

2018 OREGON TOURISM ENGAGEMENT SURVEY

PORTLAND REGION

This report summarizes findings from a 2018 survey of tourism industry stakeholders in Oregon. The survey sought feedback from stakeholders to provide guidance and perspective on priorities for future investments from Regional Destination Management Organizations. Findings are presented for respondents from Portland Region with additional statewide results for context.

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SURVEY GOALS

The 2018 Oregon Tourism Engagement Survey was designed on behalf of Travel Oregon and regional tourism partners to elicit feedback from individuals and organizations linked to the tourism industry. The goal of the study was to obtain feedback and direction for Regional Destination Management Organizations (RDMOs). The survey built on a framework of past stakeholder surveys and was developed collaboratively by Driftline Consulting, Travel Oregon, and RDMOs.

METHODOLOGY

The survey was conducted online and was distributed in September and October 2018 via emails and an open URL to Travel Oregon databases with additional distribution from RDMOs. A total of 1,512 valid responses were collected. Results presented in this report are segmented by the region in which the respondent indicated they live or work. That is, this report aggregates responses from Portland Region to provide relevant insights to the Portland Region RDMO. Where applicable, regional results are compared to an average of Oregon's seven regions. In addition, questions were asked in a way (prioritization ratings) that enables comparisons across tactical opportunity categories. The terms respondent and stakeholder are used interchangeably.

SIGNIFICANCE

Because this survey was not conducted from a random sample it is not appropriate to perform typical statistical tests on the data. Therefore, confidence bands are not presented. The survey results should be viewed as an aggregation of relevant and thoughtful feedback from constituents. The applicability of findings to real life circumstances may depend on whether the feedback is from a broad enough (or representative) swath of stakeholders and whether individual RDMOs believe they have engaged with enough stakeholders to have a good gauge of the stakeholders' priorities. An assessment of the industries represented and the overall response numbers suggest that for all regions a diverse and appropriately sized cross-section of stakeholders responded, adding confidence to the applicability of results.

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KEY FINDINGS

- **High levels of engagement with the Oregon Tourism industry:** A greater percentage of Portland Region respondents indicated that they agree or strongly agree with the statement, “I am engaged with the Oregon tourism industry” relative to the statewide average. A smaller share, though still greater than the statewide average, indicated agreement with the statement, “I understand the Oregon tourism partnering structure.”
- **Positive Views on Tourism and the Direction of the Industry:** Portland Region stakeholders view the direction of tourism in the state and the region very positively. 84% and 76% agree that they are satisfied with the direction of the industry in the state and region respectively (relative to 82% and 78% respectively in 2017). Respondents from the Portland Region are more satisfied than those from elsewhere in the state with the direction of tourism in the state and their respective regions (page 4).
- **Tactics Identified by Over 2/3 of Respondents as High or Very High Priority:** There were a handful of tactics across all categories (Marketing, Development, Management, Capacity Building, Industry Services, Global Sales) that stood out for their importance to stakeholders. Listed below are these “standout” tactics and the percentages of respondents listing the tactic as a “high” or “very high” priority for the region to pursue.
 - Marketing: Social - Enhancing non-paid social media presence for regional social channels (69%).
 - Marketing: PR or Communications - Targeted communications to publications and journalists for the region (68%).
 - Marketing: Website - Developing or enhancing current regional destination website (67%).
 - Destination Development – Planning and Management: Increase visitation to the region during off-peak seasons (70%).
 - Destination Development – Planning and Management: Identify and foster partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact (69%).
 - Destination Development – Planning and Management: Manage tourism growth in order to preserve local assets (natural and cultural) (68%).
 - Destination Development – Planning and Management: Create positive interaction between tourists and residents (67%).
 - Destination Development – Product Development: Provide more opportunities for visitors to experience locally grown and produced foods (67%).
 - Destination Development – Training and Capacity Building: Develop skills, knowledge and networks to build local capacity for developing and managing tourism (70%).
 - Public Affairs and Communications: Increase engagement with local and regional policymakers to ensure the value of tourism is clearly communicated (71%).
 - Public Affairs and Communications: Work with partners to ensure tourism is represented at external stakeholder meetings in other fields (transportation, housing, land use, economic development) (71%).

- Public Affairs and Communications: Create clear messaging about how the tourism sector functions in Oregon: state, regional, local, industry, and consumer as well as its associated benefits (jobs, economic development, etc.) (68%).
- Public Affairs and Communications: Proactively engage with consumer media to garner coverage that will inspire travel to your region (67%).

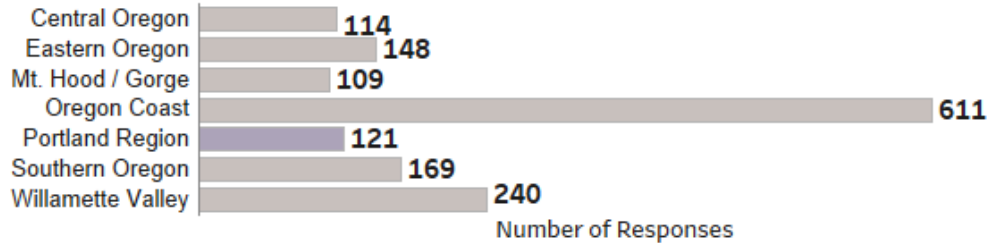
- **Custom Questions: Top Domestic and International Markets:** The Portland Region asked stakeholders to identify the top domestic and international source markets for their organization. As in 2017, the top domestic markets were Washington (state) and Northern California by a substantial margin. The top international markets were Western Canada and Japan (page 24).

- **Custom Questions: Sports and Meetings/Conventions:** The Portland Region asked stakeholders to evaluate the importance of sports events and meetings/conventions to the region, to the city of Portland, and to their specific organization. In general, respondents indicated that meetings/conventions were more important across all categories than sports events. Additionally, respondents indicated that meetings/conventions were more important to the region than to their organization and more important to the city than to the region (page 24).

RESPONDENT PROFILE

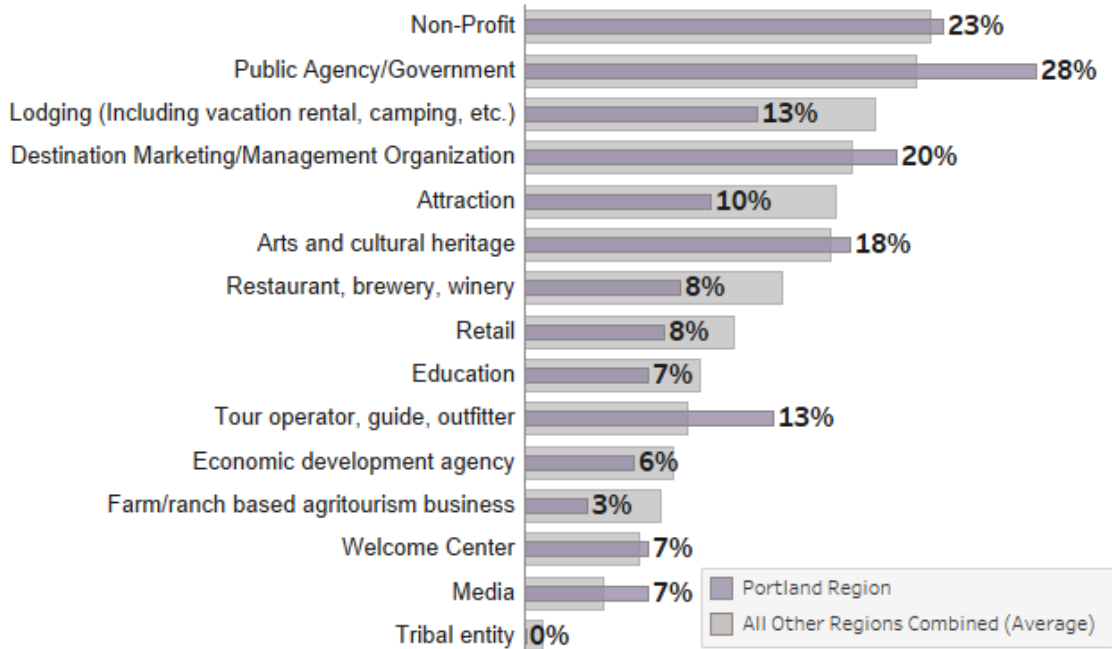
The figures below present the overall number of respondents as well as the industries in which respondents work. The question for Organization Type was a multiple response question, allowing respondents to select more than one industry or organization type. Thus, percentages will not sum to 100%. Relative to other regions, respondents from Portland Region were more likely to work in “Public Agency/Government (+6%)” or work as a tour operator, guide, outfitter (+5%), and less likely to work at an attraction (-7%) or a in lodging (-6%). Additional details can be found in the figures below.

Number of Respondents



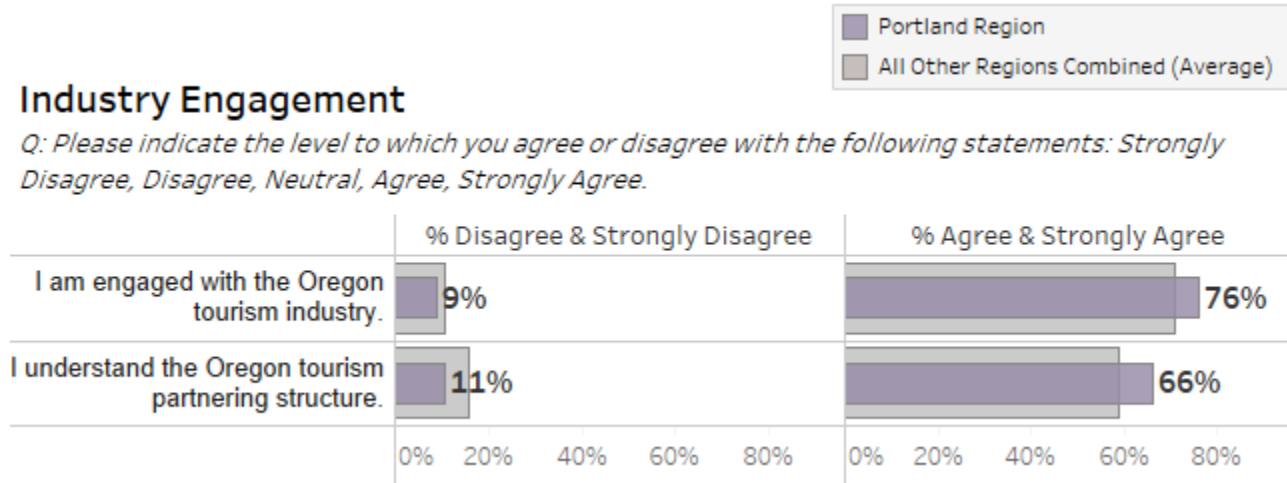
Organization Type

Q: Please indicate the sector of the tourism industry in which you work by checking all that apply:



TOURISM INDUSTRY ENGAGEMENT AND OVERALL HEALTH

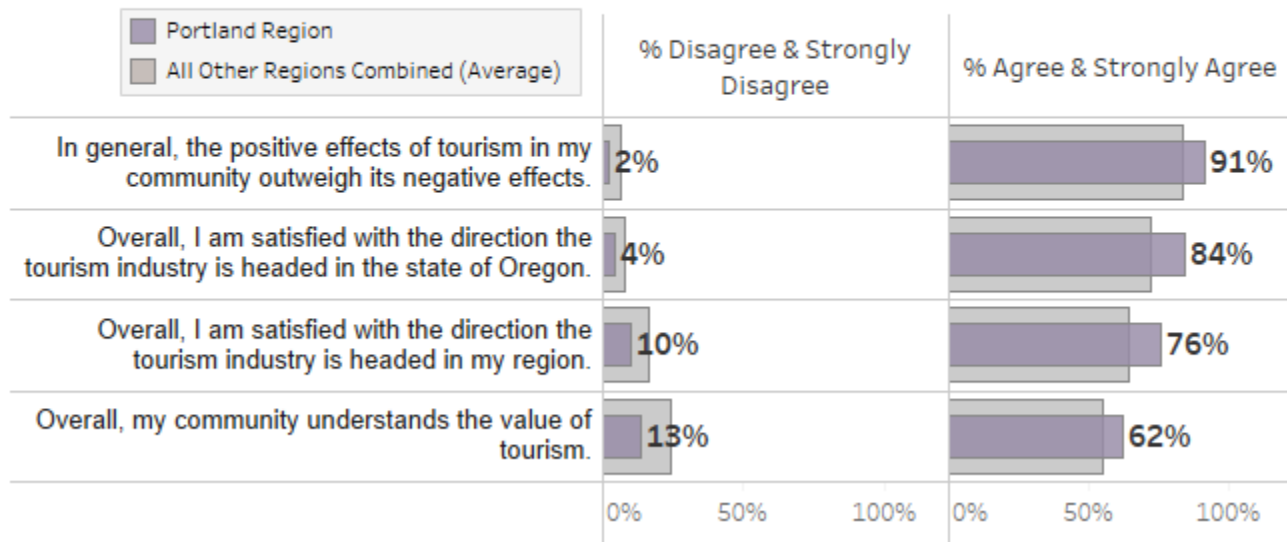
Respondents from Portland Region indicate high levels of industry engagement. Relative to the rest of the state, respondents are more engaged with the industry (+5% agree or strongly agree) and better understand the partnering structure (+7% agree or strongly agree).



On measures of overall industry health, respondents from Portland Region indicate high levels of satisfaction. Relative to the rest of the state, they are more positive about the health of the tourism industry, with a higher percentage of respondents indicating “Agree” or “Strongly Agree” in each category. As in the rest of the state, respondents are most in agreement that the positive effects of tourism outweigh its negative effects, and they are least in agreement that their community understands the value of tourism.

Overall Health of the Tourism Industry

Q: Please indicate the level to which you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.

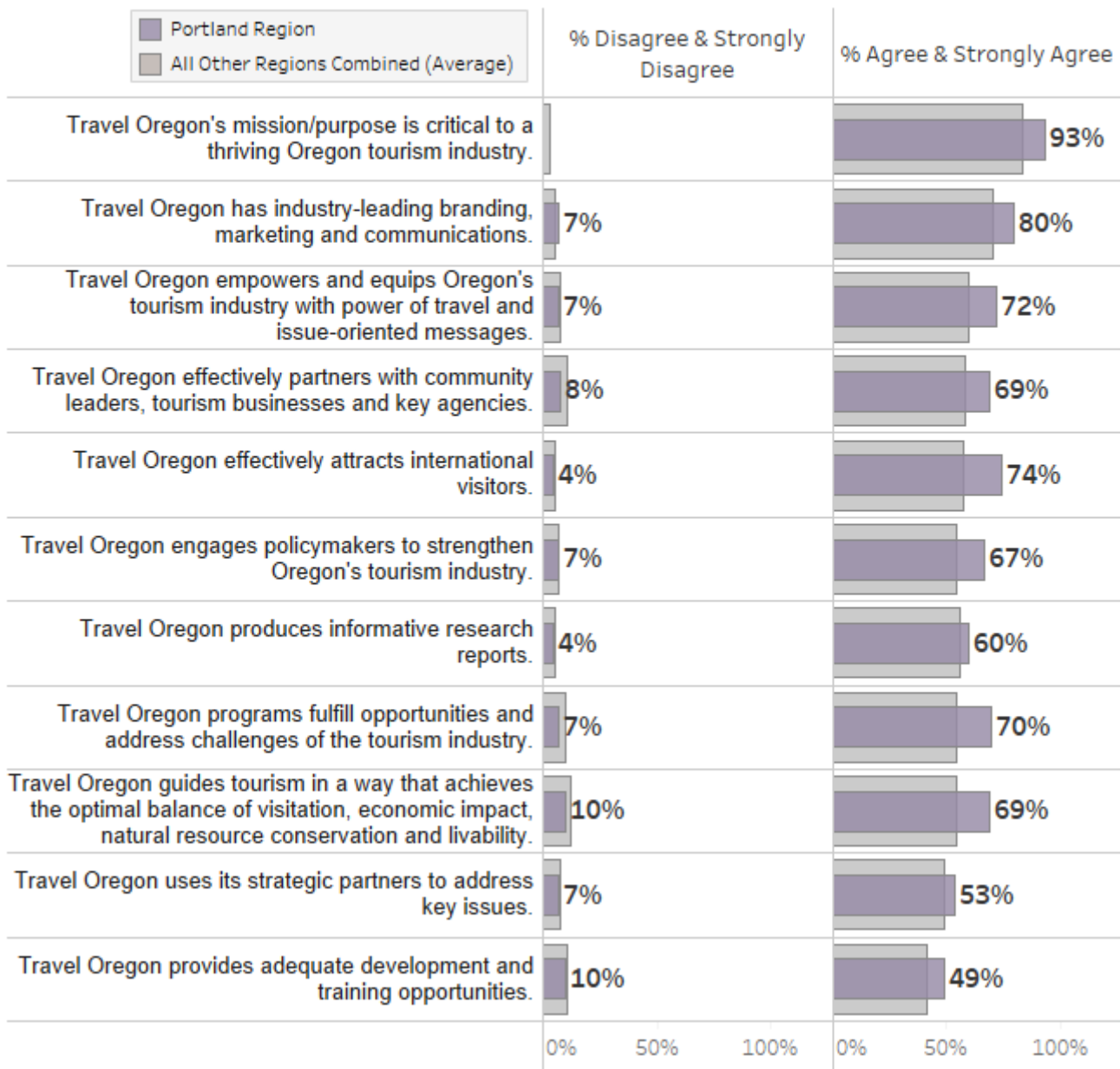


TRAVEL OREGON PERFORMANCE

On measures of Travel Oregon performance, there is broad consensus that Travel Oregon's mission/purpose is critical to a thriving Oregon tourism industry, and that Travel Oregon has industry-leading branding, marketing and communications. There least amount of agreement about whether Travel Oregon provides adequate development and training opportunities. For each statement, respondents from Portland Region were more to agree or strongly agree relative to all other regions combined.

Travel Oregon Performance

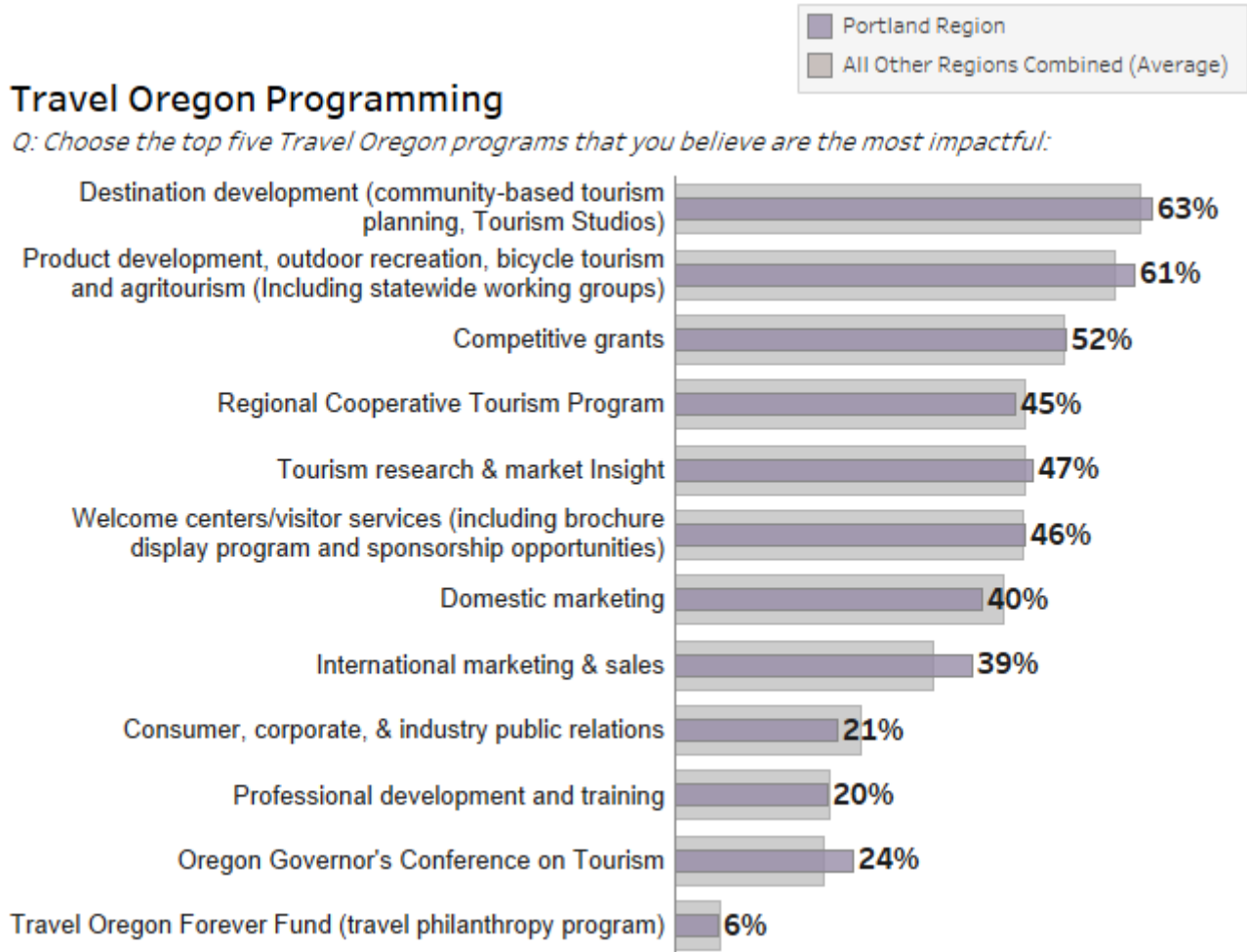
Q: To what extent do you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



Overall, “Destination Development” was most cited among the top-five most impactful Travel Oregon programs, followed by “Product development, outdoor recreation, bicycle tourism and agritourism.” Respondents from Portland Region were more likely to cite “International marketing and sales” (+5%) and the “Oregon Governor’s Conference on Tourism” (+4%).

Travel Oregon Programming

Q: Choose the top five Travel Oregon programs that you believe are the most impactful:



Looking ahead to 2019-2021 planning, 21% of Portland Region respondents indicated Marketing and Promotion as a first, second, or third highest priority, followed closely by Destination Development and Management (19%). Priority given to tourism research & market insight was less in the Portland region than all other regions combined.

Statewide Desired Tourism Priorities & Focus Areas

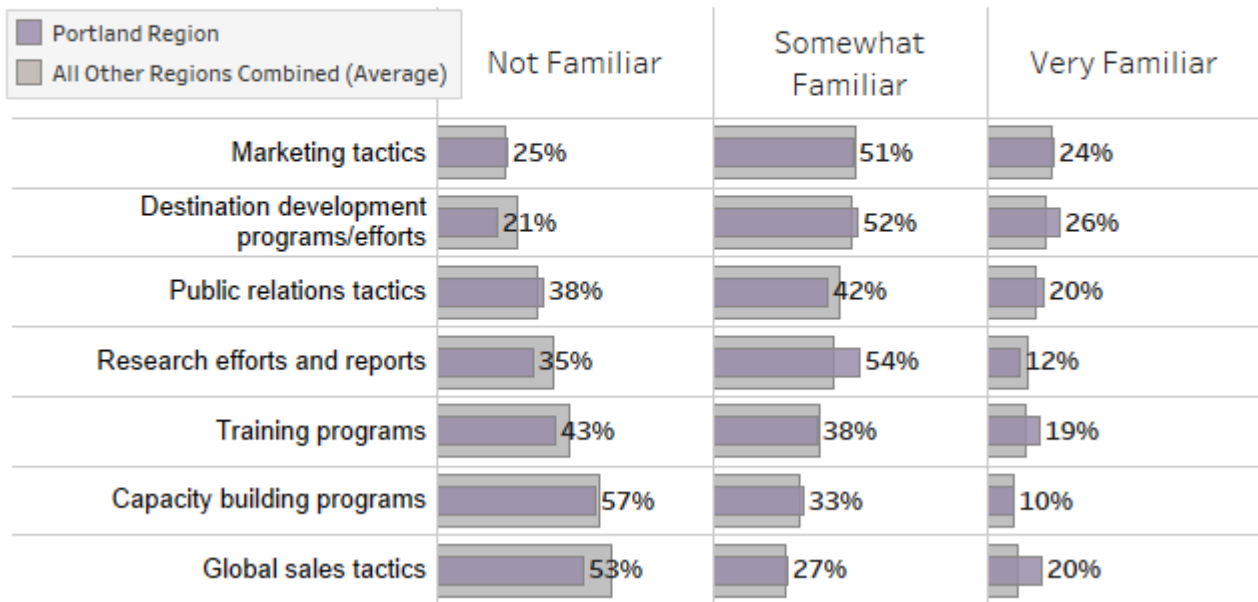
Q: Given limited resources, what three priority areas do you believe are most important for 2019-2021 tourism planning?

	All Other Regions Combined (First, Second, Third Priority)	Region (First, Second, Third Priority)
Marketing and Promotion	19%	21%
Destination Development & Management	18%	19%
Funding & Grants	14%	12%
Infrastructure & Transportation	13%	15%
Stakeholder Engagement & Collaboration	12%	9%
Tourism research & market Insight	9%	5%
Workforce & Training	7%	7%
Product Development	6%	10%
Other (describe below)	2%	1%

Respondents were asked to indicate their familiarity with regional initiatives engaged in by the RDMO over the past 12 months. Respondents, both overall and in Portland Region, were most familiar with the marketing tactics of the RDMO. This result may be a reflection of the priorities of the RDMO or it may reflect the priorities of the constituents. Additionally, future investments in capacity building, global sales, and training programs are likely to need additional communication and outreach efforts in order to be better recognized and understood by stakeholders. These categories receive notably lower ratings of familiarity than other initiatives that were rated, however there is significantly more familiarity with global sales tactics in Portland, especially relative to other regions.

Familiarity with Initiatives

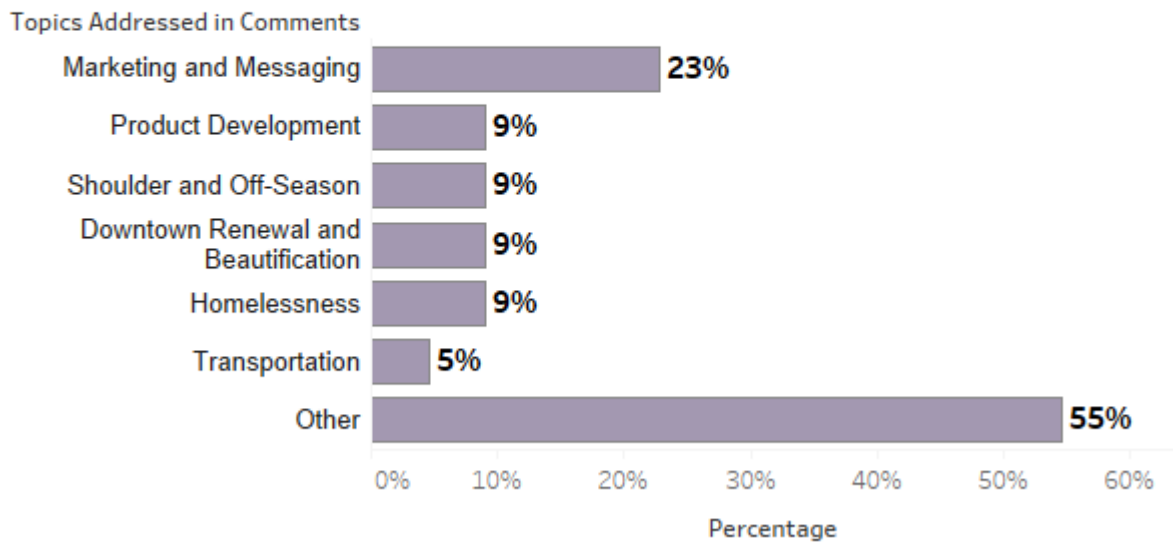
Q: Please indicate how familiar you are with the initiatives undertaken by your regional destination management organization in the following areas in the past 12 months:



Repondents were also asked to describe a specific outcome they would like their region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of the destination. The table below summarizes the comments (presented in their entirety in the appendix). The comments span a wide range of topics, though many focused on marketing and messaging.

Open-Ended Regional Goals: Comments Categorized for Analysis

Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.

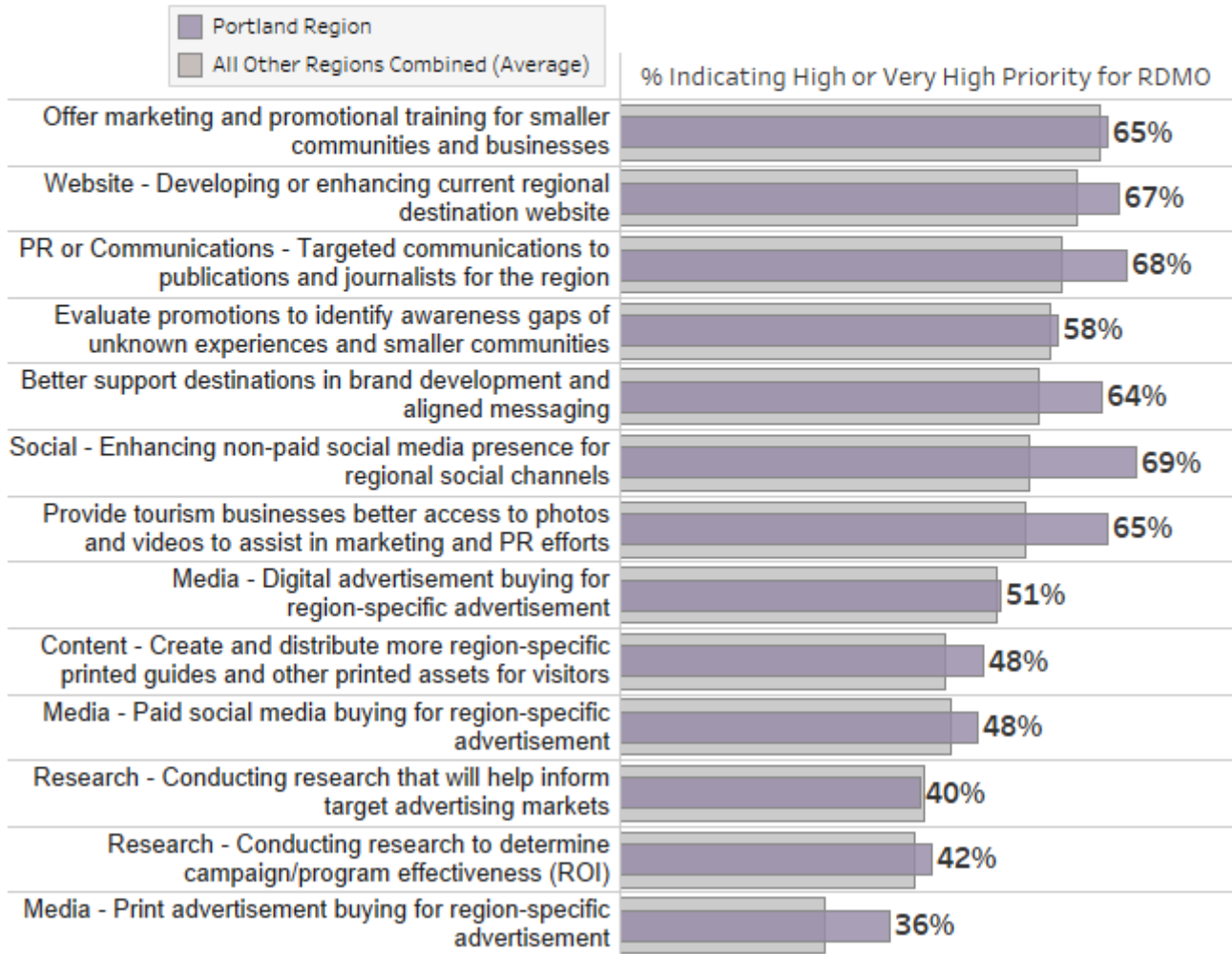


MARKETING

Respondents were asked to prioritize a variety of marketing tactics for their region. Respondents could select from a scale of responses including: “not a priority,” “low priority,” “moderate priority,” “high priority,” and “very high priority.” Enhancing its non-paid social media presence was the highest rated marketing tactic in the Portland Region, representing a significant difference from the statewide average (where it was ranked 6th). Respondents from the Portland Region were also more likely to rate, “provide tourism businesses better access to photos and videos to assist in marketing and PR efforts” as a high priority relative to all other regions combined.

Tactical Opportunities - Marketing

Q: Please indicate how you would prioritize the following tactical MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available not all items should be considered to be an extremely high priority and some may not even 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. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



As a follow-up to rating marketing tactics, respondents were asked to identify their top-two marketing opportunities. In the Portland region, “Provide tourism businesses better access to photos and videos to assist in marketing and PR efforts” rose to the top priority with 14% of respondents rating it among their top-two. The prioritization of marketing tactics in the Portland region is more evenly distributed than the statewide average.

Tactical Opportunities - Marketing

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

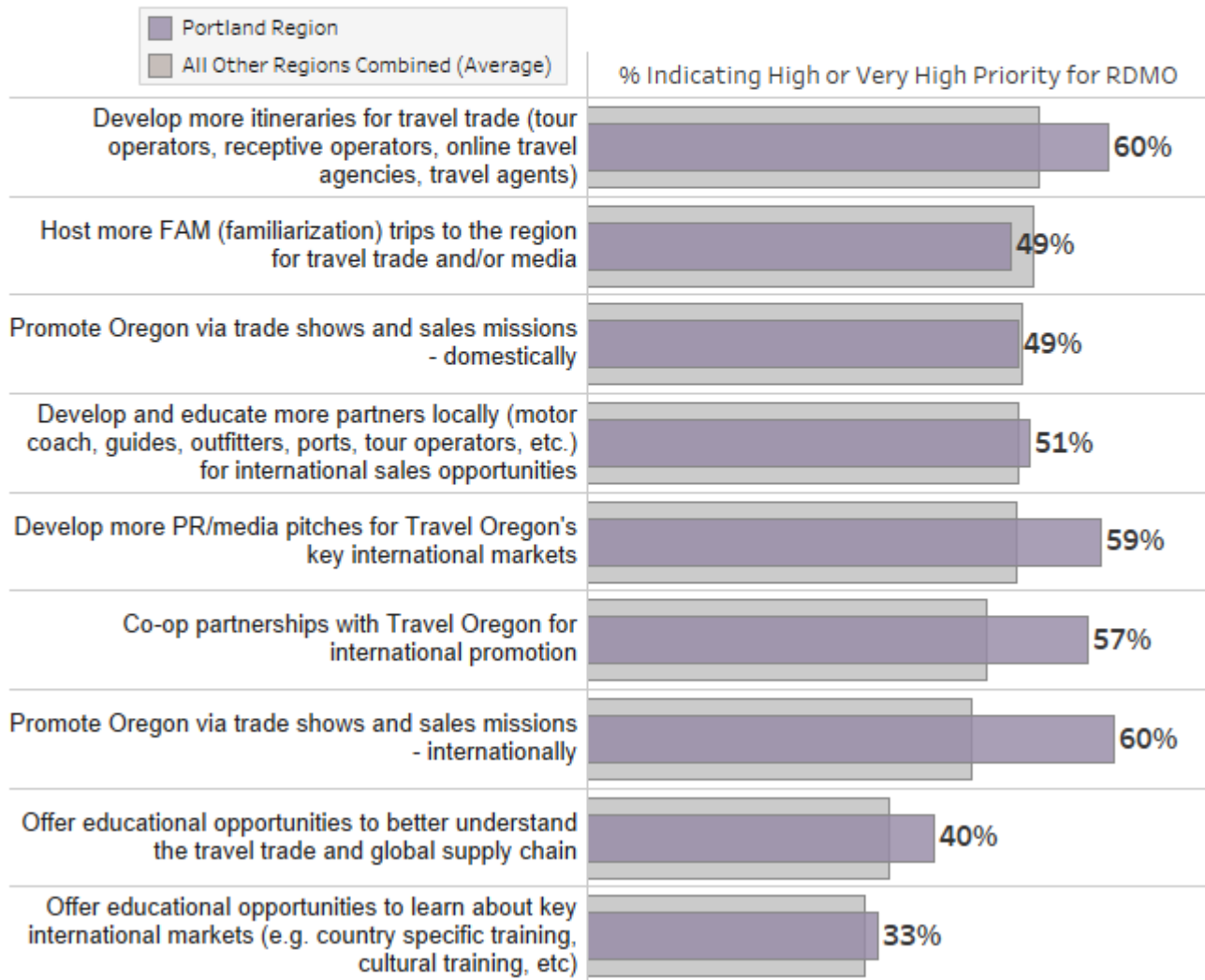
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Offer marketing and promotional training for smaller communities and businesses	16%	12%
Better support destinations in brand development and aligned messaging	11%	10%
Evaluate promotions to identify awareness gaps of unknown experiences and smaller communities	11%	8%
Website - Developing or enhancing current regional destination website	10%	8%
PR or Communications - Targeted communications to publications and journalists for the region	9%	9%
Content - Create and distribute more region-specific printed guides and other printed assets for visitors	9%	9%
Provide tourism businesses better access to photos and videos to assist in marketing and PR efforts	8%	14%
Social - Enhancing non-paid social media presence for regional social channels	6%	8%
Media - Digital Advertisement Buying for region-specific advertisement	6%	7%
Research - Conducting research that will help inform target advertising markets	5%	4%
Media - Paid Social Media Buying for region-specific advertisement	5%	6%
Research - Conducting research to determine campaign/program effectiveness (ROI).	4%	3%
Media - Print Advertisement Buying for region-specific advertisement	1%	2%

GLOBAL SALES, PROMOTIONS, PR, MEDIA, & MARKETING

Using the same prioritization scale, respondents were asked to prioritize global sales, promotions, PR, media, and marketing tactics. Respondents from the Portland region rated, “Promote Oregon via trade show and sales missions internationally” highest followed by “Develop more itineraries for travel trade.” Both tactics were rated considerably higher than their statewide averages.

Tactical Opportunities - Global Sales, Promotions, PR, Media, & Marketing

Q: Please indicate how you would prioritize the following tactical GLOBAL SALES, PROMOTIONS, PR, MEDIA, & MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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.



When asked to identify their top two global sales, promotions, PR, media, and marketing opportunities, “Develop and educate more partners locally for international sales opportunities,” had the highest percentage of respondents indicating it as a first or second priority. “Co-op partnerships with Travel

Oregon for international promotion” was a standout tactic with 9% of respondents choosing it as their top priority (more than any other tactical opportunity).

Tactical Opportunities - Global Sales, Promotions, PR, Media, & Marketing

Q: From the list above, please identify your top two opportunities for global promotions, sales, PR, media, & marketing:

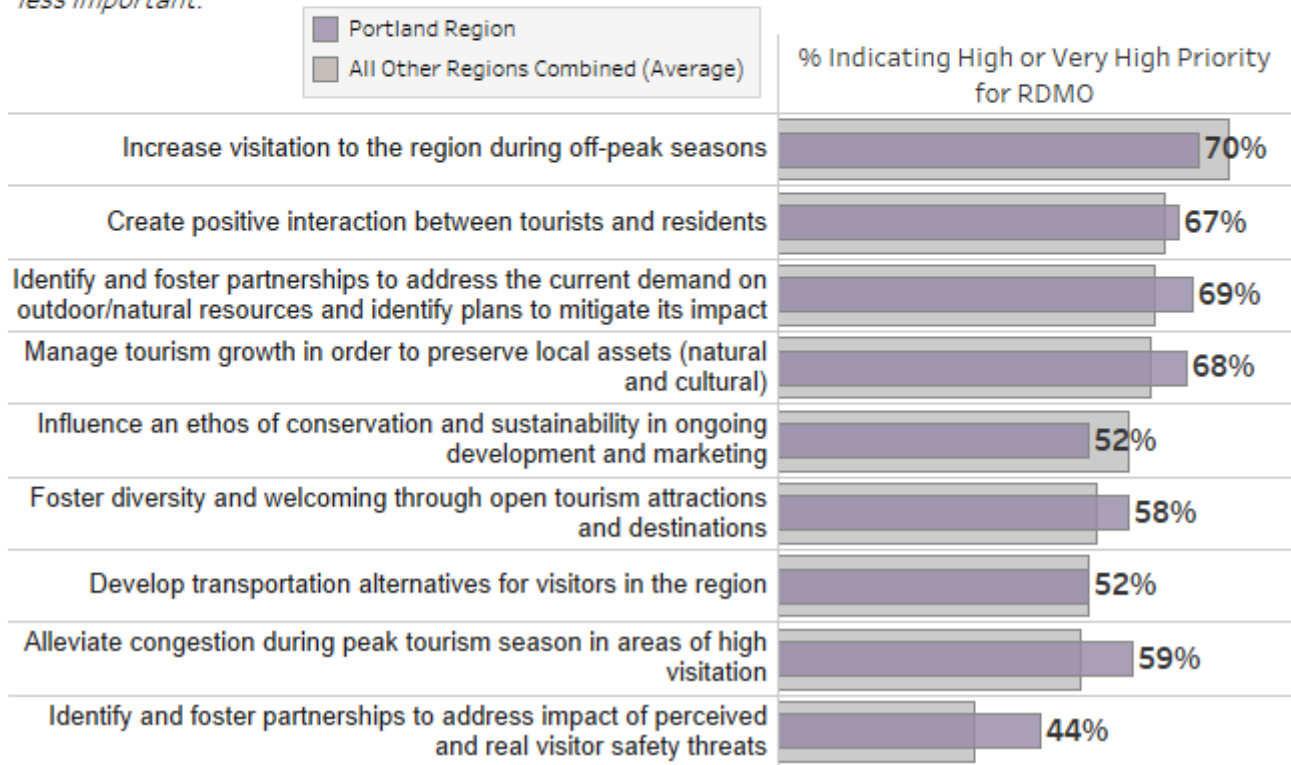
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Develop and educate more partners locally (motor coach, guides, outfitters, ports, tour operators, etc.) for international sales opportunities	16%	17%
Develop more itineraries for travel trade (tour operators, receptive operators, online travel agencies, travel agents)	14%	12%
Host more FAM (familiarization) trips to the region for travel trade and/or media	14%	10%
Promote Oregon via trade shows and sales missions - domestically	13%	10%
Co-op partnerships with Travel Oregon for international promotion	11%	15%
Develop more PR/media pitches for Travel Oregon's key international markets	10%	12%
Promote Oregon via trade shows and sales missions - internationally	7%	12%
Offer educational opportunities to better understand the travel trade and global supply chain	7%	7%
Offer educational opportunities to learn about key international markets (e.g. country specific training, cultural training, etc)	6%	4%

DESTINATION DEVELOPMENT

Stakeholders in Portland Region were asked to prioritize destination development opportunities across three categories: Planning and Management, Product Development, and Training and Capacity Building. Across the three macro-categories (management, development, and capacity), there are six priorities which more than two-thirds of respondents identified as a “very high priority” or a “high priority,” four of which are clustered together as top planning and management opportunities.

Tactical Opportunities - Destination Development: Planning and Management

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 areas should be considered to be an extremely high priority and some may not even 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.



When asked to identify their top-two tactics, increasing visitation to the region during off-peak seasons emerged as the favorite with 19% indicating it among their top-two tactics 12% choosing it as their top tactical opportunity.

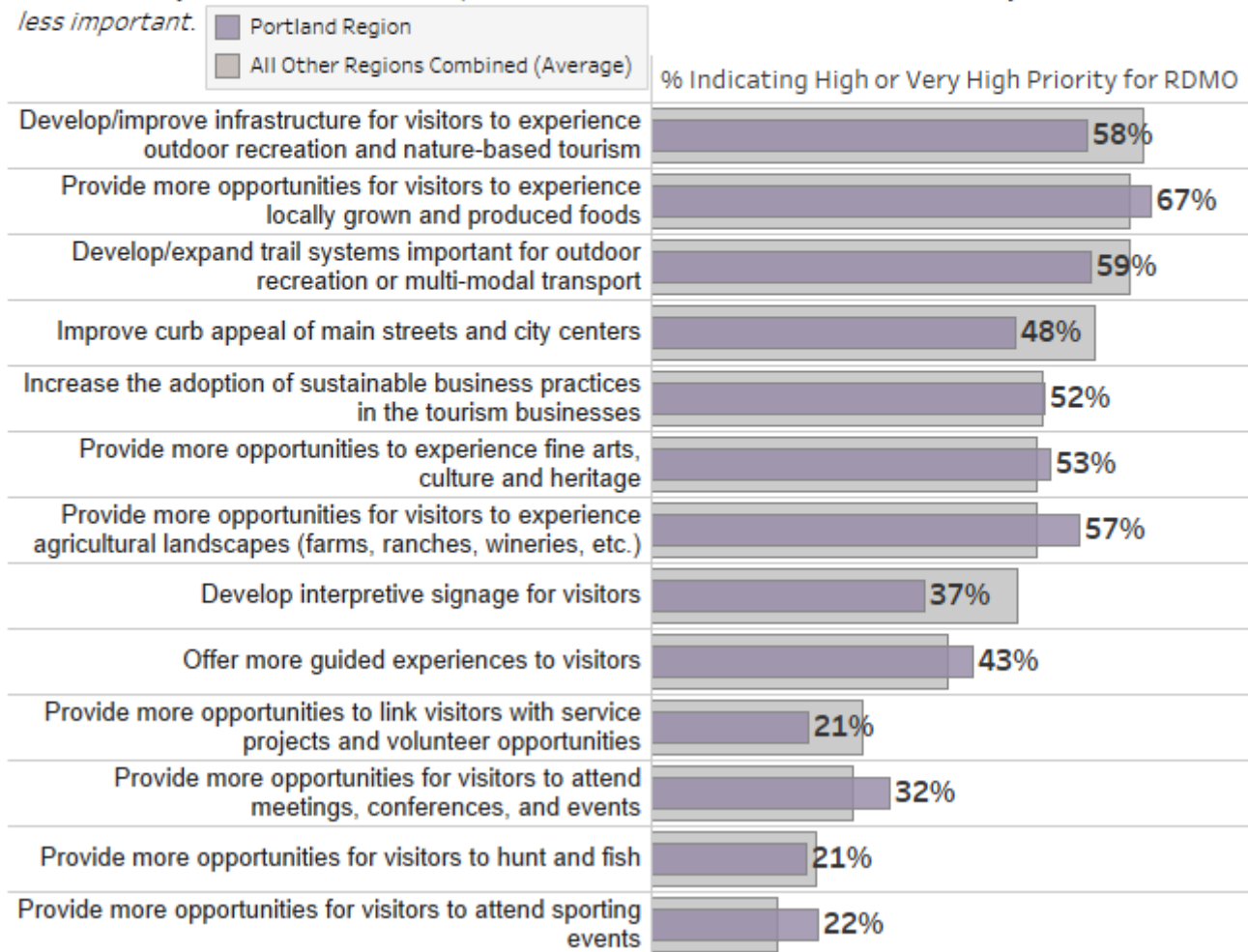
Tactical Opportunities - Destination Development: Planning and Management

Q: From the list above, please identify your top two planning and management opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Work with partners to help increase visitation to the region during off-peak seasons	21%	19%
Manage tourism growth in order to preserve local assets (natural and cultural)	14%	16%
Identify and foster partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact	12%	13%
Develop transportation alternatives for visitors in the region	11%	13%
Create positive interaction between tourists and residents	10%	12%
Influence an ethos of conservation and sustainability in ongoing development and marketing	10%	3%
Foster diversity and welcoming through open tourism attractions and destinations	9%	8%
Work with partners to help alleviate congestion during peak tourism season in areas of high visitation	8%	9%
Identify and foster partnerships to address impact of perceived and real visitor safety threats including homeless	5%	8%

Tactical Opportunities - Destination Development: Product Development

Q: Please indicate how you would prioritize the following tactical PRODUCT DEVELOPMENT OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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.



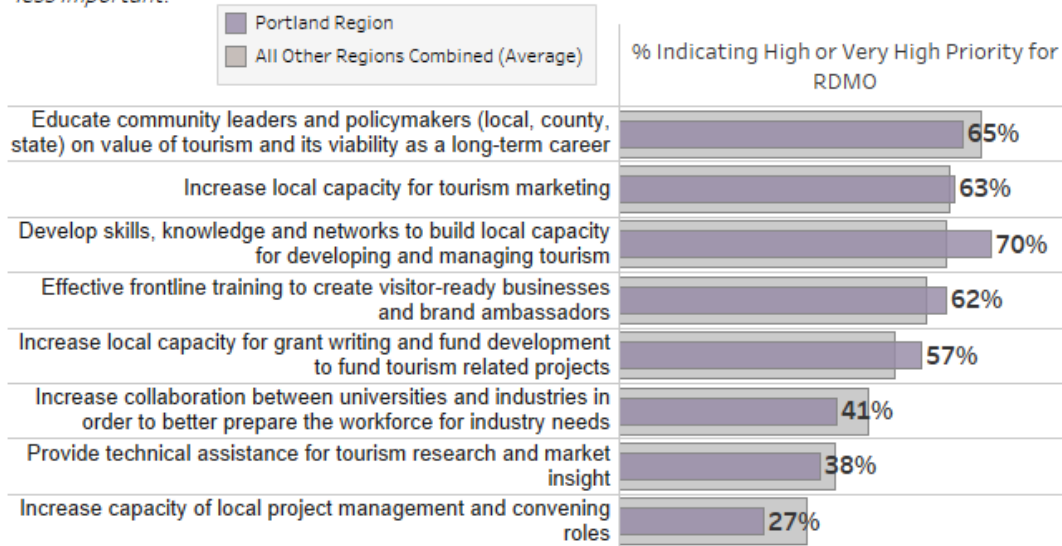
Tactical Opportunities - Destination Development: Product Development

Q: From the list above, please identify your top two product development opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Develop/improve infrastructure for visitors to experience outdoor recreation and nature-based tourism	18%	18%
Improve curb appeal of main streets and city centers	16%	17%
Develop/expand trail systems important for outdoor recreation or multi-modal transport	14%	10%
Increase the adoption of sustainable business practices in the tourism business	9%	10%
Provide more opportunities for visitors to experience locally grown and produced foods	8%	10%
Provide more opportunities to experience fine arts, culture and heritage	7%	6%
Develop interpretive signage for visitors	7%	3%
Provide more opportunities for visitors to experience agricultural landscapes	6%	9%
Offer more guided experiences to visitors	4%	7%
Evaluate and focus product development opportunities to include more conferences	3%	2%
Provide more opportunities to link visitors with service projects and volunteer opportunities	3%	2%
Evaluate and focus product development opportunities to include more fishing and hunting	2%	2%
Evaluate and focus product development opportunities to include more sporting events	1%	3%

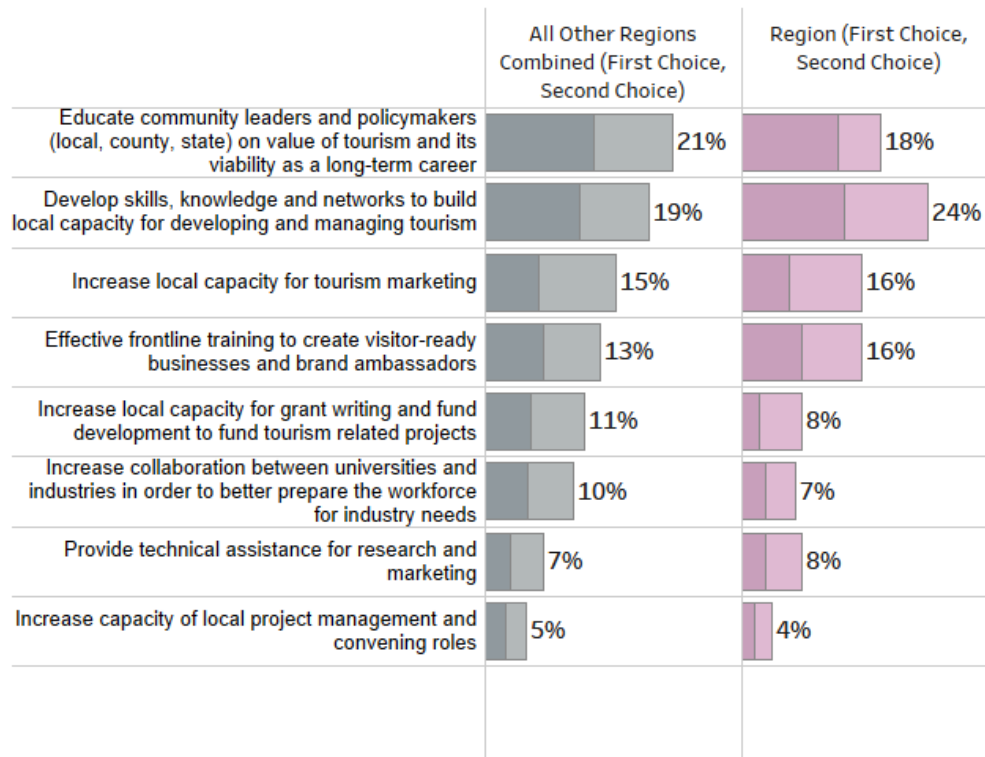
Tactical Opportunities - Destination Development: Training and Capacity Building

Q: Please indicate how you would prioritize the following tactical TRAINING and CAPACITY BUILDING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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.



Tactical Opportunities - Destination Development: Training and Capacity Building

Q: From the list above, please identify your top two training and capacity building opportunities:

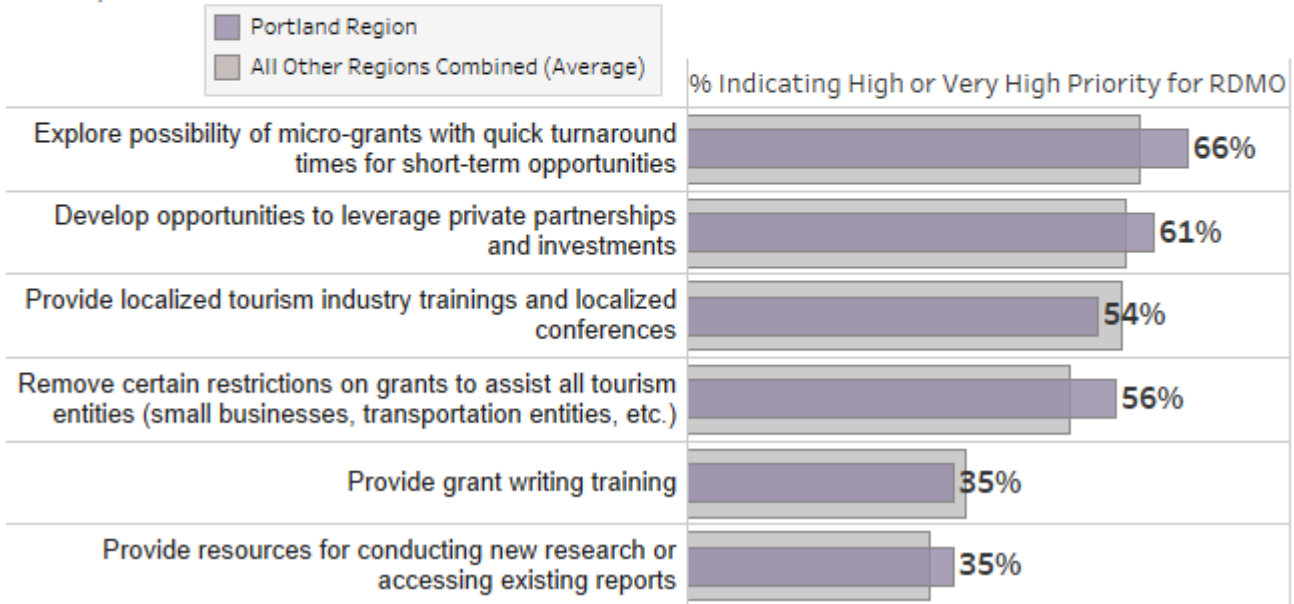


GLOBAL STRATEGIC PARTNERSHIPS

Stakeholders used the same rating system as in previous sections to prioritize specific global strategic partnership initiatives. One opportunity was rated a “very high priority” or a “high priority” by more than two-thirds of respondents: explore the possibility of micro-grants with quick turnaround times for short-term opportunities. Developing opportunities to leverage private partnerships and investments was also a highly rated tactic, both state-wide and in the Portland Region.

Tactical Opportunities - Global Strategic Partnerships









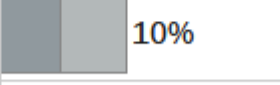
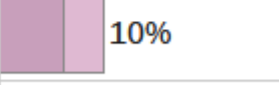
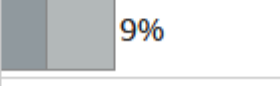
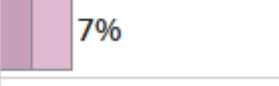
Q: Please indicate how you would prioritize the following tactical STRATEGIC PARTNERSHIP OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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.



When asked to identify their top two priorities, respondents from the Portland Region favored exploring the possibility of micro-grants with quick turnaround times for short-term opportunities with 26% of Portland Region respondents saying it is among their top-two highest priorities and 9% citing it as their top priority.

Tactical Opportunities - Global Strategic Partnerships

Q: From the list above, please identify your top two strategic partnership opportunities:

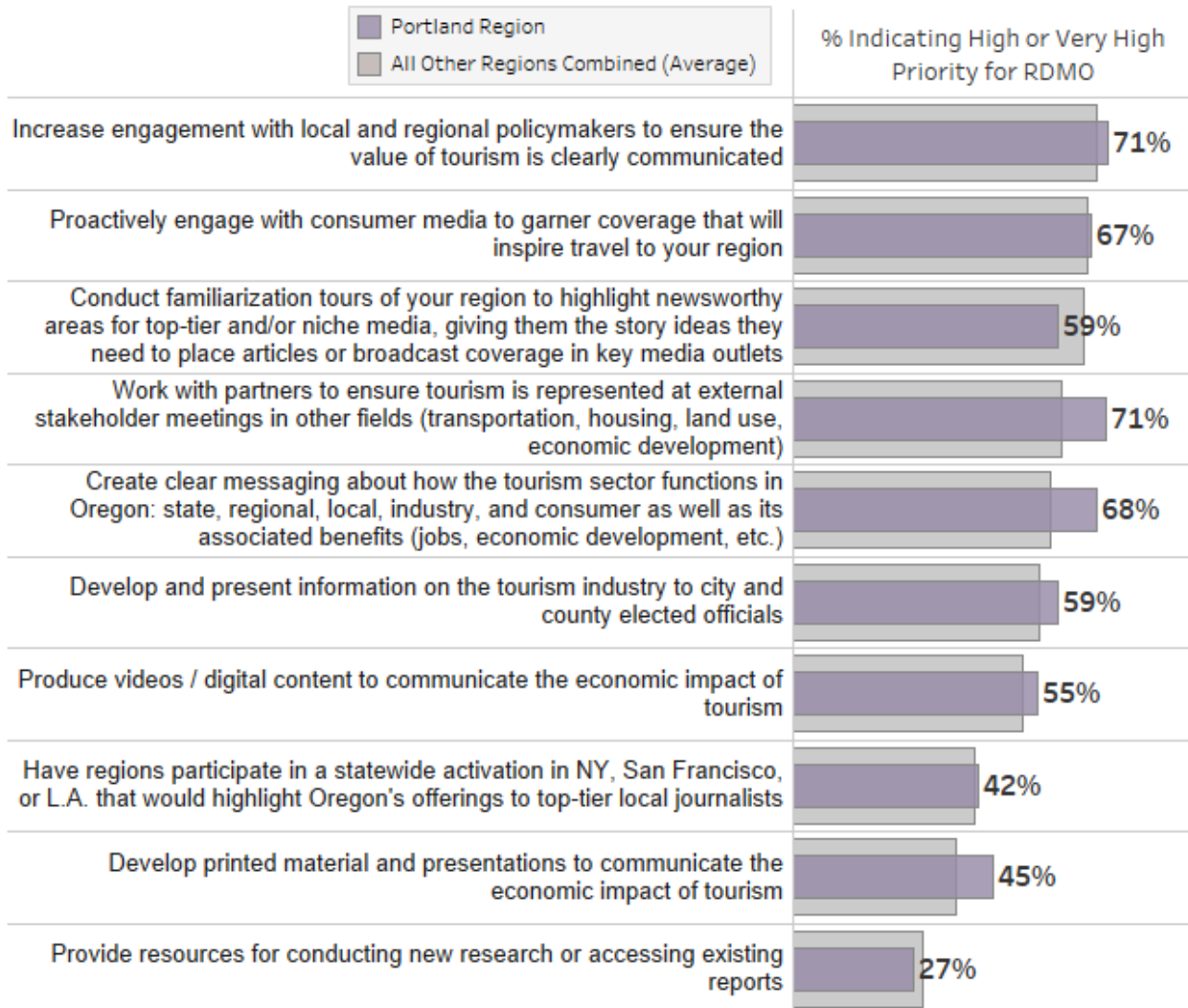
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Explore possibility of micro-grants with quick turnaround times for short-term opportunities	 22%	 26%
Develop opportunities to leverage private partnerships and investments	 21%	 20%
Provide localized tourism industry trainings and localized conferences	 21%	 20%
Remove certain restrictions on grants to assist all tourism entities (small businesses, transportation entities, etc.)	 17%	 17%
Provide grant writing training	 10%	 10%
Provide resources for conducting new research or accessing existing research	 9%	 7%

PUBLIC AFFAIRS AND COMMUNICATIONS

Using the same rating scale as in previous sections, Portland Region stakeholders evaluated several tactics related to public affairs and communications. Both statewide and in the Portland Region, respondents prioritized increasing engagement with local and regional policymakers to ensure the value of tourism is clearly communicated. “Work with partners to ensure tourism is represented at external stakeholder meetings in other fields (transportation, housing, land use, economic development)” was also highly rated, differing from the statewide average.

Tactical Opportunities - Public Affairs and Communications

Q: Thinking from the perspective of tourism marketing and management, please indicate how you would prioritize the following tactical PUBLIC AFFAIRS AND COMMUNICATION OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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.



Tactical Opportunities - Public Affairs and Communications

Q: From the list above, please identify your top two public affairs and communications opportunities:

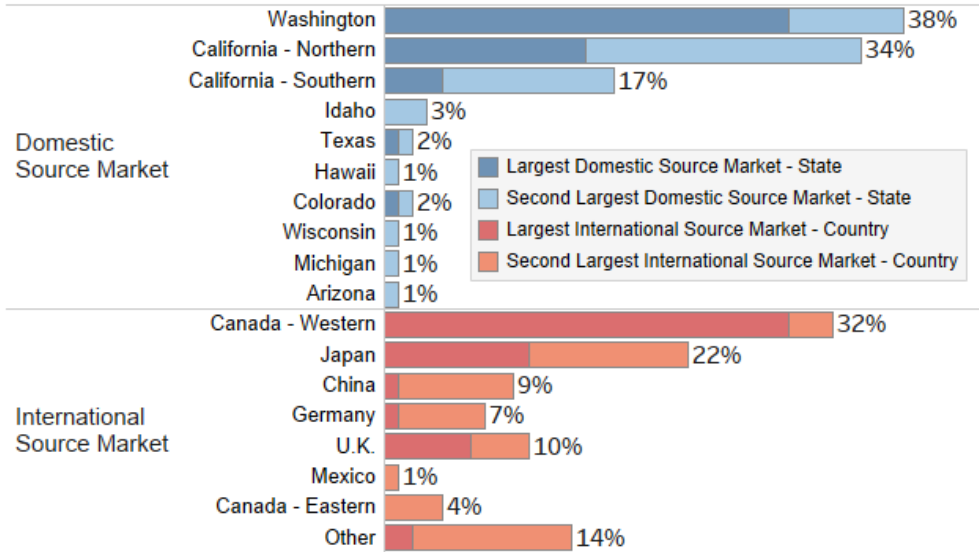
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Conduct familiarization tours of your region to highlight newsworthy areas for top-tier and/or niche media	17%	9%
Proactively engage with consumer media to garner coverage that will inspire travel to your region	16%	15%
Increase engagement with local and regional policymakers to ensure the value of tourism is clearly communicated	14%	14%
Work with partners to ensure tourism is represented at external stakeholder meetings in other fields	11%	15%
Create clear messaging about how the tourism sector functions in Oregon	11%	14%
Develop and present information on the tourism industry to city and county elected officials	10%	9%
Produce videos / digital content to communicate the economic impact of tourism	7%	12%
Have regions participate in a statewide activation in NY, San Francisco, or L.A. that would highlight Oregon's offerings to top-tier local journalists	6%	6%
Conduct more research to capture the economic impact of tourism	4%	5%
Develop printed material and presentations to communicate the economic impact of tourism	4%	3%

CUSTOM REGIONAL QUESTIONS

Each region had the opportunity to ask a series of custom questions of specific interest to their stakeholders, challenges, and opportunities. Findings from these custom questions are presented below.

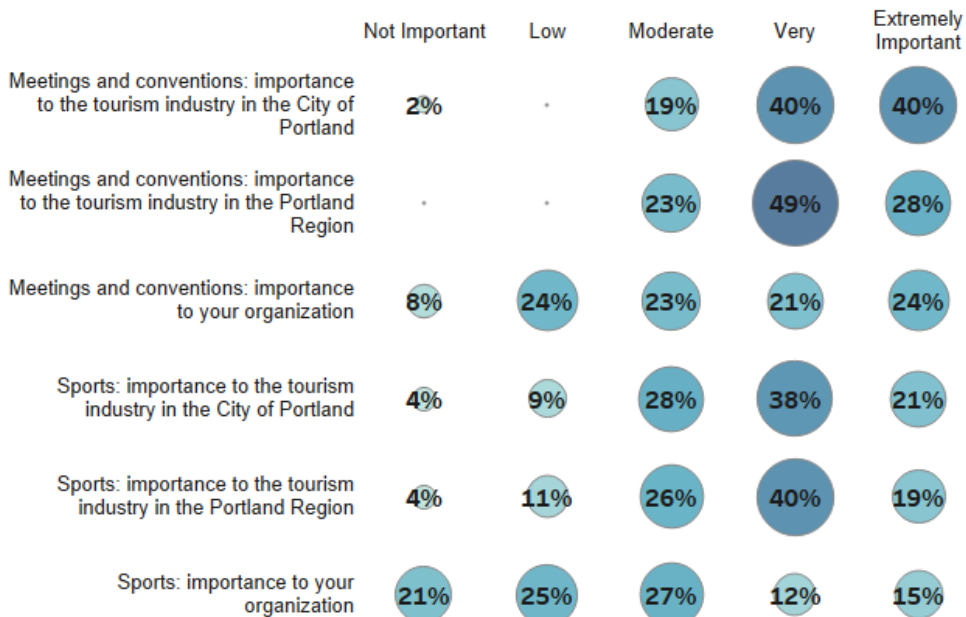
Portland Region Top Source Markets

Q: Please indicate the top two domestic and international source markets for your business or organization.



Meetings/Conventions and Sports Events: Importance in the Portland Region

Q: Portland Region: We are interested in knowing more about the economic impact of the meetings, conventions, and sports business in the Portland region. Please indicate the importance you would place on the meetings, conventions, and sports business in the following areas:



Appendix – Coded Open-Ended Responses

<p><i>Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.</i></p>	Downtown Renewal and Beautification	Shoulder and Off-Season	Product Development	Marketing and Messaging	Transportation	Homelessness	Other
Portland Region							
• I'm working on a documentary called Pre's People. I hope my documentary promotes tourism in the Coos Bay area.							
• increase tourism in winter/low season (Jan-Feb), and also improve the perception visitors have of Portland- especially safety and cleanliness- which is heavily impacted right now by the large and very visible homeless population.							
• put us on the map. We're not a drive-thru destination							
• Virtual Day Trip Tour Guides to our region.							
• Travel Oregon will embrace, promote and support events and activities that bring tourists to Oregon. This survey takes way longer than 15 minutes btw.							
• Funding for the Salmonberry Trail							
• Returning to our region to re-experience all we have to offer, with increased lodging and food establishments to serve the increased number of visitors.							
• I think keeping our development monies to help local business to connect to and learn how to promote our areas to improve							
• Careful promotion like "Visit but don't stay". Enjoy and don't destroy.							
• St Helens is not just an area to have just a 1 month of activities in Oregon... there is so much untapped tourism resources in this area that are not being looked at.							
• Facilitate ethos and opportunities for people who visit sites to help contribute to their conservation, maintenance, and care.							
• Transportation solutions and systems that effectively and efficiently move visitors around the region to minimize traffic and congestion impacts and extend the economic impact beyond the central city.							
• I would like to see the Portland Region embrace more of the area of Columbia County. Especially the Columbia River Waterfront. Columbia County has over 50 miles of riverfront land but not well represented in any marketing.							
• I want tourists in Portland to be able to wander around the city center checking out our old churches/cathedrals							
• All facets of the tourism industry would sense a better connection with our primary tourism partners RDMOs and DMOs and notice and increase in tourism traffic.							
• To commit to creating a department or division that spotlights Oregon's gardens and horticulture tourism assets. There are hundreds of businesses, sights, non-profits, festivals, gardens, farms, nurseries, etc. that are out there, just waiting to have tourists know they are there. My dream goal is to have Travel Oregon announce their Garden Tourism initiative at the meeting of the American Public Gardens Association which is being held in Portland June 2020.							
• Agrotourismo opportunities, perhaps with skills workshops. Allowing new dollars into smaller communities to offset some job loss that occurs as tourism focus shifts away from environmentally destructive activities.							
• Ensure that the tourism is value added for residents and visitors alike. We all benefit by having a healthier set of cultural, historical, and quality outdoor experiences if provided in a sustainable manner.							
• Lowered perception of 'high season price gouging' by visitors and travel trade (specific to hotels). Increased focus in marketing on cultural aspects of the region that make it special.							
• Community buy-in on tourism projects. How will it improve everyone's quality of life							
• I would like to see the streets cleaned up and our homeless population addressed. I would also like to clear up congestion during peak seasons in some areas and am concerned to protect our natural resources.							

<p><i>Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.</i></p>	Downtown Renewal and Beautification	Shoulder and Off-Season	Product Development	Marketing and Messaging	Transportation	Homelessness	Other
<p>Portland Region</p>							
<ul style="list-style-type: none"> I would like to see some money given to help us actualize the plan that was written several years ago that we have been implementing on our own. When we tell people that Travel Oregon gives us no support in our tourism activities other groups are shocked. We also wonder why we get no support even though we have driven many thousands of dollars into the Portland marketplace and have established a national and international attraction. Maybe someday we will get the answer. 							

Appendix, Continued – Open-Ended Responses

Given limited resources, what three priority areas do you believe are most important for 2019-2021 tourism planning? If you selected "Other" as a priority, please describe:

Balancing conservation and tourism; engaging public/tourists in conservation efforts to help stave off "loving Oregon to death"

Creating a department or division that focuses on gardens, horticulture, nurseries and agriculture. This is an opportunity similar to what was done for bicycle tourism. More people participate in garden tourism than bicycle tourism, so it could end up being an even bigger tourism opportunity. Oregon has the garden and horticultural assets, we just need to promote them more and toot our own horn about the world-class gardens we have.

Nothing was mentioned about the issue raised at every table in my regional meeting, dealing with homelessness.

Product Development & Sales - if the industry is not selling, there are no funds for the other things.

Please indicate any other areas of marketing that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

Check out Prespeople.com

Continued creation of "ready-for-market" itineraries for travel buyers of all types....citing the 7 Wonders of Oregon itinerary as one of the best ever created.

local events that would appeal to tourists

Marketing / cultural outreach to engage diverse demographics (ethnicity, age, region, etc.)

Social Media needs to be explored and used without neglecting website interactions. Social media needs to be embedded in the websites or at the very least directing tourist to websites.

Waymarking, Billboard marketing in key locations, travel-related videos and programming haven't been discussed extensively, but are areas of effective outreach that should not be overlooked.

Please indicate any other areas of global sales and international travel trade and media that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

Co-op partnerships that go beyond the traditional travel trade and media channels, specifically OTAs and straight-up content buys to reach consumers. Research on int'l consumers behavior/profiles to develop and target tactics efficiently and effectively.

It seems like we concentrate on the same areas that are known and there is already a lot of information to be had online. Travelling to foreign countries to promote is great, but only if the people going know what is really there to offer.

Partner with existing organizations like OTTA for developing itineraries and educational opportunities related to travel trade for domestic & international markets.

Partnerships for new market development internationally and domestically

Promote Oregon's film industry successes and opportunities.

Please indicate any other areas of planning, management, development, training, or capacity building that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

Consider the return on investment as a criteria in making tourism related investments.

Create role for community leadership in branding community's image that will be embraced by local residents.

I would like you to reach out to the old churches in Portland about opening their doors to tourists to view. This is something I like doing elsewhere, seeing the lovely buildings, but it is not possible in Portland despite our many lovely churches.

Long term vision of where we want to be not simply what we need today. Too often these processes appear to be looking forward and are not.

Missing this type of window after 23/24 as well as 25/26. Prioritizing assessments with regional approach, as what's wanted/needed in one is not what is needed somewhere else. Some of these are and can be done by local DMOs, eg: educating community leaders (local, county)

Appendix, Continued – Open-Ended Responses

Municipalities, non-profits, etc., need to understand there may be an initial season (or two) of building without large amounts of revenue -- but with correct planning and execution the sunk costs will eventually return in increasing amounts.

Rather than develop new transportation alternatives, promote existing ones. Rather than providing more opportunities for visitors to experience arts, culture, farms, food, etc, promote existing assets.

There is a disconnect between the industry services and the community. there is little fostering of the positive impacts to Joe Public by tourism. Tourism doesn't pay property taxes or VRF so county assets are strained by tourism

Please indicate any other areas of industry services that you believe should be an extremely high priority in order to advance the economic impact of tourism:

Closer partnerships with regional and local economic development practitioners

Create a user-friendly environment for tourists that will want them to share their fun and challenging experiences to others.

Let out of state non profits use Oregon grant money for Oregon tourist programs

There seems to be no way to effectively work with Travel Oregon through Travel Portland. Silly road blocks make us slow to reach an audience that is wanting more of what we already offer.

Tourism outreach to the community

upleveling to drive data and research driven decision making

Workforce training

Please indicate any other areas of PUBLIC AFFAIRS AND COMMUNICATIONS that you believe should be an extremely high priority for in order to increase visitation in your area.

Advertise our tourism areas to help bring tourist to our area

Budget planning & buy-in by local, regional, and state officials is critical to funding high priority items. Look at highly successful tourism programs and incorporate the best parts.

Create an "umbrella" website that brings together garden and horticulture sights, events, businesses, non-profits. Similar to RideOregonRide website, but focusing on gardens and horticulture instead of bicycle tourism

For some reason for Question #19 I could not find "Provide resources for conducting new research or accessing existing reports" in the options. It would be my first choice, and my first choice listed above would be my second choice.

Hire my crew to do promotional videos

Support of actually getting things done that would increase guest experiences instead of doing reports and wasting more money on duplicate efforts and plans that are already paid for. Stop wasting money on people that do nothing but repeat efforts already in place. Hire people that know the community in which they work so they can avoid creating groups that have no capacity to accomplish anything except another group that has zero time and energy to accomplish much.

the "Provide resources for conducting new research or accessing existing research" is not an option in #18.

Consumer media outreach in partnership with not only RDMOs but also DMOs and which location (listed are NY, LA, SF) do DMOs/RDMOs think will have highest impact?

Working in cities that the RDMOs can't afford to be in by themselves.