spending by per visitor per day compared to Clatsop (\$83) and Lincoln Counties (\$84).
- Lincoln County (48.4%) generated the highest market share in terms hotel/motel visitor spending compared to Clatsop (39.8%) and Tillamook Counties (11.8%).
- Lincoln County (45.9%) generated the highest market share in terms vacation home visitor spending compared to Clatsop (27.8%) and Tillamook Counties (26.3%).

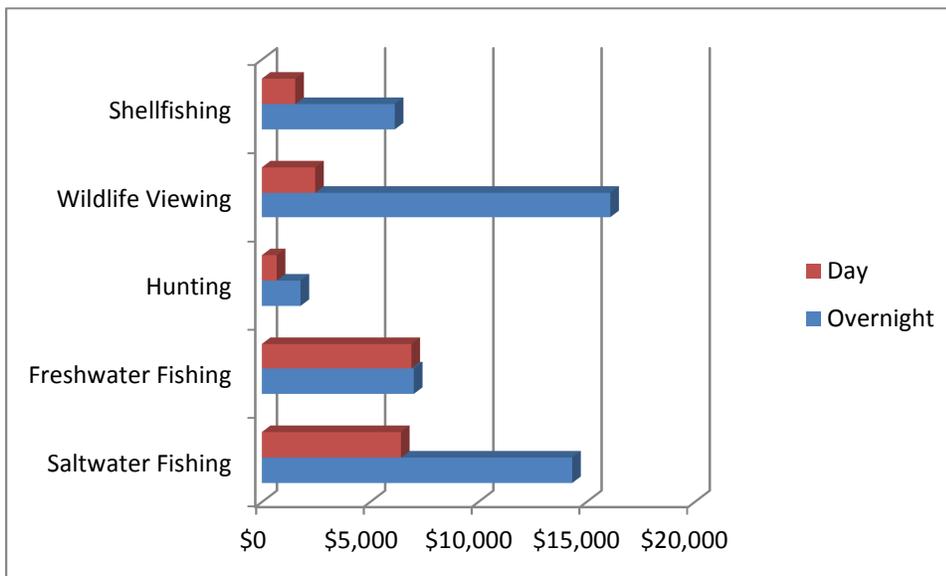
Fishing, Shellfishing, Hunting and Wildlife Viewing

The diverse landscape of Tillamook County provides many opportunities for outdoor recreation opportunities. The following table show expenditures generated from freshwater fishing, saltwater fishing, shellfishing, hunting, and wildlife viewing. It shows travel-generated expenditures by activity including the total travel spending made by Oregon residents and nonresidents in Tillamook County and three other coastal counties.

These statistics have been sourced from the “*Fishing, Hunting, Wildlife Viewing, and Shellfishing in Oregon, 2008 State and County Expenditure Estimates*” produced by Dean Runyan Associates which was prepared for Oregon Department of Fish and Wildlife. This study is the result of a comprehensive effort by the Oregon Department of Fish and Wildlife (ODFW) and Travel Oregon to describe hunting, fishing, wildlife viewing, and shellfish harvest participation and related expenditures made throughout Oregon and the state’s travel regions and counties.

Outdoor Recreation Expenditures in Tillamook County (000)

	Overnight	Day	Total
Saltwater Fishing	\$14,344	\$6,428	\$20,772
Freshwater Fishing	\$7,026	\$6,913	\$13,939
Hunting	\$1,789	\$688	\$2,477
Wildlife Viewing	\$16,104	\$2,465	\$18,569
Shellfishing	\$6,145	\$1,545	\$7,789



Outdoor Recreation Competitors (\$ 000)

	Shellfishing	Fishing	Hunting	Wildlife Viewing	Combined Activities
Tillamook	\$7,689	\$34,710	\$2,477	\$18,569	\$63,446
Lincoln	\$7,660	\$32,478	\$1,607	\$53,229	\$94,974
Clatsop	\$5,661	\$9,693	\$2,313	\$55,481	\$73,147

Primary Purpose of Trip Among Participants in Oregon 2008

	Overnight	Day Visitors	Total	Local Recreation
Wildlife Viewers	15.7%	20.5%	17.4%	22.5%
Freshwater Anglers	63.7%	87.4%	74.9%	93.1%
Saltwater Anglers	80.5%	87.1%	83.4%	94.2%
Shellfishers	39.6%	74.3%	56.0%	89.5%
Hunters	91.5%	90.4%	91.1%	93.3%

Note: Local Recreation represents local trips of less than 50 miles (one-way).

Source: Dean Runyan Associates

Wildlife Viewing Trips by Type of Wildlife Viewed (in Thousands), 2008

	Birds	Land Animals	Marine Mammals	Tidepools	Fish	Reptiles	Other	Total
North Coast								
Overnight	259	192	87	139	86	34	0	797
Day (50+ miles)	120	104	28	28	40	16	8	344
Local (under 50 miles)	49	46	17	17	16	3	4	153
Central Coast								
Overnight	194	162	117	81	64	11	4	632
Day (50+ miles)	139	82	67	67	29	5	0	388
Local (under 50 miles)	111	63	44	40	36	4	4	301

Note: Local Recreation represents local trips of less than 50 miles (one-way).

Source: Dean Runyan Associates

Days of Participation by Type of Activity (in Thousands), 2008

	Shellfish	Saltwater Fishing	Freshwater Fishing	Hunting	Wildlife	Total
North Coast						
Overnight	282	319	295	103	2392	3391
Day (50+ miles)	72	103	216	50	344	784
Local (under 50 miles)	64	7	101	37	153	361
Central Coast						
Overnight	257	343	398	68	1896	2962
Day (50+ miles)	64	128	194	23	388	799
Local (under 50 miles)	54	12	132	27	301	526

Key Points

- Tillamook County generated \$63.4 million from tourists engaged in these activities in 2008.
- Saltwater fishing (\$14.3 mill) and freshwater fishing (\$16.1 mill.) were the most popular of the activities in Tillamook County.
- Compared to Lincoln and Clatsop Counties, Tillamook County has a higher share of the shellfishing and fishing markets.
- Lincoln City (\$94.9 mill.) displays the greatest all around strength for all of these activities than either Clatsop (\$73.1 mill.) or Tillamook (\$63.4 mill.) Counties.
- North Coast experienced the most trips for Fishing, Tidepools, Birdwatching and viewing Land Animals, but Central Coast experienced the most trips for Marine Animals.
- The number of days participating in Wildlife viewing was greatest on the North Coast

Nature-based tourism represents a competitive advantage for the Tillamook Coast and will be pivotal to the region's future development. Nature-based tourism is tourism that relies on experiences directly related to the natural environment. It is not a niche market simply catering to avid nature enthusiasts.

Nature-based experiences can be passive or physically demanding, and may often be a combination. Visitors can relax by enjoying the passive experiences of lying on a beach, taking a scenic drive or quietly watching wildlife. Nature also provides the opportunity to be engaged in more active and strenuous activities like kayaking, parasailing, rock-climbing or deep-sea fishing. It may also take the form of a beach or lakeside event or concert. Getting back to nature sometimes includes relaxing and soaking up the atmosphere one day, and being active the next. An aspect of the natural environment is an ever present "star" of the experience. It may be an essential part of the experience, or may simply enhance an activity by providing an attractive backdrop. Getting back to nature helps visitors relax and can be spiritually enriching.

Nature is an ever-present component of the Tillamook Coast tourism experiences. The region's scenic coastline includes four bays and nine rivers. Situated along the coast are two State Parks, six County Parks, four National Wildlife Refuges in a compact area with unspoiled beaches, capes, waterfalls, estuaries, raging rivers, sea stacks and vast mountain rainforests. The area features abundant wildlife including bears, mountain lion, whales, sea lions, eagles, elk, and hundreds of bird species including puffins. The County population is 25,250 with many living in coastal villages in idyllic natural settings where visitors can enjoy a slower-paced small town feel.

Despite these considerable assets, there are many access, experience, service and infrastructure gaps around many of them. The future development of the Tillamook Coast as a competitive nature-based tourism destination will be limited if these gaps are not addressed, no matter how attractive the natural environment.

In many cases, the existing nature-related services and outfitters are sometimes difficult to discover, access or find information about.

There is a growing demand worldwide for authentic, high quality nature experiences that are immersive, interactive, a contrast to everyday life, and deliver on expectations, including:

- Interpretation of natural, heritage and cultural sites
- Wildlife viewing
- Iconic short and distant walks
- Lodging and dining that is embraced by nature
- Adventure activities

What are the Success Factors for Nature Tourism?

It is important the Tillamook Coast's tourism assets 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 worldwide. The Tillamook Coast is in an ideal position to meet the requirements to become a leading nature-tourism destination. The top five drivers for nature tourism success are:

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 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.

Visitors from around the world are looking for more than just another image for their Facebook or Instagram page of where they have been. They want a truly immersive experience. It's now no longer about where they've been, it's now about what they felt, thought, remembered, tasted and heard while they were there. There has been a transition away from product or commodity mindsets among tourism operators and destination managers to one of experiential focus, by streamlining business, customer and marketing processes.

A tourism product is what you buy.

A tourism experience is what you remember.

Important to moving beyond the commodity and product mindset involves changing one's thinking that a business is merely performing a function or service e.g. a meal or a bed for the night. The transition to an experiential focus from a product or commodity focus isn't too difficult. Consider:

- Which lodging establishments offer more than a place to stay?
- How can visitors be engaged, stimulated and actively involved in memorable ways?
- How do businesses help visitors connect to the local area's distinctive strengths?
- How does the local experience compare to similar places and operations in the USA and around the world?
- Do marketing materials convey compelling experiences or product details?
- Are experiences 'bundled' providing complementary products to like-minded visitors?

The diverse topography of the Tillamook Coast makes it an ideal location for soft adventure activities. The region already has a number of soft adventure operators and commercial 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 seasonal) businesses that do not have broad distribution and sale of their products. However, when their role in the visitor experience is fully understood & acknowledged, they do represent many important benefits for 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.

Having something to do for a half or full day, rather than say an hour, can mean the difference between a visitor either driving on 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 visitors 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 Chamber's marketing
- Increased economic and employment opportunities for the community
- A more personalized and authentic experience for visitors
- 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 use of 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 a fascinating and 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.

Tourism has the power to significantly change the character, environment, economic and social well-being of places. Global economists forecast continued tourism growth worldwide at between 3-6% annually, depending upon the destination and its visitor source markets. This accelerating growth may cause negative impacts in some locations.

This rapid pace of change, increasing concerns for the sustainability of the economic, natural, and cultural environments of places, and a desire to ensure that tourism provides optimum benefits to communities has led the worldwide movement toward more responsible and sustainable tourism practices. The trend has led to a number of initiatives, variously called geotourism, eco-tourism, nature tourism, sustainable tourism, community-based tourism, and Tourism 2.0.

Tillamook Coast research identified that residents are concerned about the preservation of the natural environment and their way of life, yet there is also desire to increase the development of tourism. Balancing these potentially conflicting goals will require a sustainable approach toward tourism management in the region. This approach is aligned with the indicators developed by the Tillamook County Futures Council.

The term geotourism was given impetus through the research conducted by the National Geographic Society. 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”⁴

The characteristics and values of geo-tourists were derived from research conducted by National Geographic Traveler (NGT) and the Travel Industry Association of America (TIA). The principles of geotourism have now been adopted in thirty-nine countries and are used to guide their sustainable tourism programs. These practices and principles have direct relevance to the Tillamook Coast.

The general perception is that *sustainable tourism* is about little more than taking care of the natural environment. What is frequently overlooked is that it’s also about managing tourism’s social (e.g. sense of place, traffic, and congestion) and economic impacts (such as quality employment, seasonality, visitor spending) on a location and its enterprises. The challenge for the Tillamook Coast is to encourage tourism in ways that will produce economic and social benefits while also protecting and enhancing the region’s unspoiled natural environment and the quality of life.

Triple Bottom Line

National Geographical Society has provided destinations with the tools to address sustainable tourism through its geotourism programs. By adopting and activating geotourism practices, destinations are in a better position to achieve a healthy balance from their tourism development

⁴ National Geographic: <http://travel.nationalgeographic.com/travel/sustainable/>

across the desired environmental, economic, social and cultural outcomes. This is referred to as the “triple bottom line”. This triple bottom line for geotourism frequently involves:

1. *Community sustainability* with a focus on outcomes that impact local communities, and their lifestyles, sense of place and character, visitor flows, and avoiding any form of exploitation.
2. *Economic sustainability* concerned with the viability of communities, business mix and the provision of stable employment. It relates directly to seasonality, yield, innovative product development, dispersal of visitors, and professional development.
3. *Environmental sustainability* through conserving and managing resources, especially those that are not renewable. It may extend to actions that minimize pollution of air, land and water, and to conserve biological diversity and natural heritage.

Geotourism Values

Geotourists are a perfect match for the Tillamook Coast 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. Among the beliefs expressed by geotourists:

- Over half of American travelers think it’s harder to find unspoiled places than it used to be.
- Almost three quarters don’t want their visits to harm the environment at the places they visit.
- 71% of this traveling public 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.
- 53% consider their travel experience is better when they have learned about their destination’s customs, geography, and culture.

This linkage is revealed when we consider the most common values stated by the hundreds of participants in the Tillamook Coast interviews, workshops and surveys when compared with the geotourism values, as shown in the following table:

Geotourism Values	Local/County Values
✓ Authenticity	✓ Authenticity
✓ Respect for environment	✓ Respect for environment
✓ Concern for community well being	✓ Concern for community well being
✓ Against over-development	✓ Against over-development
✓ Seek distinct local character	✓ Retain local character
✓ Preserve the natural environment	✓ Preserve the natural environment

Source: Geotourism: The New Trend In Travel; Prepared by Travel Industry Association of America for National Geographic Traveler; 2003

Geotourist Profiles

The segmentation process applied to American travelers by the National Geographic Study identified eight market segments each with unique Geotourism related profiles. They offer varying degrees of potential for geotourism behavior and market prospects. Of these, four segments were identified as being of greatest relevance to the Tillamook Coast.

1. Urban Sophisticates
2. Geo Savvys
3. Good Citizens
4. Outdoor Sportsmen

The target markets for the Tillamook Coast should be those individuals who display the same characteristics as Urban Sophisticates and Geo Savvy. Good Citizens could provide additional opportunities but the other two segments possess special relevance to the Tillamook Coast and its nature-based experience. The following provides a summary of these four priority segments.

Urban Sophisticates (21.2 million in USA)

Urban Sophisticates are the most concerned of all the groups about living in harmony with nature (88%), and historic sites (67%) to preserve and protect them; and being willing to pay a premium to visit places that control access (28%). More than 34 percent of Urban Sophisticates report that tourism has a dominant role in the local economy of the area in which they reside. Above-average shares hold positive views about tourism, feeling it enhances the strength and vitality of their local economies (54%), while also improving the image of their local area (54%). A much larger segment of the population than the Geo-Savvy group, the actions, attitudes and opinions of Urban Sophisticates are bound to have a greater impact on the travel market. However, these two groups closely correlate on behavior and opinions in several areas and hence can be viewed as one very large market segment in many cases.

Geo Savvy (16.3 million)

What really distinguishes Geo-Savvys from similar segments particularly Urban Sophisticates is their well-above average interest in environmentally-oriented travel. It is more important to Geo-Savvys than to any other cluster that they not damage the environment when they travel (84%). They are nearly three times above average in enjoying primitive travel to wilderness areas (59%). They are twice as likely as the average to like outdoor adventure travel offering challenge, risk and excitement (57%) or to travel to remote locales (66%). Geo-Savvys' at-home behaviors also reflect these environment attitudes.

They are the most likely of all segments to enjoy outdoor recreation (73%) and sports (63%) in their local area, read or watch shows about nature and the environment (61%); donate money to nature/environmental organizations (37%), subscribe to nature/environmental publications (35%), or to be a member of an environmental, development or human rights group (30%) or a nature club (18%). The majority (81%) believe their experience is better when their destination preserves its

natural, historic, and cultural sites and attractions, the highest share of all segments. Three quarters (73%) say that the educational experience provided by travel is very important to them.

Good Citizen (17.6 million)

What distinguishes Good Citizens from other groups is their strong involvement in a number of community activities, as well as their heightened level of cultural and environmental awareness and sensitivity, as manifested in behaviors in their local areas. These tendencies are less obvious in their travel behavior.

Good Citizens are more likely than any other group to participate in civic organizations (55%), to volunteer for (54%) or make donations to (55%) historic, cultural and educational organizations, to volunteer for nature-related or environmental organizations (29%), or to write to politicians or companies to express their opinions about their environmental or business practices (42%). They are also the most likely to read a daily newspaper (89%), to attend religious services (82%), or to vote in national (95%) and state/local elections (95%).

Outdoor Sportsmen (21 million)

Outdoor Sportsmen, a group dominated by men, like to travel. More than 92 percent say they would travel more if they had more money and 75 percent would travel more if they had more time. Their travel preferences revolve around the outdoors. A clean, unpolluted environment is important to most Outdoor Sportsmen when they travel (80%). Outdoor Sportsmen are more concerned than most others that there are fewer unspoiled destinations than there used to be (64%) and about the traffic congestion and overcrowding that tourism can generate (64%).

Despite this orientation to the outdoors, however, Outdoor Sportsman are the least likely to be willing to pay a premium to visit places that control the number of people entering (12%). They are also generally only average or below average on sustainable environmental practices at home. Outdoor Sportsmen report the lowest interest of all eight segments in having high quality accommodations with excellent facilities and fine dining when they travel (15%).

When the strategy has been activated, it is vital to closely monitor and manage progress and make adjustments when necessary. There are many aspects of the tourism program that can be monitored; however, the metrics to be examined will be guided by the organization's objectives and the investment in specific programs.

The research data available to Visit Tillamook Coast is available in two forms. The first form of data, known as secondary research or desk research, generally involves the review and analysis of published information, analysis and reports that are readily available, generally at no or low cost. This kind of information tends to be aggregated and is generally not customized or as specific in location. Travel Oregon is an important source of this information.

The second kind of data is primary research, which is customized information that is researched and assembled for a specific location or issue. Primary research will be directly focused on the Tillamook Coast and may be conducted by Visit Tillamook Coast, local partners or by engaging a research agency. It may also relate to metrics established to monitor VTC marketing programs. Primary research can include the commissioning of surveys and other instruments targeted to a specific location, market or issue.

The following provides a variety of those performance measures that can be considered:

Performance Indicator	Method
<i>Strategy Implementation</i>	Monitor the level of success in activating and implementing the recommendations in this strategy. Track factors for success and reasons for gaps in performance.
<i>Destination Travel Impacts</i>	Monitor the Oregon Travel Impacts prepared annually by Dean Runyan & Associates for Travel Oregon. Evaluate the county performance for indicators of local results in regard to visitor spending impacts, visitor volume, overall trends, visitor shares.
<i>Lodging Industry Performance</i>	Monitor on a monthly basis using Smith Travel Research (STR.com) statistics relevant to local hotels and motels: revenues, ADR (average daily rate), occupancy levels, REVpar (revenue per available room), market share vs. competitor destinations in metro area, monthly /annual trends. Track lodging tax receipts. Also solicit feedback from local lodging partners.
<i>Marketing Programs</i>	Monitor and evaluate performance of tactical marketing programs such as website and social media results, advertising responses, and public relations using accepted industry metrics. However, these should relate to the specific objectives and investments set for each program.

<i>Internet Marketing and Social Media</i>	All digital marketing should be evaluated regularly using Google Analytics and other tools to monitor web traffic, rankings, competitors, links, followers, friends, visitors, likes, key words and SEO, page views and a variety of relevant metrics.
<i>Media Coverage</i>	Monitor media coverage, particularly externally, for its use of the desired brand messages.
<i>Major Events incl. Grants Events</i>	Initiate a customer research program to gain insights into the spending, economic impact, demographics, behavior, points of origin, motivations and satisfaction of visitors to major events and sports tournaments.
<i>Product / Experience Development</i>	Monitor the number of new tourism-related businesses, events, packages and multi-product offerings to successfully meet customer needs as they relate to the opportunities outlined in this strategy.
<i>Customer Profiles</i>	Assess shifts in customer profiles and source markets. Depending upon available budgets research visitor profiles and behavior in conjunction with county tourism organizations.
<i>Customer Satisfaction</i>	Conduct ongoing customer surveys to monitor satisfaction with the Tillamook Coast experience and the likelihood of visitors returning. These surveys should be conducted at all major events and evaluate the behavior and spending of visitors.
<i>Community Tourism Support</i>	Conduct a survey of residents, businesses, tourism, government and other interested organizations. This should include assessment of residents' overall image of the Tillamook Coast and that of certain key precincts. Repeat every two years.
<i>Co-operative Support</i>	Track the level of participation in Visit Tillamook Coast co-operative marketing opportunities.
<i>Stakeholder Feedback</i>	Survey key stakeholders and partners on the Tillamook Coast annually to explore and track tourism related issues, and seek feedback on VTC programs and needs.

Appendix 8.**Tourism Advisory Committee**

A Tourism Advisory Committee was established by Tillamook County Economic Development Council to oversee the creation of the Tourism Development and the Brand Strategies. The members of the TAC during the planning process were:

Name	Title	Affiliation
Judson Randall (Vice-Chair)	Retired, Former Editor, <i>The Oregonian</i>	Oceanside
Shirley Kalkhoven (Vice-Chair)	Mayor, City of Nehalem	City of Nehalem
Mary Faith Bell	Director of Communications and Marketing	Adventist Health System, Tillamook
Brian Williams	Owner	Big Wave Cafe, Manzanita
Eugene Tish	Attorney, Owner,	Garibaldi House Inn & Suites
Val Folkema	Owner	Garibaldi Marina, Bay City
Jeremy Strober	President	Kiwanda Hospitality, Pacific City
Kay Covert	Executive Director	Manzanita Chamber of Commerce
Gloria Scullin	President	Nestucca Valley Community Alliance
Betty Baumgart	Realtor	Rockaway Beach
Justin Aufdermauer	Director	Tillamook Area Chamber of Commerce

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Total Destination Marketing

20212 SW 86th Ave

Tualatin OR 97062

Phone: 503 692 4603

www.DestinationBranding.com