# 2020 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY

Driftline Consulting

November, 2020

#### **PURPOSE**

The 2020 Oregon Tourism Industry Stakeholder Survey was designed on behalf of the Oregon Tourism Commission, dba Travel Oregon and the state's seven official regional destination management organizations (RDMOs), to elicit feedback from individuals and organizations linked to the tourism industry. The results of the survey will help set strategic direction for Travel Oregon and the regional partners. It will also be used to make funding and programmatic decisions in marketing, grants, tourism-related infrastructure, visitor management, and more.

#### DATA COLLECTION

 The survey was conducted online and distributed in both English and Spanish between October 5-30, 2020, by way of direct email communications, a press release, industry newsletters and industry partners' distribution channels to an open URL hosted on Travel Oregon's industry website.

A total of 1,245 valid responses were collected.

#### ADDITIONAL RESOURCES

- Results from the survey are accessible via an interactive online dashboard that enables
  further exploration of the data. Users of this online dashboard can segment questions by
  key variables to gain additional insight into segments of the Oregon tourism stakeholder
  population that were not addressed in this report.
- The survey also resulted in an extensive number of open-ended responses. Selections of open-ended responses are provided throughout this report. These comments are presented in the respondents' own words, and they do not reflect the opinions of Travel Oregon. All comments are viewable in the online dashboard with accompanying word clouds and bar charts.
- Access the online dashboards by going to: <a href="https://rebrand.ly/TO\_Stakeholder2020">https://rebrand.ly/TO\_Stakeholder2020</a>

#### KEY FINDINGS BUSINESS HEALTH

46% of respondents reported their business/organization has laid off, terminated, or otherwise let go of employees in 2020, with the most layoffs occurring 4-6 months ago (roughly April through June). 14% anticipate layoffs/terminations at their business/organization within the next six months, while 32% are unsure if layoffs will occur within the next six months.

 Over half (54%) of respondents characterize the impacts of COVID-19 on their organization/business's revenue or funding as having a significant negative impact. By comparison, 17% describe the wildfires as having a significant negative impact.

# KEY FINDINGS RESILIENCY, RECOVERY, & REOPENING

- 37% of respondents are not at all concerned about promoting their community and feel it
  would benefit from visitors, while 24% expressed some or significant concern. When it
  comes to welcoming visitor to their communities, respondents are most concerned with
  "diminished visitor experience at their destination due to facility/amenity closures, fewer
  frontline workers, etc."
- By a large margin, "help advocating for effective policies and funding to support tourism businesses/organizations" is the resource that will best support Oregon businesses/organizations recover. "Support developing and bolstering visitor experiences that are COVID-appropriate and that enhance local livability" will best support Oregon communities, followed by "communication tools and message frameworks to convey safe visitor behavior in town and businesses."

## KEY FINDINGS PLANNING AND MANAGEMENT

- From a list of ten actions that would aid in recovery from COVID-19, wildfires, and related
  economic conditions, respondents believe grants and funding resources should be the top
  priority. Marketing and promotion should be a key focus area in the longer term (next 2 to 5
  years).
- "Managing tourism impacts in order to preserve local assets (natural and cultural) and livability" is the top tactical planning and management strategy that will advance the economic impact of tourism and ensure its vitality and sustainability.

# KEY FINDINGS DIVERSITY, EQUITY & INCLUSION

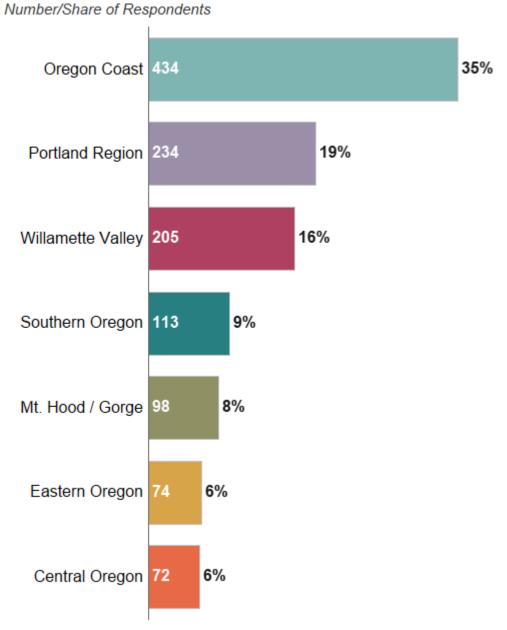
- 44% of respondents think the tourism industry should play a role in advancing social and racial justice. 22% percent do not think the industry should play a role, while 23% are unsure.
- 61% report having received training related to cultural awareness, anti-racism, implicit bias, or some other diversity, equity, and inclusivity related training. 54% percent would be interested in participating in diversity, equity, and/or inclusivity related training.
- Nearly 9 in 10 Oregon respondents feel somewhat or very prepared to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds.

## KEY FINDINGS INDUSTRY ENGAGEMENT & COMMUNICATIONS

- 61% of respondents agree or strongly agree with the statement, "I am satisfied with my experience(s) working with Travel Oregon." Just 3% strongly disagree. To a slightly lesser degree on average, respondents are satisfied working with their RDMO.
- By a large margin, respondents currently receive tourism-related information from Travel
  Oregon and their RDMO from e-newsletters (85%). Website was the next most-cited
  information source at 46%. Over two-thirds of respondents prefer to receive industry-related
  information via e-newsletter.

#### **RESPONSES BY REGION**

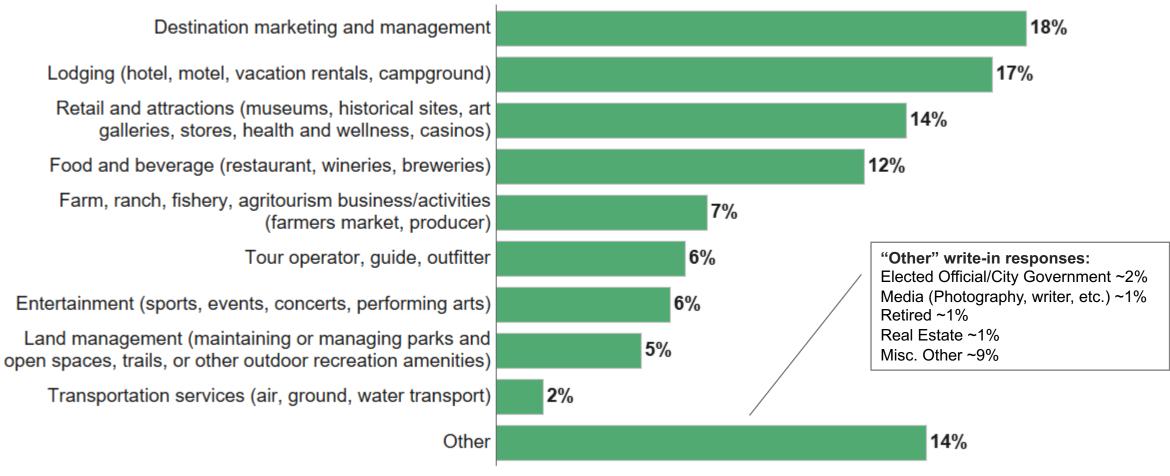
A total of 1,245 valid responses were collected.



### RESPONDENT PROFILE

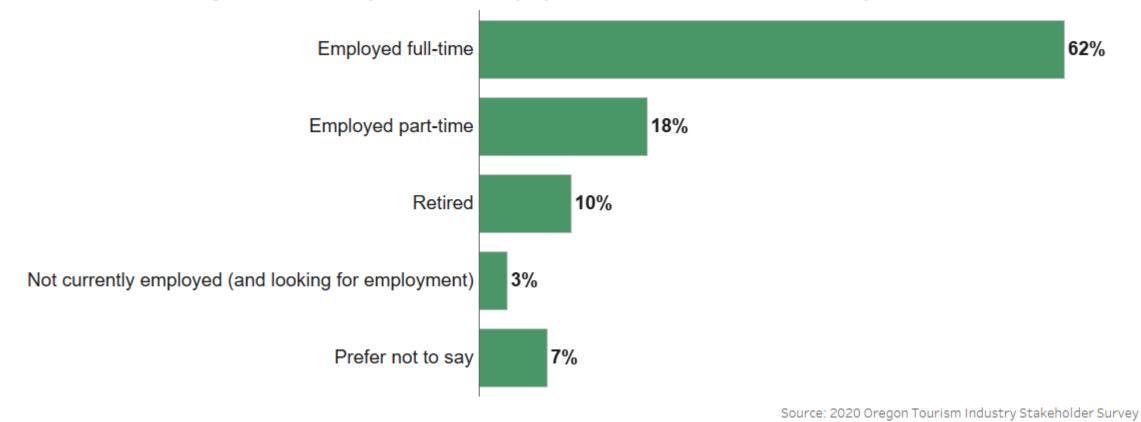
#### TOURISM INDUSTRY SECTOR

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



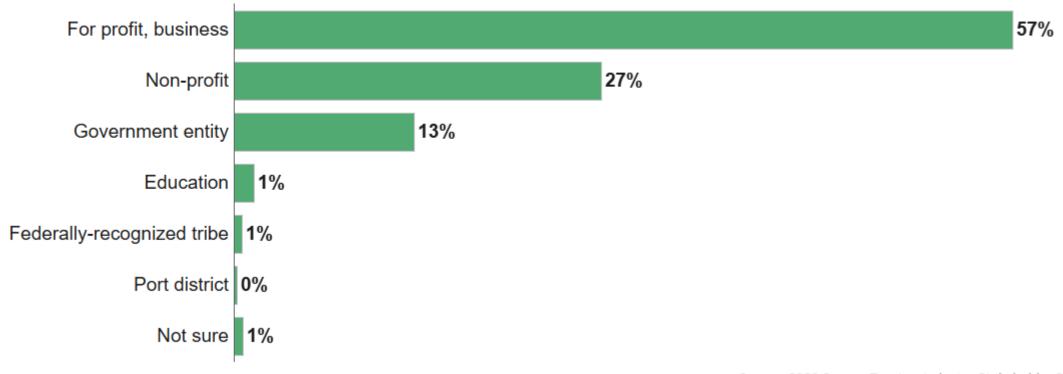
#### **EMPLOYMENT STATUS**

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

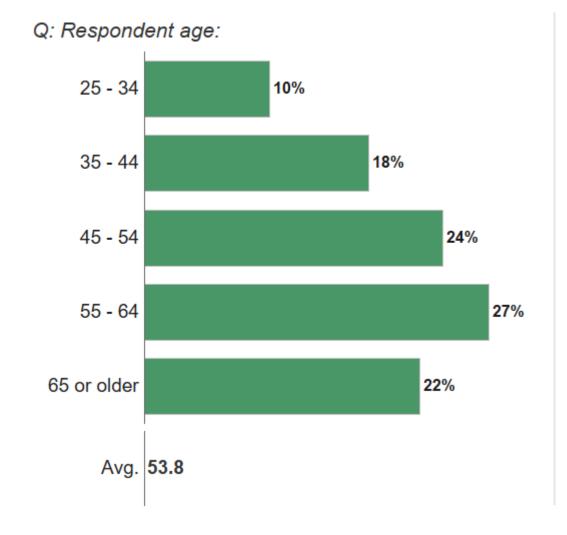


#### **ENTITY TYPE**

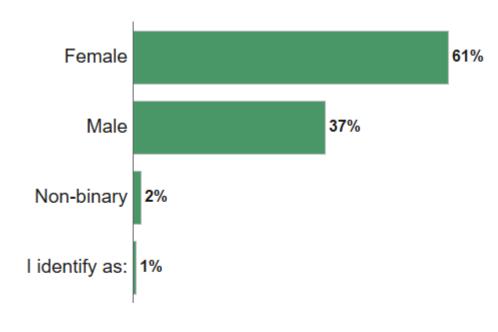
Q: Which entity type best describes your business/organization?



#### AGE & GENDER

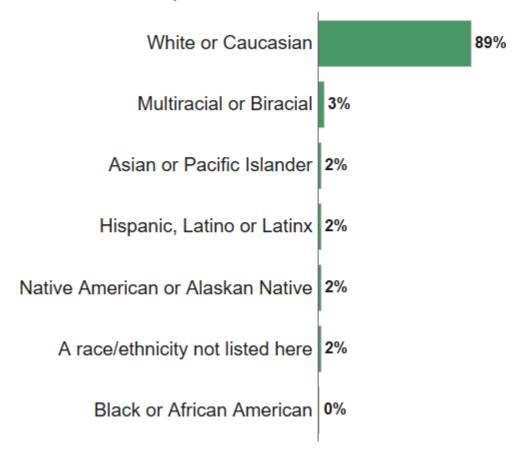


#### Q: What is your gender?

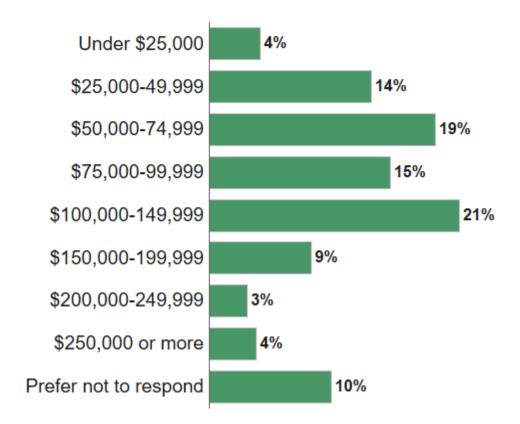


#### RACE & INCOME

Q: Which of the following best describes you? (Please select one answer)

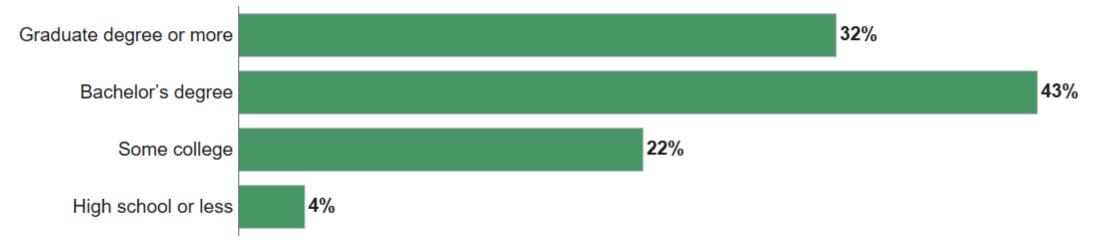


Q: Which of these categories best describes the total gross annual income of your household (before taxes)?



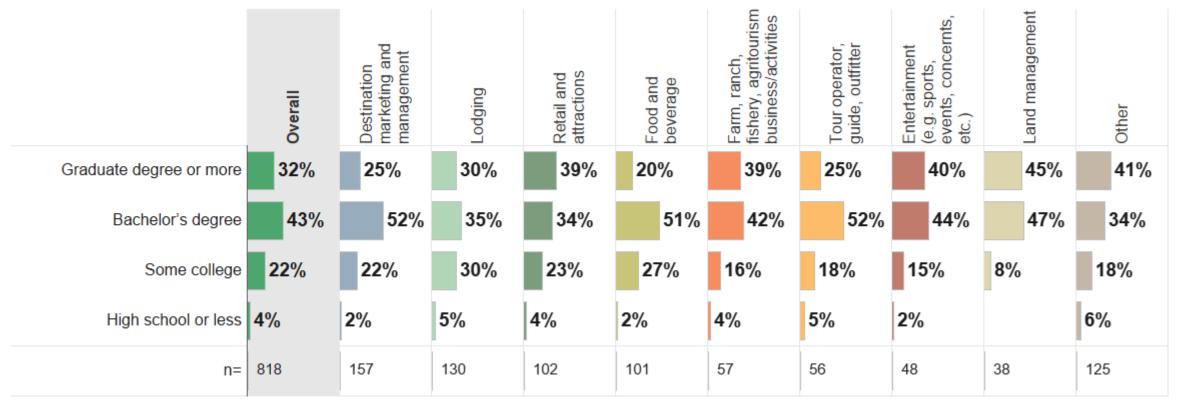
#### **EDUCATION**

#### Q: What is your highest level of education?



#### EDUCATION BY SECTOR

#### Q: What is your highest level of education?



Source: 2020 Oregon Tourism Industry Stakeholder Survey

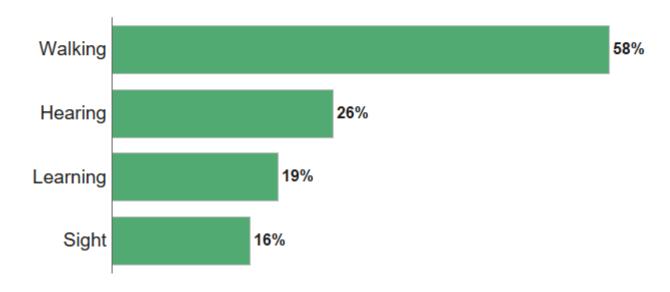
Transportation services sector included in "Other" due to insufficient sample size.

#### PRESENCE OF A DISABILITY

Q: Do you have a disability?



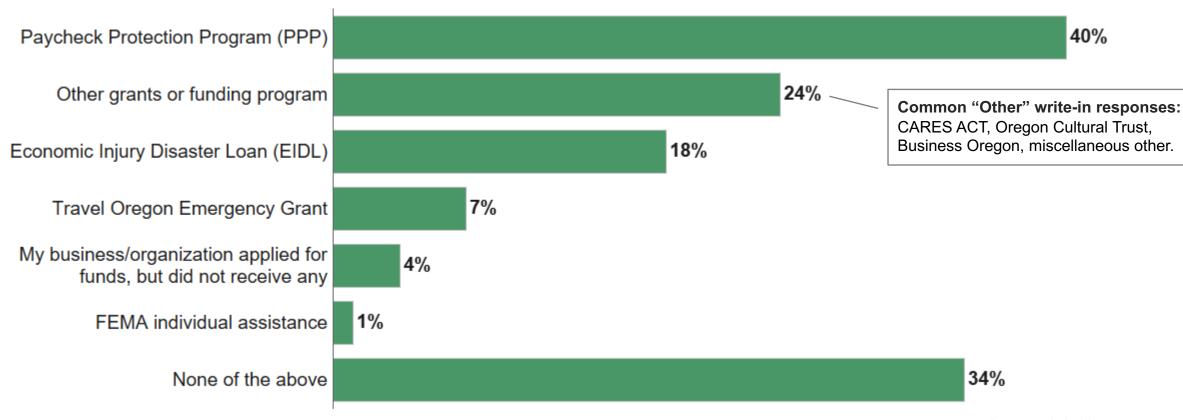
Q: [If Yes] What are these disabilities? (Check all that apply)



# FUNDING SOURCES & BUSINESS HEALTH

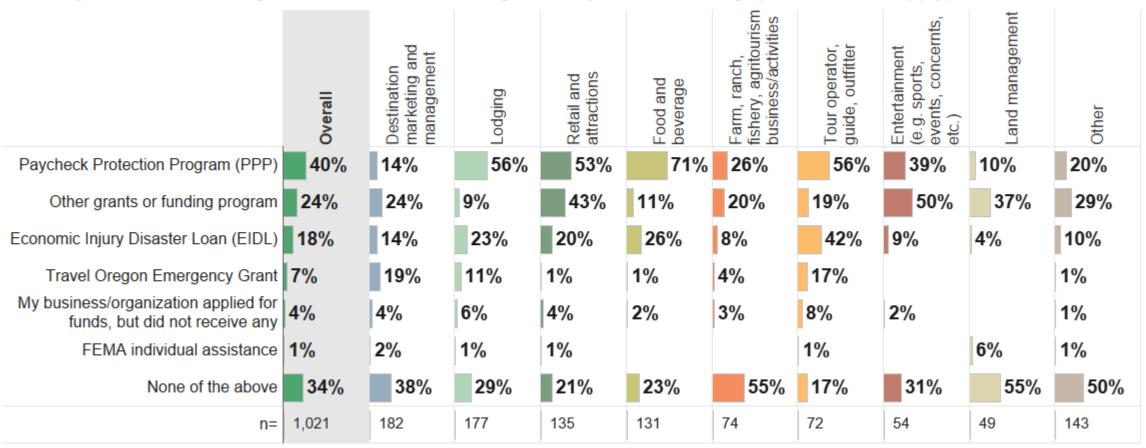
#### **FUNDING SOURCES**

Q: Has your business or organization received funding from any of the following: (Check all that apply)

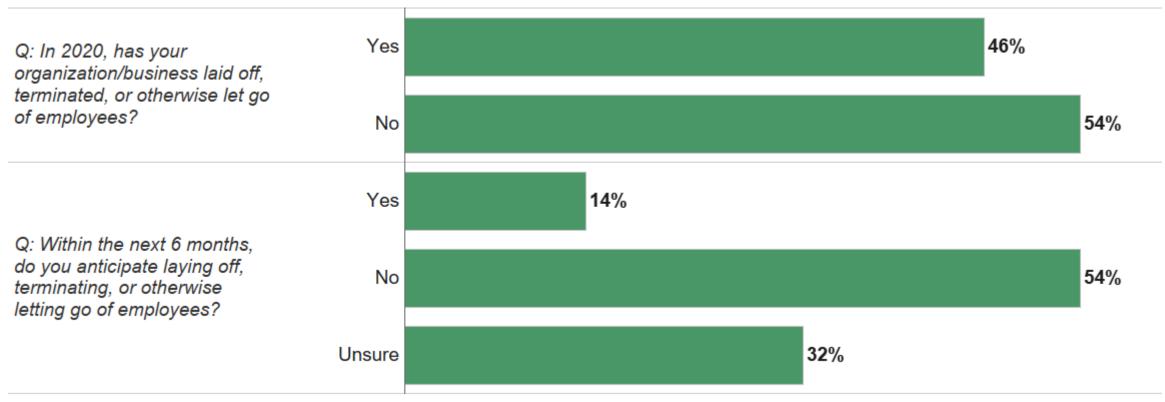


### FUNDING SOURCES BY SECTOR

Q: Has your business or organization received funding from any of the following: (Check all that apply)



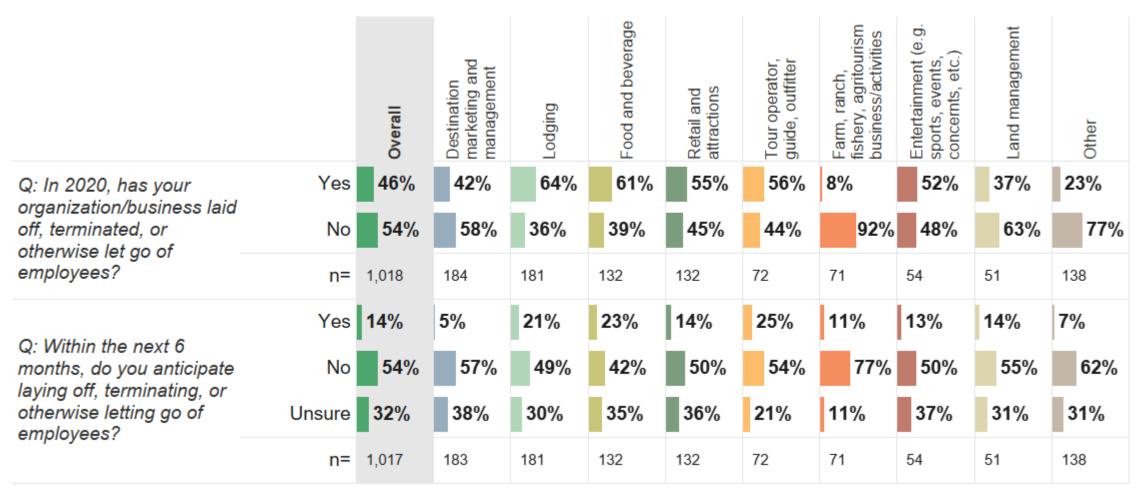
#### PAST & FUTURE LAYOFFS



## PAST & FUTURE LAYOFFS BY REGION

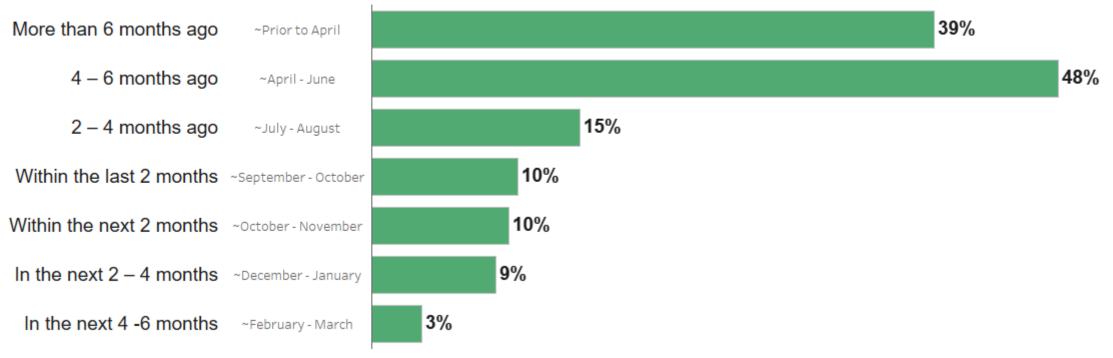
		Overall	Region						
			Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
Q: In 2020, has your organization/business laid off, terminated, or otherwise let go of employees?	Yes	46%	62%	40%	44%	42%	54%	39%	46%
	No	54%	38%	60%	56%	58%	46%	61%	54%
	n=	1,018	68	62	82	322	193	102	181
Q: Within the next 6 months, do you anticipate laying off, terminating, or otherwise letting go of employees?	Yes	14%	18%	11%	11%	13%	22%	12%	13%
	No	54%	51%	65%	52%	55%	49%	55%	54%
	Unsure	32%	31%	24%	37%	32%	30%	33%	33%
	n=	1,017	67	62	82	322	193	102	181

### PAST & FUTURE LAYOFFS BY SECTOR



#### TIMING OF LAYOFFS

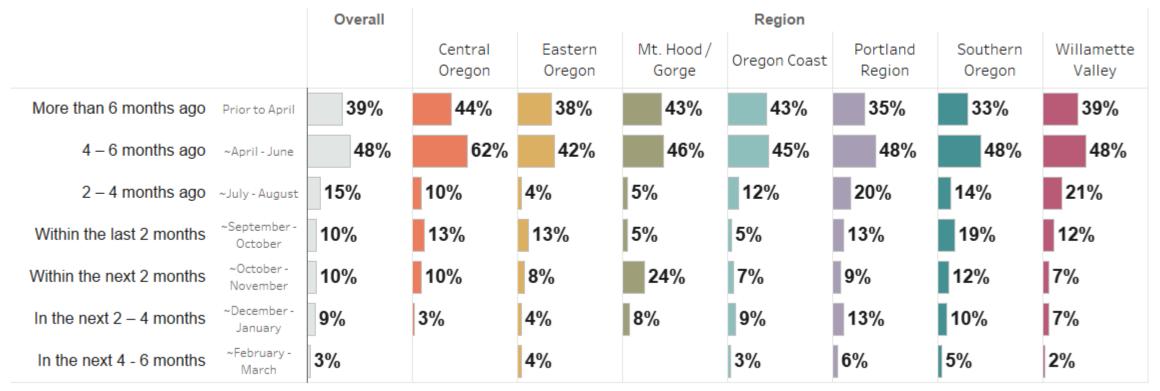
Q: When did layoffs or terminations occur and/or when do you anticipate them occurring? (Check all that apply)



<sup>\*</sup>Data collection occurred throughout the month of October. Month labels are approximations.

### TIMING OF LAYOFFS BY REGION

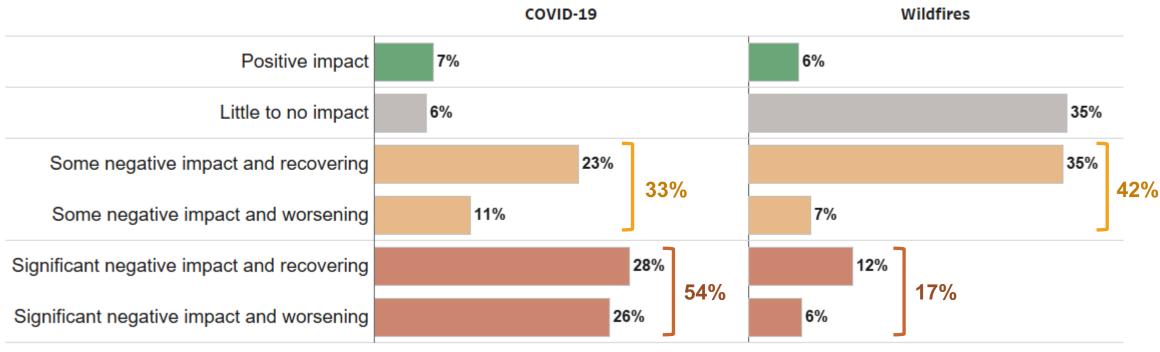
Q: When did layoffs or terminations occur and/or when do you anticipate them occurring? (Check all that apply)



<sup>\*</sup>Data collection occurred throughout the month of October.

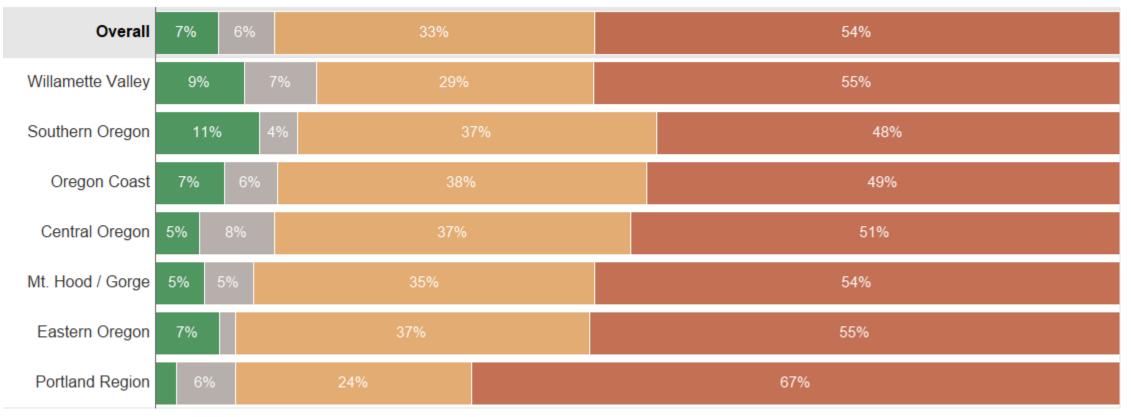
#### IMPACTS ON REVENUE/FUNDING

Q: How would you characterize the impacts of the following on your organization/business's revenue or funding?



### COVID-19 IMPACTS ON REVENUE/FUNDING BY REGION

Q: How would you characterize the impacts of COVID-19 on your organization/business's revenue or funding?



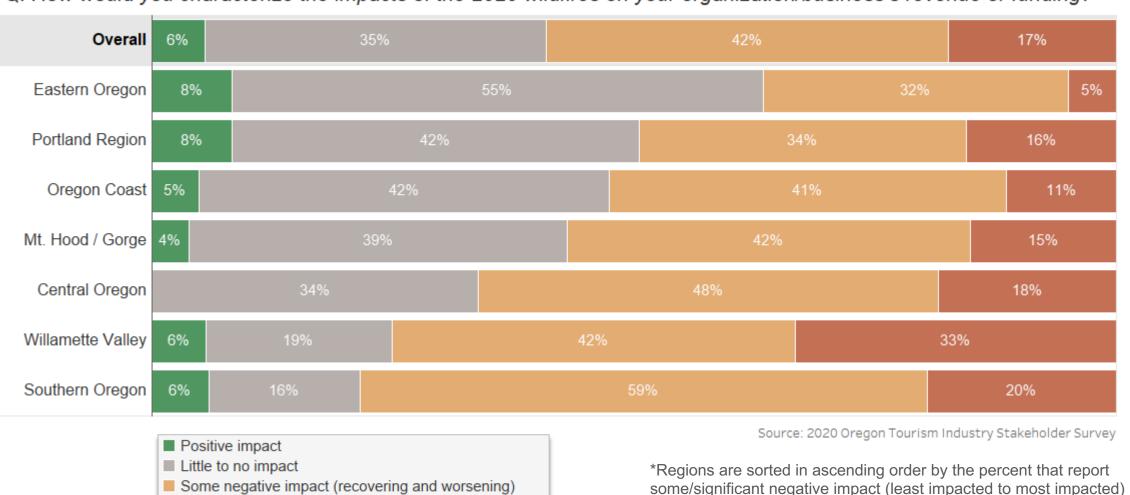
Source: 2020 Oregon Tourism Industry Stakeholder Survey

\*Regions are sorted in ascending order by the percent that report some/significant negative impact (least impacted to most impacted)

Positive impact
 Little to no impact
 Some negative impact (recovering and worsening)
 Significant negative impact (recovering and worsening)

### WILDFIRE IMPACTS ON REVENUE/FUNDING BY REGION

Q: How would you characterize the impacts of the 2020 wildfires on your organization/business's revenue or funding?

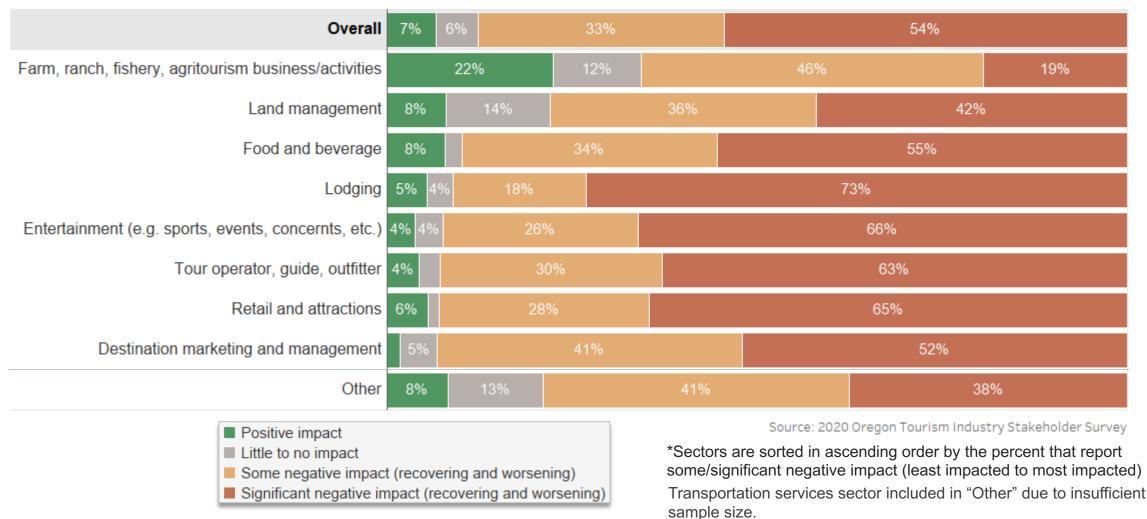


■ Significant negative impact (recovering and worsening)

,

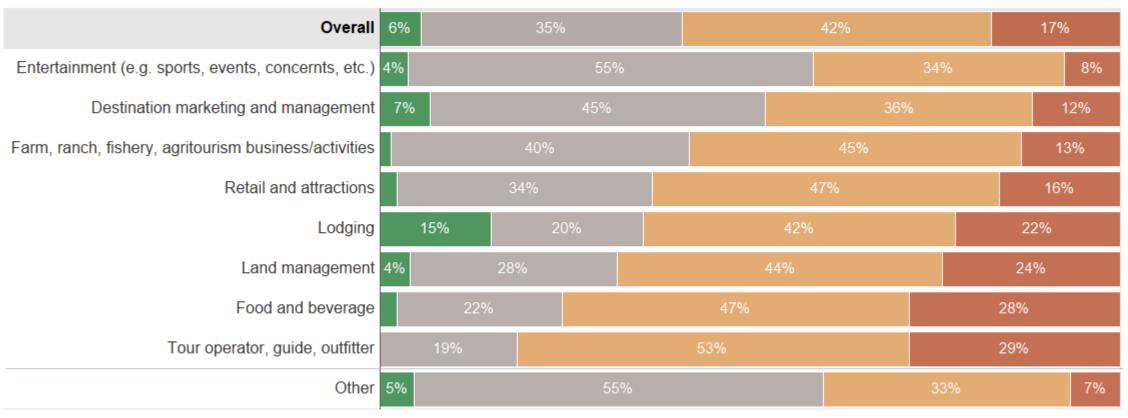
### COVID-19 IMPACTS ON REVENUE/FUNDING BY SECTOR

Q: How would you characterize the impacts of COVID-19 on your organization/business's revenue or funding?



### WILDFIRE IMPACTS ON REVENUE/FUNDING BY SECTOR

Q: How would you characterize the impacts of the 2020 wildfires on your organization/business's revenue or funding?



Significant negative impact (recovering and worsening)

Source: 2020 Oregon Tourism Industry Stakeholder Survey

■ Positive impact

■ Little to no impact

■ Some negative impact (recovering and worsening)

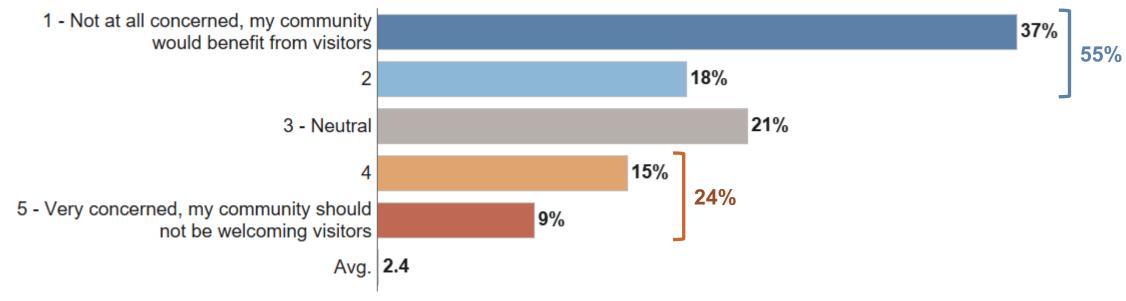
\*Sectors are sorted in ascending order by the percent that report some/significant negative impact (least impacted to most impacted)

Transportation services sector included in "Other" due to insufficient sample size.

# RESILIENCY, RECOVERY AND REOPENING

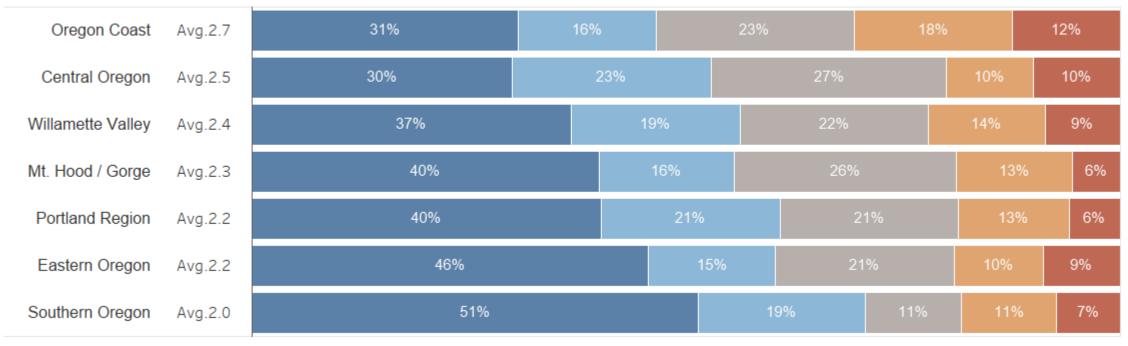
#### **WELCOMING VISITORS**

Q: How would you feel if you saw an advertisement today promoting your community to visitors?



### WELCOMING VISITORS BY REGION

#### Q: How would you feel if you saw an advertisement today promoting your community to visitors?



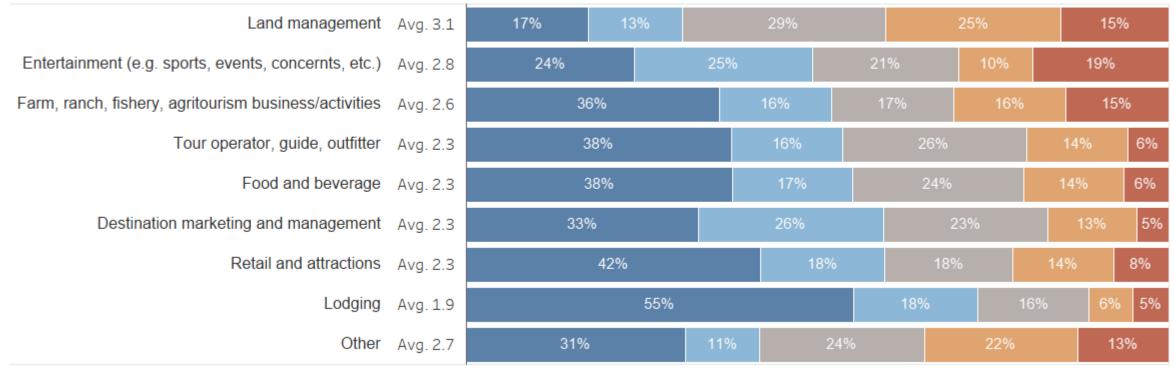
Source: 2020 Oregon Tourism Industry Stakeholder Survey

\*Regions are sorted in descending order by the average rating, most concerned to least concerned.

<sup>1 -</sup> Not at all concerned, my community would benefit from visitors
2
3 - Neutral
4
5 - Very concerned, my community should not be welcoming visitors

### WELCOMING VISITORS BY SECTOR

Q: How would you feel if you saw an advertisement today promoting your community to visitors?



Source: 2020 Oregon Tourism Industry Stakeholder Survey

1 - Not at all concerned, my community would benefit from visitors
2
3 - Neutral
4
5 - Very concerned, my community should not be welcoming visitors

\*Sectors are sorted in descending order by the average rating, most concerned to least concerned. Responses from the Transportation Services sector are combined with "Other."

Transportation services sector included in "Other" due to insufficient sample size.

### WELCOMING VISITORS "WHY DO YOU FEEL THAT WAY"

Respondents were asked to explain their response to the previous question, "How would you feel if you saw an advertisement promoting your destination to visitors?" Comments are summarized by the respondent's rating response. Selections of open-ended responses are on the following slide.

### Most Used Words by Response:

Not concerned about welcoming visitors (1 & 2) 526 comments safepeople need social open will businesses business travel community tourism visitors people tourists community much safe visitors pandemic now community need economy covid safety local still can safely distancing

Most open-ended comments from respondents not concerned with promotion cited the economic necessity of tourism to their local economy and the desire to remain open for business. Many also expressed confidence in their ability to operate safely.

### Neutral (3) 162 comments area can benefit risk businesses safety however time visit business covid travellike tourism local need

Comments from neutral respondents tended to weigh the economic benefits of tourism against the potential risk of increased COVID-19 cases. In the words of one respondent, "I recognize that so much of our local economy is dependent on tourism, but with relatively few COVID cases here currently, it feels like a huge risk to encourage visitors at this time."

#### Concerned about welcoming visitors (4 & 5) 241 comments dont time tourism covid19 already people communities visitors businesses business manythink feel covid county can small area

Open-ended responses from respondents concerned about promotion were primarily related to COVID-19, although some noted overtourism concerns independent of the virus. Respondents were concerned that increased tourism would lead to increased cases.

### WELCOMING VISITORS OPEN-ENDED: "WHY DO YOU FEEL THAT WAY"

### **Example Responses:**

#### Not concerned about welcoming visitors (1 & 2)

Beyond the fact that it's my job to promote travel here, our destination has thankfully been spared by wildfire impacts & our COVID precautions & lodging options (including isolated VRDs) ensure visitors can safely spend time here while social distancing. Plus travel can be a balm for troubled times.

We have had a successful summer of welcoming tourism and there are no cases of COVID in our area. We are demonstrating that we can offer services and keep our staff and local residents safe. Winter is going to be challenging, any encouragement for visitors would greatly help!

We have had a normal amount of visitors this summer after rebounding from closure and have had no major outbreaks since them. With masks and social distancing in place, we feel we are being protected.

At this phase of the pandemic, there are segments of the larger population willing to travel for work and leisure. Tourism sector businesses who remain open have taken the necessary steps to ensure the safety and perception of visitors. Messaging which conveys that "travel may not be for everyone right now. However, we stand ready to welcome and serve those who travel with safety and responsibility as priorities" is entirely appropriate and reflects the early messaging that will lead the recovery. We must not engage in an industry-wide staring contest, waiting for others to lead.

### Concerned about welcoming visitors (4 & 5)

Because Central Oregon is already severely negatively impacted by too many visitors, especially this summer. The land is overrun and needs time to heal, forests are very vulnerable to more human-caused fire, and traffic is highly congested. Yes, we need and depend upon tourism dollars, but with Covid, we don't need additional exposure. People just need a chance to get their lives and routines back with the huge impact of outside visitation.

Covid cases continue to be on the rise as are case positivity rates especially in our county. As a destination we receive visitors from other communities with even higher case loads. It's not responsible for us to be promoting travel at this time until there is a vaccine or cure.

COVID-19 rates are rising in our county. There has been a lot of tourism over the summer, which has been good for businesses struggling from COVID related shutdowns this spring, but the community does feel somewhat overwhelmed with tourists and may need a little time to recover before the next wave of tourism.

Many visitors are still coming, despite no marketing or advertising, and discouragement of non-essential travel. Our community benefits from the visitation, thus lessening the economic impact of the pandemic and recent wildfires. What is concerning is COVID cases are increasing again; schools are still closed and winter is coming - forcing everyone to stay indoors. As long as people are moving around from community to community - it seems likely that cases will continue to spread and increase throughout the state.

### CONCERNS WITH WELCOMING VISITORS, I OF 2

Q: As you think about welcoming visitors to your community, how concerned are you about the following? (1 = Not at all concerned, 5 - Extremely concerned), TOP 7 CATEGORIES

Rating Category	Avg.			Percent Respo	nding	
Safety of staff and visitors to restaurants	3.3	11%	18%	25%	19%	27%
Lack of visitation due to decrease in travel demand	3.2	17%	15%	24%	18%	27%
Safety of staff and visitors to lodging properties	3.2	14%	18%	27%	21%	20%
Diminished visitor experience of your destination (due to facility/amenity closures, fewer frontline workers, etc.)	3.1	14%	15%	37%	14%	20%
Overburdened public resources (bathrooms, parking, parks/open spaces)	3.1	20%	17%	21%	17%	25%
Safety of staff and visitors to recreational or leisure experiences	3.1	15%	19%	27%	19%	19%
Lack of COVID-19 testing capacity	3.1	20%	16%	24%	17%	24%

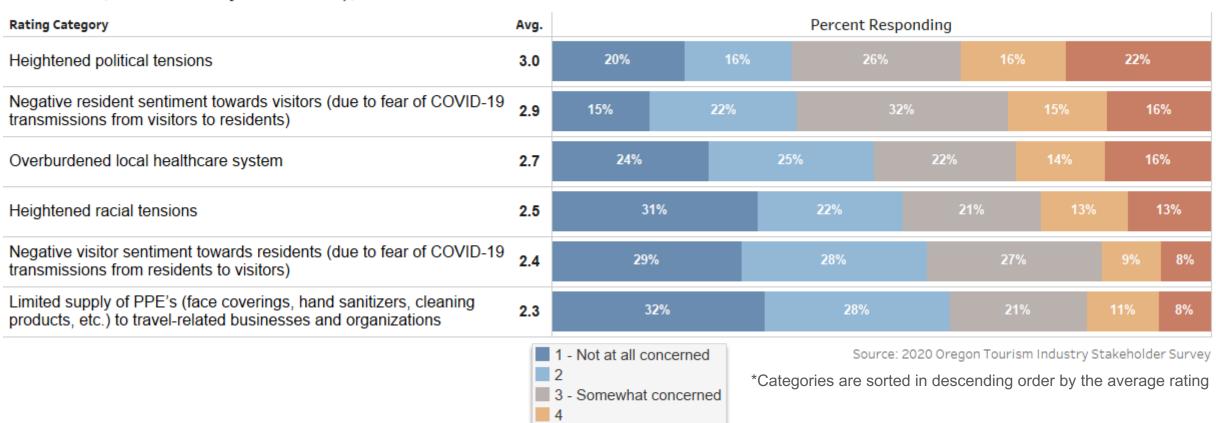
1 - Not at all concerned
2
3 - Somewhat concerned
4
5 - Extremely concerned

Source: 2020 Oregon Tourism Industry Stakeholder Survey

\*Categories are sorted in descending order by the average rating

### CONCERNS WITH WELCOMING VISITORS, 2 OF 2

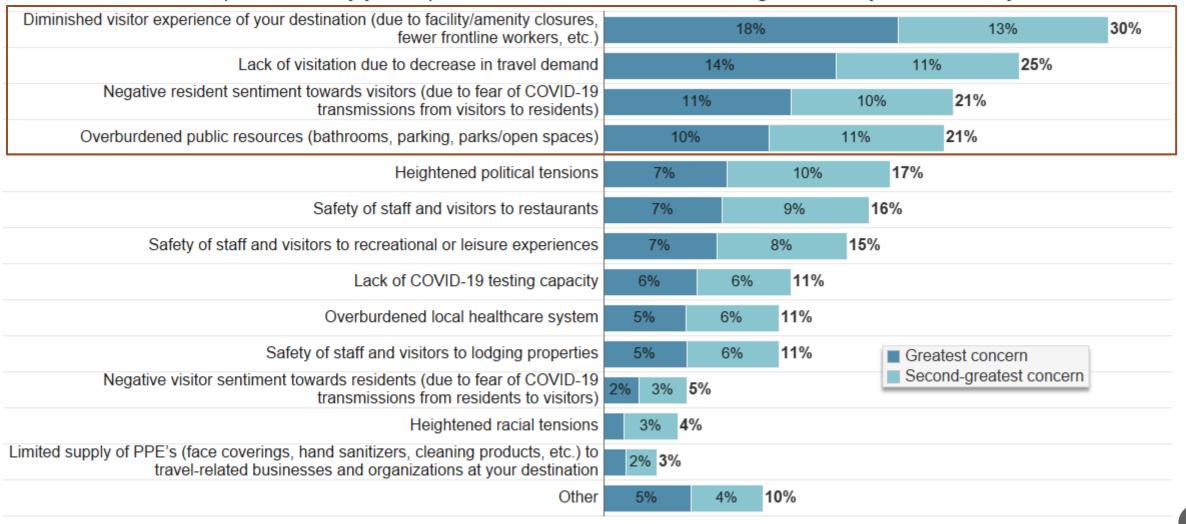
Q: As you think about welcoming visitors to your community, how concerned are you about the following? (1 = Not at all concerned, 5 - Extremely concerned), BOTTOM 6 CATEGORIES



5 - Extremely concerned

### TOP 2 CONCERNS ABOUT WELCOMING VISITORS

Q: From the list above, please identify your top two concerns related to welcoming visitors to your community.

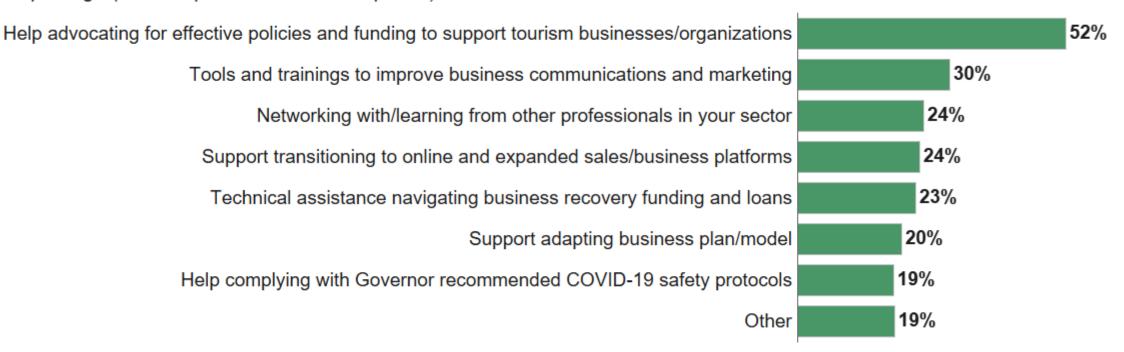


## TOP 2 CONCERNS ABOUT WELCOMING VISITORS BY REGION

Q: From the list above, please identify your top two concerns related to welcoming visitors to your community.

■ Greatest concern	Overall				Region			
Second-greatest concern		Central Oregon	Eastern Oregon	Mt. Hood/ Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
Diminished visitor experience of your destination (due to facility/amenity closures, fewer frontline workers, etc.)	30%	24%	42	36%	20%	35%	409	35%
Lack of visitation due to decrease in travel demand	25%	26%	429	429	10%	25%	36%	36%
Negative resident sentiment towards visitors (due to fear of COVID-19 transmissions from visitors to residents)		32%	16%	19%	34%	9%	9%	14%
Overburdened public resources (bathrooms, parking, parks/open spaces)	21%	14%	7%	23%	35%	10%	18%	11%
Heightened political tensions	17%	22%	14%	10%	15%	31%	16%	12%
Safety of staff and visitors to restaurants	16%	12%	19%	19%	14%	16%	16%	18%
Safety of staff and visitors to recreational or leisure experiences	15%	10%	12%	15%	10%	15%	20%	22%
Lack of COVID-19 testing capacity	11%	16%	10%	5%	14%	10%	6%	13%
Overburdened local healthcare system	11%	10%	12%	9%	16%	8%	5%	6%
Safety of staff and visitors to lodging properties	11%	14%	7%	11%	11%	9%	11%	11%
Negative visitor sentiment towards residents (due to fear of COVID-19 transmissions from residents to visitors)		2%	5%	2%	6%	5%	4%	6%
Heightened racial tensions		5%		4%	2%	13%	3%	4%
Limited supply of PPE's (face coverings, hand sanitizers, cleaning products, etc.) to travel-related businesses and organizations at your destination	3%	2%	2%	2%	4%	1%	3%	5%
Other	10%	12%	11%	3%	9%	14%	11%	7%

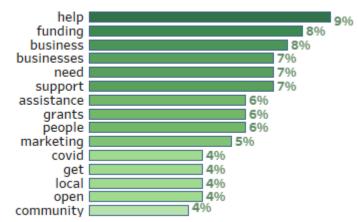
Q: Which of the following resources or programs would best assist your BUSINESS/ORGANIZATION in resiliency, recovery, and reopening? (Select up to three answer options)



**EXAMPLE "OTHER" RESPONSES** 

Q:Which of the following resources or programs would best assist your BUSINESS/ORGANIZATION in resiliency, recovery, and reopening? – Other (please specify):





### **Example Responses:**

"Other" write-in responses were diverse in nature; however, the need for additional grant and funding resources was especially common.

Funding and training. Small businesses need loans and training on how to adapt in this new business environment. The local banks Columbia and us bank are not lending to many of the small businesses that need help now. We need alternative sources of funding.

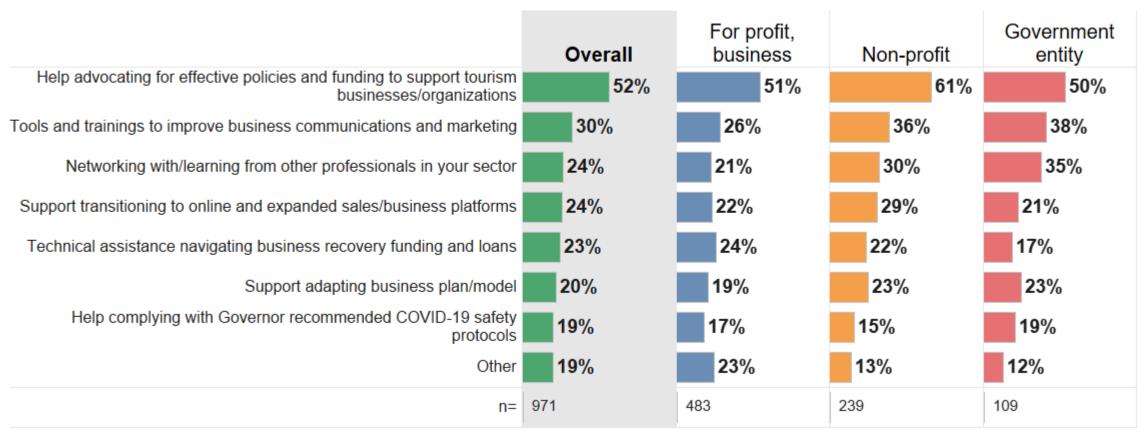
We always need funds. Advertising is important and we are always looking for grant money.

Nonprofit funding streams have completely shifted to respond to COVID but don't consider recreation/tourism worthwhile avenues for COVID relief.

We have done all of the above - we need additional funding to make it through the winter.

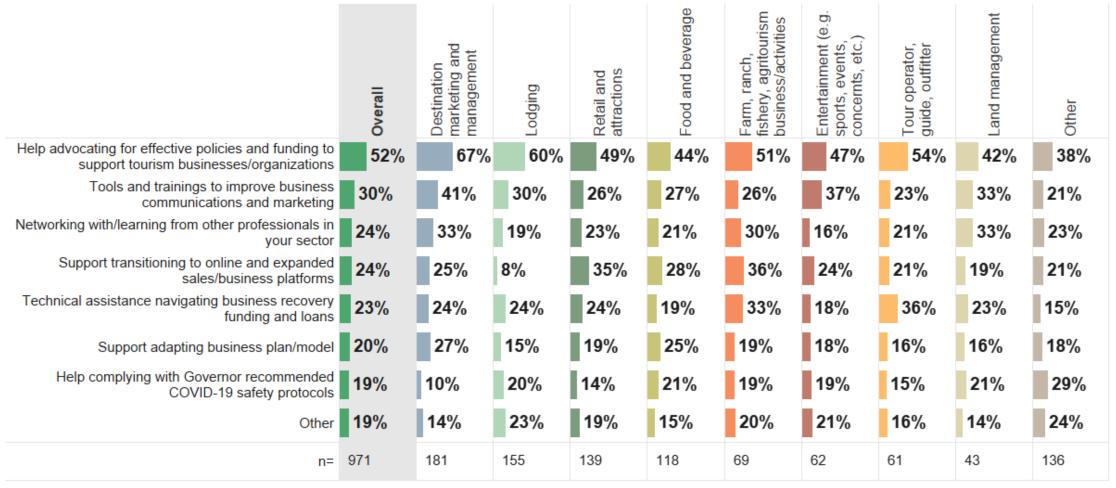
BY ENTITY TYPE

Q: Which of the following resources or programs would best assist your BUSINESS/ORGANIZATION in resiliency, recovery, and reopening? (Select up to three answer options)



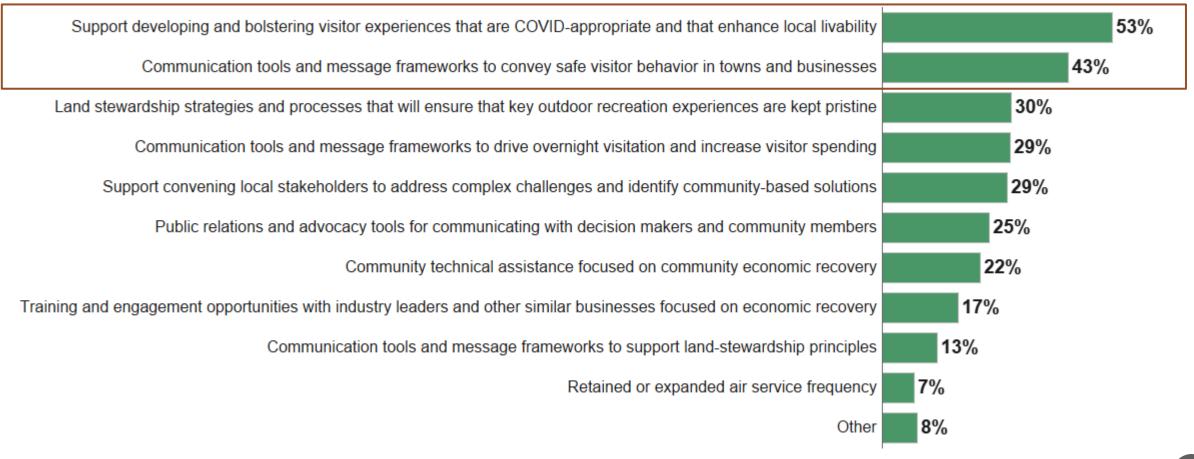
**BY SECTOR** 

Q: Which of the following resources or programs would best assist your BUSINESS/ORGANIZATION in resiliency, recovery, and reopening? (Select up to three answer options)



### RESOURCES/PROGRAMS TO ASSIST YOUR COMMUNITY

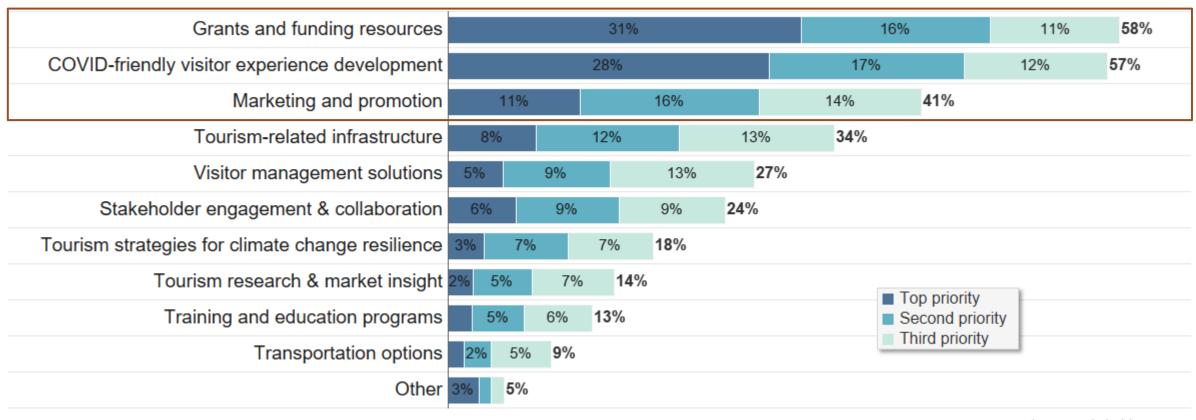
Q: Which of the following resources or programs would best assist your COMMUNITY in resiliency, recovery, and reopening? (Select up to three answer options)



### PLANNING & MANAGEMENT

### SHORT-TERM PRIORITIES

Q: Please identify the three areas that you believe should be emphasized for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions:



## SHORT-TERM PRIORITIES: TOP PRIORITY BY REGION 1) GRANTS AND FUNDING RESOURCES

Q: Please identify the three areas that you believe should be emphasized for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions: (TOP PRIORITY ONLY)

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette Valley
1	1 31%	1 33%	1 39%	1 33%	26%	1 39%	1 32%	32%
2	28%	28%	24%	27%	2 24%	33%	22%	2 29%
3	11%	11%	7%	9%	13%	10%	21%	17%
4	8%	8%	7%	7%	9%	6%	6%	6%
5	6%	5%	7%	5%	9%	4%	4%	5%
6	5%	5%	5%	5%	7%	2%	4%	4%
7	3%	5%	3%	5%	4%	2%	3%	4%
8	3%	3%	3%	4%	3%	2%	2%	2%
9	2%	2%	3%	2%	2%	1%	2%	1%
10	2%	2%	2%	2%	2%	1%	2%	1%
11	1%				1%		1%	

## SHORT-TERM PRIORITIES: TOP PRIORITY BY REGION 2) COVID-FRIENDLY VISITOR EXPERIENCE DEVELOPMENT

Q: Please identify the three areas that you believe should be emphasized for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions: (TOP PRIORITY ONLY)

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette Valley
1	31%	33%	39%	33%	1 <b>26</b> %	39%	32%	1 32%
2	2 28%	2 28%	2 24%	2 27%	24%	2 33%	2 22%	29%
3	11%	11%	7%	9%	13%	10%	21%	17%
4	8%	8%	7%	7%	9%	6%	6%	6%
5	6%	5%	7%	5%	9%	4%	4%	5%
6	5%	5%	5%	5%	7%	2%	4%	4%
7	3%	5%	3%	5%	4%	2%	3%	4%
8	3%	3%	3%	4%	3%	2%	2%	2%
9	2%	2%	3%	2%	2%	1%	2%	1%
10	2%	2%	2%	2%	2%	1%	2%	1%
11	1%				1%		1%	

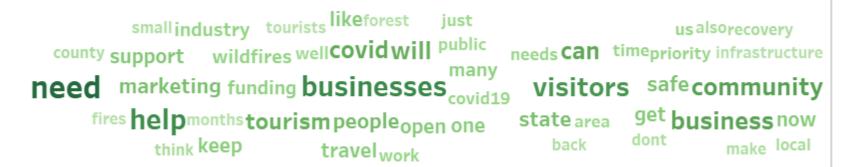
## SHORT-TERM PRIORITIES: TOP PRIORITY BY REGION 2) MARKETING AND PROMOTION

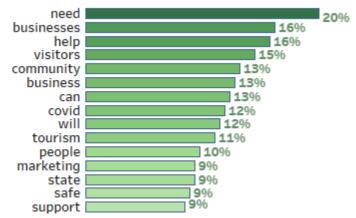
Q: Please identify the three areas that you believe should be emphasized for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions: (TOP PRIORITY ONLY)

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette Valley
1	31%	33%	39%	33%	26%	39%	32%	32%
2	28%	28%	24%	27%	24%	33%	22%	29%
3	3 11%	3 11%	3 7%	9%	13%	3 10%	3 21%	3 17%
4	8%	8%	7%	4 7%	9%	6%	6%	6%
5	6%	5%	7%	5%	5 9%	4%	4%	5%
6	5%	5%	5%	5%	7%	2%	4%	4%
7	3%	5%	3%	5%	4%	2%	3%	4%
8	3%	3%	3%	4%	3%	2%	2%	2%
9	2%	2%	3%	2%	2%	1%	2%	1%
10	2%	2%	2%	2%	2%	1%	2%	1%
11	1%				1%		1%	

### SHORT-TERM PRIORITIES OPEN-ENDED RESPONSES

Q: Do you have any comments on your priorities for immediate (6 - 12 months) recovery from COVID-19, wildfires, and related economic conditions?





### **Example Responses:**

The most common theme in open-ended responses was the need to sustain businesses while maintaining public safety.

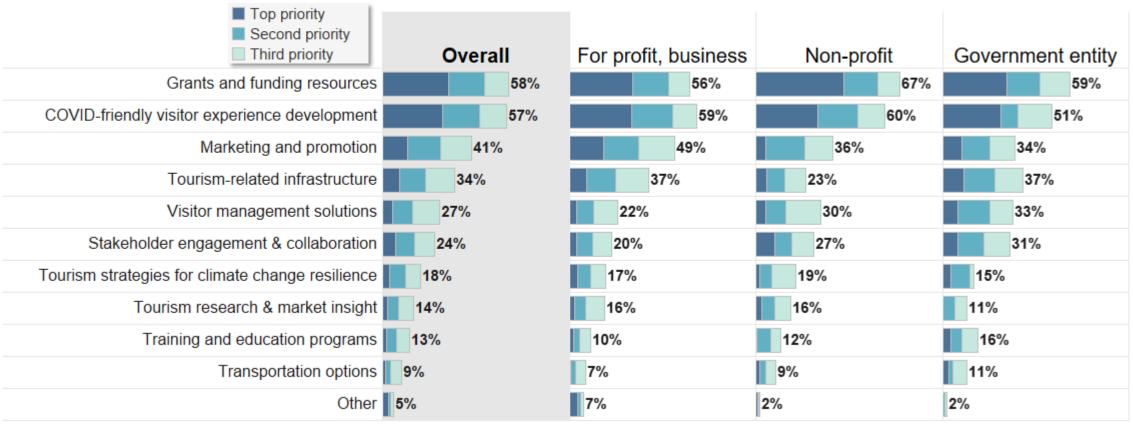
Recovery starts with COVID-19 friendly visitor experiences and those are most likely found in outdoor recreation. Those experiences need to be developed or enhanced and then promoted. Meanwhile, additional research would help the overall Oregon tourism industry understand why this is important.

Covid-19 may not be the last health related issue we'll have to deal with in the near future. I believe that, in order the weather the coming months we need to drive people to want to travel, to believe there are safe ways to vacation. That is, in my opinion, the way to sustain growth in our industry. Moving forward, supporting struggling businesses to help keep them afloat is also important.

We are just trying to survive. We can barely maintain ourselves, much less have the bandwidth to plan 6-12 months ahead. We need help with consulting but no money to pay for it. Grant opportunities are very competitive. We primarily need financial support

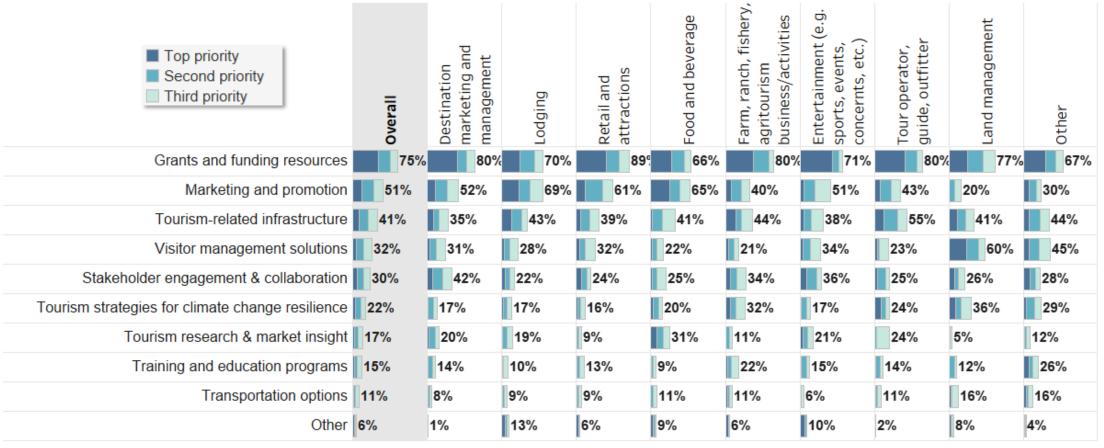
## SHORT-TERM PRIORITIES BY ENTITY TYPE

Q: Please identify the three areas that you believe should be emphasized for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions:



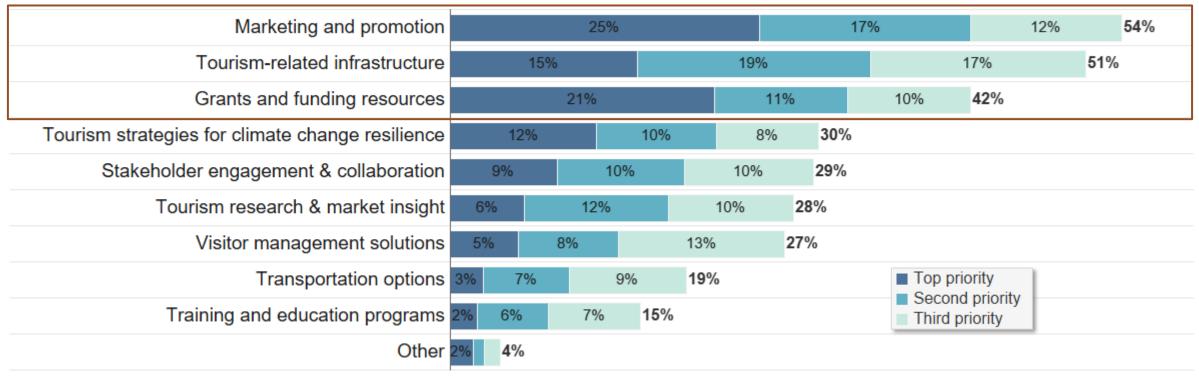
## SHORT-TERM PRIORITIES BY SECTOR

Q: Please identify the three areas that you believe should be emphasized for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions:



### LONG-TERM PRIORITIES

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years:



# LONG-TERM PRIORITIES: TOP PRIORITY BY REGION 1) MARKETING AND PROMOTION

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years: (TOP PRIORITY ONLY)

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette Valley
1	1 25%	1 26%	37%	28%	24%	1 30%	1 32%	1 34%
2	21%	22%	2 19%	2 22%	2 17%	21%	23%	21%
3	15%	15%	12%	13%	17%	13%	14%	17%
4	12%	13%	10%	12%	12%	11%	11%	9%
5	9%	9%	6%	9%	9%	7%	10%	8%
6	6%	6%	6%	9%	8%	7%	4%	5%
7	5%	6%	4%	3%	4%	3%	2%	3%
8	3%	4%	4%	3%	3%	3%	2%	2%
9	2%		4%	1%	3%	2%	1%	1%
10	2%			1%	2%	2%	1%	1%

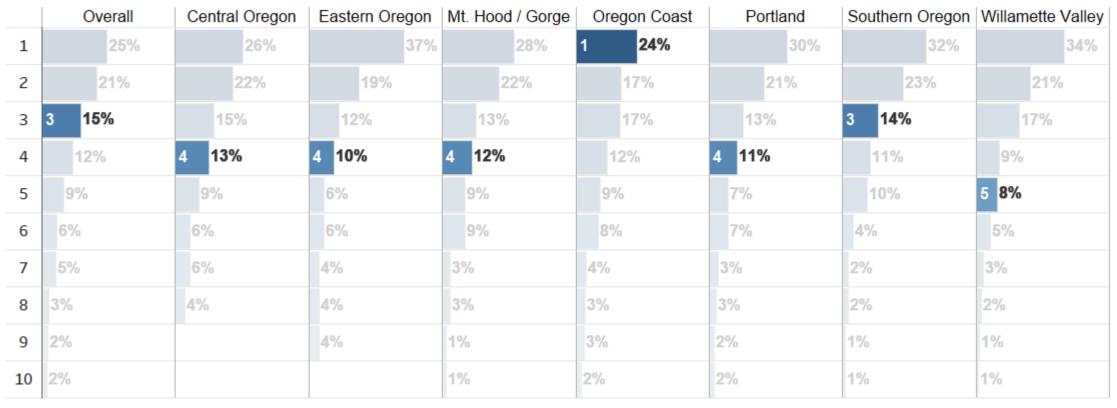
# LONG-TERM PRIORITIES: TOP PRIORITY BY REGION 2) GRANTS AND FUNDING RESOURCES

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years: (TOP PRIORITY ONLY)

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette Valley
1	25%	26%	1 37%	1 28%	24%	30%	32%	34%
2	2 21%	2 22%	19%	22%	17%	2 21%	2 23%	2 21%
3	15%	15%	12%	13%	3 17%	13%	14%	17%
4	12%	13%	10%	12%	12%	11%	11%	9%
5	9%	9%	6%	9%	9%	7%	10%	8%
6	6%	6%	6%	9%	8%	7%	4%	5%
7	5%	6%	4%	3%	4%	3%	2%	3%
8	3%	4%	4%	3%	3%	3%	2%	2%
9	2%		4%	1%	3%	2%	1%	1%
10	2%			1%	2%	2%	1%	1%

# LONG-TERM PRIORITIES: TOP PRIORITY BY REGION 3) TOURISM RELATED INFRASTRUCTURE

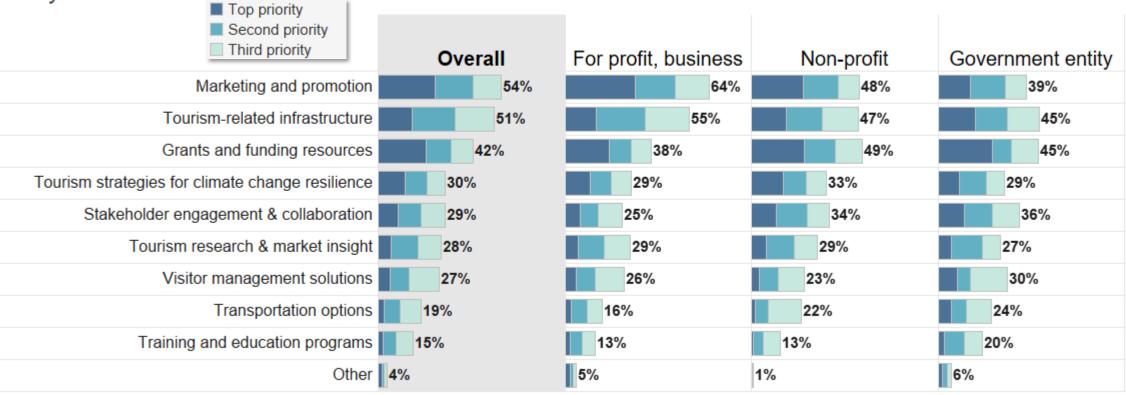
Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years: (TOP PRIORITY ONLY)



## LONG-TERM PRIORITIES BY ENTITY TYPE

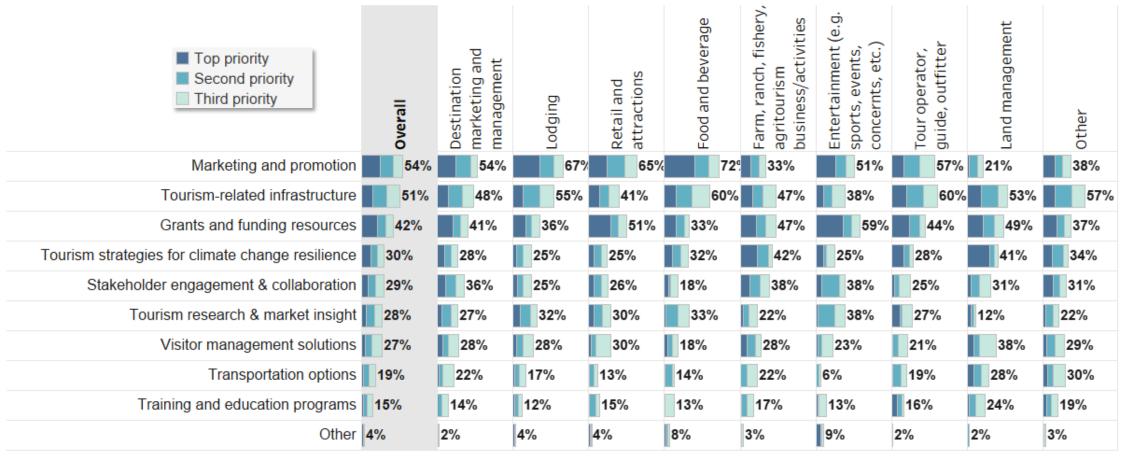
Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next

2 - 5 years:



## LONG-TERM PRIORITIES BY SECTOR

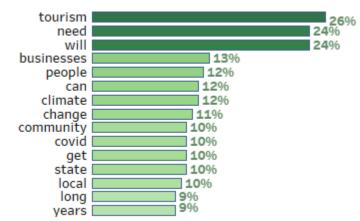
Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years:



### LONG-TERM PRIORITIES OPEN-ENDED RESPONSES

Q: Do you have any comments on your priorities for longer-term tourism planning over the next 2-5 years?





### **Example Responses:**

COVID distracted us from the perils of climate change. incorporating environmental stewardship into tourism messaging will be important to changing behaviors that impact our ocean.

Continuing with #takecareoutthere and other programs that encourage responsible recreation

Stakeholders need to believe that within the next 2-5 years there will likely be necessary adjustments to visitor marketing strategies - so building flexibility and resiliency is essential. Our small businesses have a focus on building and sustaining a re

Please take good long look at infrastructure and how the tourist industry should be responsible for the impact of tourism on the local communities. How might the planning address the ability of the locals to conduct a normal daily life when the roads are so congested that we cannot access food, health care, and emergencies.

## SHORT VS. LONG-TERM PRIORITIES TOP 3 COMBINED

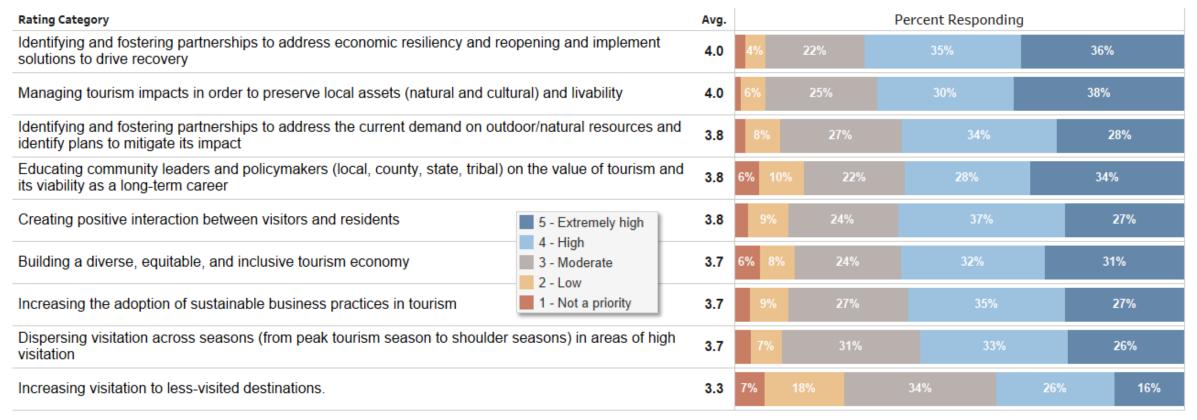
#### Immediate recovery (6 - 12 months)

#### **Longer-term tourism Planning (2 - 5 years)**

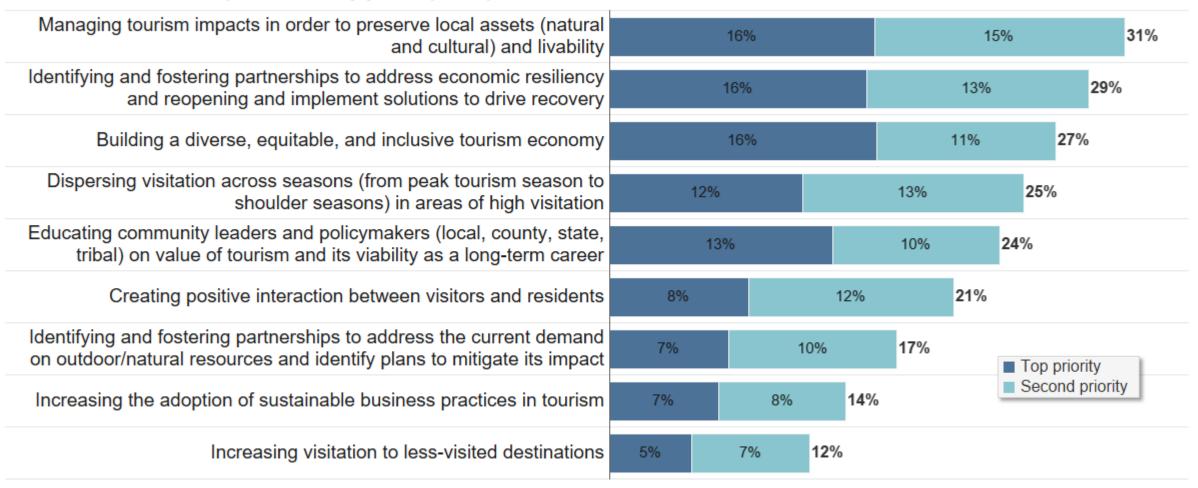
1	Grants and funding resources (59%)	Marketing and promotion (54%)
2	COVID-friendly visitor experience development (58%)	Tourism-related infrastructure (51%)
3	Marketing and promotion (41%)	Grants and funding resources (42%)
4	Tourism-related infrastructure (33%)	Tourism strategies for climate change resilience (30%)
5	Visitor management solutions (26%)	Stakeholder engagement & collaboration (29%)
6	Stakeholder engagement & collaboration (24%)	Tourism research & market insight (28%)
7	Tourism strategies for climate change resilience (18%)	Visitor management solutions (27%)
8	Tourism research & market insight (14%)	Transportation options (19%)
9	Training and education programs (12%)	Training and education programs (15%)
10	Transportation options (9%)	

### TACTICAL PLANNING & MANAGEMENT: RATINGS

Q: Please indicate how you would prioritize the following tactical planning and management opportunities to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available, not all tactics should be considered extremely high priorities, and some may not be feasible given budget realities. Please differentiate between tactics which you believe deserve new/continued investment and those areas which you believe to be less important. (1 = Not a priority, 5 = High priority)



### TACTICAL PLANNING & MANAGEMENT: TOP 2 PRIORITIES



### TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:

### I) MANAGING TOURISM IMPACTS IN ORDER TO PRESERVE LOCAL ASSETS (NATURAL AND CULTURAL) AND LIVABILITY

		Overall	Cer	ntral Oregon	East	ern Oregon	Mt.	Hood / Gorge	C	regon Coast		Portland	Sol	uthern Oregon	Willa	amette Valley
1	1	31%		34%		30%	1	35%	1	46%		38%		34%		37%
2		29%		30%	2	30%		34%		25%		36%		33%		30%
3		27%	3	30%		26%		32%		25%		28%		32%		28%
4		25%		24%		26%		26%		24%	4	22%		24%		28%
5		24%		22%		24%		18%		23%		18%		18%		20%
6		21%		21%		22%		17%		18%		15%	6	17%	6	19%
7		17%		17%		22%		15%		16%		14%		16%		15%
8		14%	1	3%	119	%		15%		15%		14%		16%	1	1%
9		12%	9%	0	9%		6%	6	8	%		14%	-	11%	11	1%

### TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:

### 2) IDENTIFYING AND FOSTERING PARTNERSHIPS TO ADDRESS ECONOMIC RESILIENCY AND REOPENING AND IMPLEMENT SOLUTIONS TO DRIVE RECOVERY

		Overall	Cen	ntral Oregon	East	ern Oregon	Mt.	Hood / Gorge	О	regon Coast		Portland	Sou	thern Oregon	Willa	amette Valley
1		31%		34%		30%		35%		46%	1	38%		34%		37%
2	2	29%		30%		30%	2	34%		25%		36%	2	33%	2	30%
3		27%		30%		26%		32%		25%		28%		32%		28%
4		25%		24%		26%		26%	4	24%		22%		24%		28%
5		24%		22%		24%		18%		23%		18%		18%		20%
6		21%	6	21%		22%		17%		18%		15%		17%		19%
7		17%	,	17%	7	22%		15%		16%		14%		16%		15%
8		14%	1;	3%	119	<b>/</b> /o		15%		15%		14%		16%	1	1%
9	1	2%	9%	0	9%		6%	/o	89	%		14%	1	1%	1	1%

## TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION: 3) BUILDING A DIVERSE, EQUITABLE, AND INCLUSIVE TOURISM ECONOMY

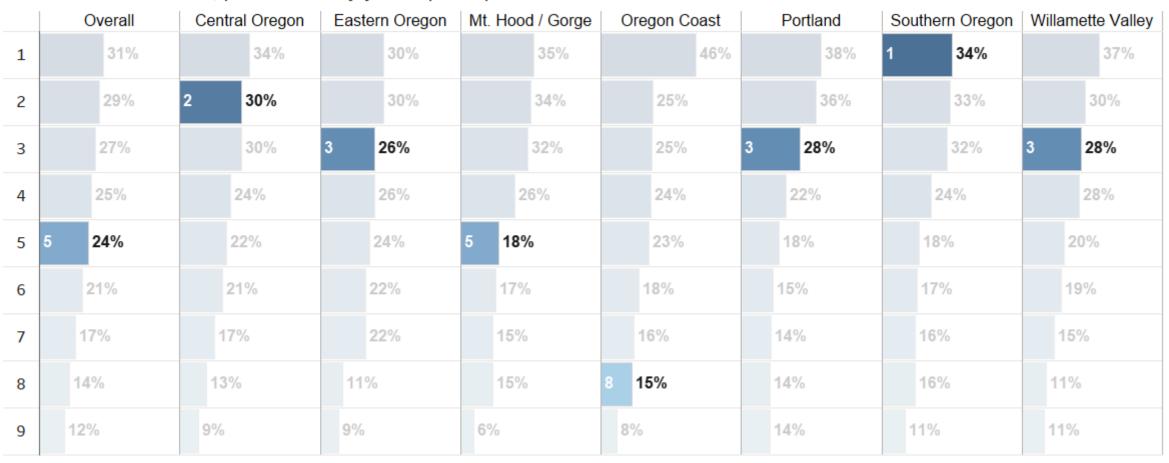
		Overall	Cen	ntral Oregon	East	ern Oregon	Mt.	Hood / Gorge	O	regon Coast		Portland	Sou	uthern Oregon	Willa	amette Valley
1		31%		34%		30%		35%		46%		38%		34%	1	37%
2		29%		30%		30%		34%		25%	2	36%		33%		30%
3	3	27%		30%		26%	3	32%		25%		28%		32%		28%
4		25%		24%		26%		26%		24%		22%	4	24%		28%
5		24%	5	22%	5	24%		18%		23%		18%		18%		20%
6		21%		21%		22%		17%	6	18%		15%		17%		19%
7		17%		17%		22%		15%		16%		14%		16%		15%
8	1	14%	13	3%	11	%		15%		15%		14%		16%	1	1%
9	1	2%	9%		9%		6%	6	89	6		14%	1	1%	1	1%

### TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:

### 4) DISPERSING VISITATION ACROSS SEASONS (FROM PEAK TOURISM SEASON TO SHOULDER SEASONS) IN AREAS OF HIGH VISITATION

		Overall	Cer	ntral Oregon	East	ern Oregon	Mt.	Hood / Gorge	C	regon Coast		Portland	Sou	uthern Oregon	Will	amette Valley
1		31%	1	34%		30%		35%		46%		38%		34%		37%
2		29%		30%		30%		34%	2	25%		36%		33%		30%
3		27%		30%		26%		32%		25%		28%	3	32%		28%
4	4	25%		24%		26%	4	26%		24%		22%		24%	4	28%
5		24%		22%		24%		18%		23%		18%		18%		20%
6		21%		21%	6	22%		17%		18%		15%		17%		19%
7		17%		17%		22%		15%		16%	7	14%		16%		15%
8		14%	1	3%	11'	%		15%		15%		14%		16%	1	1%
9	1	12%	9%	6	9%		6%	/o	8	%		14%	1	1%	1	1%

# TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION: 5) EDUCATING COMMUNITY LEADERS AND POLICYMAKERS (LOCAL, COUNTY, STATE, TRIBAL) ON VALUE OF TOURISM AND ITS VIABILITY AS A LONG-TERM CAREER



## TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION: 6) CREATING POSITIVE INTERACTION BETWEEN VISITORS AND RESIDENTS

	C	Overall		Central Oregon		Eastern Oregon		Mt. Hood / Gorge		Oregon Coast		Portland		Southern Oregon		Willamette Valley	
1		31%		34%	1	30%		35%	46%			38%			34%		37%
2		29%		30%		30%		34%		25%		3	36%		33%		30%
3		27%		30%		26%		32%	3	25%		289	%		32%		28%
4		25%	4	24%		26%		26%		24%		22%			24%		28%
5		24%		22%		24%		18%		23%	5	18%			18%	5	20%
6	6 2	21%	21%			22%		17%		18%		15%		17%			19%
7	17	17%		7%		22%		15%		16%		14%		7	16%	15%	
8	14	14%		13%		%		15%		15%		14%		16%		11%	
9	129	12% 9%			9%		9 6%		8%			14%		11%		11%	

### TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:

### 7) IDENTIFYING AND FOSTERING PARTNERSHIPS TO ADDRESS THE CURRENT DEMAND ON OUTDOOR/NATURAL RESOURCES AND IDENTIFY PLANS TO MITIGATE ITS IMPACT

	Overall		Central Oregon		Eastern Oregon		Mt. Hood / Gorge		0	Oregon Coast		Portland		Southern Oregon		Willamette Valley		
1		31%		34%		30%		35%		46%			38%		34%		37%	
2		29%		30%		30%		34%		25%			36%		33%		30%	
3		27%		30%		26%		32%		25%		28	%		32%		28%	
4		25%		24%		26%		26%		24%	24%		22%		24%		28%	
5		24%		22%		24%		18%	5 23%			18%		5	18%		20%	
6		21%	21%			22%	6 17%			18%		15%		17%			19%	
7	7	17%	7	17%		22%		15%		16%	14%				16%		15%	
8	14%		13%		8 11%		15%			15%		14%		16%		8 11%		
9		12%		9%		9%		6%		8%		14%		11%		11%		

## TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION: 8) INCREASING THE ADOPTION OF SUSTAINABLE BUSINESS PRACTICES IN TOURISM

#### Q: From the list above, please identify your top two priorities:

		Overall	Cen	tral Oregon	Easte	ern Oregon	Mt.	Hood / Gorge	Oregon Coast			Portland		Sou	thern Oregon	Willamette Valley	
1		31%		34%		30%		35%		46%			38%		34%		37%
2		29%		30%		30%		34%		25%			36%		33%		30%
3		27%		30%		26%		32%		25%		2	8%		32%		28%
4		25%	24%			26%		26%		24%		22%		24%			28%
5		24%	22%			24%		18%	23%			18%		18%			20%
6		21%	1% 21%			22%	17%		18%			15%		17%			19%
7		17%		17%		22%		7 15%		7 16%		14%		16%		7 1	5%
8	8 14% 8		8 13	8 13%		11%		15%		15%		14%		16%		11%	
9	12%		9%		9 9%		6%		8%		9	14%		9 11%		11	%

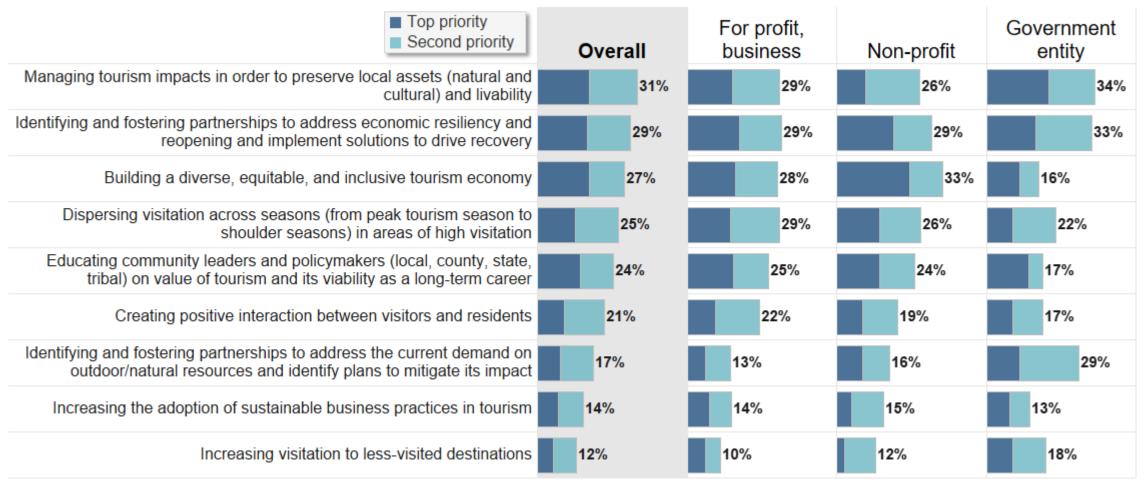
## TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION: 8) INCREASING VISITATION TO LESS-VISITED DESTINATIONS

#### Q: From the list above, please identify your top two priorities:

	(	Overall	Cen	ntral Oregon	Easte	ern Oregon	Mt.	Hood / Gorge	Oregon Coast			Portland		Southern Oregon		Willamette Valley		
1		31%		34%		30%		35%			46%			38%		34%		37%
2		29%		30%		30%		34%		25%				36%		33%		30%
3		27%		30%		26%		32%		25%			2	8%		32%		28%
4		25%		24%	4	26%		26%		24%		22%		24%			28%	
5		24%		22%		24%		18%		23%		18%				18%	20%	
6		21%	1% 21%		4	22%	17%			18%		6	15%		17%			19%
7	1	17% 17%		17%	4	22%	15%		16%			14%		16%		1	5%	
8	14%		13%		11%		8 15%			15%			14%		8 16%		11%	
9	9 12%		9 9%		9%		6%		9 8	9 8%			14%		11%		9 11%	

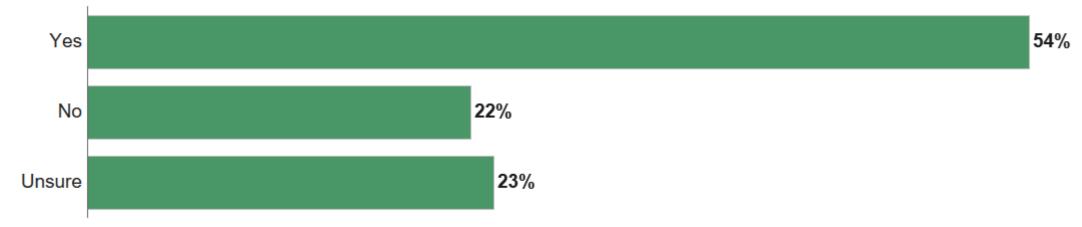
## TACTICAL PLANNING & MANAGEMENT: TOP 2 PRIORITIES BY ENTITY TYPE

Q: From the list above, please identify your top two priorities:

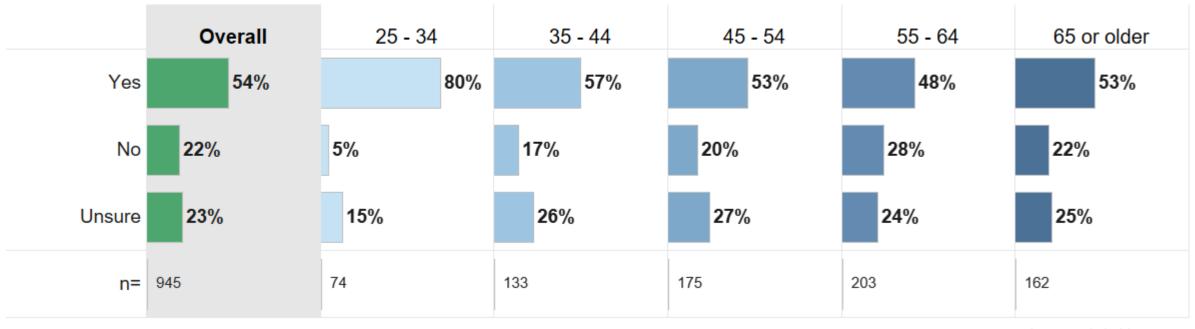


## DIVERSITY, EQUITY & INCLUSION

Q: Do you think the Oregon tourism industry should play a role in advancing social and racial justice?

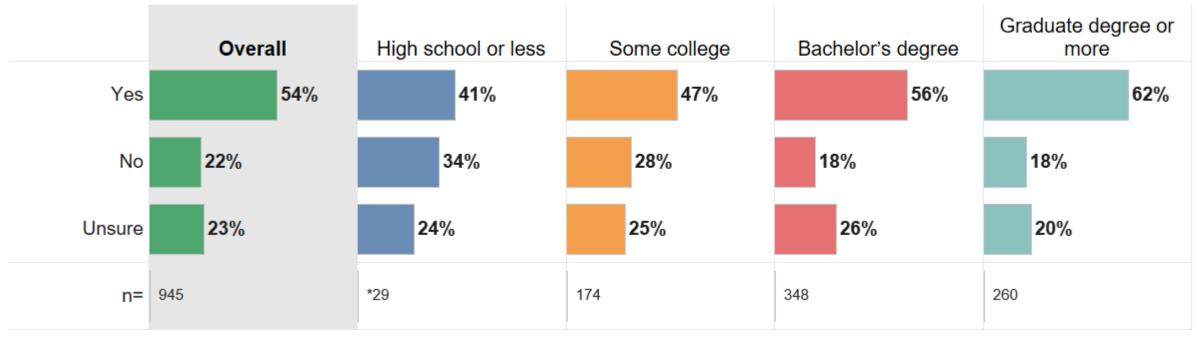


Q: Do you think the Oregon tourism industry should play a role in advancing social and racial justice?



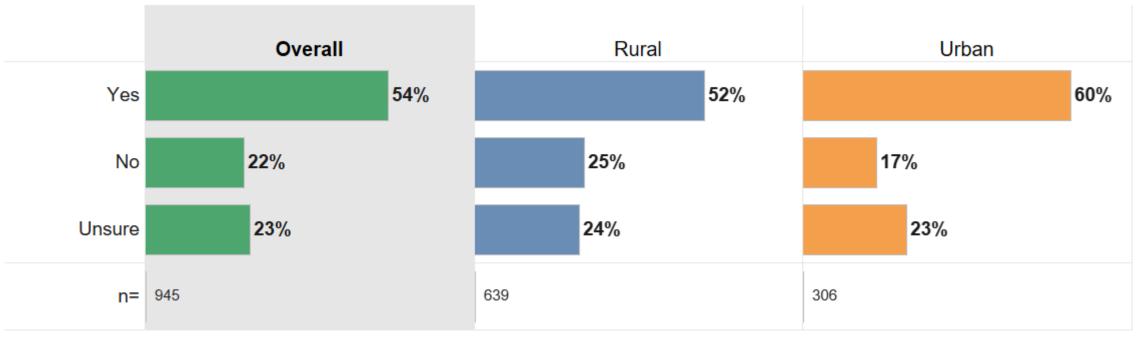
# TRAVEL OREGON'S ROLE IN ADVANCING SOCIAL & RACIAL JUSTICE BY LEVEL OF EDUCATION

Q: Do you think the Oregon tourism industry should play a role in advancing social and racial justice?



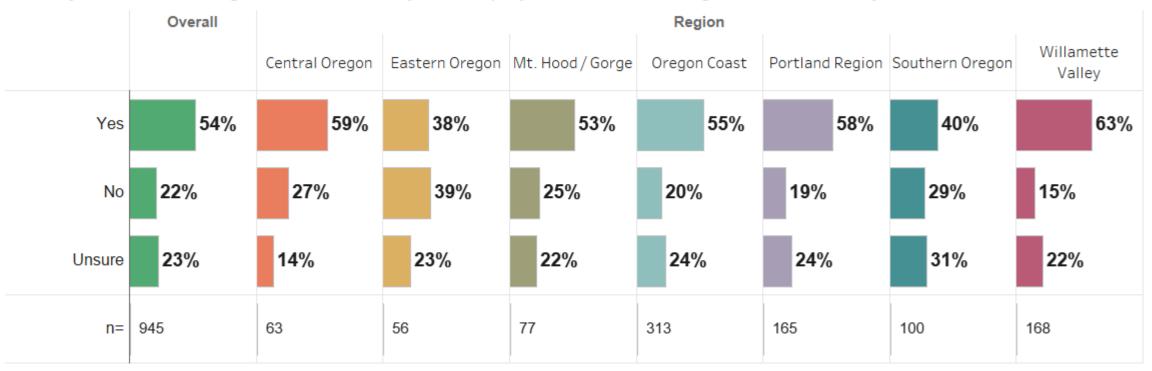
BY URBAN VS. RURAL

Q: Do you think the Oregon tourism industry should play a role in advancing social and racial justice?



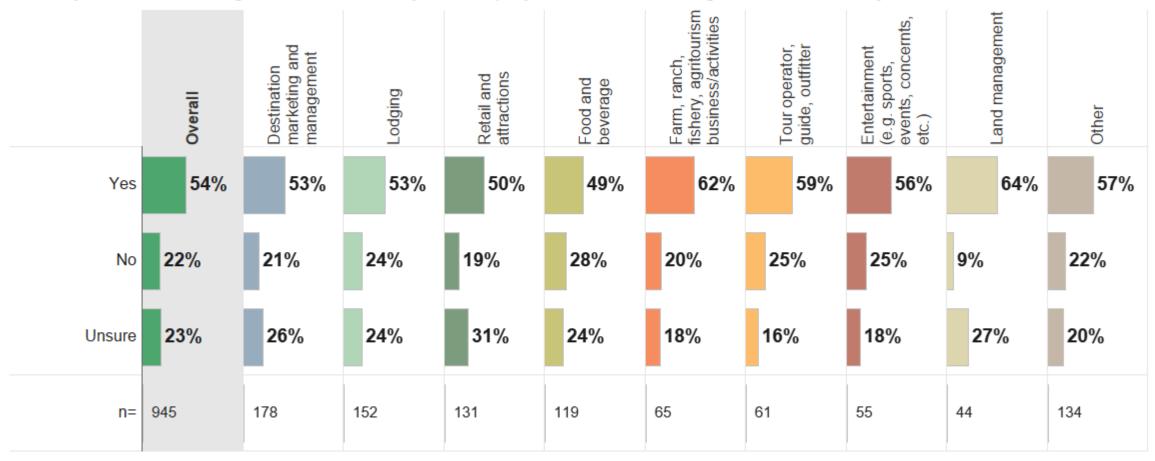
BY REGION

Q: Do you think the Oregon tourism industry should play a role in advancing social and racial justice?



BY SECTOR

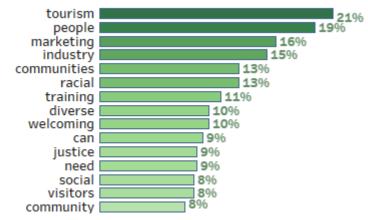
Q: Do you think the Oregon tourism industry should play a role in advancing social and racial justice?



# TRAVEL OREGON'S ROLE IN ADVANCING SOCIAL & RACIAL JUSTICE [IF YES] "HOW DO YOU SEE OREGON'S TOURISM INDUSTRY PLAYING A ROLE IN ADVANCING SOCIAL AND RACIAL JUSTICE?"

Respondents that indicated that the Oregon tourism industry should play a role in advancing social and racial justice were asked: "How do you see Oregon's tourism industry playing a role in advancing social and racial justice?" The most used words and a selection of responses follows:





Inclusive marketing, more education and training opportunities, and more diverse representation in the workforce were the most cited roles that respondents see Travel Oregon playing in order to advance social and racial justice.

#### Example Responses:

At a bare minimum, we should make sure that our marketing reflects a positive stance on advancing social and racial justice.

By offering training to all people in the industry, whether you are a marketing manager or the clerk at a front desk of a hotel. You can't make it mandatory, but you can offer certifications for those who choose to avail themselves of it. I can't believe I still live in a world filled with social and racial injustices. Things need to change. Now.

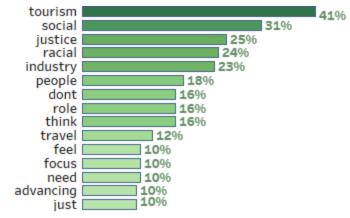
By accurately sharing the stories and history of Oregon. In context, and from multiple perspectives.

Ensuring that their organizations are diverse and honor diversity in their practices and marketing/promotion campaigns.

[IF NO/UNSURE] "DO YOU HAVE ANY COMMENTS ON YOUR RESPONSE TO THE PREVIOUS QUESTION REGARDING THE OREGON TOURISM INDUSTRY'S ROLE IN ADVANCING SOCIAL AND RACIAL JUSTICE?"

Respondents that replied "no" or "unsure" were asked: "Do you have any comments on your response to the previous question regarding the Oregon tourism industry's role in advancing social and racial justice?" A selection of responses follows:





Common themes included the belief that this is not a part of Travel Oregon's job, that social and racial justice is a political issue that should not concern Travel Oregon, or that there is nothing Travel Oregon could do to help the situation.

#### Example Responses:

That should not be your mission. Do what you currently do and do it well. Society will sort itself out without your help. Help create jobs, economic development and respect for Oregon's destinations. Travel Oregon simply cannot be all things to all people.

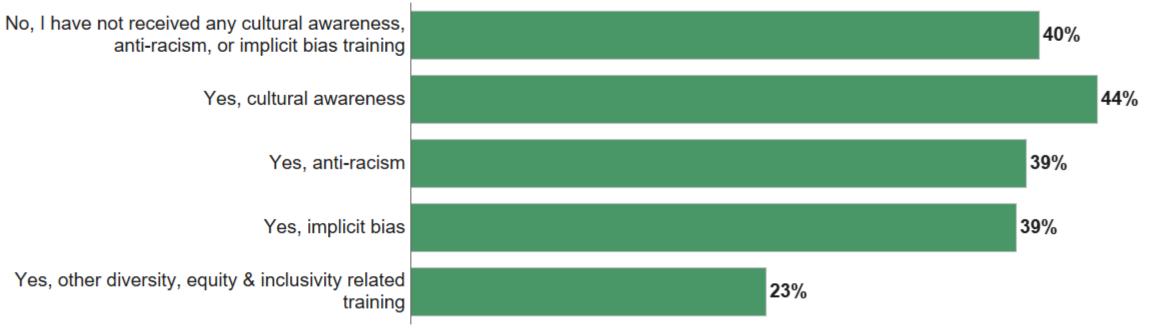
I don't feel the tourism industry has a place in political issues. We simply address people without any interest in their sex or race; these simply have no place in our efforts. They don't relate to what we are trying to accomplish. Neither is any of our business.

I think this is the role of communities and their social services, not tourism.

It is complicated. I think we all have a responsibility to work towards social and racial justice but how it ties into this industry, other than creating a welcoming environment for all, I am not sure.

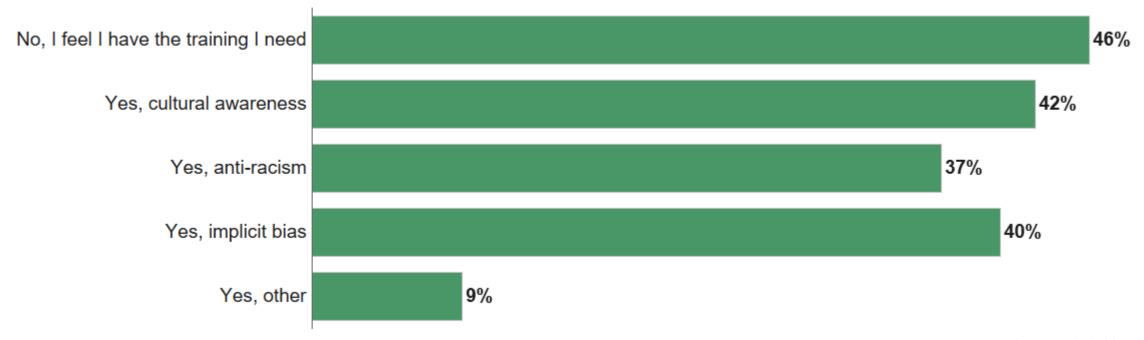
### DIVERSITY/EQUITY/INCLUSIVITY TRAINING

Q: Have you participated in trainings related to any of the following? (Check all that apply)



## DIVERSITY/EQUITY/INCLUSIVITY TRAINING

Q: Would you be interested in participating in trainings related to any of the following? (Check all that apply)



### CREATING COMMUNITY WHERE ALL FEEL WELCOME

Respondents were asked, "In a few words, what, if anything, needs to change for your community to feel like a destination where ALL who travel can enjoy their journey and feel welcome?" Three primary themes emerged:

#### Nothing needs to change/my community is already welcoming.

- These respondents often provided examples of ways in which their community is welcoming. A very small minority suggested their community should not be so welcoming.
- More training and education.
  - Increase awareness of issues, both past and present, through more training and educational opportunities for all, and especially people in leadership positions.
- More diverse representation in marketing materials and workforce.
  - More promotional materials featuring BIPOC and LGBTQ+ individuals. Greater diversity in the travel and tourism workforce at all levels.

Example responses of these three most-prominent themes are provided on the following slide. In addition, smaller shares of respondents cited the need for improving safety in their communities, removing overt displays of racism, and making travel and outdoor recreation opportunities more accessible, particularly among youth from lower socio-economic backgrounds. Safety-related concerns were more common among Portland Region respondents, and primarily cited safety-related concerns due to homelessness, the police, and protesters. Some respondents said they either did not know how to make their community more welcoming, or, as a majority in their community, were not in a position to answer.

### CREATING COMMUNITY WHERE ALL FEEL WELCOME

Q: In a few words, what, if anything, needs to change for your community to feel like a destination where ALL who travel can enjoy their journey and feel welcome?

#### Theme:

#### **Example Responses:**

## My community is already welcoming

All of our businesses do a terrific job of making diverse visitors feel welcome-- must be that rural hospitality ethic!

Our community doesn't need to change, just like communities of other cultures don't need to change. We just need to be accepting of each other and treat each other equally as human beings. If you begin to blatantly focus on these issues through travel Oregon, you will lose a lot of interest in rural areas. It's not that people don't care about cultural equality, it's that it's not really an issue where we live. People feel welcome in our community.

## More training and education

Our community is very homogenous and relatively isolated, so I think educating the community is very important. Perhaps schools have a role in teaching more acceptance of those that look or sound different than "us".

I think folks in public facing jobs need education - of Oregon's history of Black exclusion, the breadth of modern native culture, how to consider from other perspectives. Also people need a guideline and goal to strive towards - leadership with a description of the level of inclusivity that is expected in tourism.

#### More diverse representation in marketing and positions of leadership

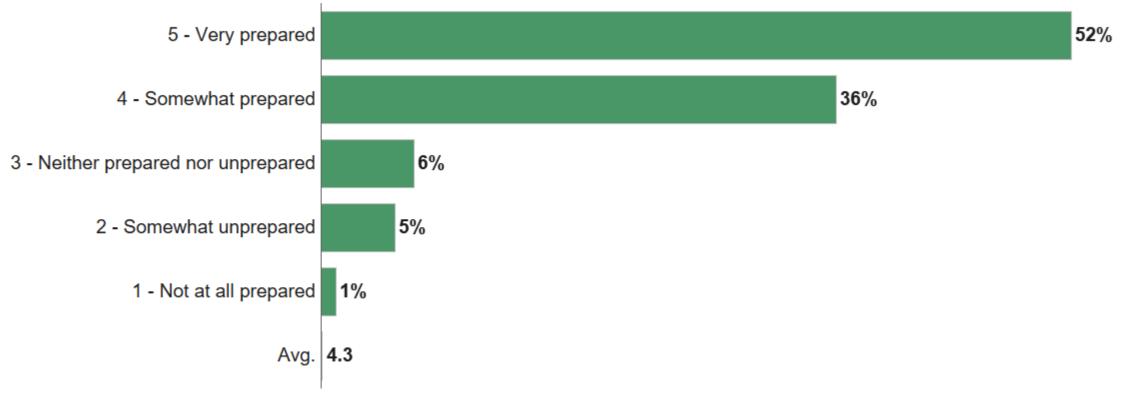
EDI trained park staff, more access and incentives for BIPOC hires within the tourism and outdoor recreation industry

More welcoming marketing for ALL; more diversity in government and tourism hires.

Visitors need to see themselves reflected in the promotional materials and business mix of a community. Oregon needs to figure out how to balance its dependence on visitors and the often antagonistic view of outsiders shared by a vocal minority

## PREPAREDNESS TO INTERACT WITH DIVERSE POPULATIONS

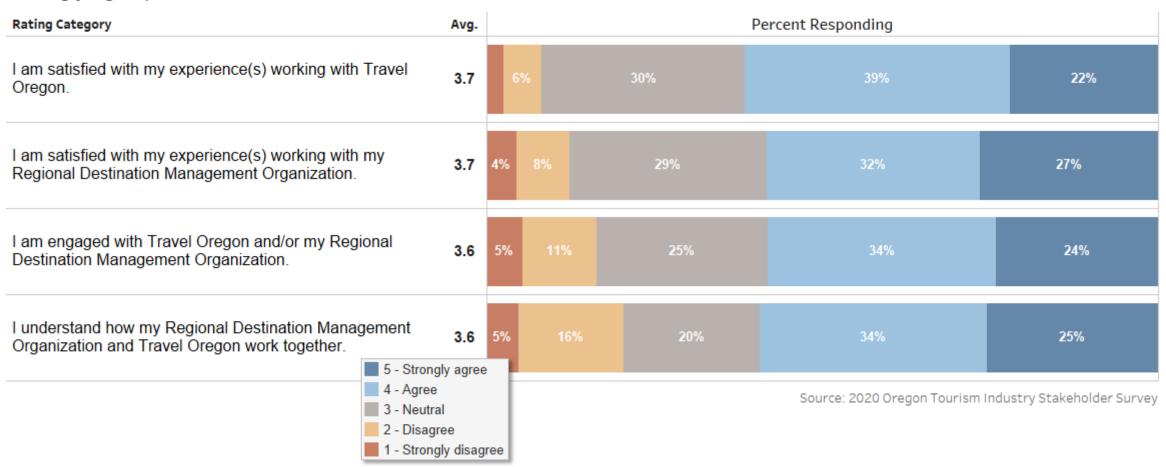
Q: How prepared do you feel to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds?



# INDUSTRY ENGAGEMENT & COMMUNICATIONS

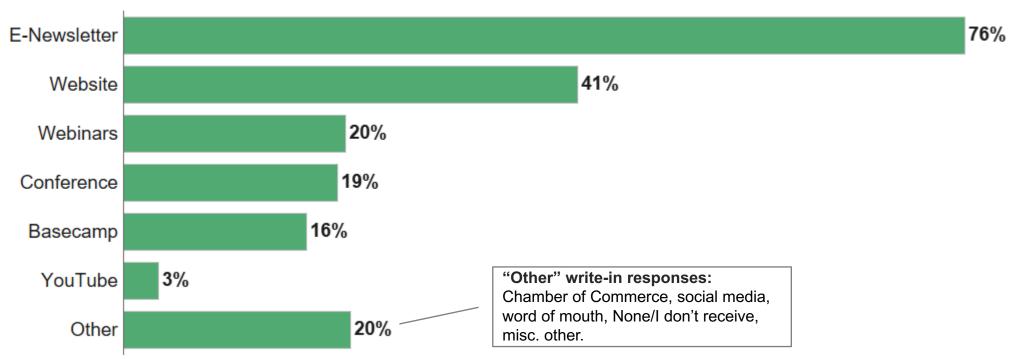
### INDUSTRY ENGAGEMENT

Q: Please indicate the level to which you agree or disagree with the following statements: (1 = Strongly disagree, 5 = Strongly agree)



### INDUSTRY ENGAGEMENT

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



### INDUSTRY ENGAGEMENT

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

