
**Attitudes, Concerns, and Priorities
of Oregon Coast Residents
Regarding Tourism and Economic Development**

Results from Surveys of Residents in Eight Communities

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**Kreg Lindberg
Rebecca Johnson
Bruce Rettig**

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Oregon Sea Grant
Corvallis, Oregon

Oregon Sea Grant
Oregon State University
Administrative Services A402
Corvallis, Oregon 97331-2134

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AUTHORS

Kreg Lindberg and Rebecca Johnson are with the Department of Forest Resources, Oregon State University. Bruce Rettig, also at Oregon State University, is with the Department of Agricultural and Resource Economics.

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THE STUDY

Introduction

Many communities on the Oregon coast are experiencing significant demographic and economic transitions. Recent research¹ shows that young adults are leaving coastal communities in search of jobs. At the same time, there has been an increase in retirees and second-home owners. Decreases in the supply of timber and fluctuation in the demand for wood products has led to declines in the wood products industries. Likewise, shortages in some fishery stocks have reduced commercial fishing. The expanding tourism, recreation, and retirement industries have helped to diversify coastal economies.

These transitions have not only disrupted the social and economic status quo, but have also put new pressures on county and municipal governments. Indeed, one of the recurrent themes of the April 1992 Conference on Emerging Coastal Issues organized by the Oregon Coastal Zone Management Association was the need to understand the impacts of this transition and to identify opportunities for managing future growth.

Sea Grant and the Coastal Oregon Productivity Enhancement program have funded research designed to provide coastal residents and governments with more information about the impact of tourism development in particular and demographic and economic transitions in general. The fundamental goal of this research is to provide information that will help communities develop policies for increasing

positive impacts while reducing negative impacts.

This research involved a survey of residents in eight Oregon coastal communities used as case studies. The survey was undertaken to help case study communities identify resident attitudes, concerns, and priorities, particularly those related to tourism. This report, which contains the initial results of the survey, was prepared to provide such information in a timely and accessible manner to coastal residents and governments. Further analysis will be carried out and more complete results will be available at a later date.

As used here, tourism includes the following components:

- visitation by nonresidents that is recreation oriented, as opposed to business oriented
- infrastructure, such as motels and restaurants, developed to meet the needs of these visitors

Tourism does not include retirees living on the coast. Survey responses suggest that resident conceptions of tourism generally follow this definition, although some residents appear to view tourism and retirement as part of the same phenomenon. In parts of the survey, tourism is divided into a variety of types, including hotels/motels, long-term vacation rentals, short-term vacation rentals, destination resorts, and day visits. These types are described in the survey on pages 34 and 35.

Background on the Resident Survey

The eight case study communities were chosen to reflect both geographic and economic diversity. Communities were chosen from the north, mid, and south coast regions. Some of the communities, like Seaside, Cannon Beach, and Gleneden Beach, have economies heavily focused on tourism and retirement. Others, like Newport, Bandon, and Coos Bay, have more diversified economies.

¹ S.W. Davis and H.D. Radtke. 1993. A Demographic and Economic Description of the Oregon Coast. Prepared for the Oregon Coastal Zone Management Association, Inc.; M. Martin, et al. 1991. Coastal Oregon Communities in Transition: A Case Study Approach. Produced by Oregon State University in cooperation with Oregon Sea Grant and the Oregon Coastal Zone Management Association, Inc.

For each community, a random sample of residents was surveyed by telephone using the random digit dialing technique. This technique enables interviewers to reach households with unlisted or new telephone numbers. However, it excludes the few coastal households that have no telephone. For the smaller communities, the sample size was approximately one-tenth the total number of households listed for each community in the 1990 U.S. Census. For the larger communities, the sample size was approximately 200 households. The list of communities and numbers of households surveyed are as follows:²

Community	Number of households
Seaside	201
Cannon Beach	51
Gleneden Beach	22
Depoe Bay	43
Lincoln Beach	9
Newport	205
Coos Bay	198
Bandon	202

The telephone survey was conducted by a professional market research firm. Randomly selected households were called, and one member from each household was chosen at random, based on date of birth, to complete the telephone survey. Many residents refused to participate in the telephone survey. Because these residents did not know the subject of the survey at the time of refusal, their objection appears targeted at surveys in general rather than this survey in particular. A small number of those who initially agreed to participate decided to stop midway through the telephone survey.

All of the residents who completed the telephone survey were also asked to complete a

mail survey. About 84 percent accepted the mail survey. Half were sent a version focused on tourism issues, and the other half were sent a version focused on more general issues. About 71 percent of those receiving the mail survey completed and returned the survey.

An important question is whether the respondents completing the survey are representative of their community. That is, are the residents who refused to participate or to complete the survey different from those who did? We will undertake additional analysis to address this question, but we have no reason at this time to believe that nonrespondents are different from respondents.

A related issue is whether the survey results reported here are representative of all coastal residents. Although we believe that resident attitudes in the case study communities will be generally similar to those of residents in other coastal communities, we can not say that they will be the same. For this reason other communities might use these results to identify likely issues and concerns within their own community. However, they should keep in mind that some differences are inevitable across communities.

The following sections present selected results from the telephone and the two mail surveys. Residents participating in the survey are often referred to as respondents in this report. Detailed results, together with the surveys themselves, are presented starting on page 15. Readers interested in community-specific results or copies of the more comprehensive final report to be completed later should contact the authors.

Employment Characteristics of Surveyed Residents

A previous study by Davis and Radtke (see footnote 1) detailed the sources of personal income for Oregon coastal residents. As shown in figure 1, much of this personal income comes from transfer payments (such as Social Security) and dividend, interest, and rent. These sources make up a larger proportion of income for coastal residents than for

² An additional 14 residents from Gleneden Beach, Depoe Bay, and Lincoln Beach participated in the telephone survey but did not participate in the mail survey. Because no address was obtained for these residents, it was not possible to determine in which of these three communities they reside.

Oregonians or Americans as a whole.

According to Davis and Radtke, timber is the largest industry on the coast, followed by tourism, fishing, and agriculture.

Figure 2 shows the employment of residents surveyed for this project. The percentages do not match those in figure 1 for several reasons. For example, our sample of residents is based on the specific communities selected for this study. In addition, respondent employment is self-reported and is based on categories that may not reflect categories used in other studies. Despite the differences, both figures reflect two important points. First, a large number of coastal residents are retirees who derive their income from transfer payments and dividends, interest, and rent. Second, tourism is an important component of the coastal economy.

The importance of tourism, and thus the number of tourism employees, varies across communities. Figure 3 shows that communities like Cannon Beach and Seaside rely more heavily on tourism to generate employment than do more diversified economies like Newport, Coos Bay, and Bandon.

On the coast and elsewhere, some members of the tourism industry are concerned that many residents fail to appreciate the importance of tourism in the economy, not only as a source of jobs in the tourism industry itself, but also as a source of jobs in other industries. When tourism businesses and their employees buy goods from other businesses, they create economic linkages between the tourism sector and other sectors in the community (the multiplier effect). In this study respondents were asked for their perception of how dependent their jobs were on tourism in the community. Survey results shown in figure 4 demonstrate that many respondents who do not work in the tourism industry itself do indeed recognize that their jobs depend on tourism.

The Benefits and Costs of Tourism in Case Study Communities

An important part of the survey was to identify what residents believe to be the most im-

portant benefits and costs of tourism development in their community. The objective of including these questions is to provide guidance to communities in their efforts to increase the benefits and reduce the costs of tourism.

Not surprisingly, the most important benefits were economic. As shown in figure 5, the majority of residents noted the general economic benefits of tourism to the community, such as bringing money into the community. Many residents also specifically noted that tourism benefits local businesses and generates jobs. Tourism also provides noneconomic benefits. Some residents noted that tourism helps increase facilities, services, and activities for residents. Moreover, some residents noted that tourists bring new ideas and expose residents to different cultures.

An important issue is whether tourism development creates the "family wage" jobs necessary to replace jobs lost as the timber and fishing industries decline. Tourism's ability to create high-paying jobs in general has been examined in previous research.³ In this study we were particularly interested in whether former employees in the timber and fishing industries were now working in tourism. We asked those currently working in the tourism industry to identify the industry in which they previously worked. We also asked whether they experienced a reduction in wages upon entering the tourism industry.

As shown in figure 6, tourism has provided a few jobs to residents previously working in the fishing or timber industry, but most tourism workers have always worked in tourism or have come from the retail or service sectors. On the other hand, figure 7 shows that the majority of those who do move into tourism from other industries earn as much as or more than in their previous job.

These results suggest that tourism jobs have not directly replaced timber or fishing jobs, at

³Dean Runyan and Associates. 1992. *Travel Industry Employment in Oregon: 1991*. Report prepared for the Tourism Division, Oregon Department of Economic Development.

least in those communities surveyed for this project. However, these figures show that tourism does make an important contribution to local communities. It provides an important option for diversifying local economies, many of which have limited options for development. Indeed, 90 percent of the residents surveyed agreed or strongly agreed with the statement "Tourism helps diversify the local economy, and therefore, it is an important industry for this community."

Tourism development has also led to problems, or costs, in coastal communities. Residents were asked to identify the most important problems associated with tourism development in their community. Results are shown in figure 8. Traffic is clearly the most frequently cited problem, followed by crime, congestion, and parking.

Various options for dealing with these problems are available to coastal communities. Many residents undertake avoidance behavior. That is, they avoid congested areas by taking different routes or by not visiting crowded sites. Thirty percent of the surveyed residents report that they have stopped going to stores, other parts of the community, beaches, campgrounds, and other areas because of crowding from tourism. Fortunately, this avoidance behavior is often necessary only during peak seasons, such as during summer and spring break.

To some extent, communities can also mitigate these problems using tools such as marketing strategies and land use planning. These tools will be reviewed more fully in future analyses. However, we present some examples here.

One option for reducing traffic problems is to spread visitation more evenly across the year. This reduces congestion during current peak months for a given level of overall visitation. Seasonal concentration is driven in part by factors, such as weather patterns and vacation periods, that are beyond the control of communities. Nonetheless, product development and marketing campaigns focused on increasing visitation during low seasons can be implemented to help spread visitation more

evenly across the year. Some coastal areas are already involved in such efforts.⁴

Another option is to use land use regulation to spread visitation more evenly across the community so that tourists are geographically dispersed. This will reduce congestion in areas that currently experience high densities of tourist use.

Of course, there are trade-offs with these strategies. The current seasonal and geographic concentration increases congestion problems at times and places of high use, but it enables residents to have a "breather" during low periods and away from high use areas. Given these trade-offs, we asked residents whether they would prefer that tourism be seasonally and geographically concentrated or spread out. As shown in figures 9 and 10, some residents prefer concentration but most prefer spreading out tourism over time and space.

Another option available to communities is to regulate certain types of tourism development. For example, the city councils in both Cannon Beach and Seaside have enacted regulations for short-term vacation rentals in residential areas. These regulations include licensing requirements such as provision of adequate parking for renters, as well as an eventual ban on rentals in Cannon Beach. We asked residents of these communities whether they would vote for or against the respective regulation. In Cannon Beach, 49 percent would vote for the regulation, though there is a potential sampling error of ± 13 percent because of the small sample size. In Seaside, only 36 percent would vote for the original regulation, with a potential sampling error of ± 7 percent.⁵ These results show that many residents, not just owners of rental units, oppose the regulations. Most of the residents who oppose the regulations do

⁴For example, the five-year strategic tourism plan prepared for Lincoln County includes such marketing efforts. Source: R. Moke McGowan. 1993. *A 5-Year Strategic Tourism Development Marketing Plan and Program of Work, 1994-1999*. Prepared for The Central Oregon Coast Association.

so because they feel the regulations violate property rights.

Despite the lack of support on the Seaside measure in particular, there is general support among coastal residents for active government involvement in controlling tourism and other industries. Seventy-nine percent of respondents agreed or strongly agreed with the statement "Local governments should take an active role in controlling the negative aspects of tourism and other industrial development." Only 7 percent disagreed or strongly disagreed with this statement.

Residents were also asked whether they would be willing to pay for programs designed to address problems associated with (1) traffic congestion on Highway 101, (2) noise and minor crime, and (3) low-income housing. Figure 11 shows the results for two of the programs, a 50 percent reduction in congestion on Highway 101 during peak periods and a 30 percent reduction in noise and crime during peak periods. Results for the other two programs, a 25 percent reduction in congestion on Highway 101 and the provision of low-income housing, were similar.

Given the low incomes of many respondents and the general opposition in Oregon to any form of additional levies, a surprising number of residents said they would be willing to pay substantial amounts of money to address these problems. Fortunately, these problems are being addressed in many communities. It is important to stress that these programs are hypothetical. In addition, by asking residents to vote on programs, we do not mean to suggest that residents should be responsible for paying for

them. Rather, the focus is on identifying the absolute and relative importance of these types of mitigation programs.

Community Pride and Quality

The surveys included several questions relating to various community aspects. The purpose of including these questions is not to say that coastal communities are better or worse than others in Oregon, but to identify potential areas for improvement or community aspects that are important to maintain in the future. Results show a strong attachment to, and pride in, coastal communities. Eighty-four percent feel that residents are proud of their community, while 83 percent enjoy spending time with other people in the community and 83 percent feel that their community is one of the most attractive on the coast. Nonetheless, many residents feel that members of the community do not work well together to deal with community issues. Many residents also feel that newer and longer-term residents do not get along well.

We were also interested in learning more about what respondents value in their community, that is, what makes their community special. Results suggest that the most important things that make these communities special are (1) the natural scenery and opportunities for outdoor recreation and (2) being able to count on neighbors to help you out in times of need. Having jobs that depend on natural resources, like logging and fishing, was also important, and this is the community aspect that has most changed for the worse as these industries have declined.

Residents also noted other things that make their community special, some of which overlap with those items already noted. They are as follows:

- the natural beauty, recreation, and climate
- community spirit, nice people in community, concern for other residents
- arts, cultural and other community activities and events

³Results from Seaside should be treated with some caution because immediately before we administered the survey, the city council voted on a measure to liberalize, rather than restrict, vacation rentals. Responses to the follow-up question indicate that most residents interpreted the question as it was intended (that is, referring to restriction), but there is evidence that some residents misinterpreted the question.

- the small size and absence of city problems like crime and litter
- the ability of citizens to get involved in local government

Expectations and Desires for the Future

One goal of this survey was to identify resident priorities for the future. For this reason, we asked a variety of questions related to growth generally and individual industries in particular. As shown in figures 12 and 13, a majority of residents would like their community to grow a little, with roughly 10 percent desiring either a decrease in population or a lot of growth. Desires are largely similar across communities, though residents of Cannon Beach tend to want relatively less growth and residents of Coos Bay and Bandon relatively more growth than do residents of other communities.

These figures also show that attitudes toward growth do not vary across length of residence and income as much as one might think.⁶ Figure 12 shows that newcomers have no less desire for community growth than do longer-term residents. The most notable difference across groups is that respondents living in the community from 10 to 19 years are more likely to favor a decrease in population. Figure 13 shows that respondents from low-income households (less than \$20,000 per year) express less desire for growth than do respondents from higher-income households. The majority of respondents from these low-income households appear to be retirees (54 percent are at least 60 years old). However, desires regarding growth are quite similar across all age groups of respondents living in low-income households. These results are contrary to the beliefs that newcomers want to "lock up" the

community and that lower-income households want growth in order to maintain or improve job opportunities.

Additional questions were asked concerning the role of newer residents. While longer-term residents may not always get along well with new residents, there is a recognition that new residents make a contribution to the community. Seventy-eight percent of those surveyed agreed or strongly agreed with the statement "Newcomers bring skills and business opportunities that contribute to the local economy." Given that newcomers may play an important role in future economic growth, we asked newer residents (those living in the community for less than five years) what attracted them to the community and whether an experience as a tourist on the coast contributed to their decision to move there. The results are shown in figures 14 and 15.

Figure 14 illustrates one of the dilemmas for many coastal communities. The natural environment and "small-town lifestyle" are two qualities that make communities attractive to both newer and longer-term residents, yet by attracting newcomers these communities run the risk of negatively affecting these attractive qualities. Figure 15 shows that a tourist experience can contribute to the decision to move to the coast, but that the experience is rarely the main reason for moving.

We also asked residents about their expectations and desires for future growth in various industries. Figures 16 and 17 show a clear discrepancy between expectations and desires. For example, the majority of residents expect the fishing and lumber and wood products industries to decrease despite desires for increase. Conversely, almost no resident expects tourism to decrease, though a small percentage of residents would like it to. Although desires vary somewhat across industries, it is clear that most residents would like all of these industries to increase.

Residents were also asked about their expectations and desires for specific types of tourism. Figures 18 and 19 show that most residents expect all types of tourism to increase in the future, although about 10 percent think that

⁶ Statistically speaking, however, there are differences across groups in the case of both length of residence and income (χ^2 tests show significance at the $\alpha = .05$ level).

short-term vacation rentals will decrease. More residents desire increases than decreases for all tourism types, but there is less support for day visitors and short-term vacation rentals than for other types. Responses to other questions suggest that this relative lack of support is due to the large amount of disruption (congestion, noise, and so on) of these particular types of tourism and the small number of jobs created by vacation rentals in particular.

As illustrated in figure 17, residents have a strong desire for growth in local industries. Indeed, 87 percent of the respondents agreed or strongly agreed with the statement, "Creating jobs for residents should be a high priority for this community." Unfortunately, most options for creating jobs involve costs. These costs might be economic, social, or environmental. Given these trade-offs, residents were asked to evaluate the acceptability of general options for creating jobs.

Despite the desire to create jobs, respondents oppose all the options presented in this survey (see figure 20). These options include allowing more pollution and changing zoning regulations to allow conversion of land from one use (like forest and farm) to another (like residential). The most acceptable option is the conversion of forest and farm land to residential areas, but even this option is considered unacceptable by 58 percent of residents. The options in this survey are just a few of the options available to communities. In addition, the questions were general and may not reflect attitudes toward individual economic development projects. However, the results demonstrate the strong desire of residents to avoid sacrificing the local "quality of life" to create jobs. These communities, like many others, are faced with the challenge of finding ways to maintain a vigorous economy while maintaining this quality of life.

Summary and Conclusions

This report provides initial results from surveys of residents in eight Oregon coastal com-

munities. The results and conclusions are summarized as follows.

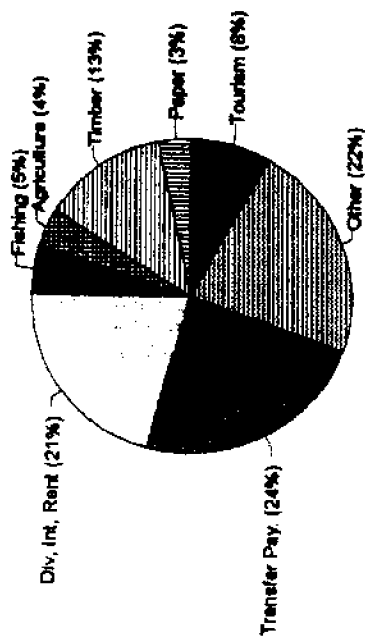
1. The surveys, together with previous research, show that tourism has made an important contribution to coastal economies. This importance is recognized by the majority of residents in the case study communities. As shown in figure 21, most residents agree or strongly agree with the statement, "Overall, for me personally the benefits of tourism outweigh the costs." An even greater majority of residents agree or strongly agree that the benefits to the community outweigh the costs to the community. These perceptions have led residents to support future increases in tourism.

2. Despite this general support, residents do experience tourism-related negative impacts. These impacts, such as traffic congestion or noise, should be mitigated where possible. If not managed, such impacts may lead to reactive regulations, such as those on short-term vacation rentals, that are unlikely to be as effective or popular as proactive measures.

3. Growth is occurring in many communities on the coast. This growth can threaten the qualities, like the small-town lifestyle and high-quality natural environment, that are important to both new and long-term residents. Therefore, it should be a continual priority of coastal residents and governments to maintain these qualities.

4. The majority of respondents desire modest growth in their community, though there are minorities that desire either more significant growth or a decrease in population. Results show that some popular conceptions, such as newcomers having antigrowth attitudes, are not always correct.

As noted in the Introduction, this report presents initial results. Further analysis will be performed and made available in the future. We hope this report, together with future reports, will help coastal communities in their efforts to manage the economic and demographic transitions they face.



Source: Davis and Radtke, 1983.

Figure 1. Sources of personal income (coast total)

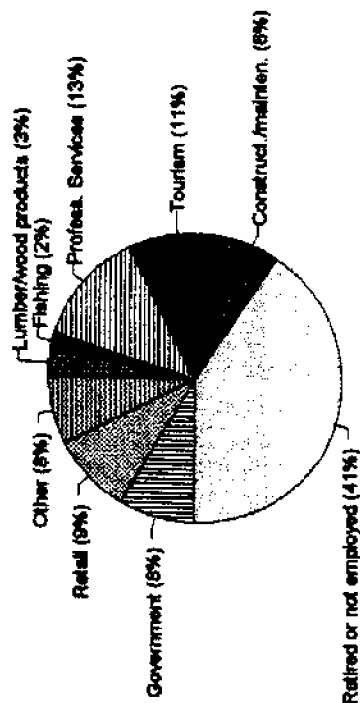


Figure 2. Employment of surveyed residents

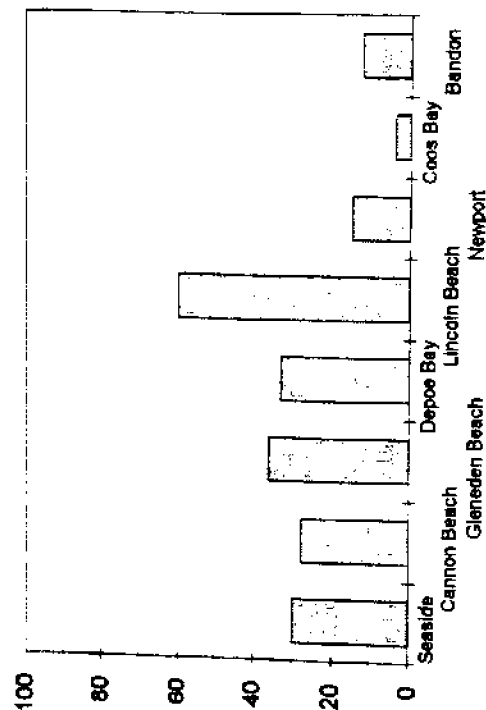


Figure 3. Employment in tourism (percentage of employed respondents)

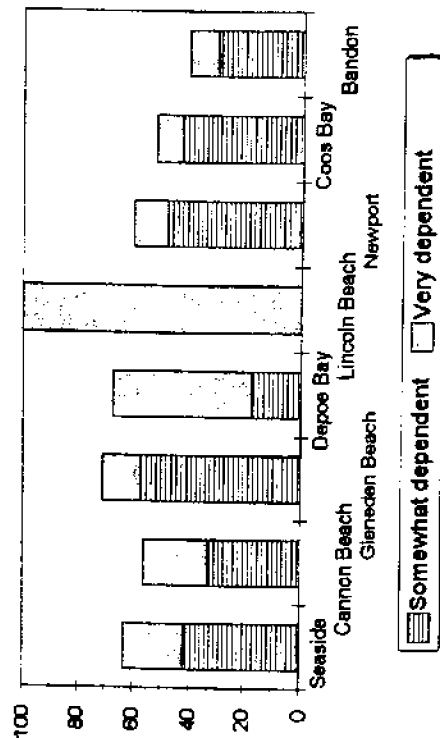


Figure 4. Do residents recognize the dependence of other jobs on tourism? (Percent of non-tourism employees noting dependence on tourism)

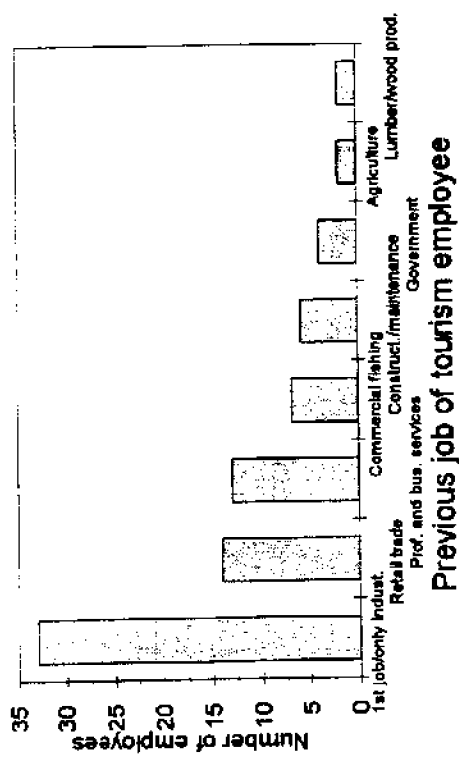


Figure 6. Do tourism jobs replace jobs lost in other industries?

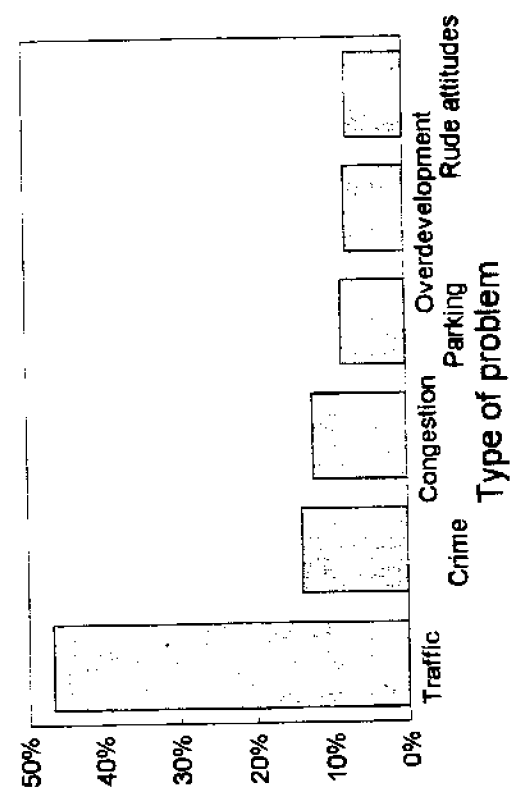


Figure 8. Tourism-related problems (percent noting each problem, multiple responses allowed)

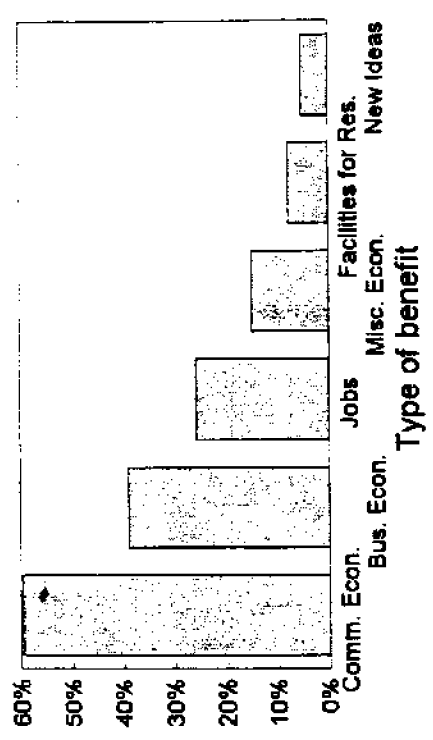


Figure 5. Tourism-related benefits (percent noting each benefit, multiple responses allowed)

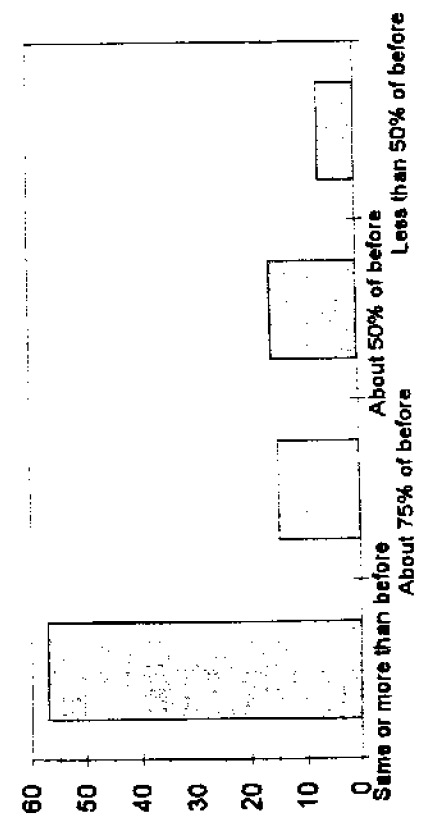


Figure 7. Do new tourism employees take a cut in pay? (Change in salary for all employees coming from a different industry, percent in each category of change.)

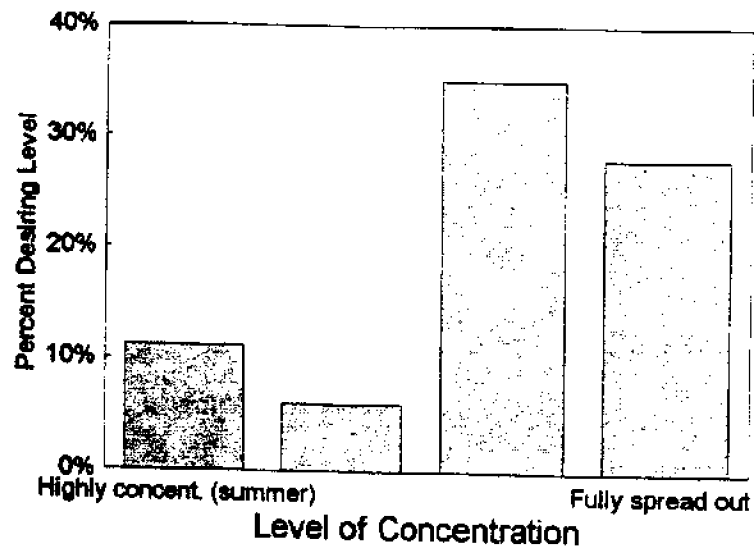


Figure 9. Desired seasonal concentration

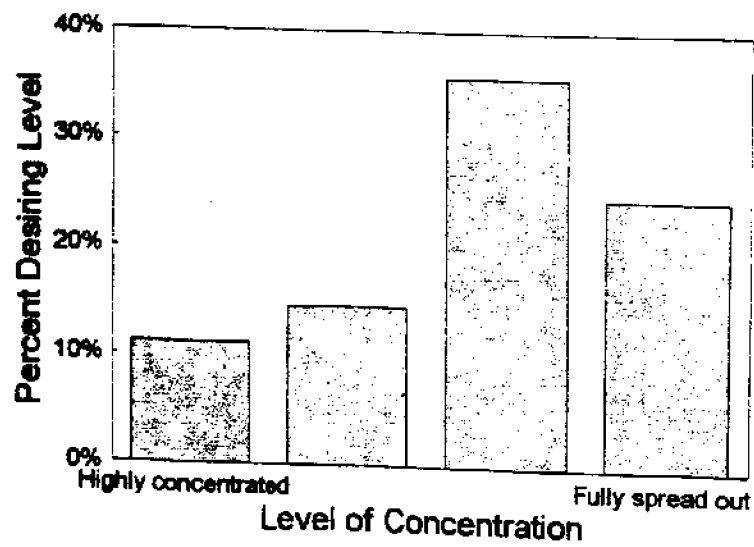


Figure 10. Desired geographic concentration

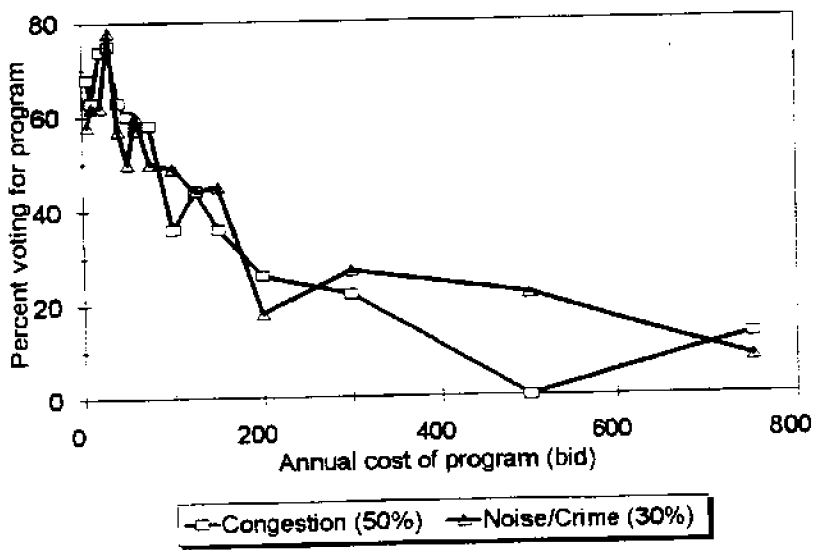


Figure 11. Willingness to pay to address problems

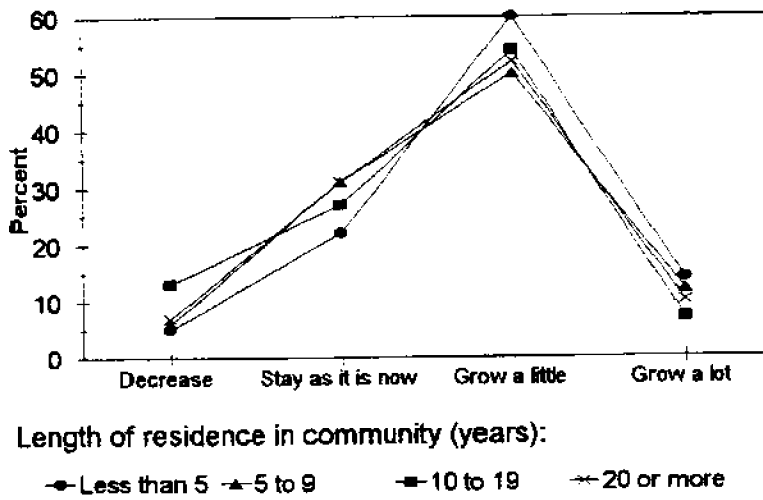


Figure 12. Do newer residents want less growth than longer-term residents?

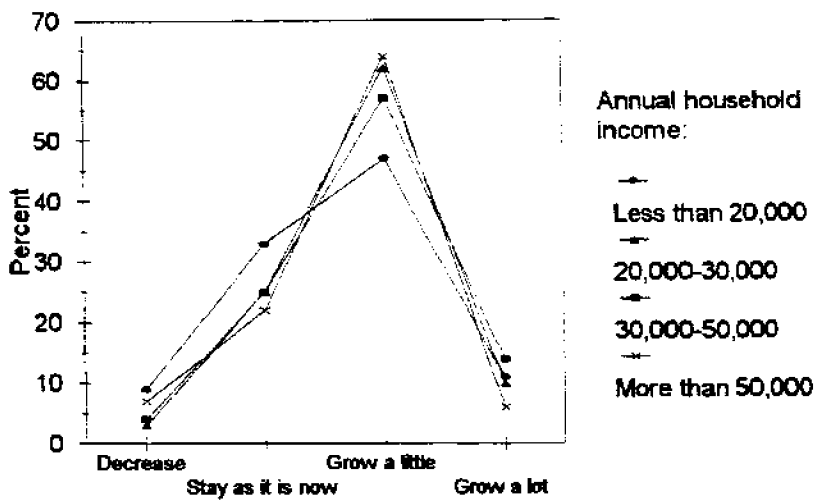
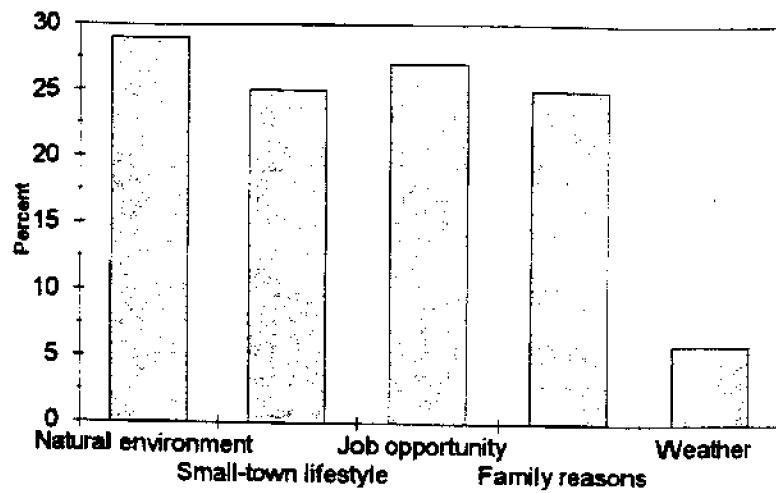


Figure 13. Do high-income households want less growth than low-income households?

Figure 14. What attracts newcomers? (Most important reasons for moving to coast, multiple responses allowed)



26% of respondents have moved to coast within past 5 years.
68% of this group visited the coast before moving there.
Graph is only for those new residents with previous visit.

Figure 15. Does tourism generate new residents?

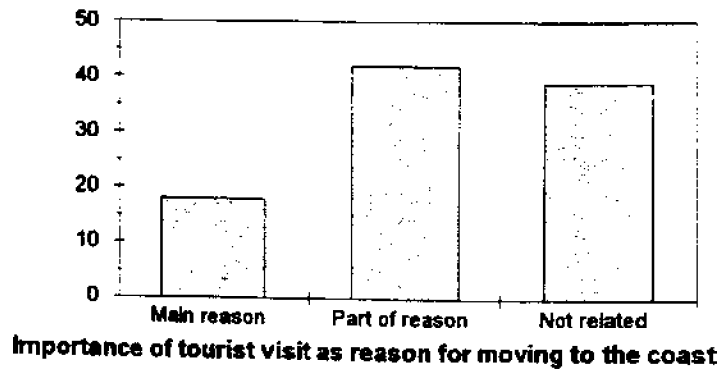
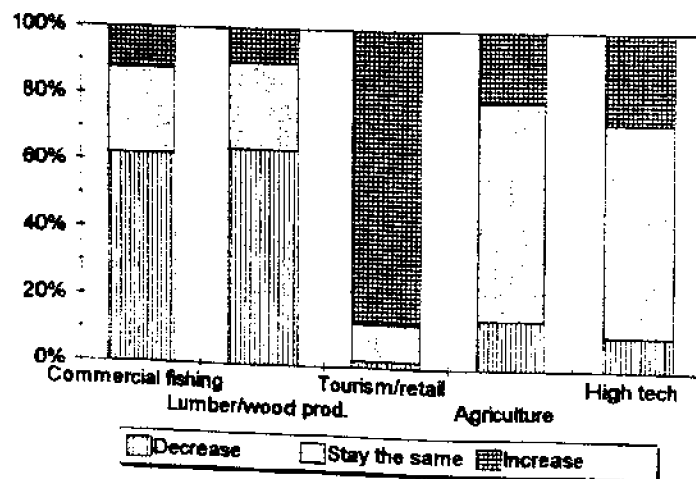


Figure 16. Expectations for industries



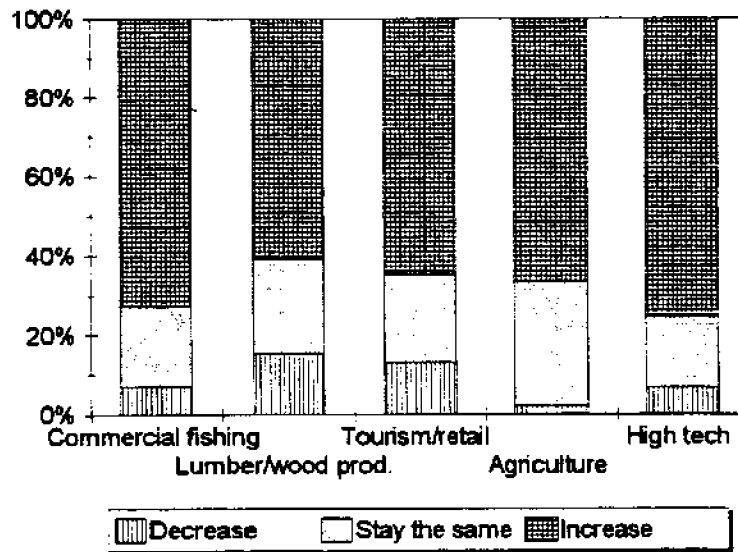


Figure 17. Desires for industries

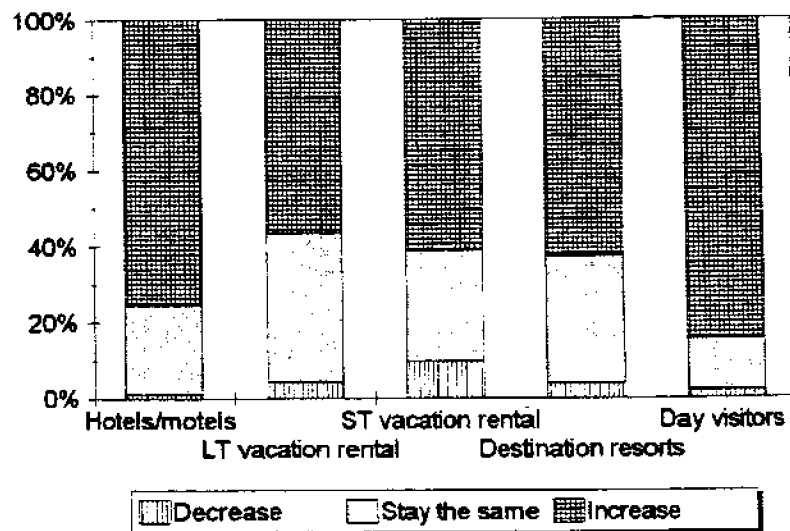


Figure 18. Expectations for tourism type

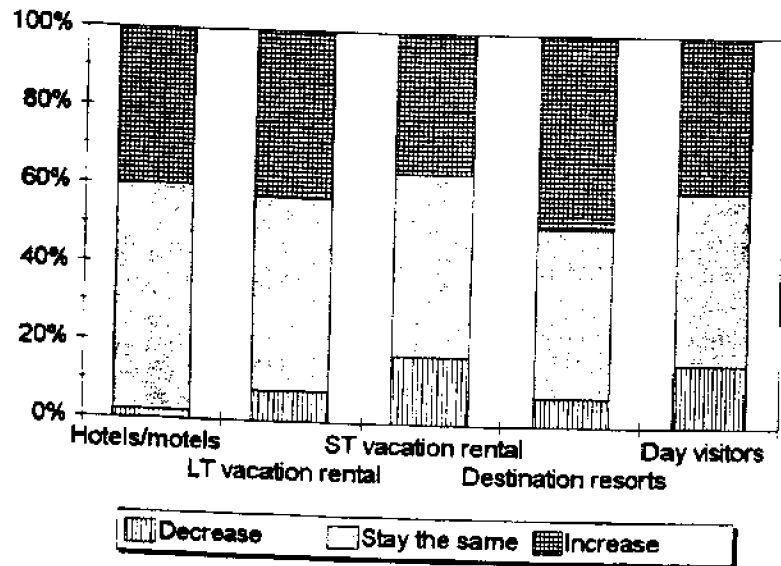


Figure 19. Desires for tourism types

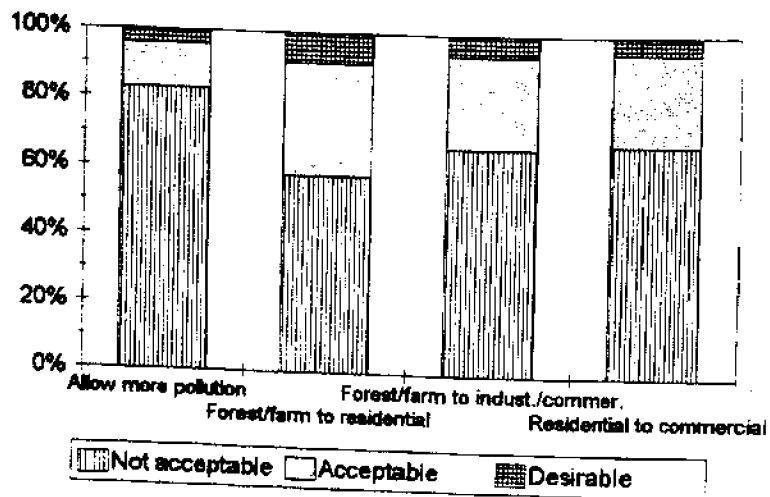


Figure 20. Acceptability of job-creation options

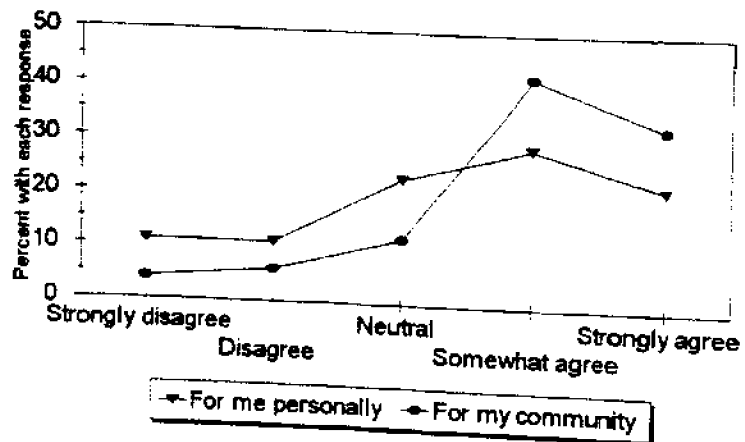


Figure 21. Overall evaluation of tourism's costs and benefits (level of agreement with statement "Overall, for me personally/for my community, the benefits of tourism outweigh the costs of tourism.")

DETAILED SURVEY RESULTS

The following are responses to each survey question. The surveys were customized for each community and included information for residents and interviewers that is not reproduced here. Each respondent was asked the questions on the telephone survey. Half of these respondents were then sent the "tourism" mail survey; the other half were sent the "general" mail survey. Comments beginning with "NOTE" were not on the original surveys and are included here to assist readers of the report.

Unless otherwise noted, all numbers are percentages of all residents responding to question. Totals may not add to 100 because of rounding or omission of categories with less than one percent.

Telephone Survey

Part I

Q1. First, please tell me what are the most important industries in your community. (Multiple responses permitted so total percentage may be greater than 100.)

- 46 Lumber and wood products
- 48 Fishing
- 61 Tourism/retail stores
- 9 Agriculture
- 1 Retirement
- 4 Shipping
- 1 None
- 6 Other (e.g., hospital, construction)
- 1 Don't know

Now I'm going to read a list of industries. For each one, please tell me whether you EXPECT that the industry will increase, decrease, or stay the same in your community in the next five years.

EXPECT

	Increase	Decrease	Same	Don't know
Q2. Commercial fishing	12	61	25	3
Q3. Lumber and wood products	10	62	25	2
Q4. Tourism/stores	87	2	11	1
Q5. Agriculture	20	14	62	5
Q6. Retirement	89	2	8	1
Q7. High tech. industry	25	9	57	9

I'm going to read the list of industries again. This time, please tell me if you WANT each of these industries to increase, decrease, or stay the same in the next five years:

	WANT			
	Increase	Decrease	Same	Don't care
Q8.Commercial fishing	72	7	20	2
Q9.Lumber and wood prod.	59	15	23	2
Q10.Tourism/stores	64	13	22	2
Q11.Agriculture	64	2	30	4
Q12.Retirement	51	13	33	3
Q13.High tech. industry	68	6	21	5

Q14. In the next five years, would you prefer to see the number of people living in your community stay as it is now, grow a little, grow a lot, or decrease?

Stay as it is now	28
Grow a little	54
Grow a lot	11
Decrease	8
Don't know	0

Q15. Next, I'll read a list of issues that are important for some coast residents. For each one, please tell me how important this issue is to you or your community.

	IMPORTANT?			
	Very	Somewhat	Not	Don't Know
Traffic congestion on Highway 101	67	25	8	0
Lack of low-income housing for needy families	59	29	11	1
Noise or minor crime in residential areas	52	33	14	0

Q16. During the busy tourist season, how often do you interact with tourists during an average week?

Everyday	35
Often, but not everyday	34
Rarely	24
Not at all (SKIP TO Q18)	7

Q17. When you do interact with tourists, how pleasant or unpleasant is it? Is it . . .

Very pleasant	29
Pleasant	55
Neither pleasant nor unpleas.	12
Unpleasant	3
Very unpleasant	1
Don't know	1

Q18. In some communities, tourism is concentrated in the summer and in others it is spread throughout the year. For your community, should tourism be . . .

Highly concentrated in summer	11
Somewhat concentrated in summer	6
Somewhat spread out	35
Fully spread out	28
Doesn't matter	19
Don't know	1

Q19. Would you prefer that tourism facilities (such as motels and restaurants) be concentrated in one AREA of your community (such as in the downtown area or waterfront) or spread more evenly across the community? Should they be . . .

Highly concentrated	11
Somewhat concentrated	15
Somewhat spread across community	36
Fully spread across community	25
Doesn't matter	13
Don't know	1

Q20. Are there places in this community where you would prefer that tourists not go? (Multiple responses permitted for residents saying "yes" so total percentage may be greater than 100.)

81 No

Yes—Which places?

11	Some residential areas
2	Some campgrounds/recreation areas
1	Beach
3	Other (usually natural areas)
1	Don't know

Q21. In the past five years, have you stopped going somewhere in your community because of the number of tourists there? (Multiple responses permitted for residents saying "yes" so total percentage may be greater than 100.)

70 No

Yes—Which places?

19	Downtown/old town/city center/stores/restaurants
4	Bayfront/harbor
2	Public parks/campgrounds
5	Beach
3	Highway 101 or other main roads
1	Other
1	Don't know

Q22. What do you think are the most important BENEFITS of tourism development for YOUR COMMUNITY? (Multiple responses permitted so total percentage may be greater than 100.)

- | | |
|----|---|
| 60 | Money/revenue into community (general community benefit) |
| 39 | Money for local businesses (good for hotels, restaurants, etc.) |
| 26 | Jobs for local residents |
| 15 | Other economic benefits for residents, including property values |
| 3 | Revenue for local government |
| 8 | Better services, facilities and events |
| 1 | Community pride, image |
| 1 | Attracts new residents |
| 1 | Encourages residents and local government to make community nicer |
| 5 | Tourists bring new ideas and culture, are pleasant to interact with |
| 1 | None |
| 4 | Don't know |

Q23. What do you think are the most important PROBLEMS of tourism development in YOUR COMMUNITY? (Multiple responses permitted so total percentage may be greater than 100.)

- | | |
|----|---|
| 45 | Heavy traffic/congestion on roads (e.g., Highway 101) |
| 9 | Crowded parking places |
| 12 | Crowding/congestion in downtown/stores/restaurants |
| 7 | Crowding/congestion at parks, beaches, and recreation sites |
| 4 | Noise |
| 14 | Crime |
| 6 | Litter |
| 8 | Tourists are uncareful/unthinking/rude/disrespectful/unappreciative/impatient |
| 4 | Jobs are low income |
| 6 | Stress/demand on city services (police, sewer, water, etc.) |
| 1 | Raises taxes |
| 2 | Disrupts daily life |
| 8 | Environmental damage/violation of zoning |
| 2 | Inflation, competition for housing |
| 6 | Other |
| 7 | None |
| 11 | Don't know |

Part II

In this next section, I would like to ask you about programs that would deal with issues that are problems in some coastal communities. These programs cost money. One way of paying for them is for your community to set up an independent fund paid for by ALL local households. Fund revenues would be used only for the program described. They will not go to the government.

These programs are HYPOTHETICAL. However, your responses may be used to guide future policies, so please answer the questions as carefully as possible.

NOTE: The "reference months" for each scenario were customized for the situation in each different community. Each resident was asked either the low or the high congestion scenario, not both.

LOW CONGESTION SCENARIO

The Oregon Department of Transportation is currently developing options for reducing traffic congestion along Highway 101 by, for example, adding turning or passing lanes. Some of the cost of these options may have to be paid by local communities.

We estimate that one option would reduce traffic congestion on Highway 101 by 25 percent during busy periods. This would mean there would be as little traffic congestion on 101 during August as there currently is during May.

1. If you had a chance to vote on a ballot measure that would reduce congestion on Highway 101 by this amount, but would require your household to pay \$_____ each year, would you vote for or against it? As with all ballot measures, at least half of the voters would have to support the measure for it to pass.

NOTE: The amount each household would pay (the bid) varied across residents. The votes for and against the measure for each bid are given below:

Bid (\$)	Percent voting For	Percent voting Against	Percent of "Don't Know"
5	56	40	4
10	62	38	0
20	67	30	4
30	89	11	0
40	57	43	0
50	63	33	4
60	63	31	6
75	32	66	2
100	30	63	7
125	40	58	2
150	31	59	10
200	23	69	9
300	6	88	6
350	0	100	0
500	22	74	4
750	22	78	0
1000	8	83	8

NOTE: The following questions were asked only of residents who voted against the measure. The numbers for each response reflect the number, not percentage, of respondents.

1a. And why would you vote against the measure?

- 66 Not a problem
- 22 A problem, but not worth the money
- 56 Can't afford it
- 38 Opposed to taxes/new taxes (GO TO 1b)
- 14 Opposed to government (inefficient, corrupt, etc.) (GO TO 1c)
- 19 Should not have to pay for it/businesses or tourists should pay (GO TO 1d)
- 31 Would not work or would cause more problems than solve (GO TO 1e)

1b. Can you tell me why you are opposed to using taxes to pay for this program?

- 9 Opposed in principle
- 5 Can't afford to pay
- 2 Program isn't worth the money
- 14 Government will waste money
- 4 Too many taxes

1c. If this program was managed by a group not associated with the government, would you vote for the program?

- 3 Yes
- 7 No
- 3 Don't know

1d. If you knew that funding by local residents was the only way to solve this problem, would you vote for the measure?

- 7 No, I still would not vote for the measure
- 1 Yes, I would vote for the measure
- 2 Don't know

1e. If there was a way to make the program work so that the problem would be solved without causing additional problems, would you be willing to vote for the program?

- 8 Yes
- 4 No
- 0 Don't know

HIGH CONGESTION SCENARIO

The Oregon Department of Transportation is currently developing options for reducing traffic congestion along Highway 101 by, for example, adding turning or passing lanes. Some of the cost of these options may have to be paid by local communities.

We estimate that one option would reduce traffic congestion on Highway 101 by 50 percent during busy periods. This would mean there would be as little traffic congestion on 101 during August as there currently is during January.

1. If you had a chance to vote on a ballot measure that would reduce congestion on Highway 101 by this amount, but would require your household to pay \$_____ each year, would you vote for or against it? As with all ballot measures, at least half of the voters would have to support the measure for it to pass.

NOTE: The amount each household would pay (the bid) varied across residents. The votes for and against the measure for each bid is given below:

Bid (\$)	Percent voting For	Percent voting Against	Percent of "Don't Know"
5	68	18	14
10	63	33	4
20	74	15	11
30	75	25	0
40	63	30	7
50	60	35	5
60	57	39	4
75	58	43	0
100	36	62	2
125	44	48	8
150	36	62	3
200	26	74	0
300	22	78	0
500	0	100	0
750	13	80	7
1000	8	75	17

NOTE: The following questions were asked only of residents who voted against the measure. The numbers for each response reflect the number, not percentage, of respondents.

1a. And why would you vote against the measure?

60	Not a problem
18	A problem, but not worth the money
67	Can't afford it
23	Opposed to taxes/new taxes (GO TO 1b)
11	Opposed to government (inefficient, corrupt, etc.) (GO TO 1c)
29	Should not have to pay for it/businesses or tourists should pay (GO TO 1d)
21	Would not work or would cause more problems than solve (GO TO 1e)
6	Other reason
2	Don't know

1b. Can you tell me why you are opposed to using taxes to pay for this program?

- 3 Opposed in principle
- 10 Can't afford to pay
- 5 Government will waste money
- 2 Too many taxes

1c. If this program was managed by a group not associated with the government, would you vote for the program?

- 2 Yes
- 4 No
- 3 Don't know

1d. If you knew that funding by local residents was the only way to solve this problem, would you vote for the measure?

- 9 No, I still would not vote for the measure
- 2 Yes, I would vote for the measure
- 1 Don't know

1e. If there was a way to make the program work so that the problem would be solved without causing additional problems, would you be willing to vote for the program?

- 4 Yes
- 2 No
- 0 Don't know

HOUSING SCENARIO

Now I would like to ask you about some more programs. Please think of each program separately. Your vote should not depend on whether or not the other programs pass.

The lack of low-income housing is a problem in some coastal communities. One possibility to increase low-income housing is to provide business incentives to developers. This would increase the units available to families that qualify for public-housing programs. These housing units would be located where they would not reduce the value of other houses in the community.

1. If you had a chance to vote on a ballot measure that would provide low-income housing for all the families in your community that qualify, but would require your household to pay \$_____ each year, would you vote for or against it? Again, please ignore the other programs.

NOTE: The amount each household would pay (the bid) varied across residents. The votes for and against the measure for each bid is given below:

Bid (\$)	Percent voting For	Percent voting Against	Percent of "Don't Know"
5	82	14	4
10	74	17	9
15	57	39	4
20	70	27	2
30	67	28	6
40	50	43	7
50	67	28	5
60	51	44	5
75	48	46	5
100	45	50	5
125	49	47	4
150	36	56	8
200	38	57	5
300	40	51	9
500	13	88	0
750	9	86	5
1000	19	81	0

NOTE: The following questions were asked only of residents who voted against the measure. The numbers for each response reflect the number, not percentage, of respondents.

1a. And why would you vote against the measure?

- 70 Not a problem
- 24 A problem, but not worth the money
- 141 Can't afford it
- 54 Opposed to taxes/new taxes (GO TO 1b)
- 16 Opposed to government (inefficient, corrupt, etc.) (GO TO 1c)
- 32 Should not have to pay for it/businesses or tourists should pay (GO TO 1d)
- 73 Would not work or would cause more problems than solve (GO TO 1e)
- 15 Other reason
- 6 Don't know

1b. Can you tell me why you are opposed to using taxes to pay for this program?

- 11 Opposed in principle
- 21 Can't afford to pay
- 14 Government will waste money
- 5 Too many taxes

1c. If this program was managed by a group not associated with the government, would you vote for the program?

- 6 Yes
- 6 No
- 2 Don't know

1d. If you knew that funding by local residents was the only way to solve this problem, would you vote for the measure?

- 15 No, I still would not vote for the measure
- 2 Yes, I would vote for the measure
- 0 Don't know

1e. If there was a way to make the program work so that the problem would be solved without causing additional problems, would you be willing to vote for the program?

- 6 Yes
- 13 No
- 1 Don't know

NOISE/CRIME SCENARIO

Another issue for some coast residents is the amount of noise and minor crimes like burglary, vandalism, and disorderly conduct. One option to address this problem is to increase the number of police officers on patrol during summer and holiday periods. We estimate that the improved enforcement would reduce noise and minor crime violations during these periods by 30%. As a result there would be as little noise and minor crime violations during July and August as there currently is in October.

1. If you had a chance to vote on a ballot measure that would reduce noise and minor crime by this amount, but would require your household to pay \$_____ each year, would you vote for or against it? Again, please ignore the other programs.

NOTE: The amount each household would pay (the bid) varied across residents. The votes for and against the measure for each bid is given below:

Bid (\$)	Percent voting For	Percent voting Against	Percent of "Don't Know"
5	58	36	7
10	62	32	6
20	62	32	6
30	78	17	4
40	57	37	5
50	50	38	12
60	60	40	0
75	50	49	1
100	49	48	3
125	44	52	4
150	45	49	6
200	18	79	3
300	27	71	2
500	22	71	8
750	8	83	8
1000	17	83	0

NOTE: The following questions were asked only of residents who voted against the measure. The numbers for each response reflect the number, not percentage, of respondents.

1a. And why would you vote against the measure?

- 186 Not a problem
- 33 A problem, but not worth the money
- 114 Can't afford it
- 27 Opposed to taxes/new taxes (GO TO 1b)
- 16 Opposed to government (inefficient, corrupt, etc.) (GO TO 1c)
- 17 Should not have to pay for it/businesses or tourists should pay (GO TO 1d)
- 68 Would not work or would cause more problems than solve (GO TO 1e)
- 5 Other reason
- 4 Don't know

1b. Can you tell me why you are opposed to using taxes to pay for this program?

- 6 Opposed in principle
- 11 Can't afford to pay
- 1 Program isn't worth the money
- 3 Government will waste money
- 3 Too many taxes

1c. If this program was managed by a group not associated with the government, would you vote for the program?

- 5 Yes
- 8 No
- 3 Don't know

1d. If you knew that funding by local residents was the only way to solve this problem, would you vote for the measure?

- 8 No, I still would not vote for the measure
- 1 Yes, I would vote for the measure
- 0 Don't know

1e. If there was a way to make the program work so that the problem would be solved without causing additional problems, would you be willing to vote for the program?

- 12 Yes
- 6 No
- 0 Don't know

NOTE: The following question was asked only of residents of Cannon Beach.

CB1. Last year the Cannon Beach City Council voted to ban short-term vacation rentals effective 1997. If this ban was presented as a ballot measure for citizens to vote on, would you vote for or against it? (Multiple responses permitted for residents saying "against" so total percentage may be greater than 100.)

49 For

Against—can you tell me why you would vote that way?

8	Not a problem
6	Bad image/makes people think we don't want visitors
25	Violates private property rights/ability to do what you want
10	Financial impact/people need income/would hurt property values
4	Alternative/self-regulation would be better
4	Other
0	Don't know

NOTE: The following question was asked only of residents of Seaside.

SS1. Last year the Seaside City Council voted to restrict ownership of short-term vacation rentals to current owners and their heirs. The result of this regulation will be a slow phaseout of these rentals in Seaside. If this regulation was presented as a ballot measure for citizens to vote on, would you vote for or against it? (Multiple responses permitted for residents saying "against" so total percentage may be greater than 100.)

36 For

Against—can you tell me why you would vote that way?

3	Not a problem
6	Bad image/makes people think we don't want visitors
32	Violates private property rights/ability to do what you want
11	Financial impact/people need income/would hurt property values
1	Alternative/self-regulation would be better
3	Other
11	Don't know

Part III

Now I'd like to ask you some questions about you and your household. Again, all responses are CONFIDENTIAL and individual responses will not be reported.

Q1. How many years you have lived in this community?

- 27 Less than 5 years
- 20 5 to 9 years
- 20 10 to 19 years
- 33 20 or more years

(IF 5 OR MORE SKIP TO Q6)

Q2. Where did you live just before moving to this community?

- 10 Elsewhere on the Oregon coast
- 31 In Oregon, but not on the coast
- 24 In California
- 12 Washington
- 2 Idaho
- 2 Colorado
- 1 Montana
- 15 Elsewhere in US
- 1 Canada
- 2 Other foreign country

Q3. What was the most important reason or reasons for moving to this community? (Multiple responses permitted so total percentage may be greater than 100.)

- 29 Natural environment (ocean, forests)
- 25 Lifestyle (small-town life, quality of life)
- 27 Job opportunity/closer to job
- 2 To start a business here
- 25 Family reasons (be closer to family, moved with family)
- 5 Cost of living (e.g., cheaper than California)
- 6 Climate, weather, to get away from earthquakes
- 1 Better access to medical facilities
- 8 Other

Q4. Before moving to the coast, did you visit the area as a tourist?

- 32 No (SKIP TO Q6)
- 68 Yes

Q5. Would you say that your experience as a tourist . . .

- 18 Was the main reason why you moved to the coast.
- 42 Was part of the reason why you moved to the coast. OR
- 39 Had nothing to do with why you moved to the coast.

Q6. In the past five years, have you considered moving away from this community? (Multiple responses permitted for residents saying "yes" so total percentage may be greater than 100.)

65 No

Yes—Why?

3 Cost of living
 4 Lack of cultural/social opportunities
 1 Tourism problems generally
 1 Congestion/crowding specifically related to tourism
 1 Growth problems
 2 Opposition to taxes/government
 1 Traffic congestion
 2 Crowding (downtown, stores, etc.)
 8 Personal reasons (not related to community)
 11 Job reasons (transferred, opportunities elsewhere)
 2 Health reasons (access to medical facilities)
 3 Weather
 1 Crime/drug problems in community
 2 Other (includes going to school)

Q7. In the past five years, have any friends or members of your family moved away from this community? (Multiple responses permitted for residents saying "yes" so total percentage may be greater than 100.)

63 No

Yes—Why?

2 Cost of living
 2 Lack of cultural/social opportunities
 1 Tourism problems generally
 1 Congestion/crowding related to tourism
 1 Growth problems
 1 Opposition to taxes/government
 9 Personal reasons (not related to community)
 24 Job reasons (transferred, opportunities elsewhere)
 2 Health reasons (access to medical facilities)
 1 Weather
 2 Other (includes going to school)

Q8. Do you live in an apartment, a townhouse, a single-family house, or mobile home?

13 Apartment
 6 Townhouse/multiplex
 69 Single-family house
 12 Mobile home/trailer
 1 Other

Q9. Do you rent or own your home?

- 31 Rent
- 69 Own

Q10. Have you been employed during any part of the past year?

- 41 No (SKIP TO Q17)
- 59 Yes

Q11. In what industry was your primary job during the past year?

- 5 Lumber and wood products (for example, mills, and logging)
- 0 Agriculture (including processing of agricultural products)
- 3 Commercial fishing (including processing of fish products)
- 22 Professional and business services (for example, banking or insurance)
- 15 Retail trade (for example, foodstores and general merchandise)
- 14 Government (including education)
- 10 Construction, maintenance, repair companies
- 2 Arts/craft
- 1 Transport
- 2 Medical/health
- 1 Real estate/property management
- 7 Other
- 18 Tourism (for example, hotels, restaurants, charter fishing)

All those not working in the tourism industry skip to Q16.

Q12. In an average week how many hours do you work in the tourism industry?

- 65 35 or more hours per week
- 30 20 to 35 hours per week
- 5 Less than 20 hours per week

Q13. How many months per year do you work in the tourism industry?

- 71 12 months (all year)
- 15 6 to 12 months
- 14 Less than 6 months

Q14. What industry did you work in before working in the tourism industry?

- 2 Lumber and wood products
- 2 Agriculture
- 7 Commercial fishing

- 13 Professional and business services
- 14 Retail trade
- 4 Government (including education)
- 6 Construction, maintenance, repair companies
- 1 Transport
- 1 Medical/health care
- 16 Other
- 33 None—first job or only industry (SKIP TO Q17)

Q15. Is your salary in the tourism industry less per year than it was in your previous job?

50 No

Yes—Was it . . .

- 7 Very close to what you were earning before
- 15 About three-quarters of what you were earning before
- 16 About one-half of what you were earning before
- 7 Less than one-half of what you were earning before
- 4 Don't know

NOTE: The following question was skipped for those working in the tourism industry.

Q16. Even if you do not work in the tourism industry itself, your job may depend indirectly on tourism. In your opinion, how dependent is your current job on tourism? Is it . . .

- 16 Very dependent
- 40 Somewhat dependent
- 44 Not at all dependent

Q17. How many of your friends or relatives work in the tourism industry?

- 41 None
- 39 A few
- 10 Many
- 10 Most or all

GENDER: 39 Male
61 Female

Mail Survey, Tourism Version

Please tell us how tourism has changed your community in the last five years. For each of the following items, please circle the number that shows the kind of change caused by tourism. Try to ignore how the item has been affected by other things, such as changes in the timber and fishing industries.

For example, if you feel that tourism has led to a moderate increase in the number of movie theaters in your community, you would circle as follows:

ITEM	HOW HAS <u>TOURISM</u> CHANGED THE ITEM?					
	Large Decrease	Moderate Decrease	No Change	Moderate Increase	Large Increase	Don't Know
number of movie theaters in the area	1	2	3	4	5	DK

ITEM	HOW HAS <u>TOURISM</u> CHANGED THE ITEM?					
	Large Decrease	Moderate Decrease	No Change	Moderate Increase	Large Increase	Don't Know
number of full-time jobs available for current residents	2	8	17	59	5	9
amount of traffic in the area	0	1	5	34	58	1
price of groceries and household goods	0	2	31	46	15	6
number of shops in the area	0	3	9	60	26	3
amount of property taxes residents pay	0	1	11	35	36	17
attractiveness of the community	3	9	18	50	16	3
value of houses in the area	0	0	6	29	59	6
standard of living for your household	1	11	63	22	2	1
number of people living in the community	1	1	8	73	12	6
number of restaurants, entertainment, and recreation places in the area	0	1	13	69	14	2
community spirit among local residents	4	12	42	31	2	10
amount of crime in the community	0	2	32	45	14	7
availability of parking in residential areas	6	23	52	10	4	6

ITEM		Large Decrease	Moderate Decrease	No Change	Moderate Increase	Large Increase	Don't Know
number of people at my favorite recreation sites (beaches, fishing holes, etc.)	0	2	11	54	30	3	
amount of litter in the community	1	3	24	50	19	5	
amount of local government revenue from taxes on tourism businesses	0	0	11	42	8	40	
amount of noise and unruly behavior in residential areas	0	2	45	38	9	7	
number of part-time jobs available for current residents	1	6	11	55	15	12	
availability of downtown parking	19	32	27	16	4	2	
attractiveness of the scenery along Highway 101	10	14	48	21	6	2	

We'd also like to know how you feel about each of these changes. In our example on the last page we circled the number 4 to show that there was a moderate increase in the number of movie theaters in the area. If you really like to go to the movies, on this page you would circle 5 to show that you like this change a lot.

Try to think only about the changes caused by tourism, and not how you feel about that item in general.

ITEM	HOW DO YOU FEEL ABOUT THE CHANGE CAUSED BY TOURISM?					
	Dislike it a lot	Dislike it a little	Neutral	Like it a little	Like it a lot	Don't Know
number of movie theaters in the area	1	2	3	4	5	DK

ITEM	HOW DO YOU FEEL ABOUT THE CHANGE CAUSED BY TOURISM?					
	Dislike it a lot	Dislike it a little	Neutral	Like it a little	Like it a lot	Don't Know
number of full time jobs available for current residents	7	5	19	22	37	9

	Dislike it a lot	Dislike it a little	Neutral	Like it a little	Like it a lot	Don't Know
amount of traffic in the area	33	34	25	5	3	0
price of groceries and household goods	20	24	47	3	1	5

**HOW DO YOU FEEL ABOUT THE
CHANGE CAUSED BY TOURISM?**

ITEM	Dislike it a lot	Dislike it a little	Neutral	Like it a little	Like it a lot	Don't Know
number of shops in the area	1	7	32	32	24	3
amount of property taxes residents pay	39	21	23	1	1	16
attractiveness of the community	6	10	23	26	33	1
value of houses in the area	16	19	24	20	14	7
standard of living for your household	10	8	62	10	8	3
number of people living in the community	5	16	44	24	8	3
number of restaurants, entertainment, and recreation places in the area	1	6	29	40	21	2
community spirit among local residents	5	9	43	21	15	7
amount of crime in the community	39	22	26	3	4	6
availability of parking in residential areas	11	28	49	5	3	4
number of people at my favorite recreation sites (beaches, fishing holes, etc.)	11	31	45	8	4	2
amount of litter in the community	41	29	25	2	2	2
amount of local government revenue from taxes on tourism businesses	5	4	29	20	12	30
amount of noise and unruly behavior in residential areas	21	29	43	1	2	5
number of part-time jobs available for current residents	6	6	18	33	26	10
availability of downtown parking	25	32	30	8	4	1
attractiveness of the scenery along Highway 101	14	14	38	14	17	3

There are different types of tourism, including hotels and motels, vacation rentals, destination resorts, and day visitors. Destination resorts are self-contained hotel and restaurant complexes, usually outside cities. We would like your opinion about these different types of tourism and their effects.

For each item, please circle the number that shows your opinion of each type of tourism. If you do not know the effect of that type of tourism, please circle DK.

Your opinion of the **number of jobs** created by:

	<i>Hardly Any</i>	<i>A Few</i>	<i>Many</i>	<i>Very Many</i>	<i>Don't Know</i>
Hotels and motels	3	33	40	14	10
Long-term vacation rentals (1 week or longer)	25	36	10	2	26
Short-term vacation rentals (less than 1 week)	22	32	17	6	24
Destination resorts (like Salishan)	10	18	25	10	37
Day visitors	9	26	32	16	18

Your opinion of the amount of **disruption** (congestion, noise, and so on) created by:

	<i>None</i>	<i>Small Amount</i>	<i>Moderate Amount</i>	<i>Large Amount</i>	<i>Don't Know</i>
Hotels and motels	12	42	29	6	10
Long-term vacation rentals (1 week or longer)	20	39	18	3	19
Short-term vacation rentals (less than 1 week)	17	34	20	12	17
Destination resorts (like Salishan)	21	28	14	5	31
Day visitors	8	29	34	20	9

Your opinion of the effect on the **natural environment** created by:

	<i>Very Negative</i>	<i>Negative</i>	<i>Positive</i>	<i>Very Positive</i>	<i>Don't Know</i>
Hotels and motels	8	40	28	1	23
Long-term vacation rentals (1 week or longer)	6	33	29	2	30
Short-term vacation rentals (less than 1 week)	12	35	24	1	28
Destination resorts (like Salishan)	8	23	25	4	40
Day visitors	16	36	25	2	21

During the telephone interview, we asked what you expect and want to happen to some coastal industries. Now we would like to ask the same kind of questions about tourism in your community.

For each type of tourism, please circle whether you **EXPECT** the type of tourism to decrease, stay about the same, or increase in the next five years.

I EXPECT this type of tourism to:

	Decrease	Stay about the same	Increase	Don't Know
Hotels and motels	1	23	74	1
Long-term vacation rentals (1 week or longer)	4	37	53	7

I EXPECT this type of tourism to:

	Decrease	Stay about the same	Increase	Don't Know
Short-term vacation rentals (less than 1 week)	9	27	57	7
Destination resorts (like Salishan)	3	26	49	23
Day visitors	2	13	82	4

Next, for each type of tourism, please circle whether you **WANT** the type of tourism to decrease, stay the same, or increase in the next five years.

I WANT this type of tourism to:

	Decrease	Stay about the same	Increase	Don't Care
Hotels and motels	3	55	38	5
Long-term vacation rentals (1 week or longer)	7	45	39	9
Short-term vacation rentals (less than 1 week)	17	43	33	7
Destination resorts (like Salishan)	6	36	41	17
Day visitors	15	42	38	6

NOTE: The following questions were customized for each respondent based on community of residence, bids used in the telephone survey, and responses from telephone survey. The blank spaces were filled in based on this customization.

During the telephone interview we asked if you would vote for or against a program that would reduce traffic congestion on Highway 101 by ____% during busy periods (so that traffic during August would be about the same as it currently is in ____). This program would cost your household \$____ each year. You said that you would vote ____ this program.

Sometimes people change their mind about how they would vote, perhaps because there isn't much time to think about it on the telephone. Have you changed your mind about this program? Please circle one of the following answers:

91 No, I would still vote ____ this program

9 Yes, I have changed my mind and would vote ____ this program.

In some communities, it makes sense to address two or three problems at the same time. This could be done with packages that combine two or three programs. As before, to pay for a package every household in the community would have to contribute money to an independent fund. We would like to ask you about two of these packages.

The first package would:

1. Provide low-income housing for all the families in your community that qualify.
- AND
2. Increase police patrols to reduce noise and minor crime by 30%, so that noise and minor crime during _____ would be about the same as it currently is in _____.

If you had a chance to vote on a ballot measure that would implement this package but would require your household to pay \$____ each year, would you vote for or against it? As with all ballot measures, at least half the voters would have to vote for the measure for it to pass.

NOTE: The amount each household would pay (the bid) varied across residents. More bid levels were offered for these packages than for individual programs, so responses for averages of three bids at a time are presented here. The votes for and against the measure for each average bid are given below.

Ave. bid (\$)	Percent voting For	Percent voting Against	Percent of "Don't Know"
22	58	21	21
58	37	44	19
85	40	53	7
109	18	73	9
146	60	40	0
186	20	56	24
243	21	50	29
309	23	62	15
391	17	69	14
629	20	60	20
1039	9	74	17

The second package would:

1. Reduce traffic congestion on Highway 101 by 50%, so that traffic during August would be about the same as it currently is in January.
- AND
2. Provide low-income housing for all the families in your community that qualify.
- AND
3. Increase police patrols to reduce noise and minor crime by 30%, so that noise and minor crime during _____ would be about the same as it currently is in _____.

If you had a chance to vote on a ballot measure that would implement this package but would require your household to pay \$ ____ each year, would you vote for or against it?

NOTE: The amount each household would pay (the bid) varied across residents. More bid levels were offered for these packages than for individual programs, so responses for averages of three bids at a time are presented here. The votes for and against the measure for each average bid are given below.

Ave. bid (\$)	Percent voting For	Percent voting Against	Percent of "Don't Know"
29	43	29	29
98	32	59	9
134	18	73	10
159	13	63	25
235	31	56	13
270	20	47	33
293	5	84	11
371	28	59	13
507	21	61	18
653	16	84	0
823	17	83	0
950	7	70	23
1222	15	85	0

NOTE: Several questions concerning the community, economy, and local government policy were asked in both the tourism and general surveys. Those results are combined and presented in the general survey, which follows this tourism survey. The following question was asked only on the tourism survey.

We are also interested in your opinions on some general issues. Please tell us how much you agree or disagree with the following statements.

	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree	Don't Know
In general, it is okay to allow some environmental impact in order to increase the number of jobs available in this community	17	22	10	31	18	3

What do you think is the most important concern facing your community right now?

Responses to this question have not yet been analyzed.

NOTE: The following demographic data are for both the tourism and the general surveys.

Finally, we would like to ask a few questions about you and your household. Please remember that all responses are **CONFIDENTIAL** and that individual responses will **NOT** be reported.

What is your age group?

8	18-29 years old
18	30-39 years old
20	40-49 years old
17	50-59 years old
39	60 years old or older

What is your highest level of education?

0	Some elementary school
7	Some high school
22	Completed high school
7	Completed vocational school or apprenticeship
32	Some college
20	Completed college
12	Completed a graduate degree

Are you currently in school?

4	Yes
96	No

How many people, including yourself, live in your household?

26	1 person
45	2 people
13	3 people
9	4 people

- 5 5 people
- 2 6 or more people

If you own your home, what is the assessed value of the property? That is, how much do you think your home would sell for if you wanted to sell it?

- 5 Less than \$20,000
- 3 to \$34,999
- 8 \$35,000 to \$49,999
- 10 \$50,000 to \$64,999
- 15 \$65,000 to \$79,999
- 27 \$80,000 to \$124,999
- 21 \$125,000 to \$199,999
- 11 \$200,000 or more

Into what group does your total household income fall (before taxes)?

- 13 Less than \$10,000
- 19 \$10,000 to \$19,999
- 22 \$20,000 to \$29,999
- 16 \$30,000 to \$39,999
- 11 \$40,000 to \$49,999
- 13 \$50,000 to \$74,999
- 4 \$75,000 to \$99,999
- 3 \$100,000 or more

About how much of your total household income is dependent on tourism (either from employment or from investments in the tourism industry)?

- 31 None
- 19 Some, but less than a quarter (25%)
- 7 More than a quarter but less than a half (25-50%)
- 5 More than a half but less than three quarters (50-75%)
- 8 More than three quarters (75-100%)

Mail Survey, General Version

First, please tell us about your community. For each statement, please circle the number that shows how much you agree or disagree with the statement. For example, if people are really great at helping each other out in times of need, you would circle as follows:

	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree	Don't Know
People in this community help each other in times of need	1	2	3	4	5	DK

	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree	Don't Know
This community is one of the most attractive on the Oregon coast	2	8	6	30	53	1
Local residents are proud of this community	1	4	9	39	45	1
If I had the opportunity, I would move away from this community	51	13	13	11	8	4
Local residents work well together to deal with issues that affect the community	7	22	18	39	10	3
Residents sometimes need to make personal sacrifices for the good of the community	4	6	19	47	20	4
I enjoy spending time with other people in this community	2	2	12	36	47	1
Compared to other communities, this community doesn't have much going for it	49	26	7	11	6	2
Tourists visiting the coast are pretty much the same kind of people as those who live here	13	30	13	29	12	3
In this community, newer residents and longer-term residents don't get along well	18	26	18	22	9	7

What do you think is the most important concern facing your community right now?

Responses to this question have not yet been analyzed.

Next, please tell us what you think is happening with the local economy in your community. Again, please circle the number that shows how much you agree or disagree with the statement.

	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree	Don't Know
The success of the local economy depends on the hard work of residents and the effective leadership of local government	2	7	3	35	52	1
This community is able to deal with changes in the local economy and still do okay	6	18	11	52	10	3
The local economy is mostly controlled by decisions made in Salem, Portland and Washington, DC. Residents can't control what happens.	17	32	9	22	14	7
Creating jobs for residents should be a high priority for this community	1	5	7	25	62	0
Fish resources belong to everyone, so it is okay for fishermen from outside Oregon to fish off the Oregon coast	29	28	14	16	11	2
Newcomers bring skills and business opportunities that contribute to the local economy	2	9	11	45	33	1
Residents must accept changes if they want to keep the local economy healthy	2	6	10	45	36	1

There are several different industries on the coast, including commercial fishing, lumber and wood products, tourism, and agriculture. We can also think of retirement as an industry since it brings in money from outside the community.

In many communities, these industries are changing. To help us identify how these changes are affecting your community, we would like your opinion about the different industries. Please circle the number that shows how each industry rates for each item.

Your opinion of the number of jobs created by:

	Hardly Any	A Few	Many	Very Many	Don't Know
Commercial fishing.....	17	34	33	9	6
Lumber and wood products	13	29	40	12	6
Tourism	0	7	37	53	2
Agriculture	24	48	16	5	8
Retirement.....	4	28	37	27	4

Your opinion of the quality of jobs created by:

	<i>Low</i>	<i>Medium/ Low</i>	<i>Medium/ High</i>	<i>High</i>	<i>Don't Know</i>
Commercial fishing.....	19	39	27	5	11
Lumber and wood products	12	30	43	6	9
Tourism	15	32	31	19	4
Agriculture	23	37	20	6	14
Retirement	8	38	31	15	9

Your opinion of the effect on the natural environment created by:

	<i>Very Negative</i>	<i>Negative</i>	<i>Positive</i>	<i>Very Positive</i>	<i>Don't Know</i>
Commercial fishing.....	7	34	38	3	19
Lumber and wood products	19	38	30	4	9
Tourism	4	25	46	16	9
Agriculture	4	13	53	10	21
Retirement	3	14	50	18	16

Next, we'd like to find out more about these different industries. As you did in the first section, please circle the number that shows how much you agree or disagree with each statement.

	<i>Strongly Disagree</i>	<i>Somewhat Disagree</i>	<i>Neutral</i>	<i>Somewhat Agree</i>	<i>Strongly Agree</i>	<i>Don't Know</i>
Fishing involves understanding and working with nature, and therefore, it is more satisfying than other jobs.....	6	16	29	34	5	9
Tourism helps diversify the local economy, and therefore, it is an important industry for this community	1	5	4	35	55	0
The fishing industry can cause a bad smell in town	24	18	18	26	12	2
Agriculture is the most basic occupation in our society, and almost all other occupations depend on it	11	13	22	30	18	7
Overall, for me personally the benefits of tourism outweigh the costs of tourism	11	11	23	29	22	4
Overall, for my community the benefits of tourism outweigh the costs of tourism	4	6	12	42	33	3
Logging involves understanding and working with nature, and therefore, it is more satisfying than other jobs.....	12	22	28	21	8	10

	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree	Don't Know
Having tourists around really changes this community in ways I don't like.....	22	25	19	23	11	0
Logging can involve clearcuts that ruin the scenery of the area	9	9	6	25	51	0

Next, please tell us about the things that make a community special, and whether these things have changed in your community.

Is living in a community where you can count on your neighbors to help you out in time of need an important part of what makes a community special?	Very Important	71	Somewhat Important	26	Not Important	3
Are you currently satisfied with this aspect of your community?	Very Satisfied	45	Somewhat Satisfied	46	Not Satisfied	9
In the last five years, has this aspect of your community changed? (Don't know = 3%)	Changed for the worse	17	Stayed the same	65	Changed for the better	16

Why has it changed?

Responses to this question have not yet been analyzed.

Is having jobs that depend on natural resources, like fishing, logging, and farming, an important part of what makes a community special?	Very Important	45	Somewhat Important	44	Not Important	11
Are you currently satisfied with this aspect of your community?	Very Satisfied	13	Somewhat Satisfied	56	Not Satisfied	30
In the last five years, has this aspect of your community changed? (Don't know=3%)	Changed for the worse	58	Stayed the same	34	Changed for the better	5

Why has it changed?

Responses to this question have not yet been analyzed.

Is living in an area with natural scenery and opportunities for outdoor recreation an important part of what makes a community special?

Very Important	89	Somewhat Important	10	Not Important	0
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Are you currently satisfied with this aspect of your community?

Very Satisfied	62	Somewhat Satisfied	32	Not Satisfied	6
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In the last five years, has this aspect of your community changed?
(Don't know=1%)

Changed for the worse	24	Stayed the same	60	Changed for the better	15
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Why has it changed?

Responses to this question have not yet been analyzed.

Is living in a community where things don't change much an important part of what makes a community special?

Very Important	16	Somewhat Important	50	Not Important	35
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Are you currently satisfied with this aspect of your community?

Very Satisfied	19	Somewhat Satisfied	59	Not Satisfied	21
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In the last five years, has this aspect of your community changed?
(Don't know=2%)

Changed for the worse	23	Stayed the same	51	Changed for the better	24
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Why has it changed?

Responses to this question have not yet been analyzed.

Are there other things that make your community special? Please list them here:

- 4 Citizen involvement in local government
- 33 Natural beauty, recreation, or climate
- 17 Arts, cultural and other community activities
- 25 Community spirit, nice people, concern for other residents
- 12 Small size, absence of congestion, crime, litter, and other city problems
- 10 Other (including good shopping and dining facilities)

NOTE: The following questions were customized for each respondent based on community of residence, bids used in the telephone survey, and responses from telephone survey. The blank spaces were filled in based on this customization.

During the telephone interview we asked if you would vote for or against a program that would reduce traffic congestion on Highway 101 by ____ % during busy periods (so that traffic during August would be about the same as it currently is in ____). This program would cost your household \$ ____ each year. You said that you would vote ____ this program.

Sometimes people change their mind about how they would vote, perhaps because there isn't much time to think about it on the telephone. Have you changed your mind about this program? Please circle one of the following answers:

- 87 No, I would still vote _____ this program
 13 Yes, I have changed my mind and would vote _____ this program.

In some communities, it makes sense to address two problems at the same time. This could be done with packages that combine two programs. As before, to pay for a package every household in the community would have to contribute money to an independent fund. We would like to ask you about two of these packages.

The first package would:

1. Reduce traffic congestion on Highway 101 by 50%, so that traffic during August would be about the same as it currently is in January.

AND

2. Increase police patrols to reduce noise and minor crime by 30%, so that noise and minor crime during _____ would be about the same as it currently is in _____.

If you had a chance to vote on a ballot measure that would implement this package but would require your household to pay \$ _____ each year, would you vote for or against it? As with all ballot measures, at least half the voters would have to vote for the measure for it to pass.

NOTE: The amount each household would pay (the bid) varied across residents. More bid levels were offered for these packages than for individual programs, so responses for averages of three bids at a time are presented here. The votes for and against the measure for each average bid are given below.

Ave. bid (\$)	Percent voting For	Percent voting Against	Percent of "Don't Know"
31	38	41	21
89	43	36	21
126	18	65	18
136	33	47	20
148	31	50	19
178	15	70	15
211	33	54	13
286	12	69	19
510	15	65	21
779	22	65	13
969	12	82	6

The second package would:

1. Reduce traffic congestion on Highway 101 by 50%, so that traffic during August would be about the same as it currently is in January.
- AND
2. Provide low-income housing for all the families in your community that qualify.

If you had a chance to vote on a ballot measure that would implement this package but would require your household to pay \$ ____ each year, would you vote for or against it?

NOTE: The amount each household would pay (the bid) varied across residents. More bid levels were offered for these packages than for individual programs, so responses for averages of three bids at a time are presented here. The votes for and against the measure for each average bid are given below.

Ave. bid (\$)	Percent voting For	Percent voting Against	Percent of "Don't Know"
37	30	55	15
80	33	48	19
109	31	46	23
124	30	45	25
162	21	70	9
202	20	60	20
266	29	53	18
316	10	76	14
429	10	80	10
570	11	79	11
899	17	76	7

In this section, please tell us how you feel about your local government and the opportunities for you to affect what happens in your community. As before, please circle the number that shows how much you agree or disagree with each statement.

	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree	Don't Know
Local government works hard to address the concerns of local residents	11	25	10	39	12	3
Local government pays too much attention to the needs of tourism businesses	8	24	22	23	17	6
This community has good fire, police, and other public services	2	6	9	38	44	0
In general, local government is effective in using tax revenue to pay for programs that benefit the community	10	19	18	34	8	12
I can personally influence how tourism is developed in this community	20	17	24	21	6	13

	Strongly Disagree	Somewhat Disagree	Neutral	Somewhat Agree	Strongly Agree	Don't Know
Local government should use property tax revenues to attract more tourists to this community during the low tourist season	24	19	18	26	9	4
Local government should use property tax revenues to attract and retain businesses in this community	12	10	13	37	23	4
Local governments should take an active role in controlling the negative aspects of tourism and other industrial development	2	5	11	40	39	3
Residents of this community are willing to pay taxes if the money is used for a good cause	9	14	12	39	17	9

Many coastal communities are looking for ways to create new jobs for residents. Unfortunately, most options for increasing jobs have some costs. These costs might be economic, social, or environmental.

In this section, we list a few of these options. For each one, please think about whether the benefit of increasing jobs for residents in your community is worth paying the cost. Please circle the number that shows whether you feel the option is:

the costs *Not acceptable*—it would not be okay if it happened because the benefits are less than the costs
OR
the costs *Acceptable*—it would be okay if it happened because the benefits are about the same as the costs
OR
 Desirable—you want it to happen because the benefits are greater than the costs

OPTION	THIS OPTION IS		
	<i>Not Acceptable</i>	<i>Acceptable</i>	<i>Desirable</i>
Change government regulations so it will be easier for industries that cause some air and water pollution to build factories here	82	13	4
Raise local taxes and use the revenue to help traditional industries, like fishing and timber, if they need it to survive	61	33	6
Change zoning regulations so that residential areas in the community can be turned into commercial areas.....	68	27	5
Change zoning regulations so that forest and farm land can be turned into <i>residential</i> areas	58	33	9

	<i>Not Acceptable</i>	<i>Acceptable</i>	<i>Desirable</i>
Change zoning regulations so that forest and farm land can be turned into <i>industrial</i> or <i>commercial</i> areas	66	27	6

Are there any other options that would be desirable? Please write them here:

Of the 28 residents who answered this question, the most frequent suggestions were to reduce regulations for landowners and developers and to try to attract nonpolluting light industry and small businesses. Other residents suggested lowering taxes and facilitating tourism development by, for example, developing more attractions.