

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: https://rebrand.ly/TO_Stakeholder2020

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

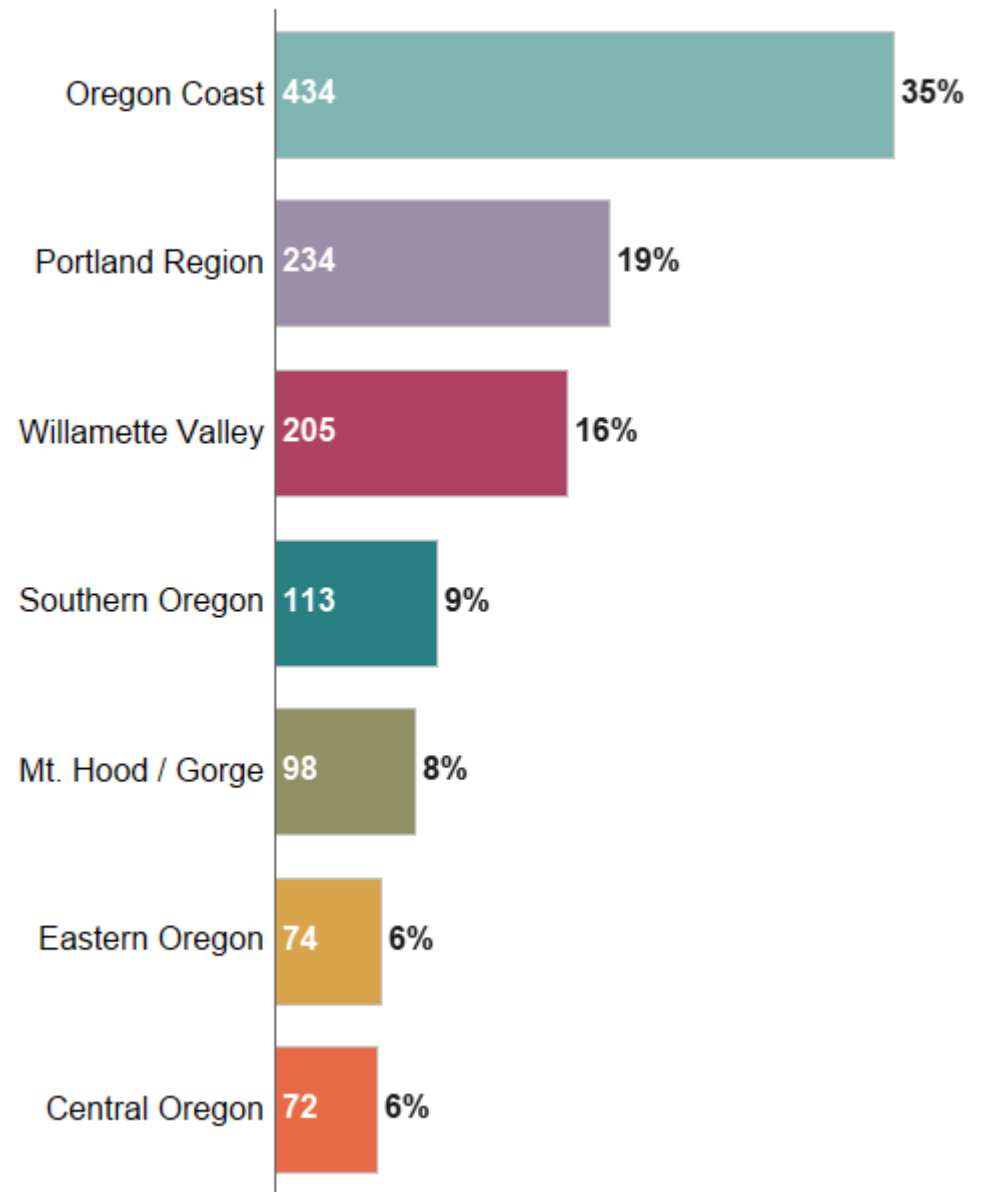
INDUSTRY ENGAGEMENT & COMMUNICATIONS

- 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.

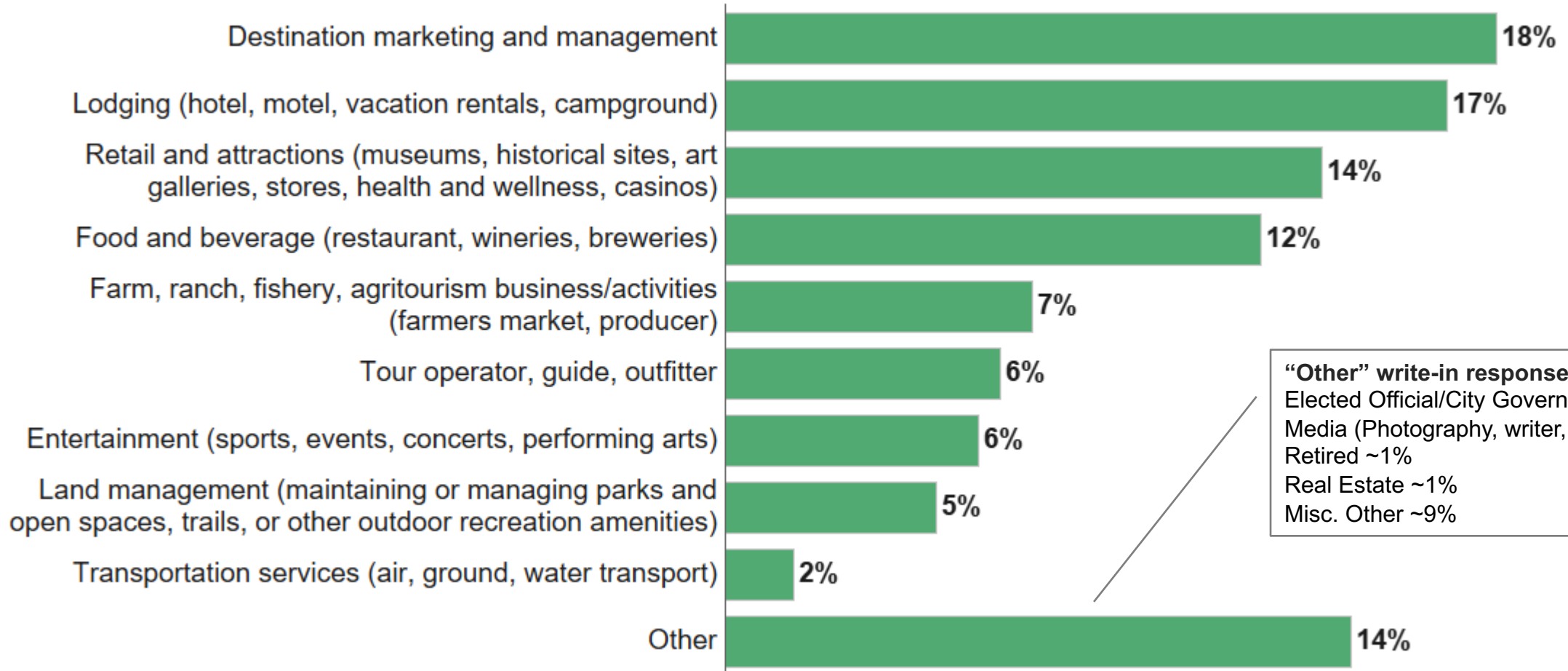
Number/Share of Respondents



RESPONDENT PROFILE

TOURISM INDUSTRY SECTOR

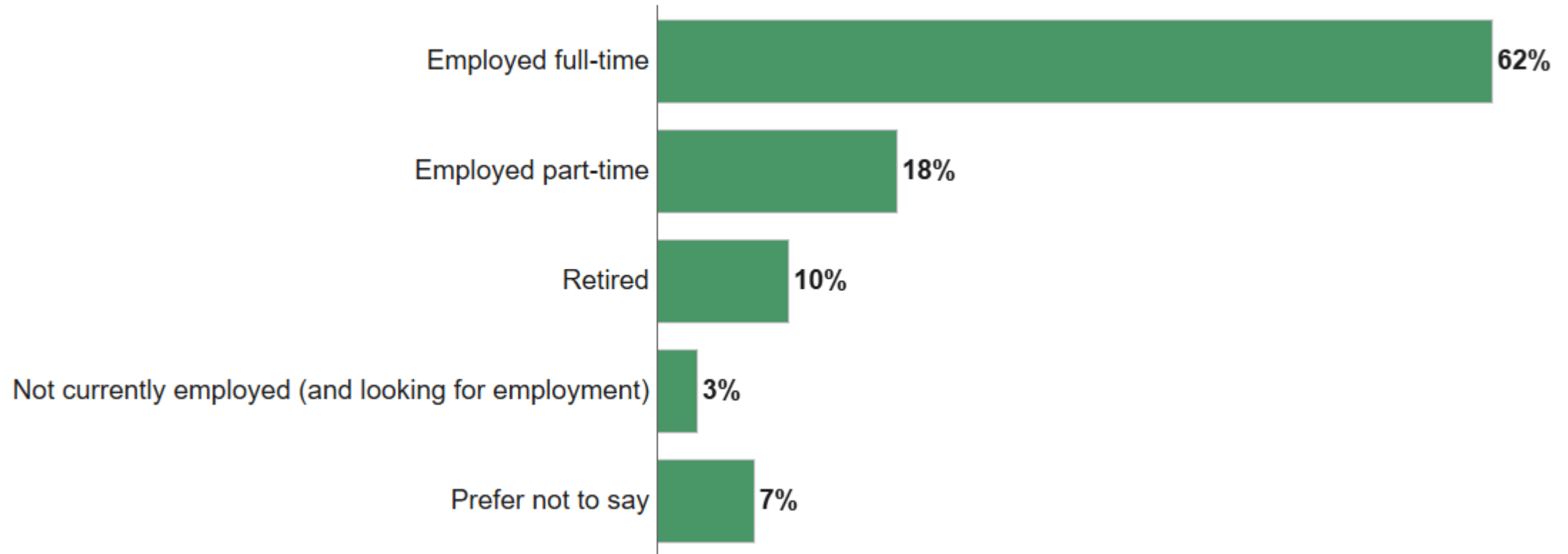
Q: In what sector of the tourism industry do you primarily work? Choose one:



Source: 2020 Oregon Tourism Industry Stakeholder Survey

EMPLOYMENT STATUS

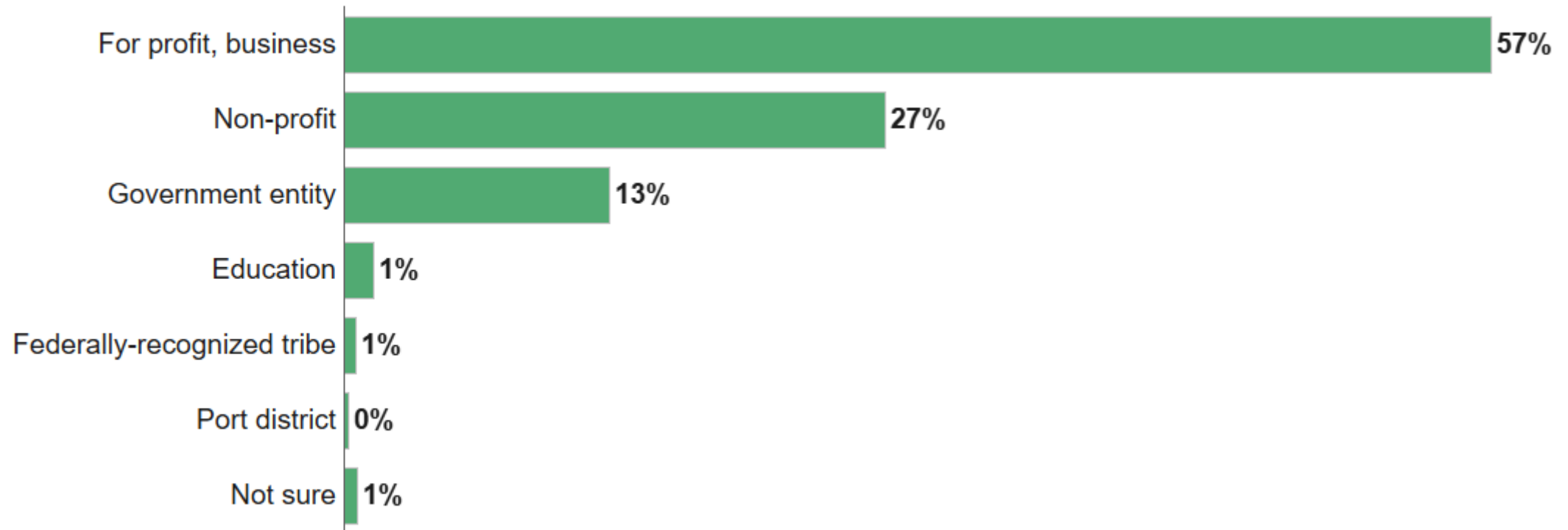
Q: Which of the following best describes your current employment status in the tourism industry?



Source: 2020 Oregon Tourism Industry Stakeholder Survey

ENTITY TYPE

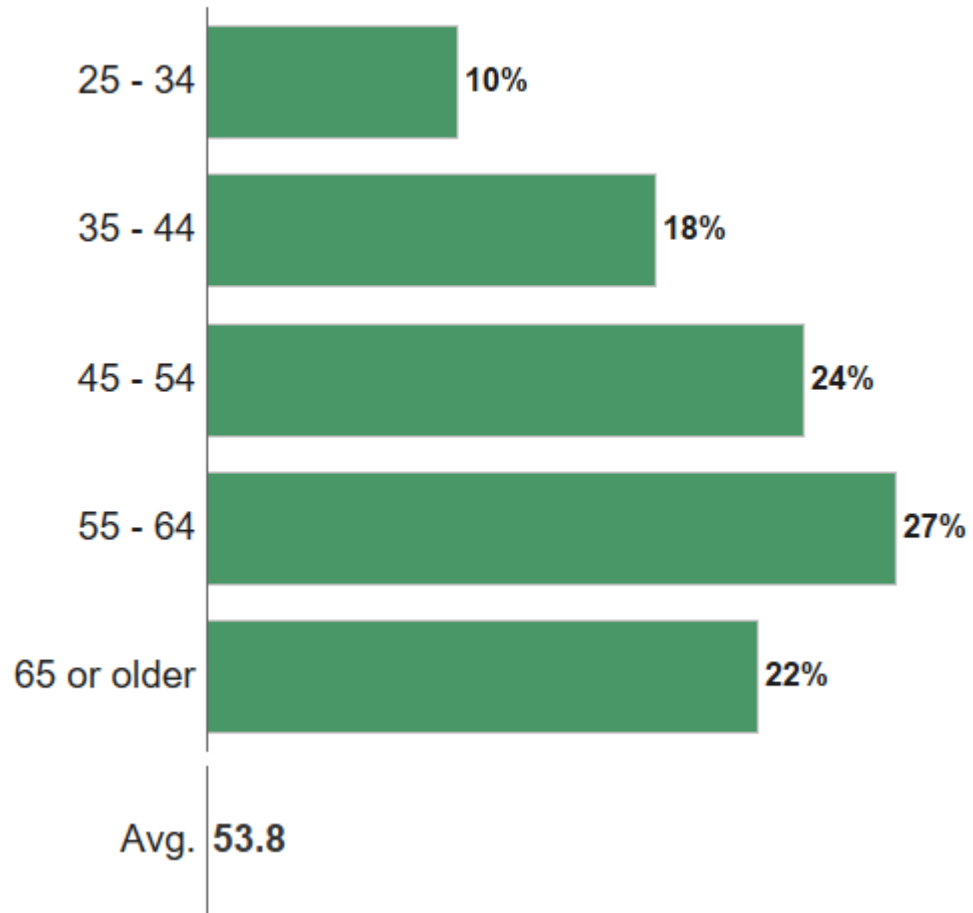
Q: Which entity type best describes your business/organization?



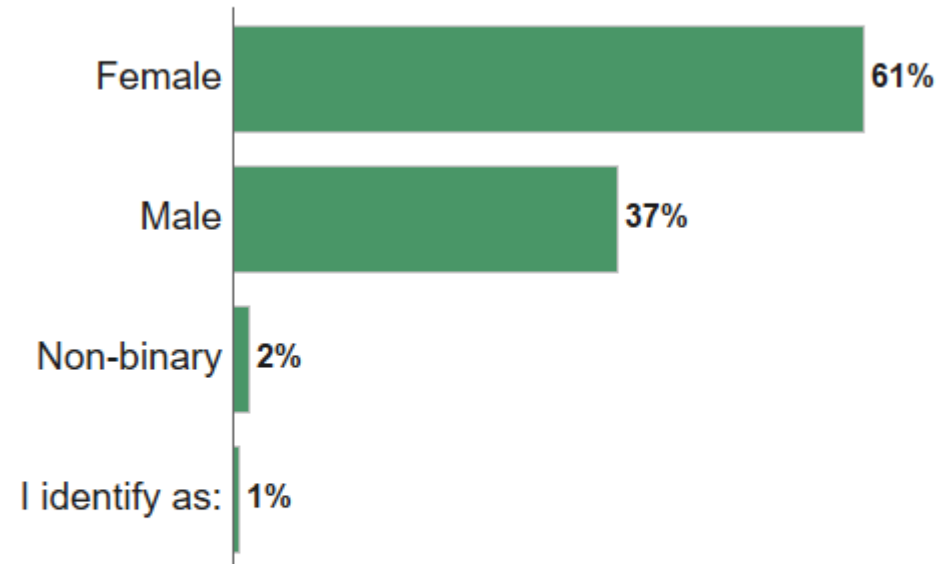
Source: 2020 Oregon Tourism Industry Stakeholder Survey

AGE & GENDER

Q: Respondent age:

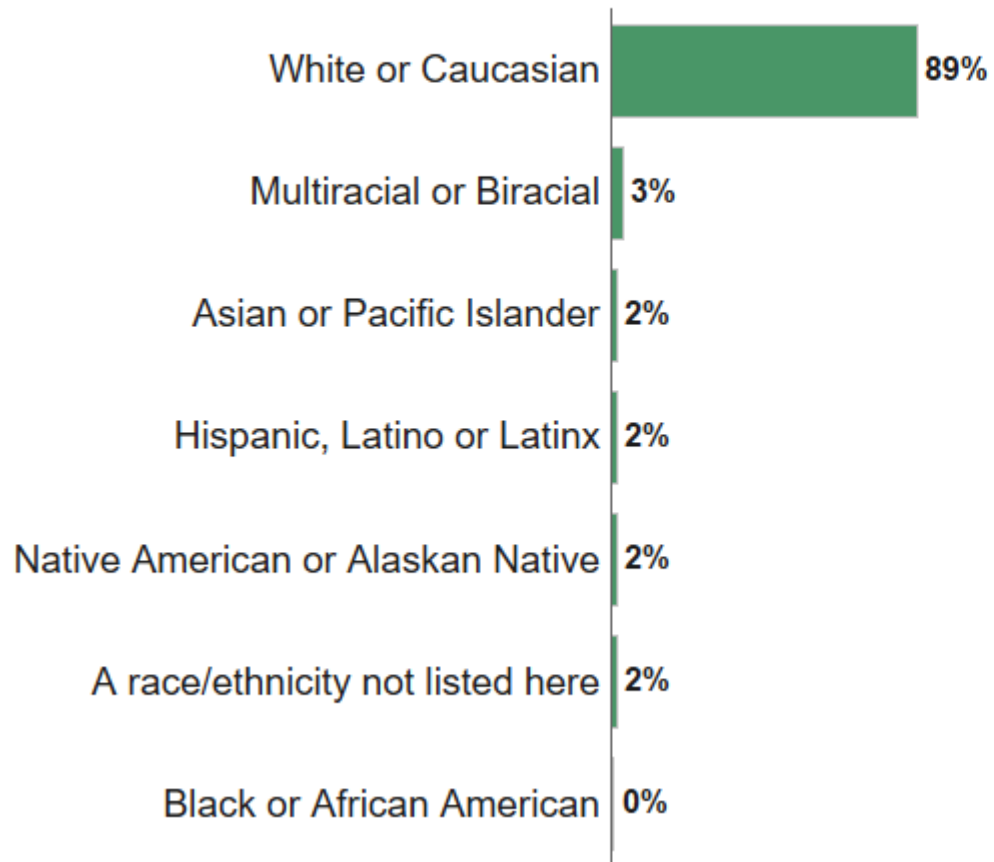


Q: What is your gender?

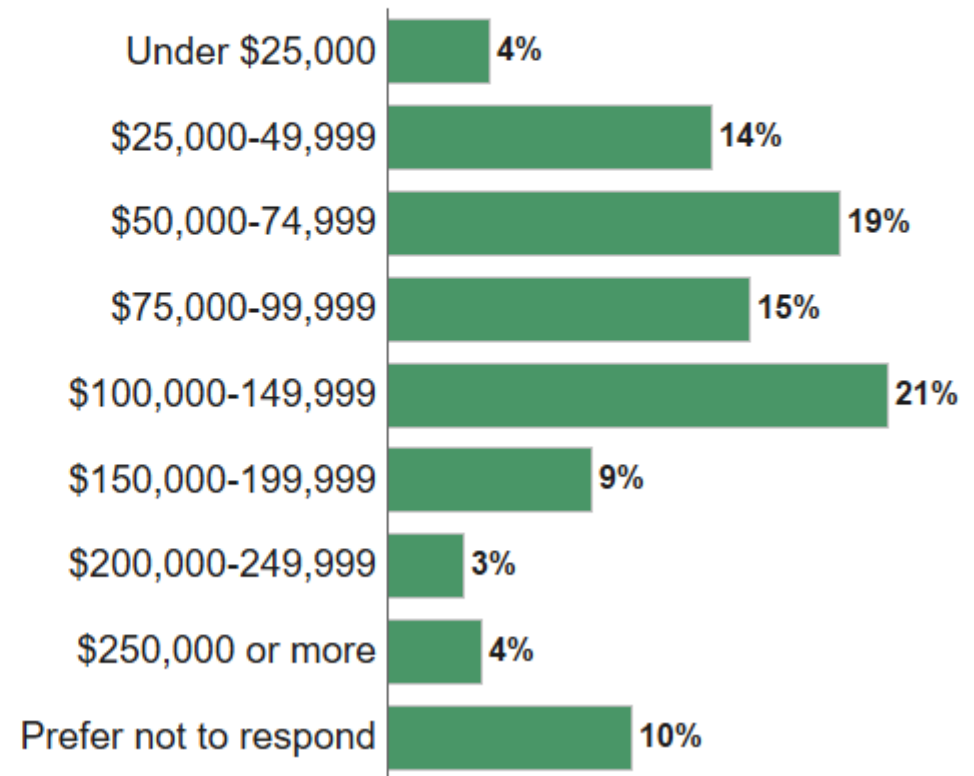


RACE & INCOME

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

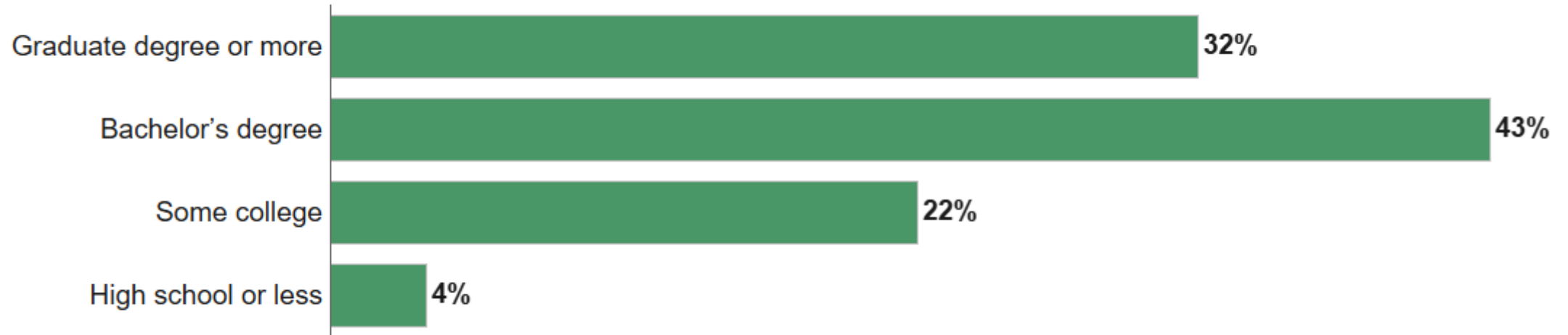


Q: Which of these categories best describes the total gross annual income of your household (before taxes)?



EDUCATION

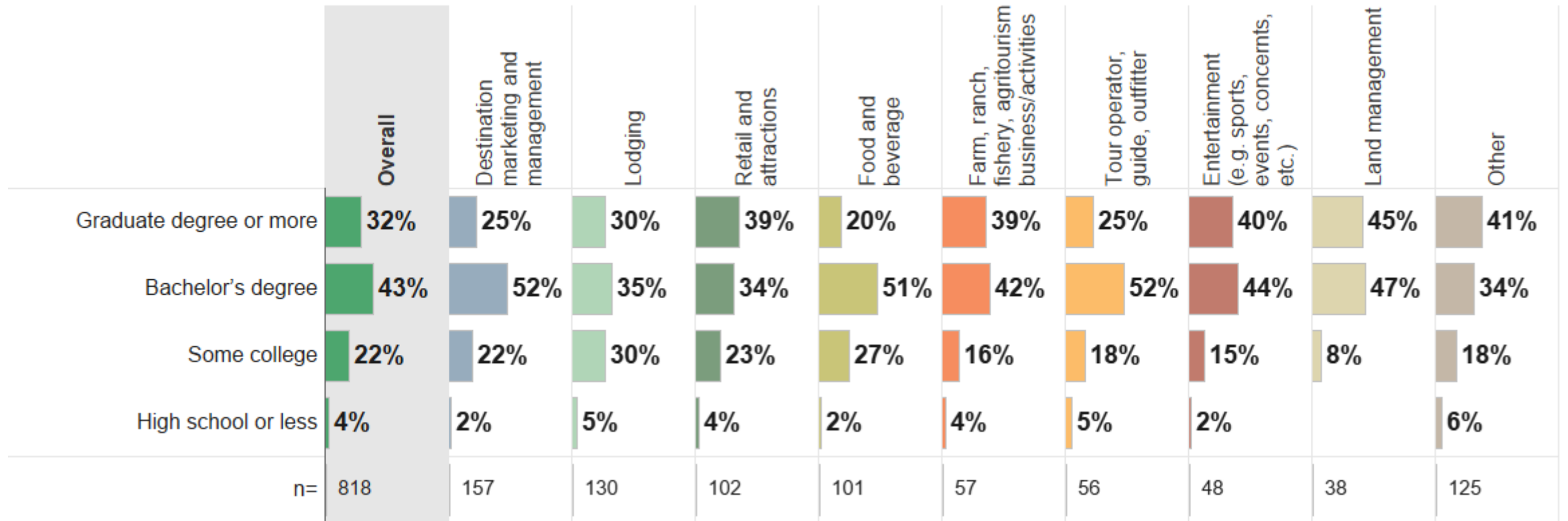
Q: *What is your highest level of education?*



Source: 2020 Oregon Tourism Industry Stakeholder Survey

EDUCATION BY SECTOR

Q: What is your highest level of education?



Source: 2020 Oregon Tourism Industry Stakeholder Survey

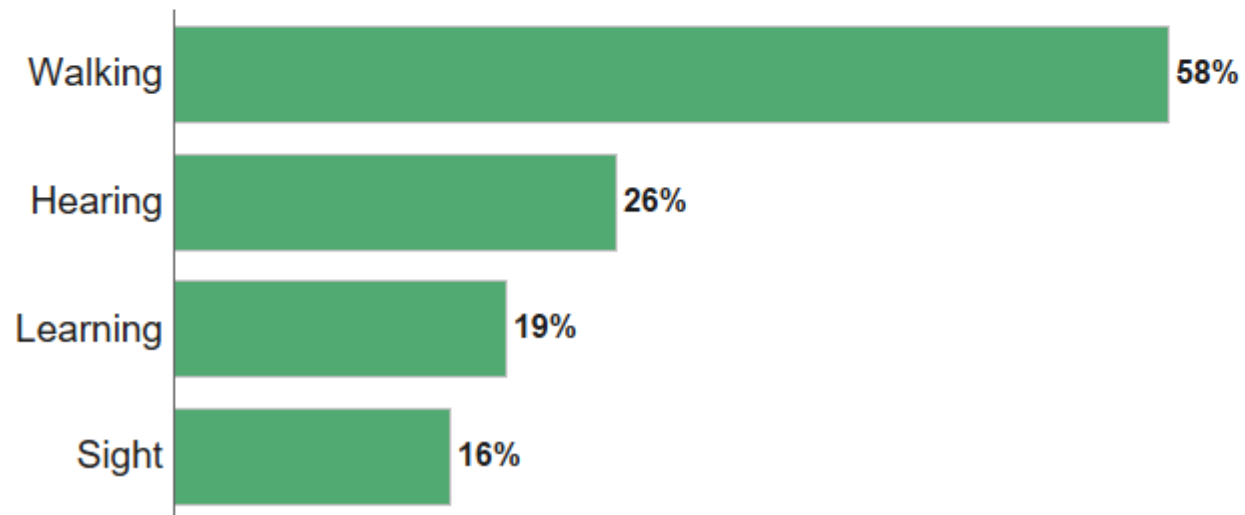
Transportation services sector included in "Other" due to insufficient sample size.

PRESENCE OF A DISABILITY

Q: *Do you have a disability?*



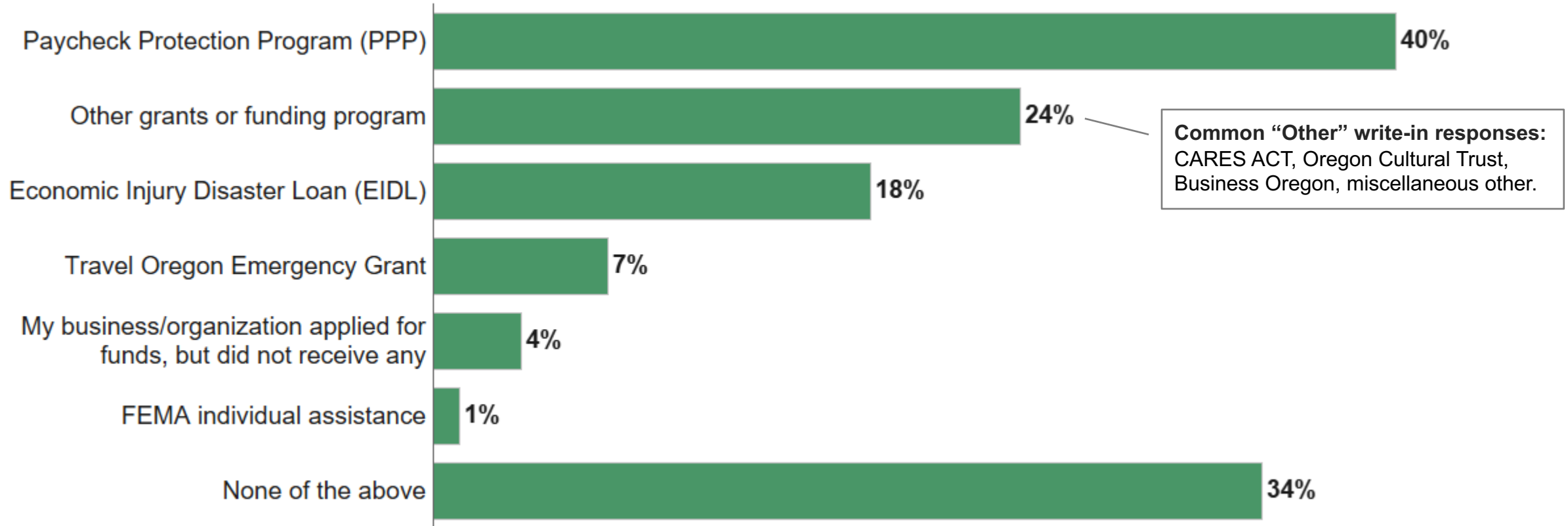
Q: *[If Yes] What are these disabilities? (Check all that apply)*



FUNDING SOURCES & BUSINESS HEALTH

FUNDING SOURCES

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



Source: 2020 Oregon Tourism Industry Stakeholder Survey

FUNDING SOURCES BY SECTOR

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

	Overall	Destination marketing and management	Lodging	Retail and attractions	Food and beverage	Farm, ranch, fishery, agritourism business/activities	Tour operator, guide, outfitter	Entertainment (e.g. sports, events, concerts, etc.)	Land management	Other
Paycheck Protection Program (PPP)	40%	14%	56%	53%	71%	26%	56%	39%	10%	20%
Other grants or funding program	24%	24%	9%	43%	11%	20%	19%	50%	37%	29%
Economic Injury Disaster Loan (EIDL)	18%	14%	23%	20%	26%	8%	42%	9%	4%	10%
Travel Oregon Emergency Grant	7%	19%	11%	1%	1%	4%	17%			1%
My business/organization applied for funds, but did not receive any	4%	4%	6%	4%	2%	3%	8%	2%		1%
FEMA individual assistance	1%	2%	1%	1%			1%		6%	1%
None of the above	34%	38%	29%	21%	23%	55%	17%	31%	55%	50%
n=	1,021	182	177	135	131	74	72	54	49	143

Source: 2020 Oregon Tourism Industry Stakeholder Survey

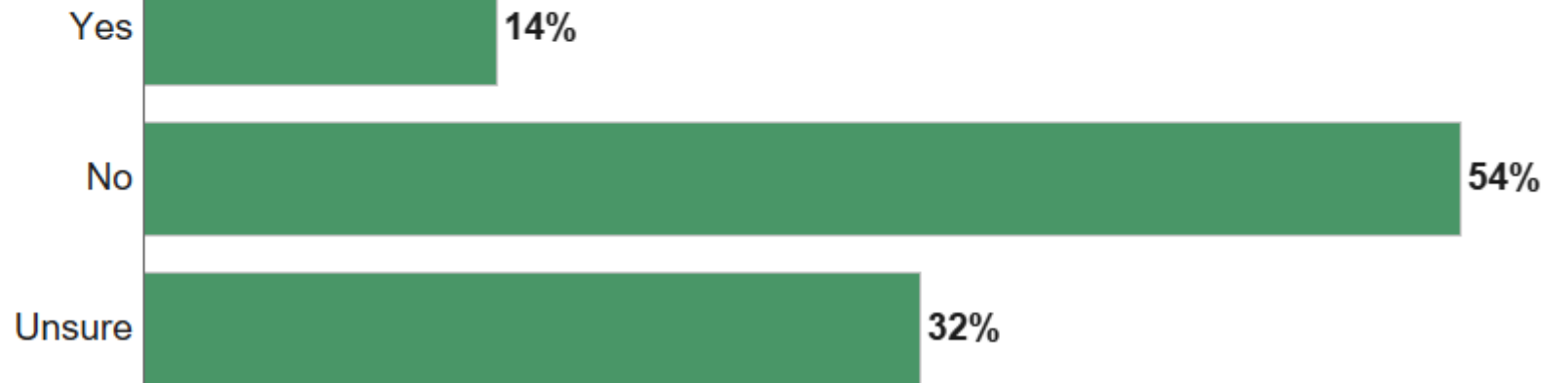
Transportation services sector included in "Other" due to insufficient sample size.

PAST & FUTURE LAYOFFS

Q: In 2020, has your organization/business laid off, terminated, or otherwise let go of employees?



Q: Within the next 6 months, do you anticipate laying off, terminating, or otherwise letting go of employees?



Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

Source: 2020 Oregon Tourism Industry Stakeholder Survey

PAST & FUTURE LAYOFFS BY SECTOR

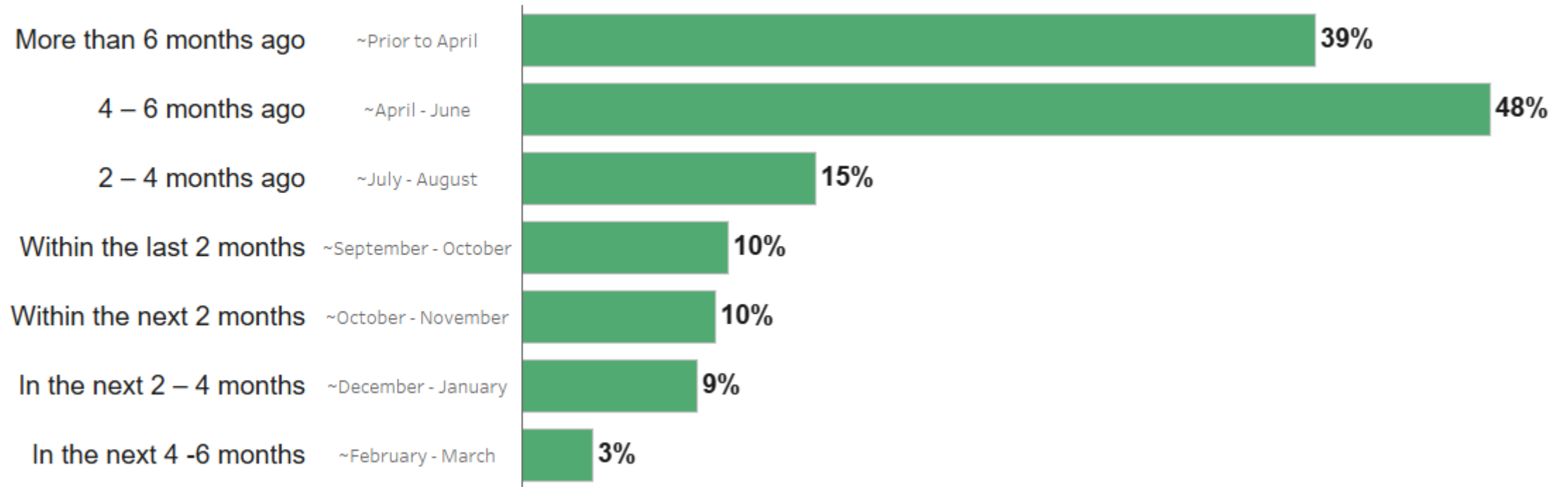
	Overall	Destination marketing and management	Lodging	Food and beverage	Retail and attractions	Tour operator, guide, outfitter	Farm, ranch, fishery, agritourism business/activities	Entertainment (e.g. sports, events, concerts, etc.)	Land management	Other	
Q: In 2020, has your organization/business laid off, terminated, or otherwise let go of employees?	Yes	46%	42%	64%	61%	55%	56%	8%	52%	37%	23%
	No	54%	58%	36%	39%	45%	44%	92%	48%	63%	77%
	n=	1,018	184	181	132	132	72	71	54	51	138
Q: Within the next 6 months, do you anticipate laying off, terminating, or otherwise letting go of employees?	Yes	14%	5%	21%	23%	14%	25%	11%	13%	14%	7%
	No	54%	57%	49%	42%	50%	54%	77%	50%	55%	62%
	Unsure	32%	38%	30%	35%	36%	21%	11%	37%	31%	31%
	n=	1,017	183	181	132	132	72	71	54	51	138

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

TIMING OF LAYOFFS

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

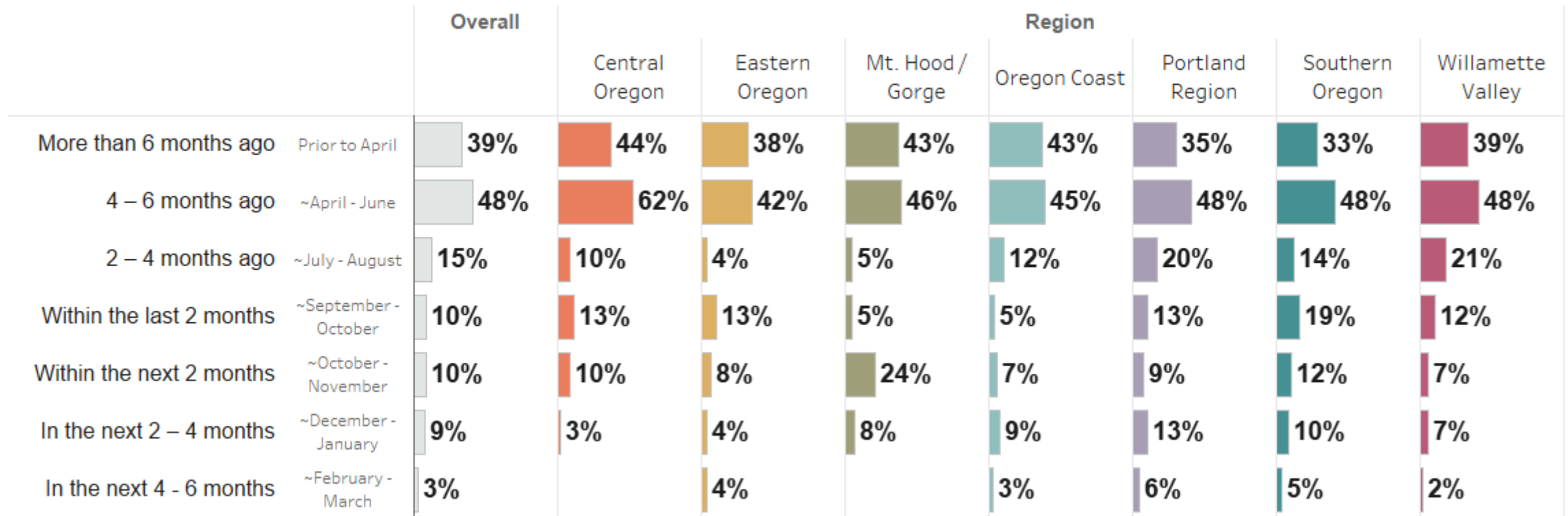


Source: 2020 Oregon Tourism Industry Stakeholder Survey

*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)

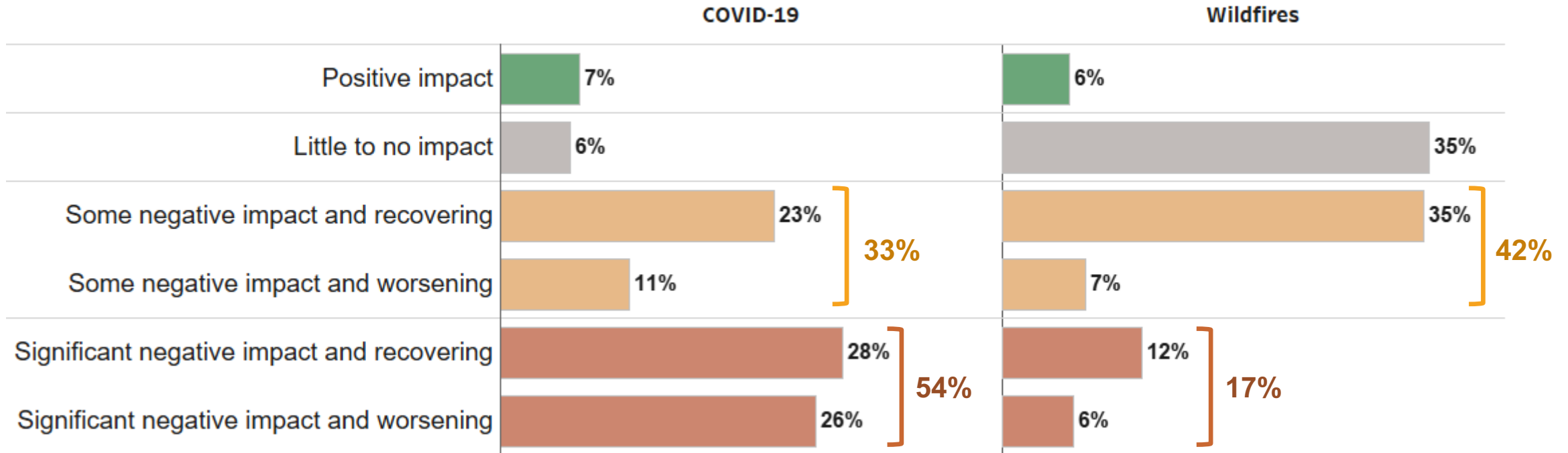


Source: 2020 Oregon Tourism Industry Stakeholder Survey

*Data collection occurred throughout the month of October.

IMPACTS ON REVENUE/FUNDING

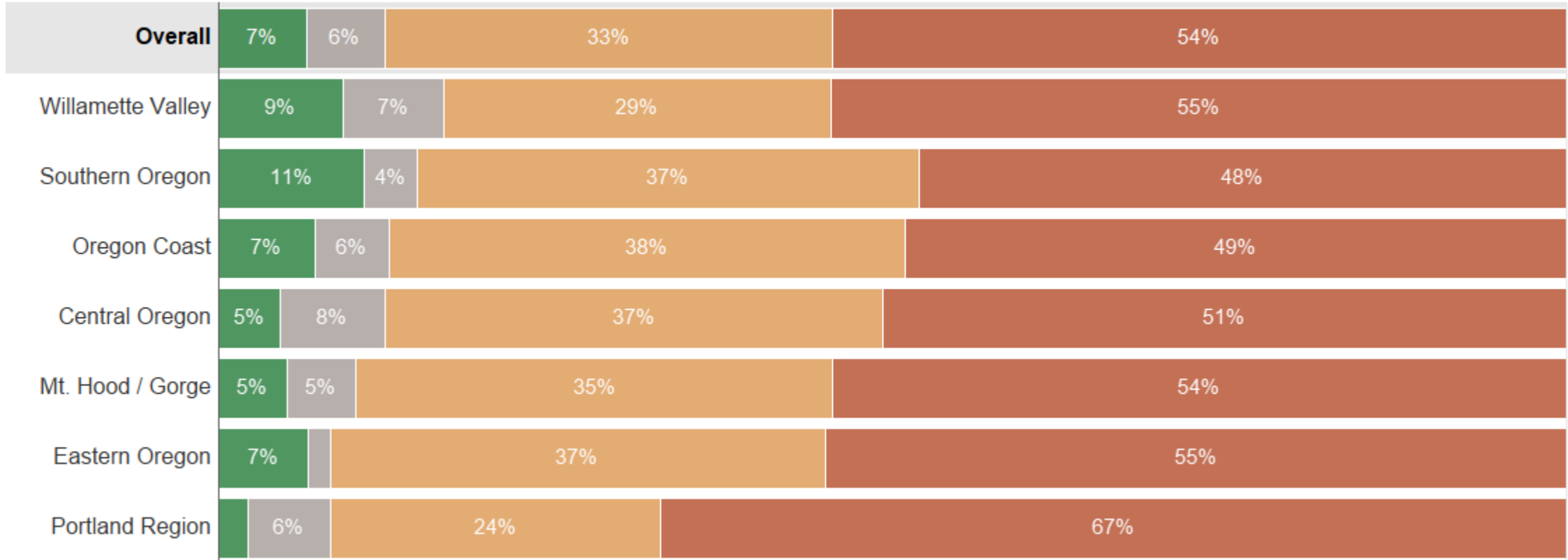
Q: How would you characterize the impacts of the following on your organization/business's revenue or funding?



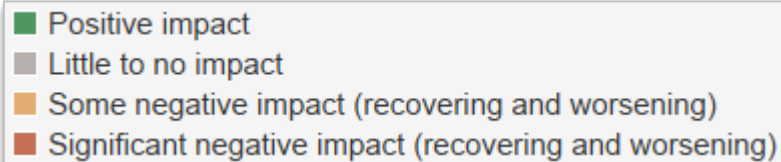
Source: 2020 Oregon Tourism Industry Stakeholder Survey

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?



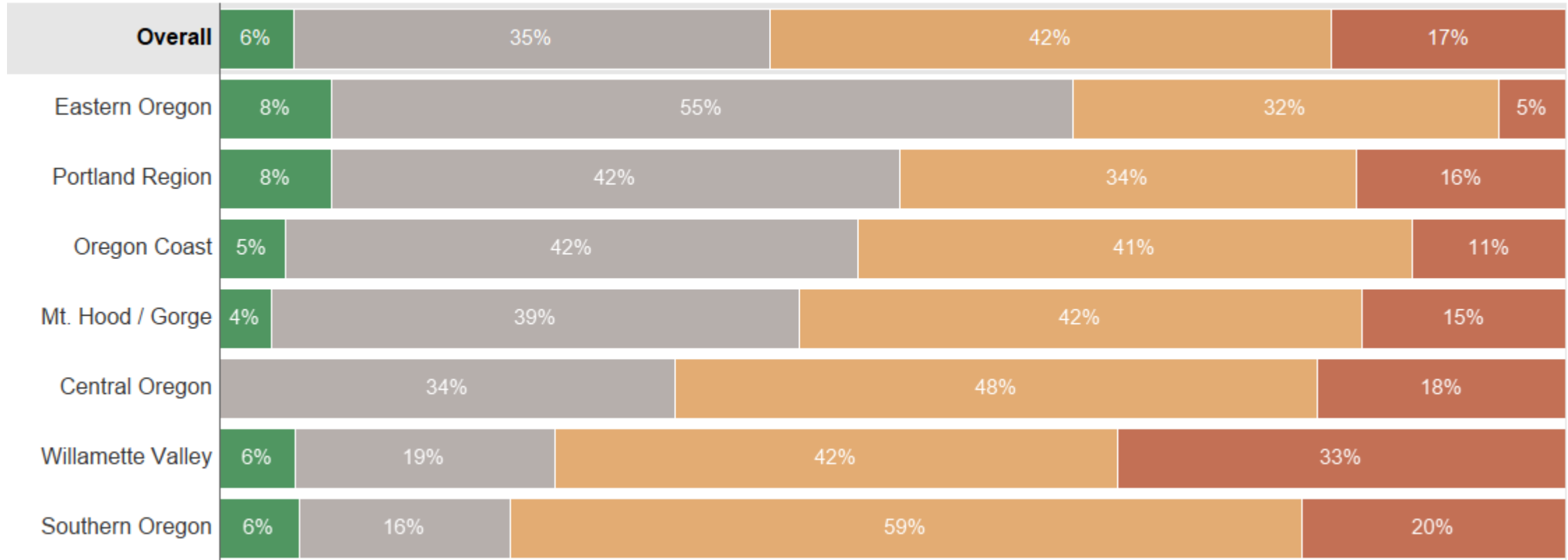
Source: 2020 Oregon Tourism Industry Stakeholder Survey



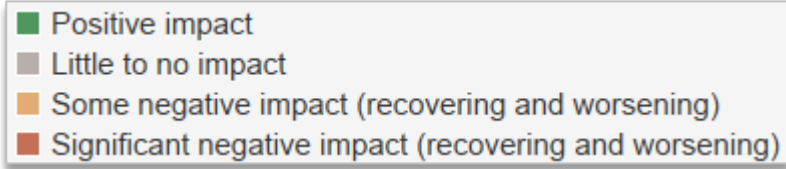
*Regions are sorted in ascending order by the percent that report some/significant negative impact (least impacted to most impacted)

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?



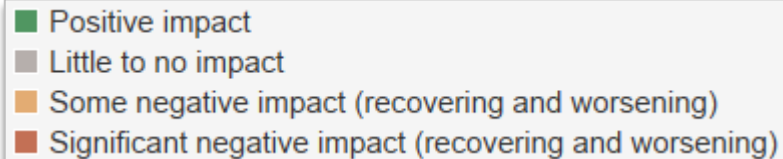
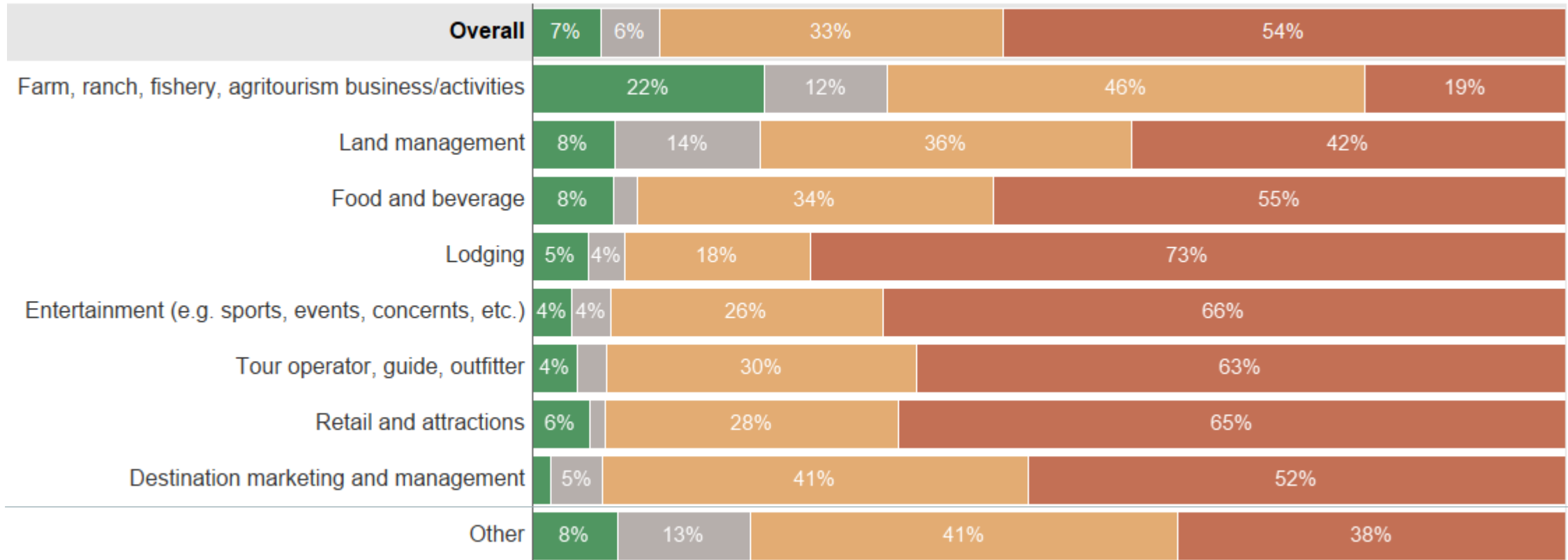
Source: 2020 Oregon Tourism Industry Stakeholder Survey



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

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?

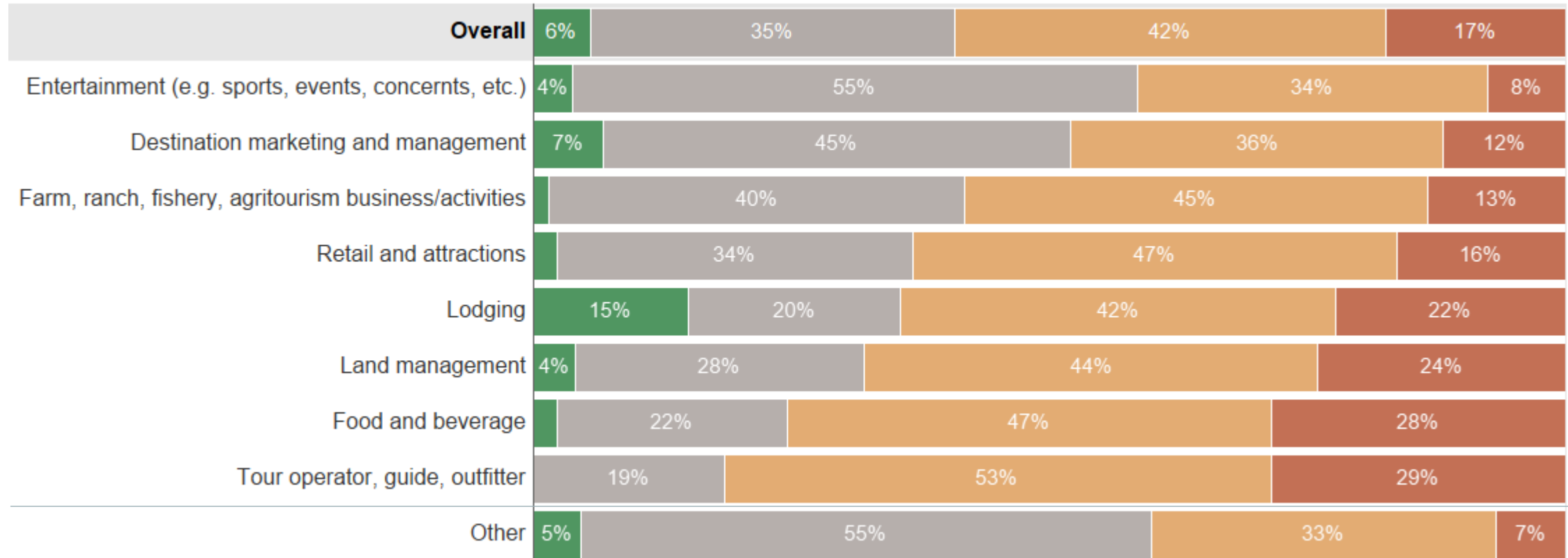


Source: 2020 Oregon Tourism Industry Stakeholder Survey

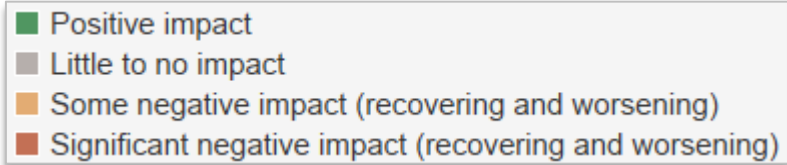
*Sectors are sorted in ascending order by the percent that report some/significant negative impact (least impacted to most impacted)
Transportation services sector included in "Other" due to insufficient sample size.

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?



Source: 2020 Oregon Tourism Industry Stakeholder Survey



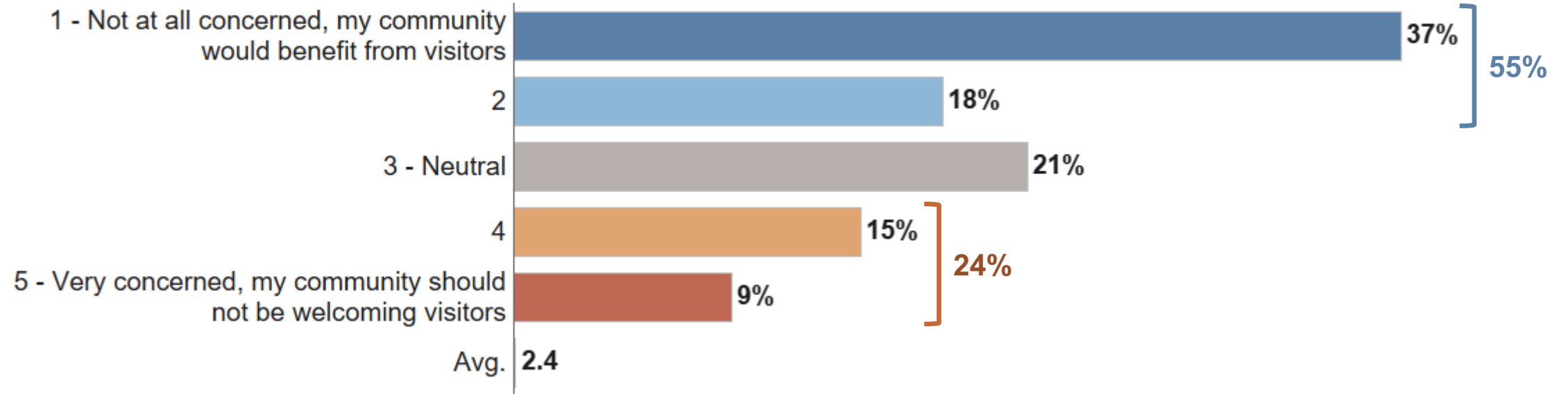
*Sectors are sorted in ascending order by the percent that report some/significant negative impact (least impacted to most impacted)

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

**RESILIENCY, RECOVERY
AND REOPENING**

WELCOMING VISITORS

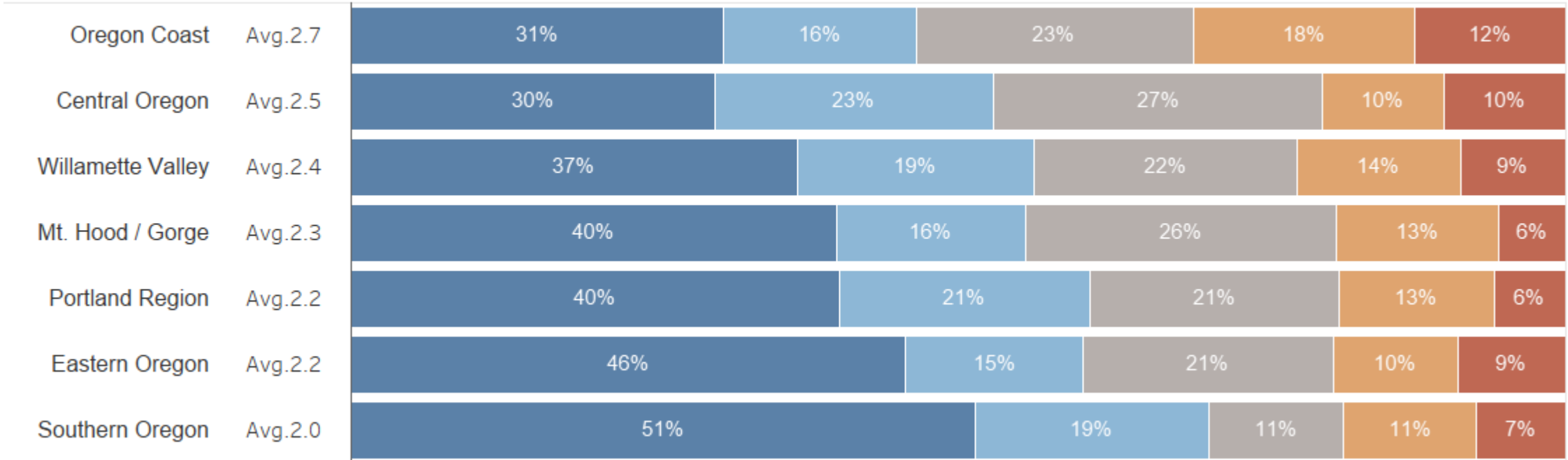
Q: How would you feel if you saw an advertisement today promoting your community to visitors?



Source: 2020 Oregon Tourism Industry Stakeholder Survey

WELCOMING VISITORS BY REGION

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



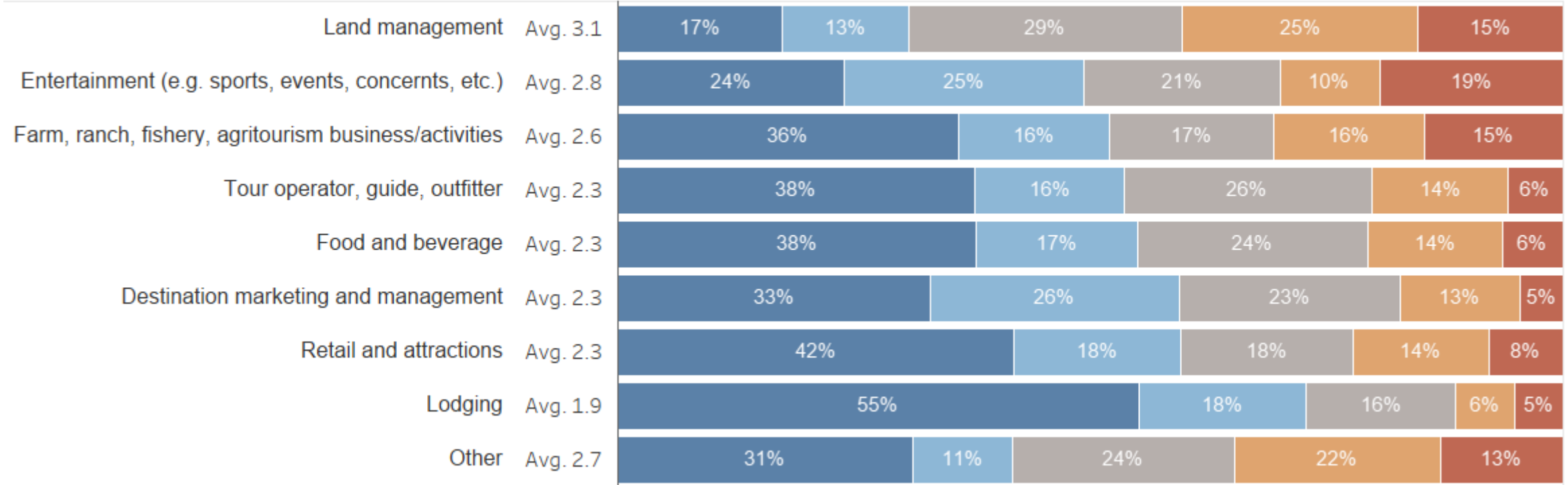
Source: 2020 Oregon Tourism Industry Stakeholder Survey

- 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

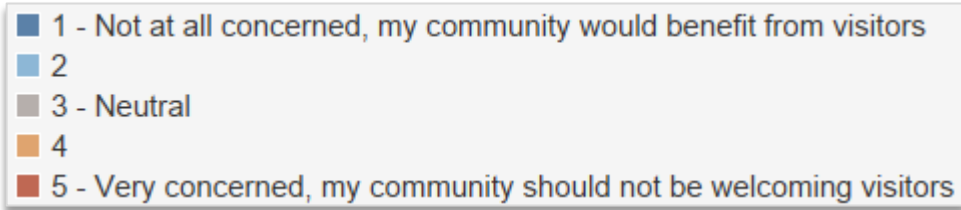
*Regions are sorted in descending order by the average rating, most concerned to least concerned.

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



*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

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.

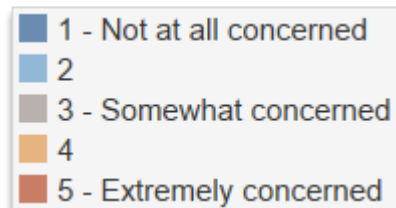
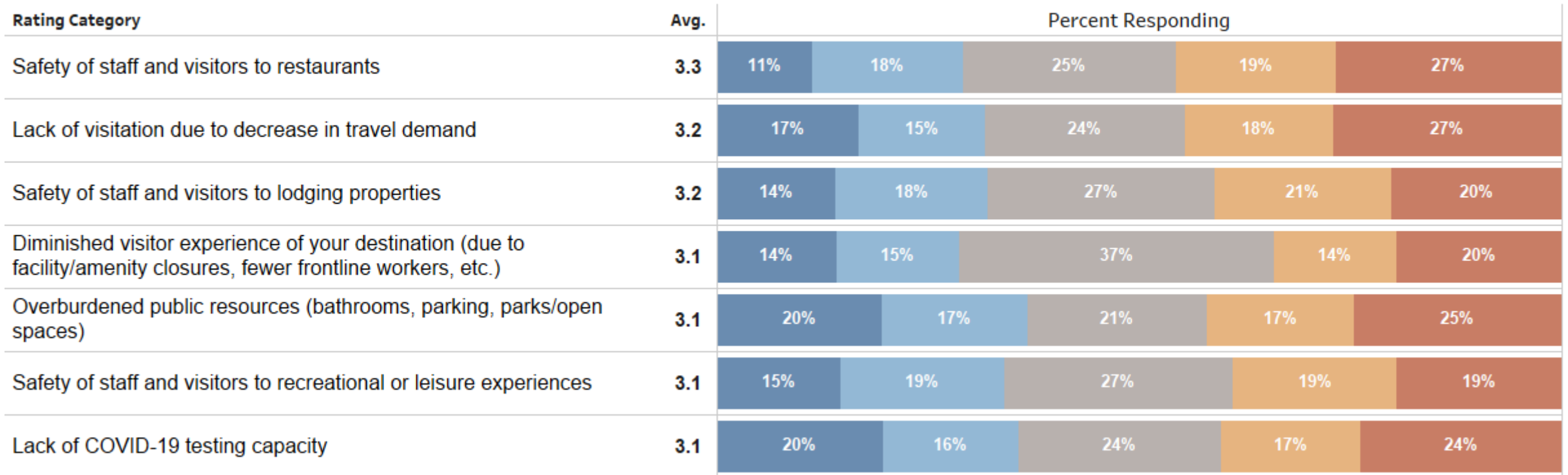
Covid cases continue to be on the rise as are case positivity rates especially in our county. As a destination we receive visitors from other communities with even higher case loads. It's not responsible for us to be promoting travel at this time until there is a vaccine or cure.

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, 1 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

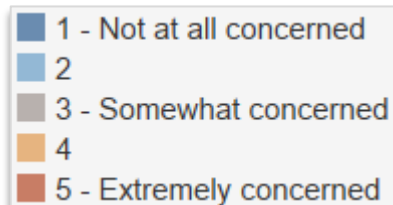
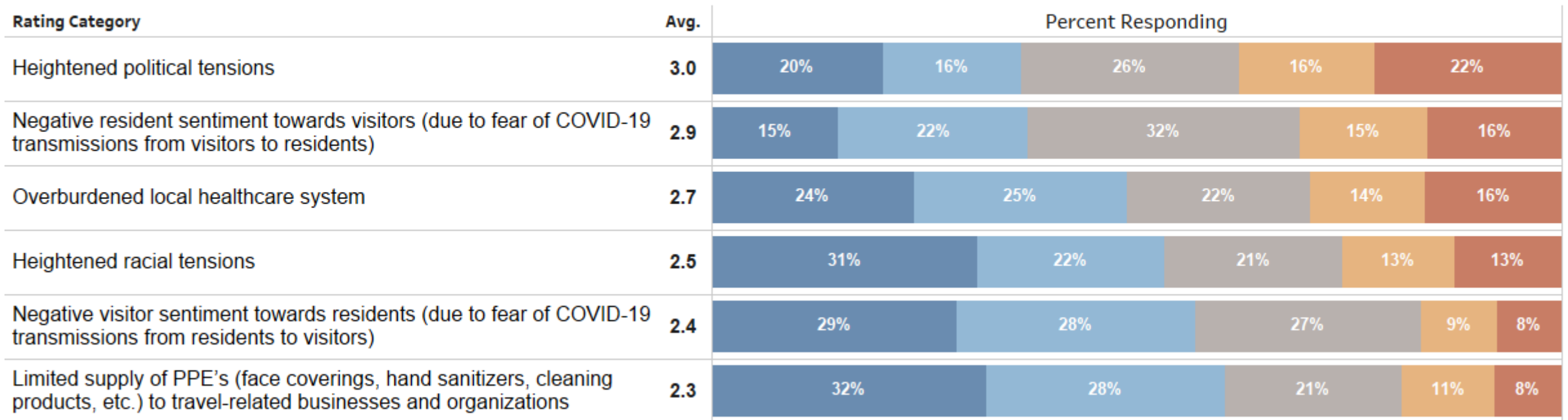


Source: 2020 Oregon Tourism Industry Stakeholder Survey

*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

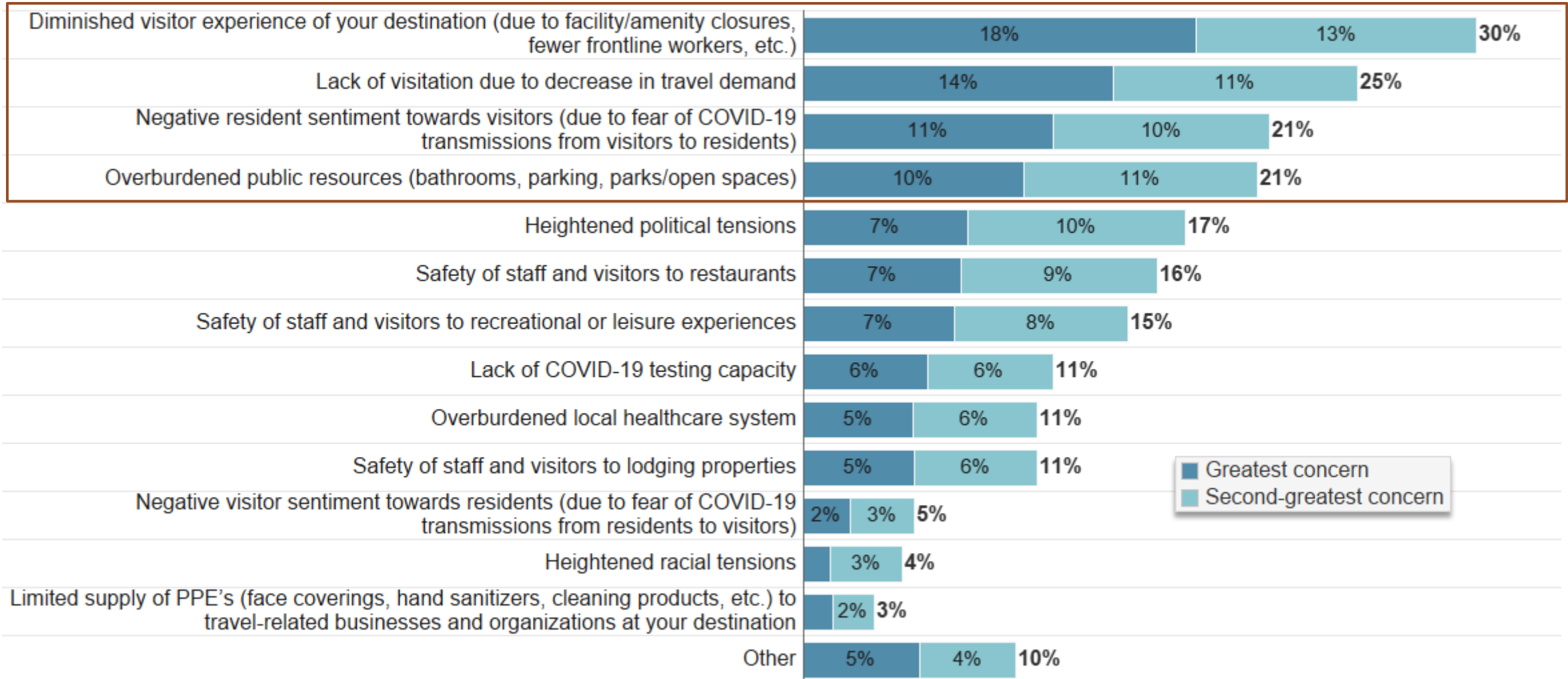


Source: 2020 Oregon Tourism Industry Stakeholder Survey

*Categories are sorted in descending order by the average rating

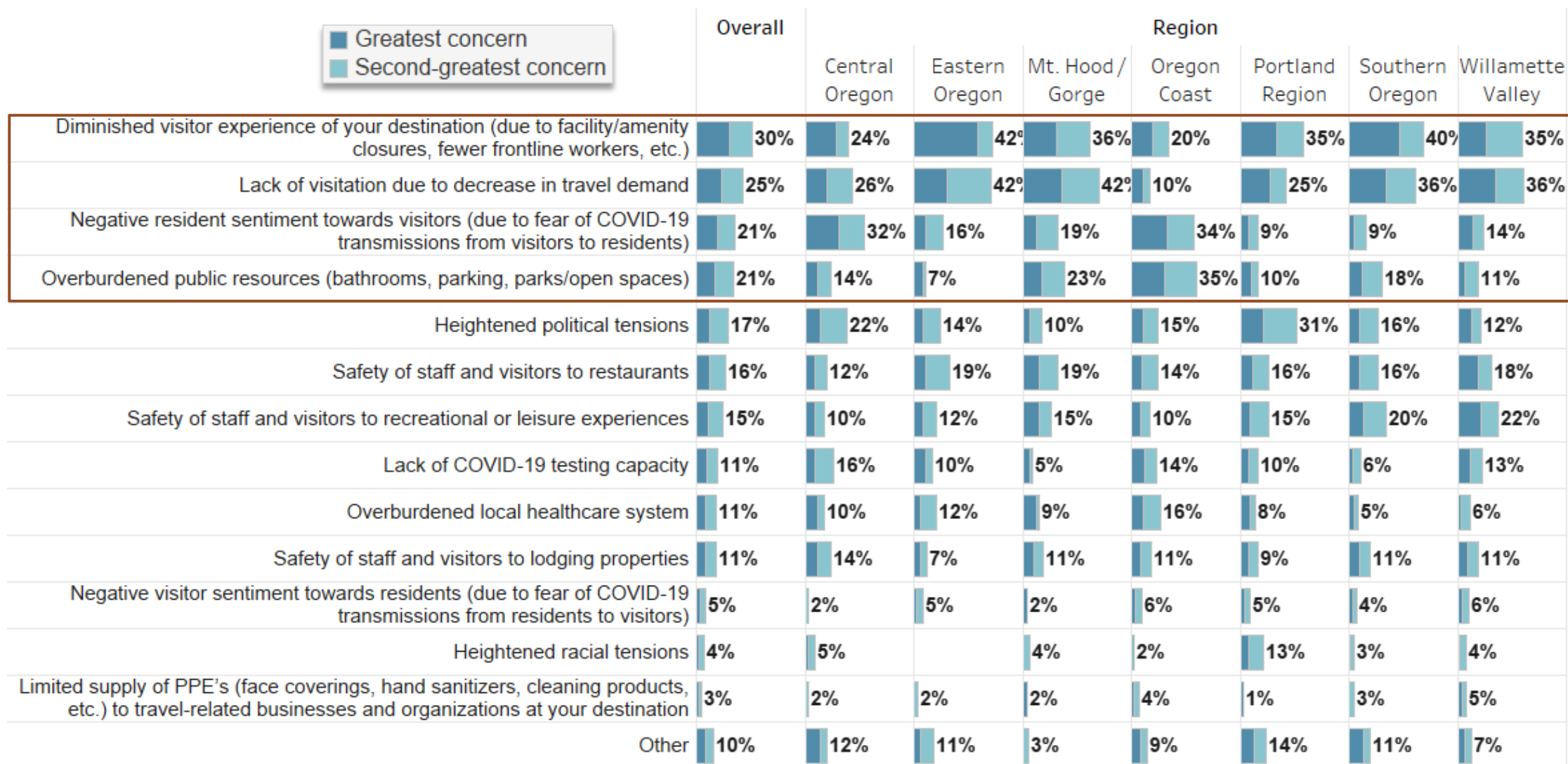
TOP 2 CONCERNS ABOUT WELCOMING VISITORS

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



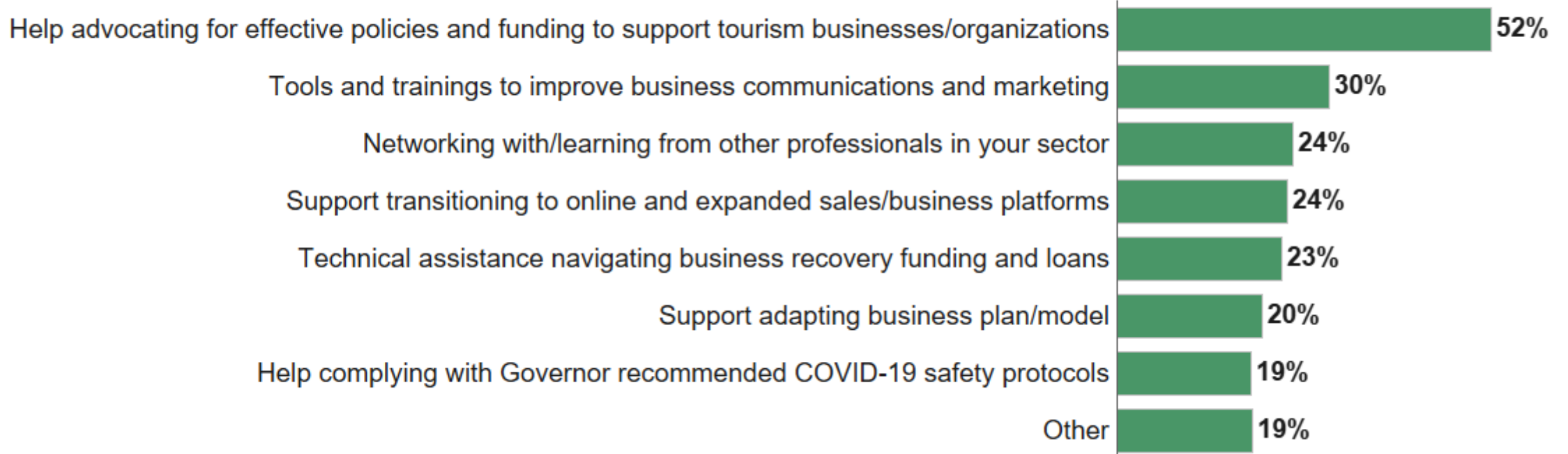
TOP 2 CONCERNS ABOUT WELCOMING VISITORS BY REGION

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



RESOURCES/PROGRAMS TO ASSIST YOUR BUSINESS/ORGANIZATION

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)

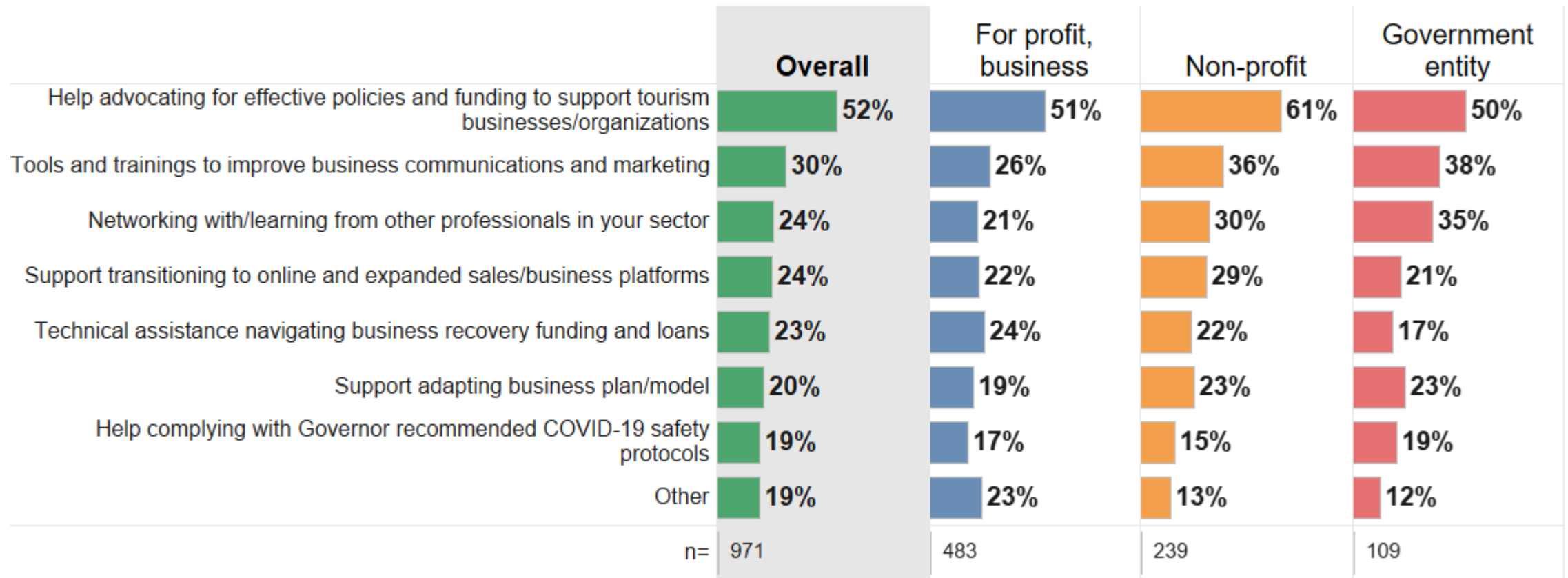


Source: 2020 Oregon Tourism Industry Stakeholder Survey

RESOURCES/PROGRAMS TO ASSIST YOUR BUSINESS/ORGANIZATION

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)



Source: 2020 Oregon Tourism Industry Stakeholder Survey

RESOURCES/PROGRAMS TO ASSIST YOUR BUSINESS/ORGANIZATION

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)

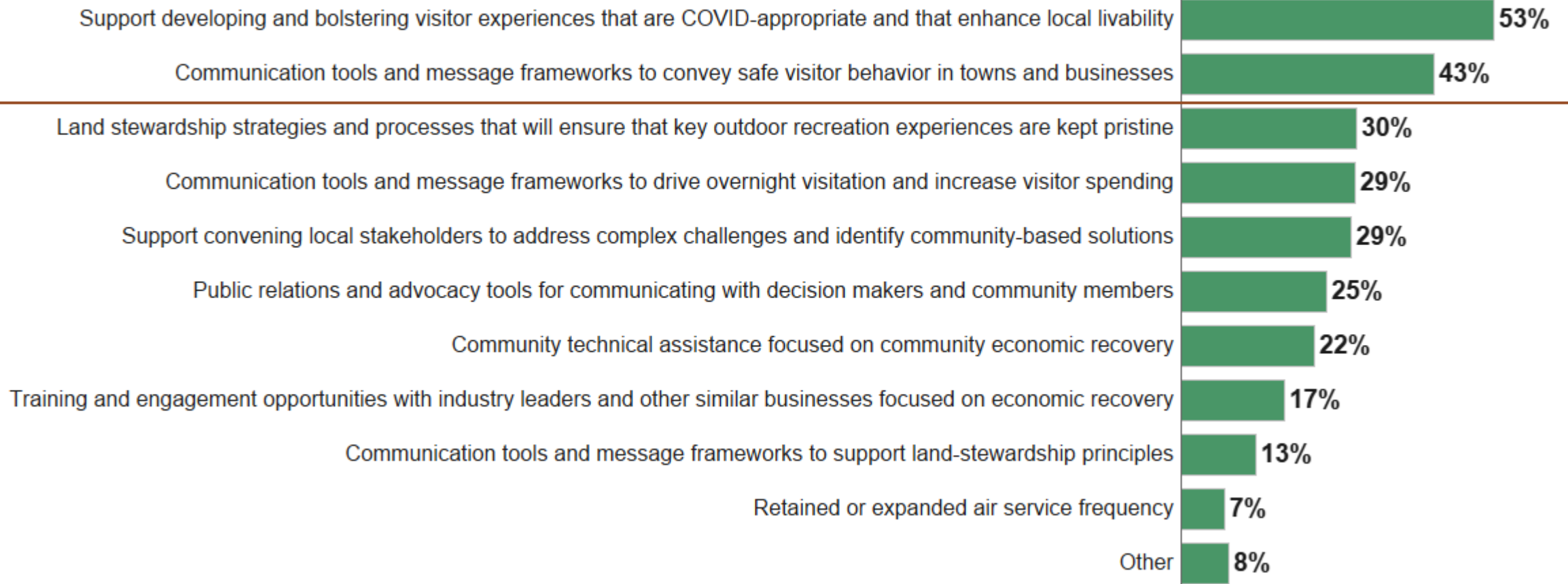
	Overall	Destination marketing and management	Lodging	Retail and attractions	Food and beverage	Farm, ranch, fishery, agritourism business/activities	Entertainment (e.g. sports, events, concerts, etc.)	Tour operator, guide, outfitter	Land management	Other
Help advocating for effective policies and funding to support tourism businesses/organizations	52%	67%	60%	49%	44%	51%	47%	54%	42%	38%
Tools and trainings to improve business communications and marketing	30%	41%	30%	26%	27%	26%	37%	23%	33%	21%
Networking with/learning from other professionals in your sector	24%	33%	19%	23%	21%	30%	16%	21%	33%	23%
Support transitioning to online and expanded sales/business platforms	24%	25%	8%	35%	28%	36%	24%	21%	19%	21%
Technical assistance navigating business recovery funding and loans	23%	24%	24%	24%	19%	33%	18%	36%	23%	15%
Support adapting business plan/model	20%	27%	15%	19%	25%	19%	18%	16%	16%	18%
Help complying with Governor recommended COVID-19 safety protocols	19%	10%	20%	14%	21%	19%	19%	15%	21%	29%
Other	19%	14%	23%	19%	15%	20%	21%	16%	14%	24%
n=	971	181	155	139	118	69	62	61	43	136

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

RESOURCES/PROGRAMS TO ASSIST YOUR COMMUNITY

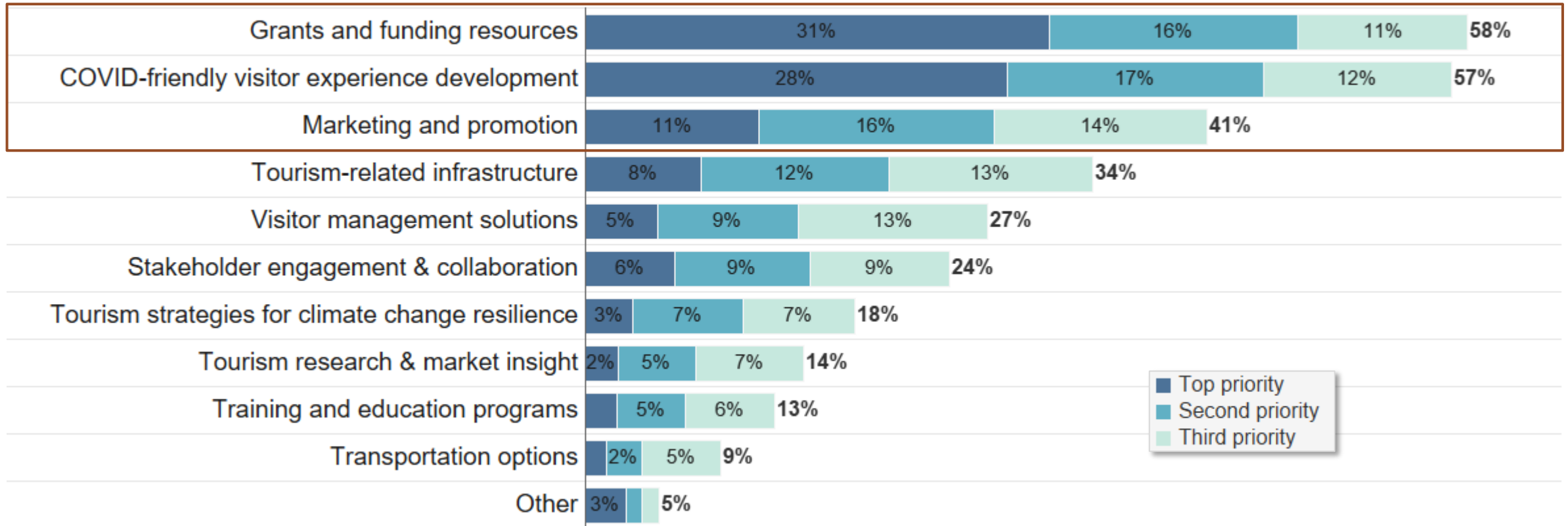
Q: Which of the following resources or programs would best assist your COMMUNITY in resiliency, recovery, and reopening? (Select up to three answer options)



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:



Source: 2020 Oregon Tourism Industry Stakeholder Survey

SHORT-TERM PRIORITIES: TOP PRIORITY BY REGION

I) 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%	

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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 26%	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)

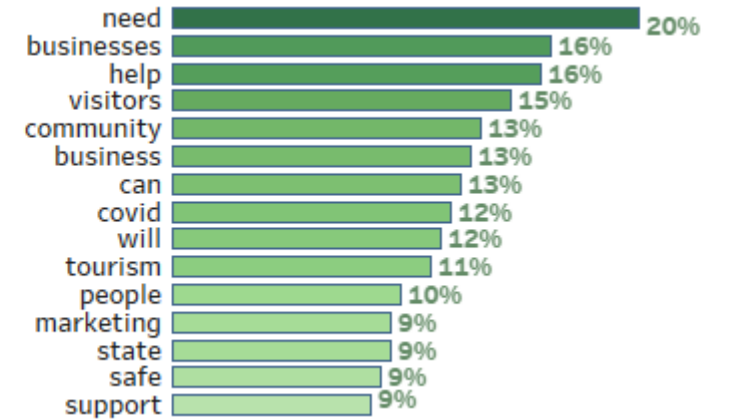
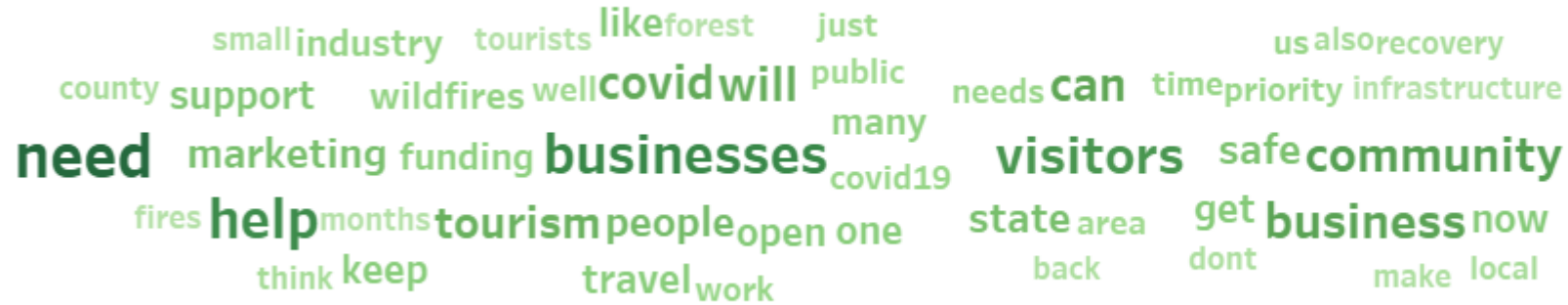
	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette Valley
1	31%	33%	39%	33%	26%	39%	32%	32%
2	28%	28%	24%	27%	24%	33%	22%	29%
3	3 11%	3 11%	3 7%	9%	13%	3 10%	3 21%	3 17%
4	8%	8%	7%	4 7%	9%	6%	6%	6%
5	6%	5%	7%	5%	5 9%	4%	4%	5%
6	5%	5%	5%	5%	7%	2%	4%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

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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.

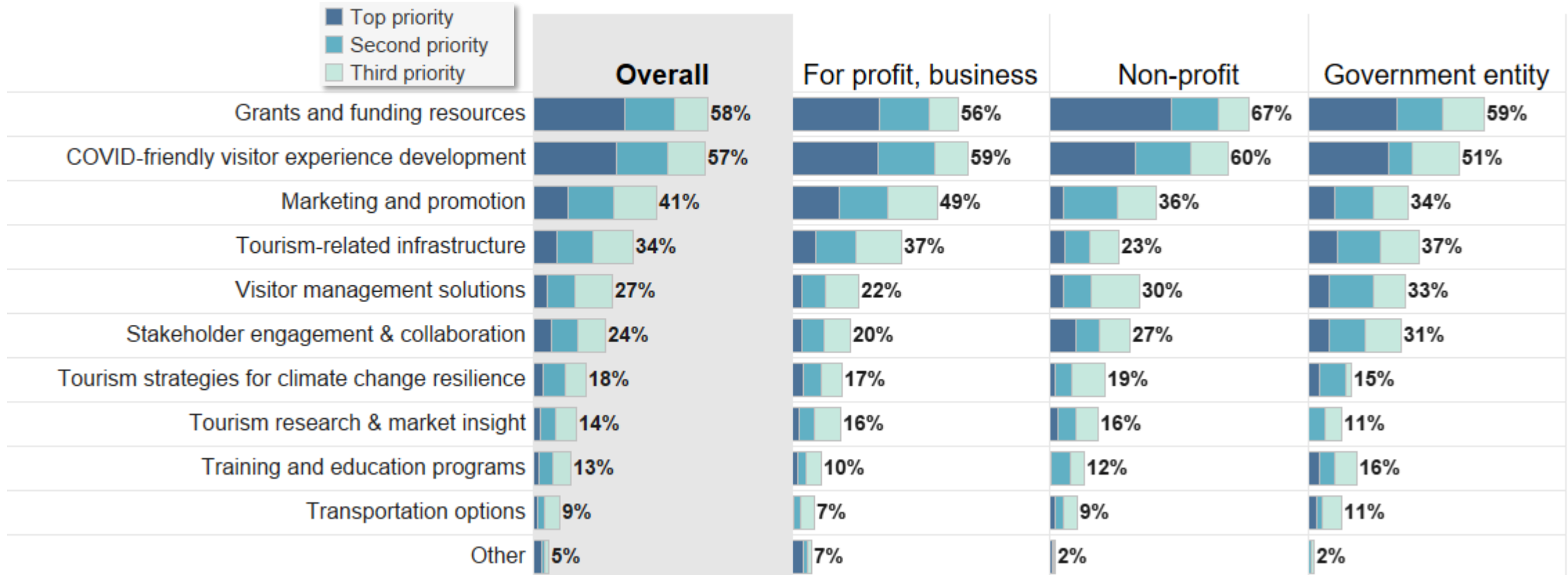
Recovery starts with COVID-19 friendly visitor experiences and those are most likely found in outdoor recreation. Those experiences need to be developed or enhanced and then promoted. Meanwhile, additional research would help the overall Oregon tourism industry understand why this is important.

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

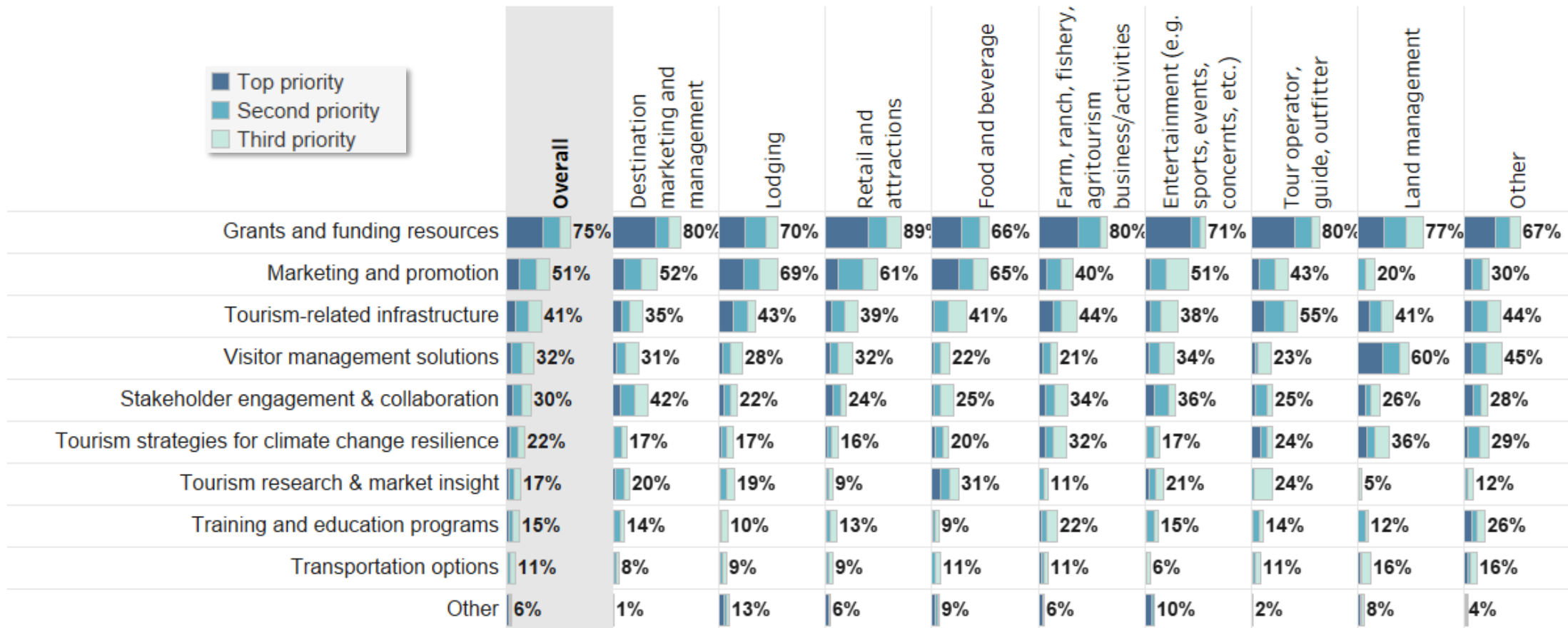
Q: Please identify the three areas that you believe should be emphasized for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions:



Source: 2020 Oregon Tourism Industry Stakeholder Survey

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:

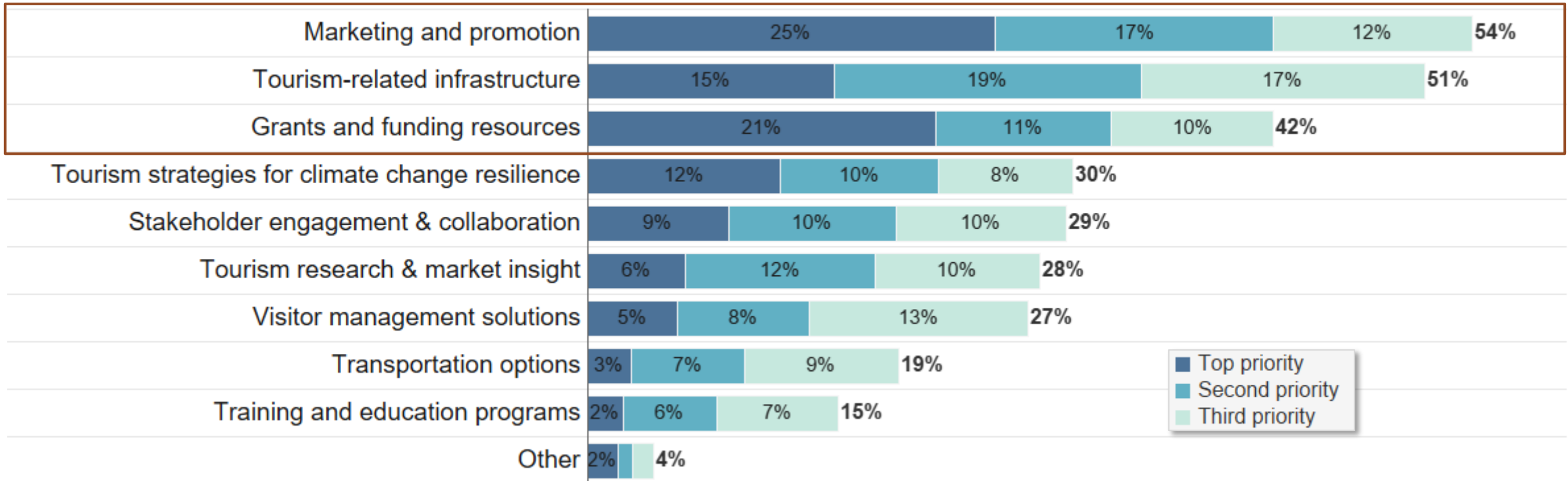


Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

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:



Source: 2020 Oregon Tourism Industry Stakeholder Survey

LONG-TERM PRIORITIES: TOP PRIORITY BY REGION

I) 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%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

LONG-TERM PRIORITIES: TOP PRIORITY BY REGION

3) TOURISM RELATED INFRASTRUCTURE

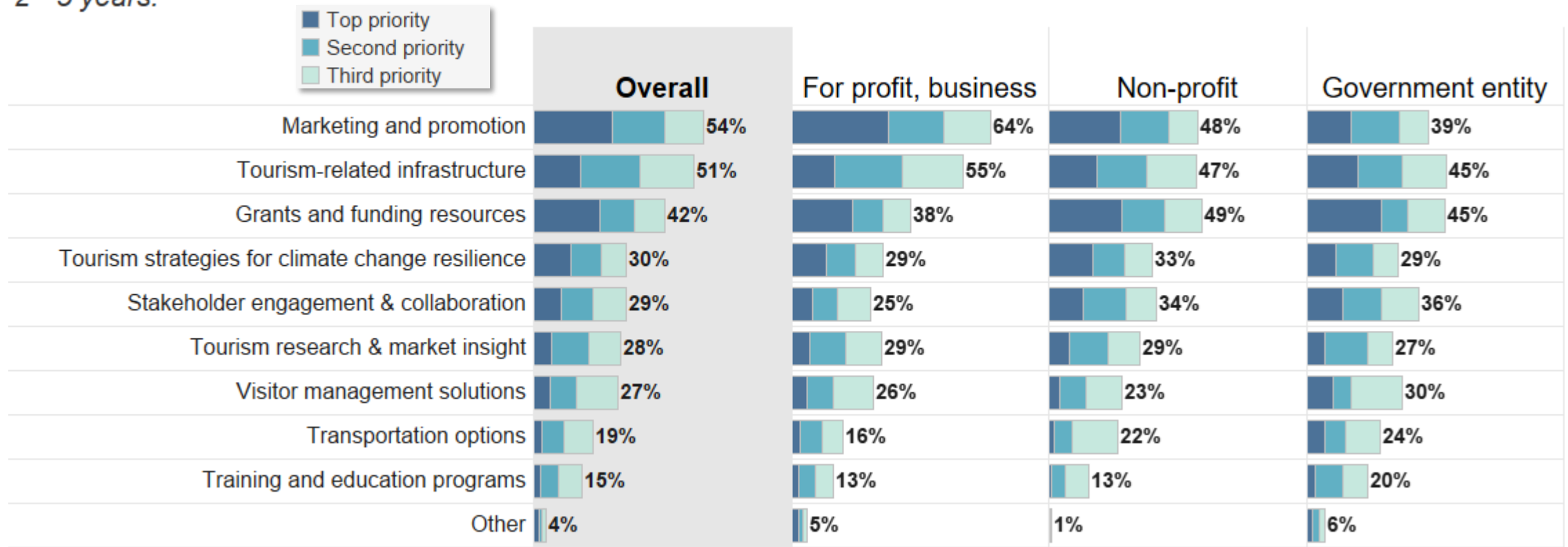
Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years: (TOP PRIORITY ONLY)

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

Source: 2020 Oregon Tourism Industry Stakeholder Survey

LONG-TERM PRIORITIES BY ENTITY TYPE

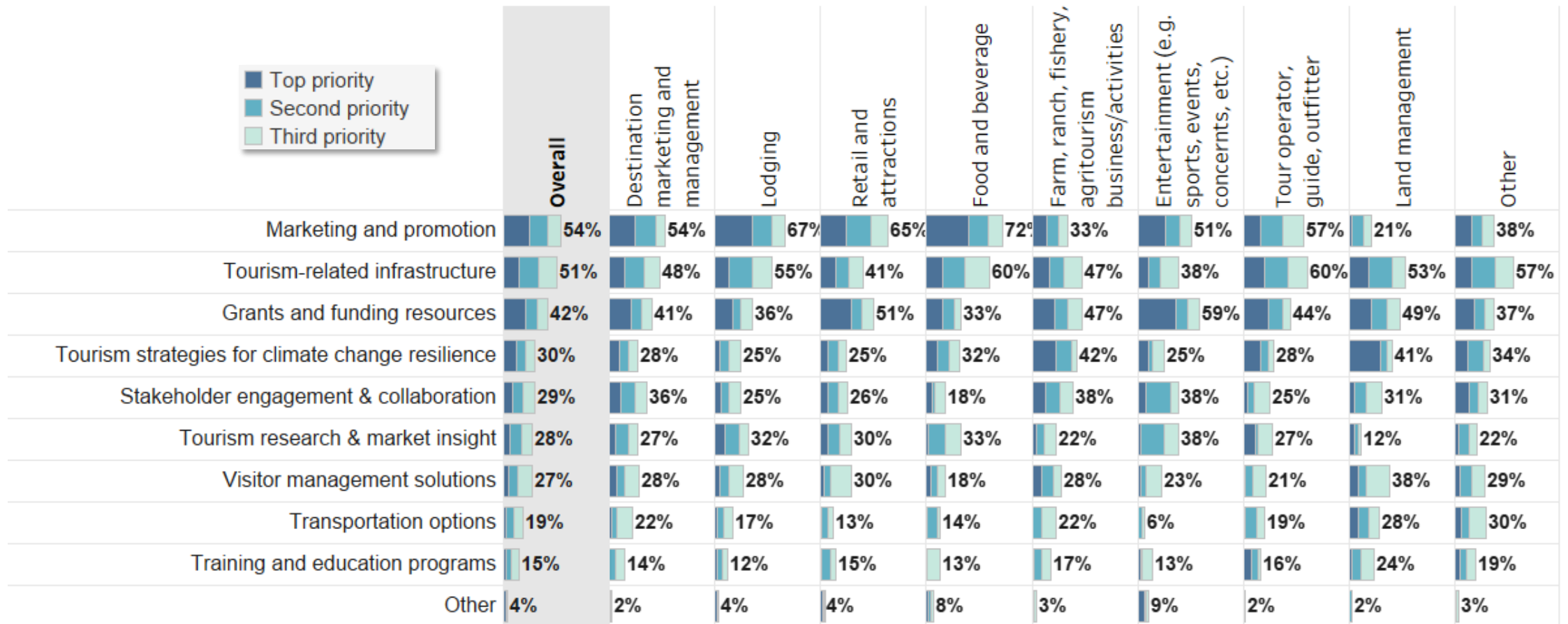
Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years:



Source: 2020 Oregon Tourism Industry Stakeholder Survey

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:



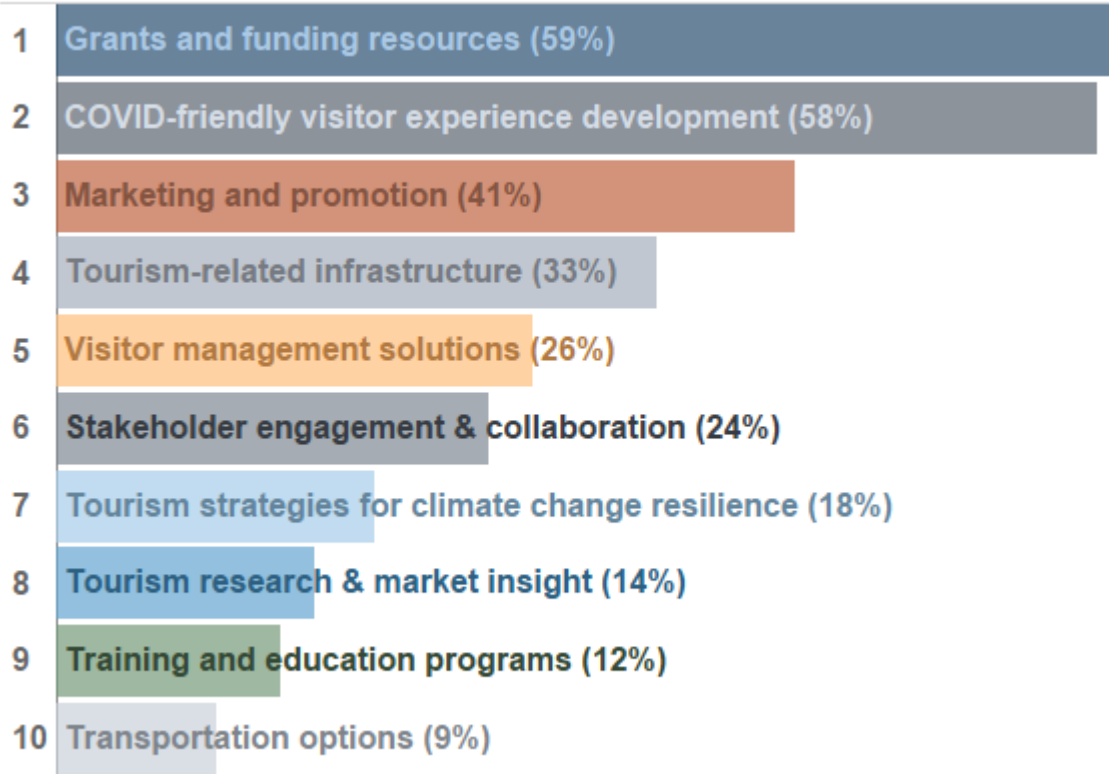
Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

SHORT VS. LONG-TERM PRIORITIES

TOP 3 COMBINED

Immediate recovery (6 - 12 months)



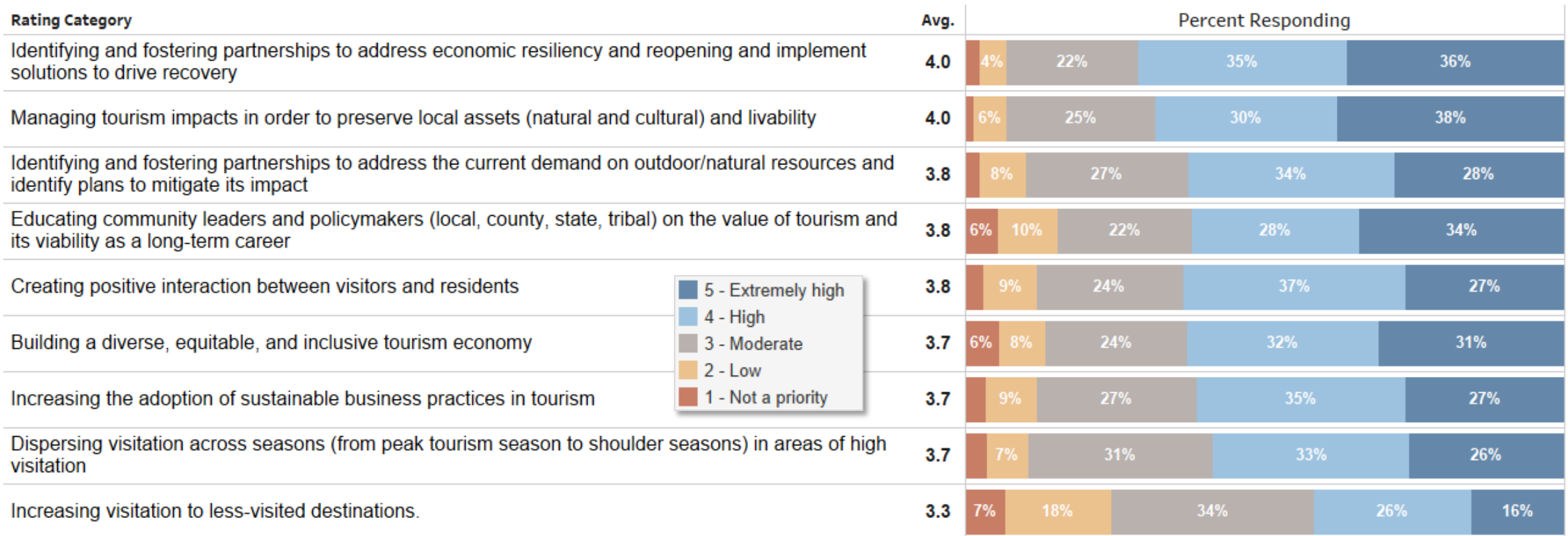
Longer-term tourism Planning (2 - 5 years)



Source: 2020 Oregon Tourism Industry Stakeholder Survey

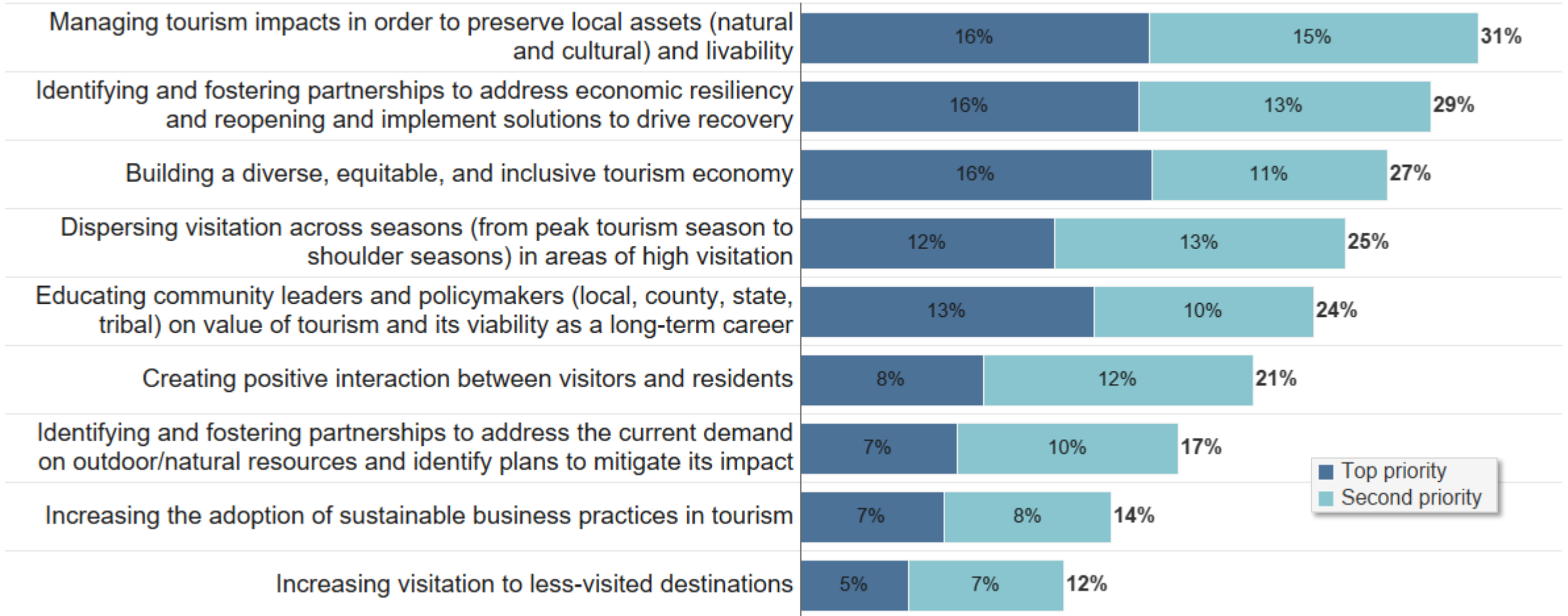
TACTICAL PLANNING & MANAGEMENT: RATINGS

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

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



Source: 2020 Oregon Tourism Industry Stakeholder Survey

TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:

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

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

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette 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%	13%	11%	15%	15%	14%	16%	11%
9	12%	9%	9%	6%	8%	14%	11%	11%

TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:

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

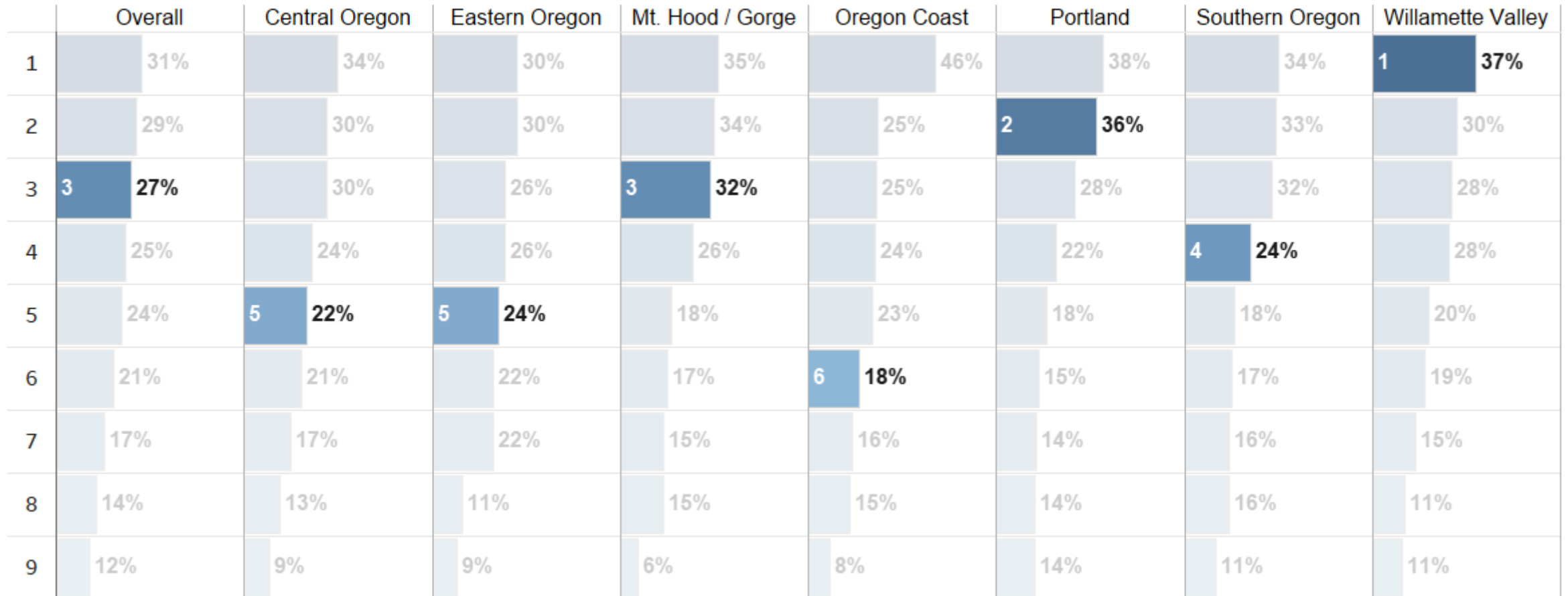
Q: From the list above, please identify your top two priorities:

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette 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%	13%	11%	15%	15%	14%	16%	11%
9	12%	9%	9%	6%	8%	14%	11%	11%

TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:

3) BUILDING A DIVERSE, EQUITABLE, AND INCLUSIVE TOURISM ECONOMY

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



TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:

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

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

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette 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%	13%	11%	15%	15%	14%	16%	11%
9	12%	9%	9%	6%	8%	14%	11%	11%

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

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

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

TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:

6) CREATING POSITIVE INTERACTION BETWEEN VISITORS AND RESIDENTS

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

	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%	36%	33%	30%
3	27%	30%	26%	32%	3 25%	28%	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 21%	21%	22%	17%	18%	15%	17%	19%
7	17%	17%	22%	15%	16%	14%	7 16%	15%
8	14%	13%	11%	15%	15%	14%	16%	11%
9	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

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

	Overall	Central Oregon	Eastern 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%	28%	32%	28%
4	25%	24%	26%	26%	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%	8 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	Central Oregon	Eastern 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%	28%	32%	28%
4	25%	24%	26%	26%	24%	22%	24%	28%
5	24%	22%	24%	18%	23%	18%	18%	20%
6	21%	21%	22%	17%	18%	15%	17%	19%
7	17%	17%	22%	7 15%	7 16%	14%	16%	7 15%
8	8 14%	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:

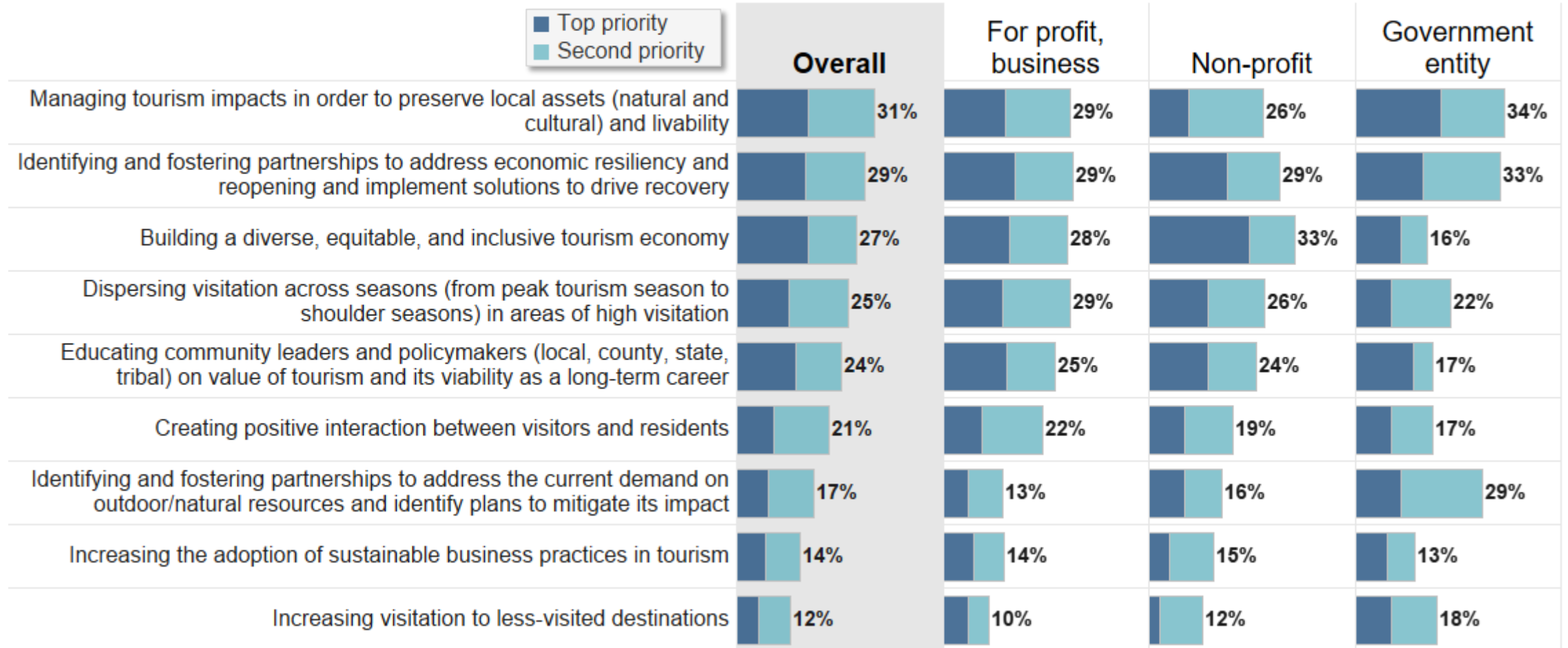
8) INCREASING VISITATION TO LESS-VISITED DESTINATIONS

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

	Overall	Central Oregon	Eastern 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%	28%	32%	28%
4	25%	24%	4 26%	26%	24%	22%	24%	28%
5	24%	22%	24%	18%	23%	18%	18%	20%
6	21%	21%	22%	17%	18%	6 15%	17%	19%
7	17%	17%	22%	15%	16%	14%	16%	15%
8	14%	13%	11%	8 15%	15%	14%	8 16%	11%
9	9 12%	9 9%	9%	6%	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:

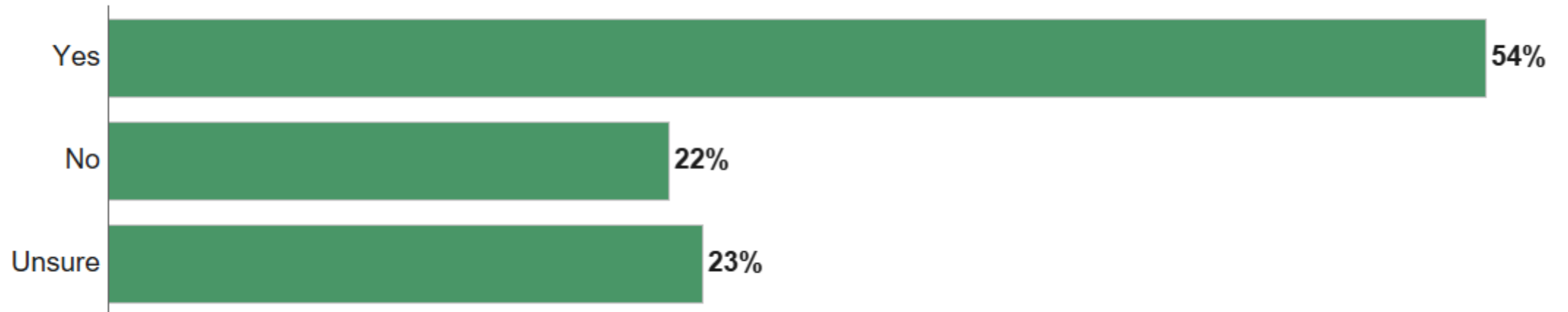


Source: 2020 Oregon Tourism Industry Stakeholder Survey

DIVERSITY, EQUITY & INCLUSION

TRAVEL OREGON'S ROLE IN ADVANCING SOCIAL & RACIAL JUSTICE

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

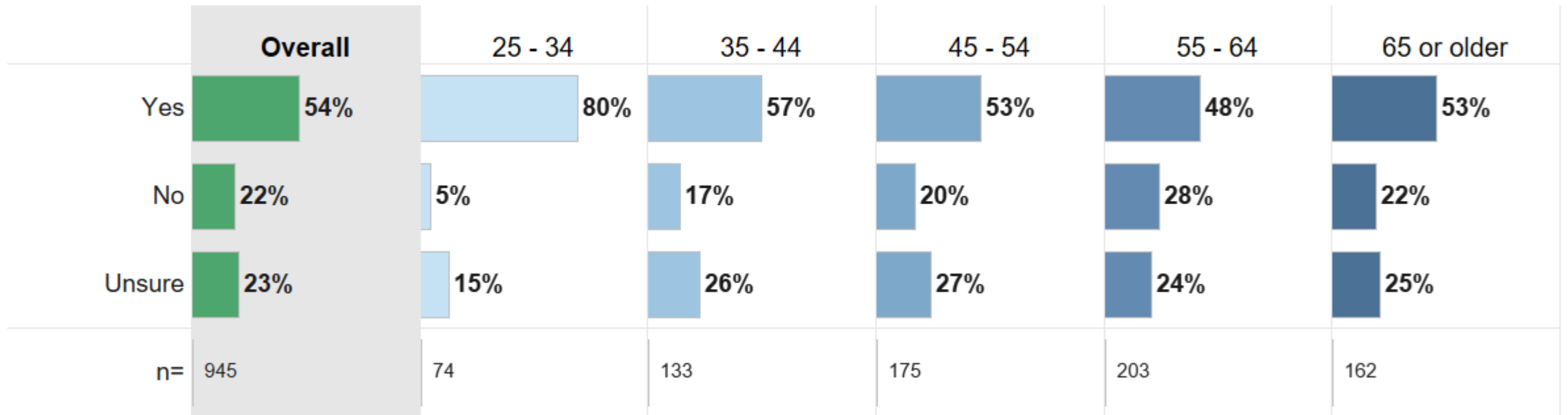


Source: 2020 Oregon Tourism Industry Stakeholder Survey

TRAVEL OREGON'S ROLE IN ADVANCING SOCIAL & RACIAL JUSTICE

BY AGE

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

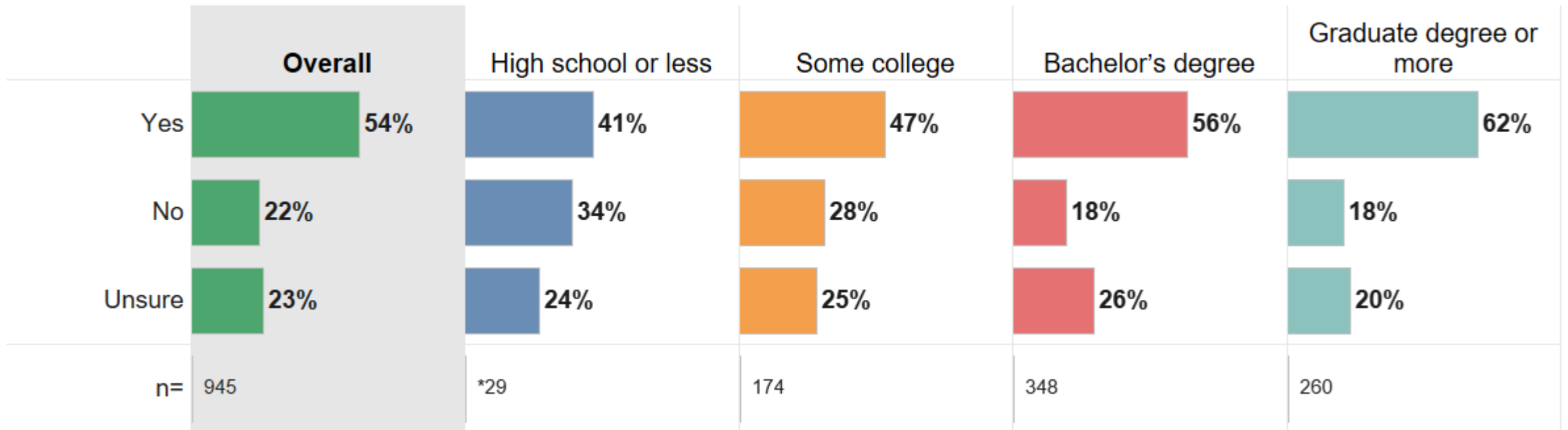


Source: 2020 Oregon Tourism Industry Stakeholder Survey

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?

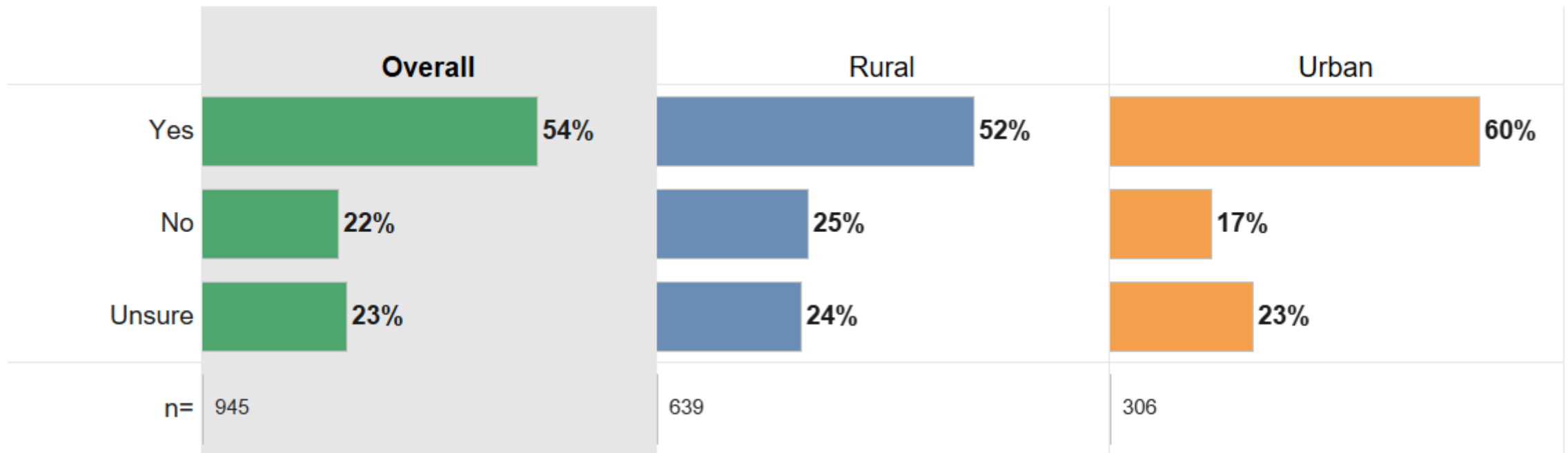


Source: 2020 Oregon Tourism Industry Stakeholder Survey

TRAVEL OREGON'S ROLE IN ADVANCING SOCIAL & RACIAL JUSTICE

BY URBAN VS. RURAL

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

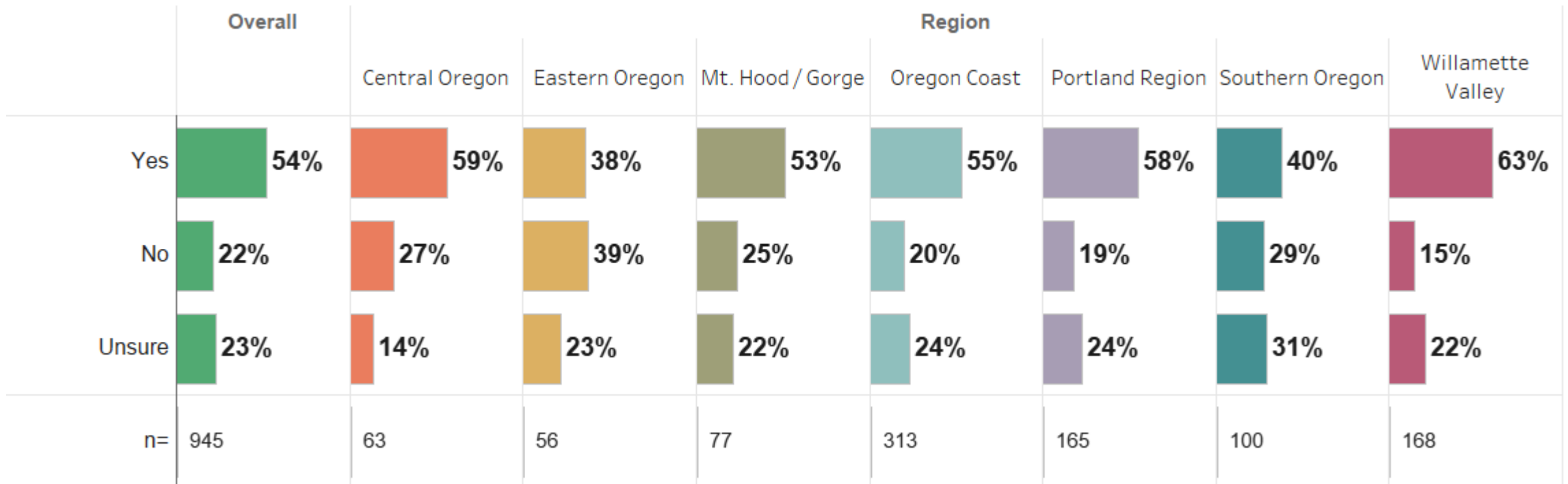


Source: 2020 Oregon Tourism Industry Stakeholder Survey

TRAVEL OREGON'S ROLE IN ADVANCING SOCIAL & RACIAL JUSTICE

BY REGION

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

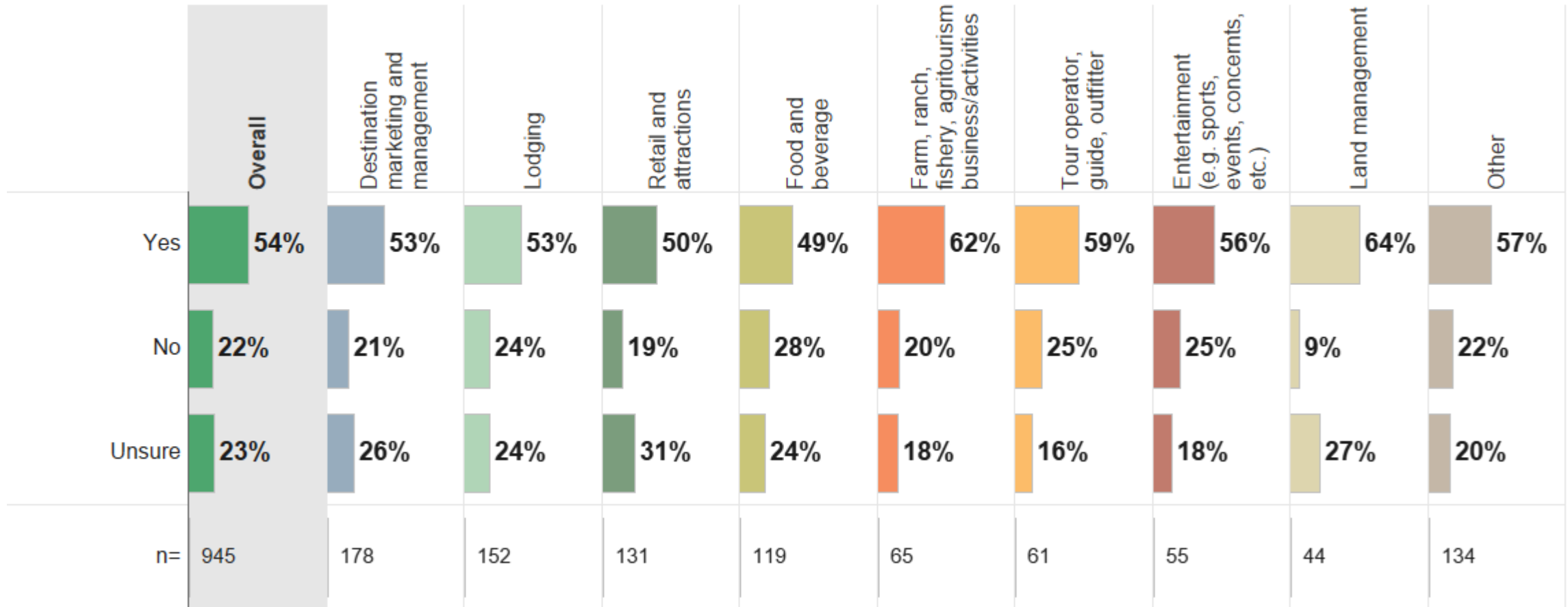


Source: 2020 Oregon Tourism Industry Stakeholder Survey

TRAVEL OREGON'S ROLE IN ADVANCING SOCIAL & RACIAL JUSTICE

BY SECTOR

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



Source: 2020 Oregon Tourism Industry Stakeholder Survey

DIVERSITY/EQUITY/INCLUSIVITY TRAINING

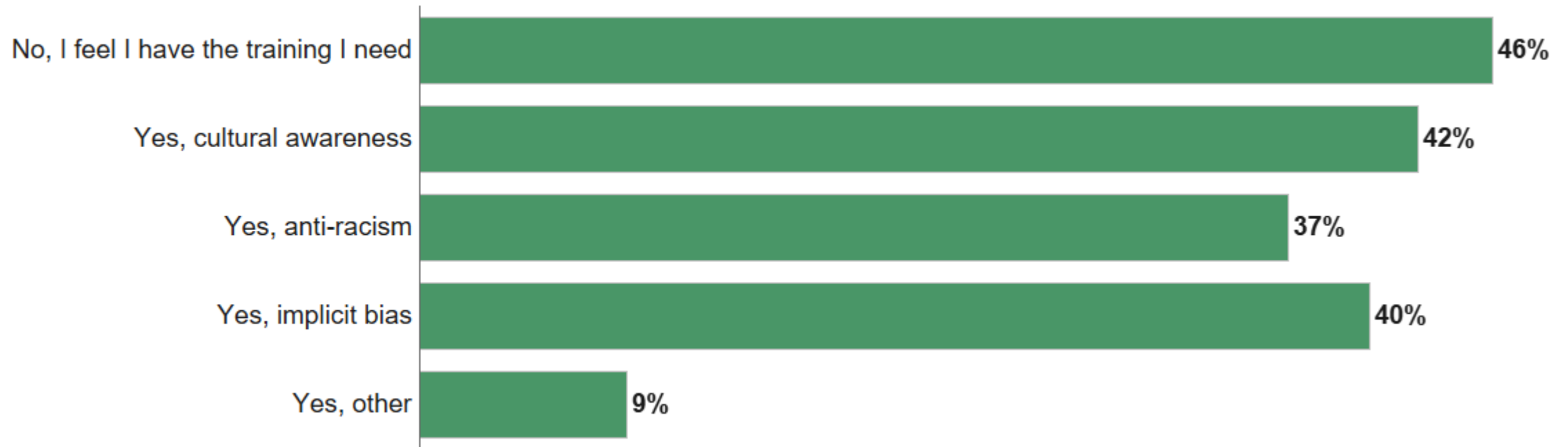
Q: Have you participated in trainings related to any of the following? (Check all that apply)



Source: 2020 Oregon Tourism Industry Stakeholder Survey

DIVERSITY/EQUITY/INCLUSIVITY TRAINING

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



Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

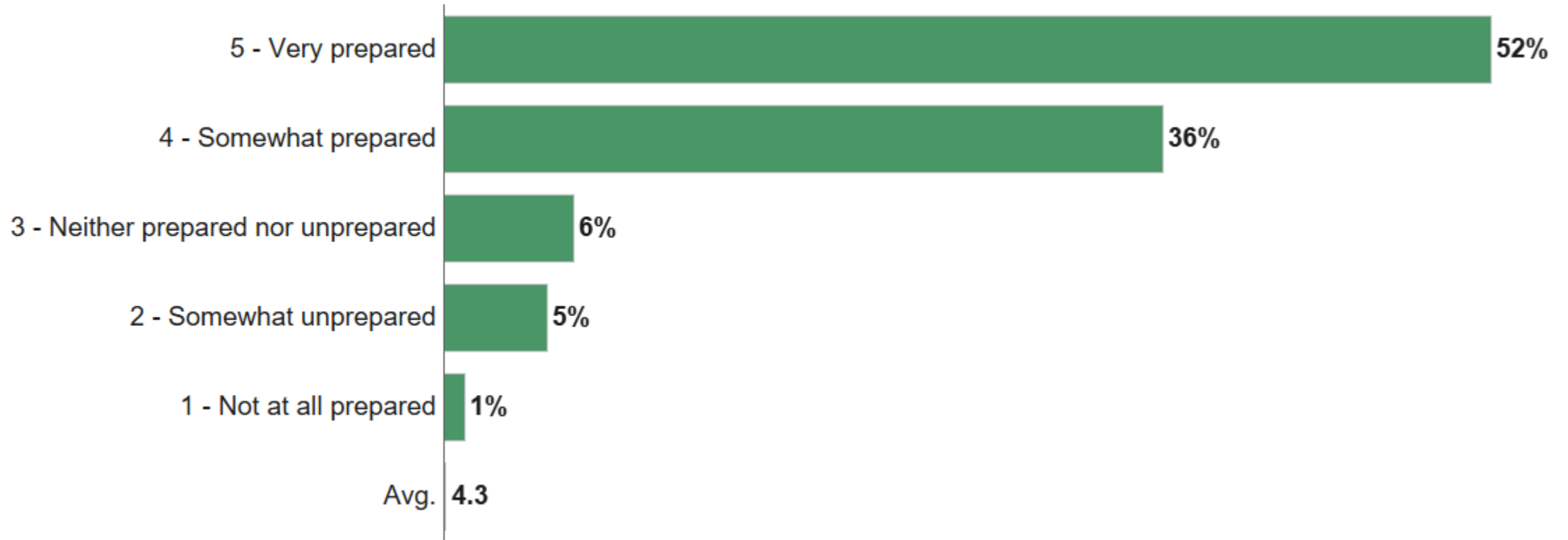
EDI trained park staff, more access and incentives for BIPOC hires within the tourism and outdoor recreation industry

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?

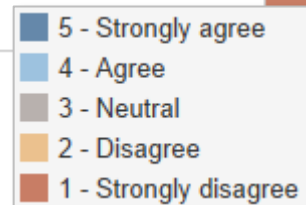
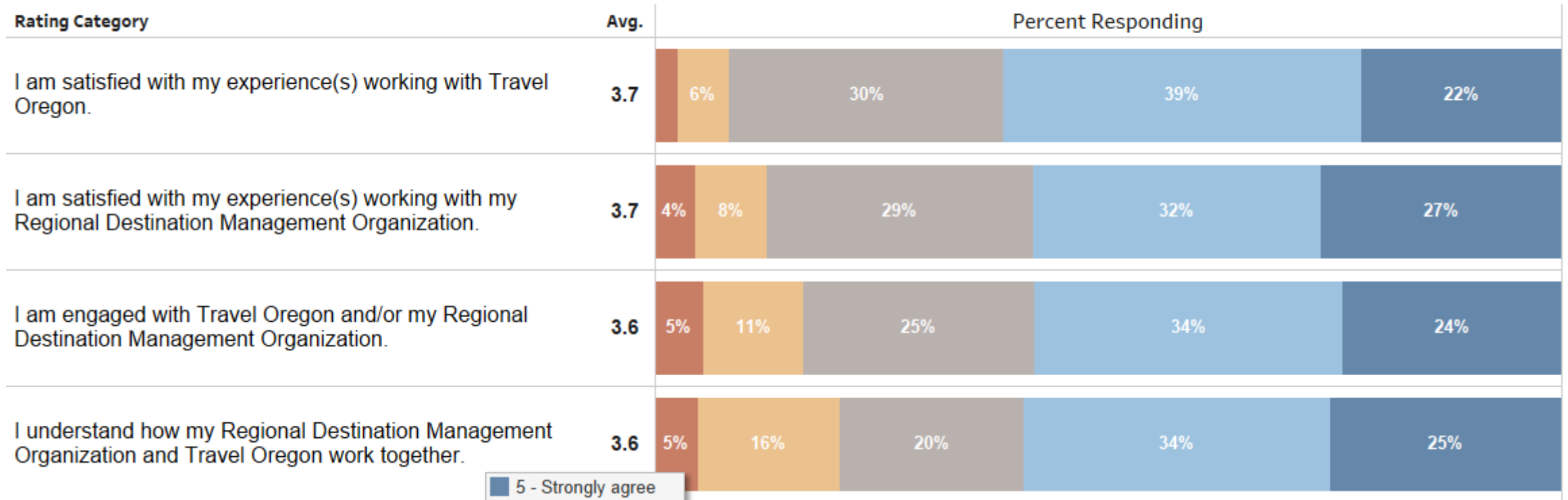


Source: 2020 Oregon Tourism Industry Stakeholder Survey

INDUSTRY ENGAGEMENT & COMMUNICATIONS

INDUSTRY ENGAGEMENT

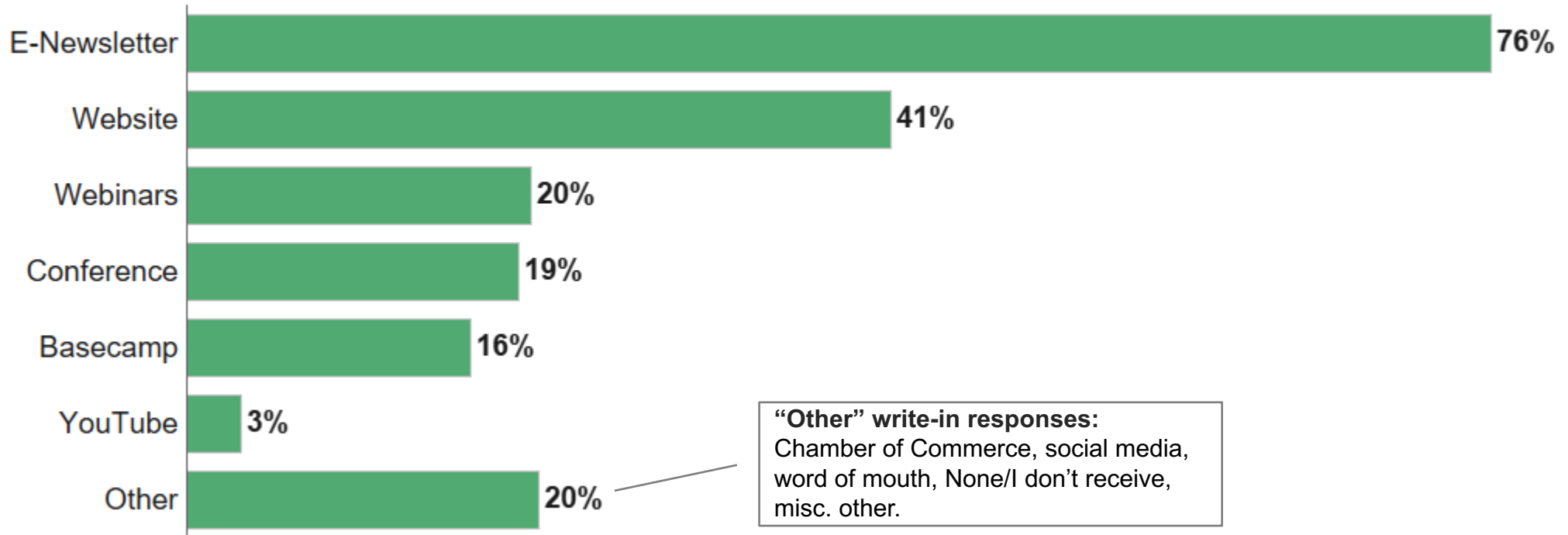
Q: Please indicate the level to which you agree or disagree with the following statements: (1 = Strongly disagree, 5 = Strongly agree)



Source: 2020 Oregon Tourism Industry Stakeholder Survey

INDUSTRY ENGAGEMENT

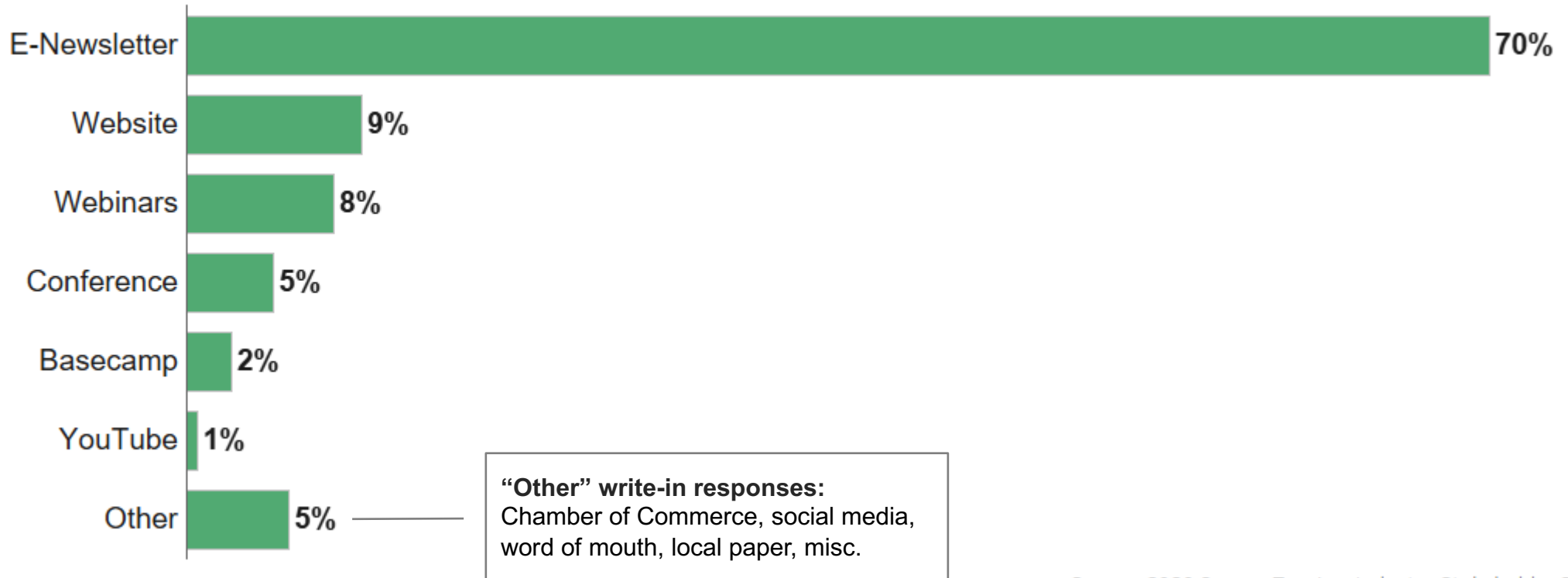
Q: How do you currently receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization? (Check all that apply)



Source: 2020 Oregon Tourism Industry Stakeholder Survey

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?



Source: 2020 Oregon Tourism Industry Stakeholder Survey