

2018 OREGON TOURISM ENGAGEMENT SURVEY

WILLAMETTE VALLEY

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 Willamette Valley 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 Willamette Valley to provide relevant insights to the Willamette Valley 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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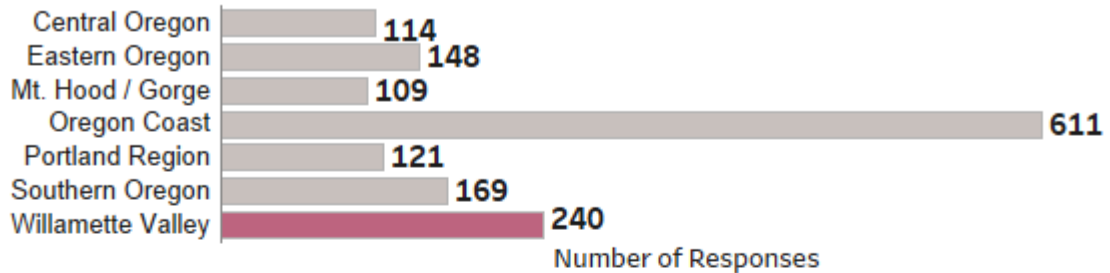
KEY FINDINGS

- **High levels of engagement with the Oregon Tourism industry:** Though to a lesser degree than the statewide average, a significantly greater share of Willamette Valley stakeholders indicated that they agree or strongly agree with the statement, “I am engaged with the Oregon tourism industry” than indicated that they disagree with it. A smaller share expressed agreement with the statement, “I understand the Oregon tourism partnering structure.”
- **Positive Views on Tourism and the Direction of the Industry:** Stakeholders view the direction of tourism positively in the state and the region. 73% and 64% agree that they are satisfied with the direction of the industry in the state and region respectively (83% and 73% in 2017). In general, respondents from the Willamette Valley are roughly as satisfied as those from elsewhere in the state with the direction of tourism in the state and their region (page 4).
- **Tactics Identified by Over 2/3 of Respondents as High or Very High Priority:** There were a handful of tactics across several categories (Planning and Management, Product Development, Training and Capacity Building, and Public Affairs and Communications) 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.
 - Destination Development – Planning and Management: Increase visitation to the region during off-peak seasons (77%).
 - Destination Development – Product Development: Provide more opportunities for visitors to experience locally grown and produced foods (67%).
 - Destination Development – Product Development: Develop/expand trail systems important for outdoor recreation or multi-modal transport (66%).
 - Destination Development – Training and Capacity Building: Educate community leaders and policymakers (local, county, state) on value of tourism and its viability as a long-term career (69%)
 - Destination Development – Training and Capacity Building: Develop skills, knowledge and networks to build local capacity for developing and managing tourism (67%).
 - Public Affairs and Communications: Conduct familiarization tours of your region to highlight newsworthy areas for top-tier and/or niche media, giving them the story ideas they need to place articles or broadcast coverage in key media outlets (74%).
 - 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: Proactively engage with consumer media to garner coverage that will inspire travel to your region (71%).
- **Custom Questions: Destination Development and Marketing “Extremely High Priorities”:** The Willamette Valley’s Custom Question section asked respondents to prioritize broad programming areas for the region. As in 2017, the area that the largest percentage of respondents identified as an “extremely high priority” was Destination Development (36% up slightly from 35% in 2017) followed by Infrastructure constraints (31%).

RESPONDENT PROFILE

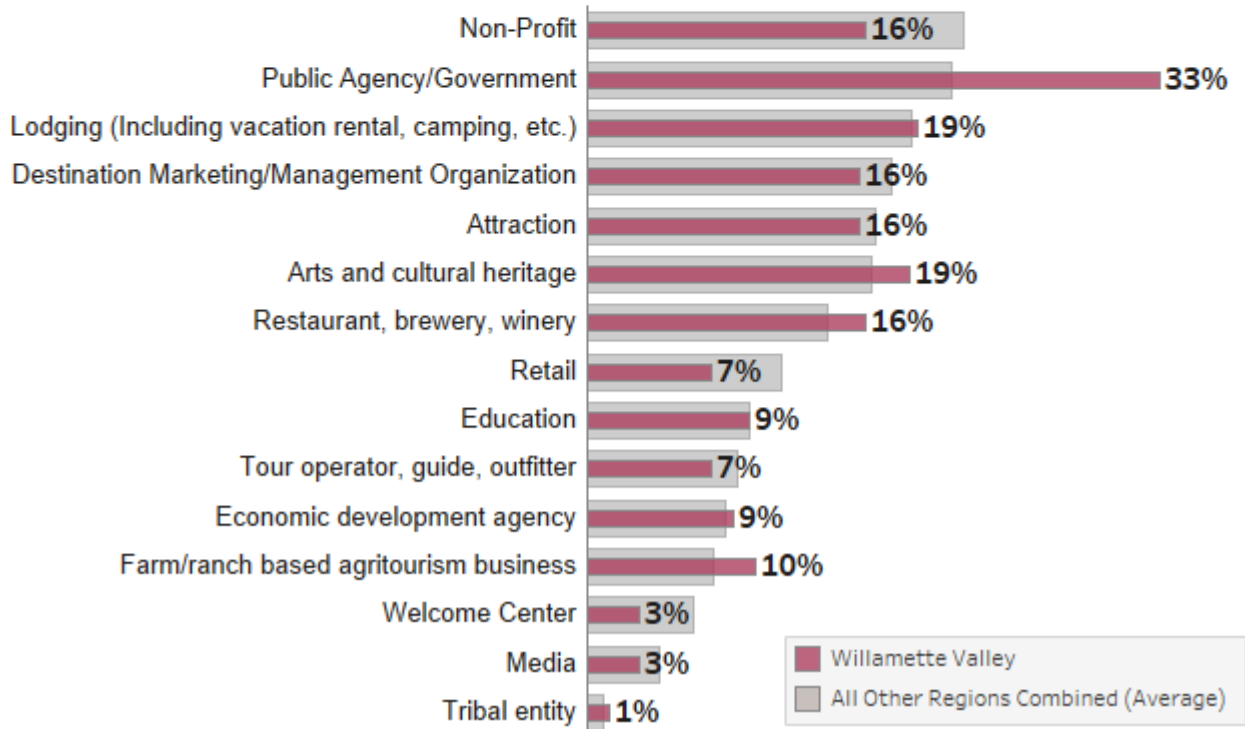
The figures below present the overall number of respondents as well as the industries in which respondents work. The question for Organization Type was a multiple response question, allowing respondents to select more than one industry or organization type. Thus, percentages will not sum to 100%. Relative to other regions, respondents from Willamette Valley were more likely to be in “Public agency/government” (+12%), and less likely to be at a non-profit (-6%) or work in retail (-4%). 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:

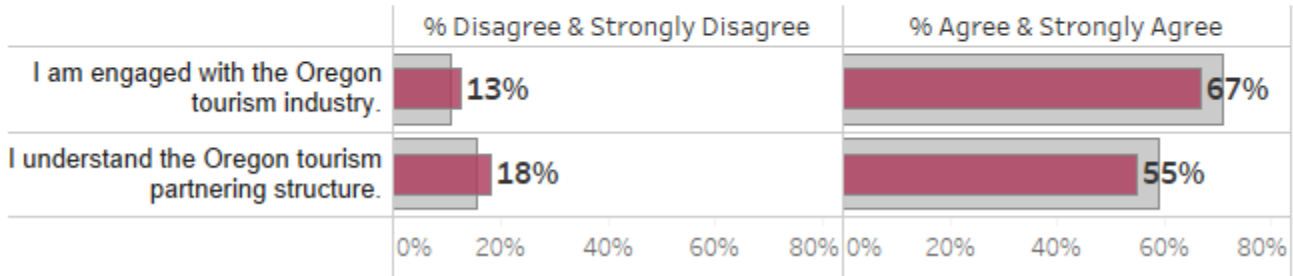


TOURISM INDUSTRY ENGAGEMENT AND OVERALL HEALTH

Respondents from Willamette Valley indicate high levels of industry engagement. Relative to the rest of the state, however, respondents are slightly less engaged with the industry (-4% agree or strongly agree) and report poorer understanding of the partnering structure (-4% agree or strongly agree).

Industry Engagement

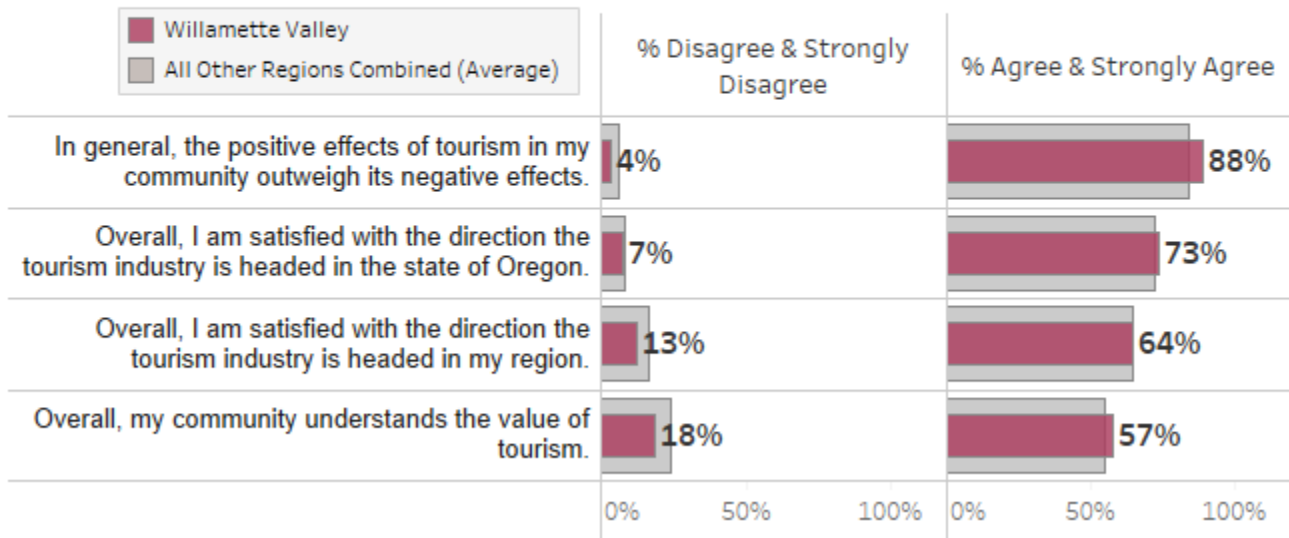
Q: Please indicate the level to which you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



On measures of overall industry health, respondents from Willamette Valley indicate high levels of satisfaction. Relative to the rest of the state, they are slightly more positive about the overall health of the tourism industry, with a marginally 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.

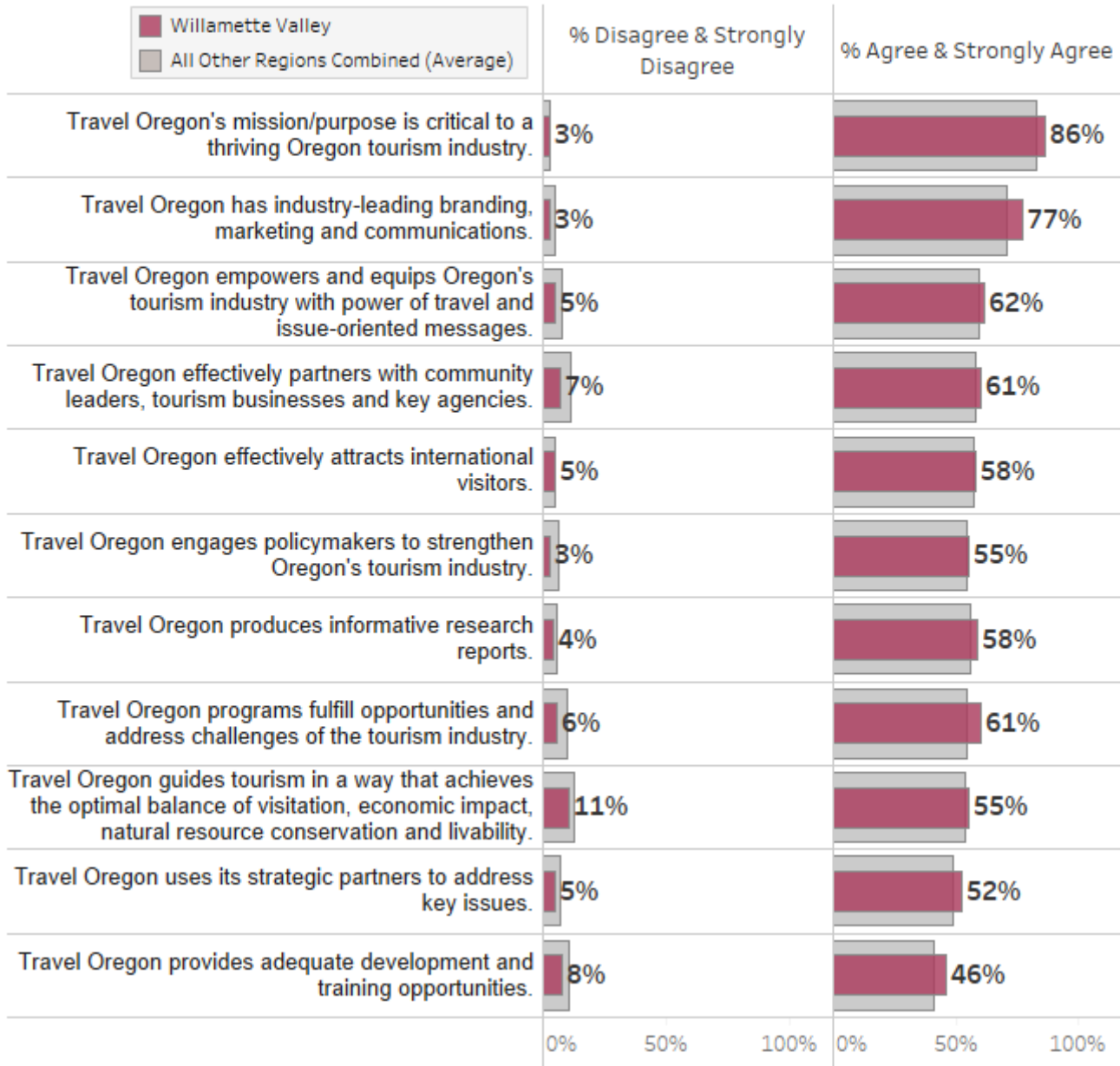


TRAVEL OREGON PERFORMANCE

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 is the least amount of agreement about whether Travel Oregon provides adequate development and training opportunities. Ratings from Willamette Valley respondents closely resemble the statewide averages.

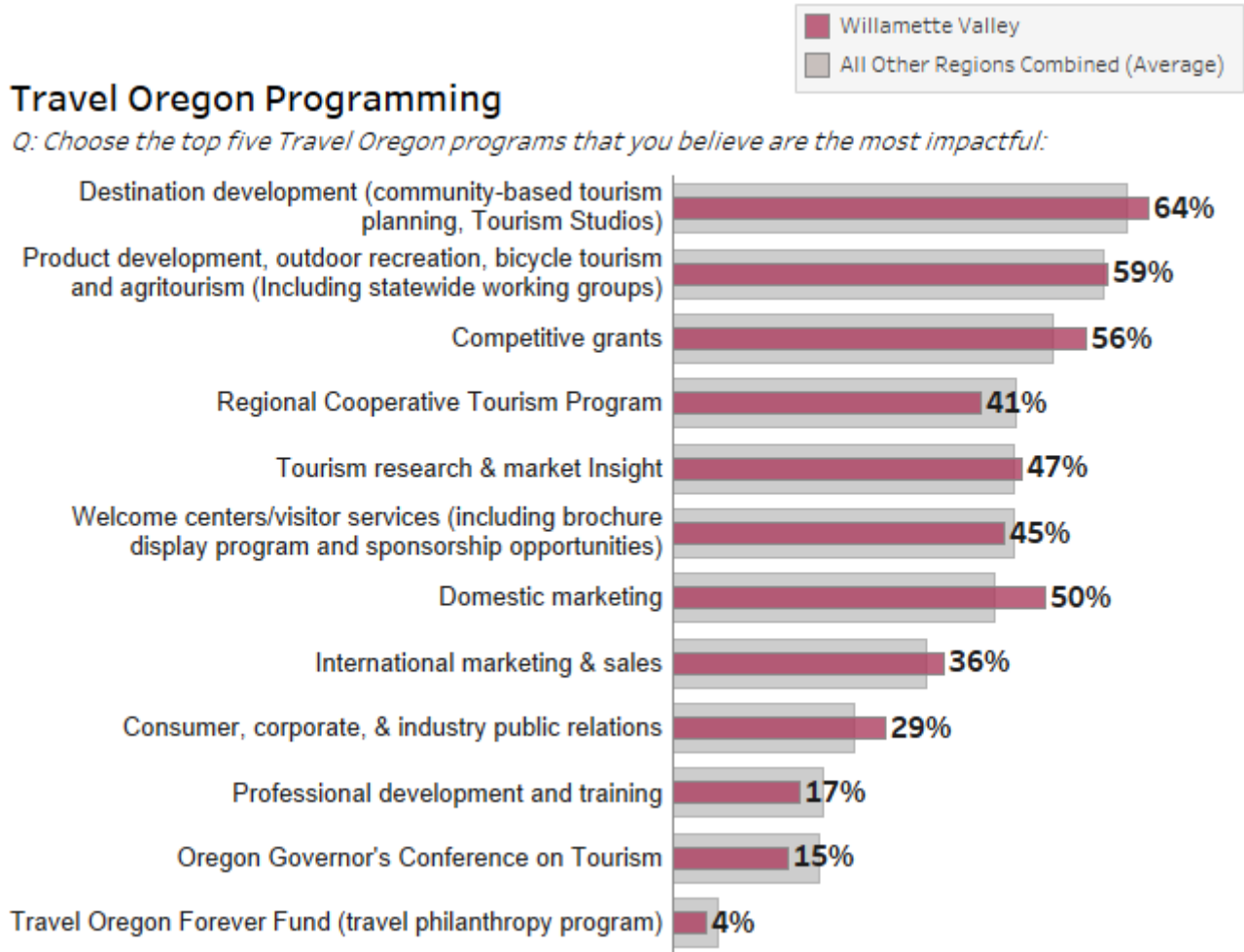
Travel Oregon Performance

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.”


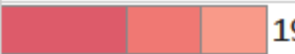
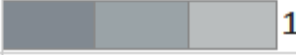
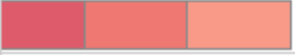






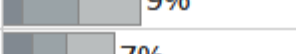
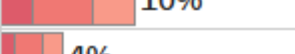
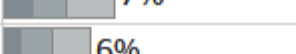





Respondents from Willamette Valley were more likely to cite the “Domestic marketing” (+7%) and less likely to cite the “Regional Cooperative Tourism Program” (-5%).



Looking ahead to 2019-2021 planning, 21% of Willamette Valley respondents indicated Destination Development & Management as a first, second, or third highest priority. Slightly fewer (21%) chose Marketing and Promotion among their three highest priorities.

Statewide Desired Tourism Priorities & Focus Areas

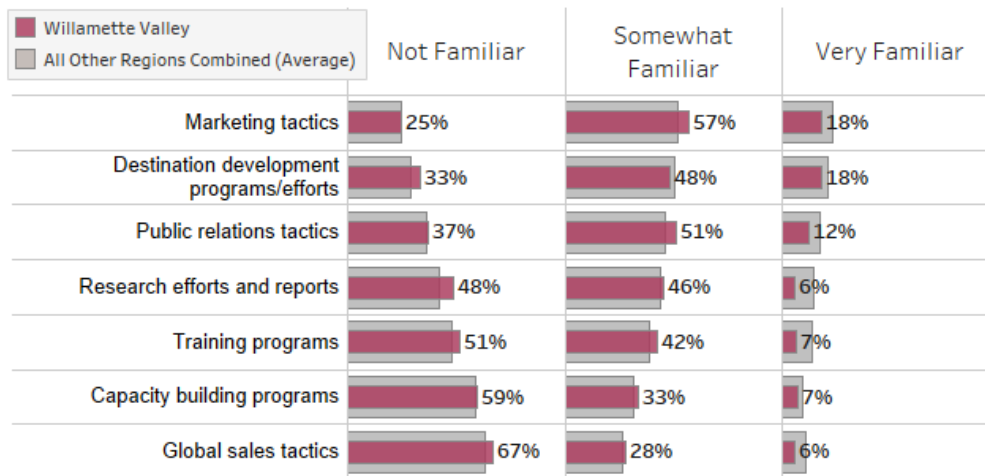
Q: Given limited resources, what three priority areas do you believe are most important for 2019-2021 tourism planning?

	All Other Regions Combined (First, Second, Third Priority)	Region (First, Second, Third Priority)
Marketing and Promotion	 19%	 19%
Destination Development & Management	 18%	 21%
Funding & Grants	 14%	 14%
Infrastructure & Transportation	 13%	 14%
Stakeholder Engagement & Collaboration	 12%	 13%
Tourism research & market Insight	 9%	 10%
Workforce & Training	 7%	 4%
Product Development	 6%	 5%
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 Willamette Valley, 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. Across all initiatives, respondents from the Willamette Valley indicated less familiarity relative to all other regions combined.

Familiarity with Initiatives

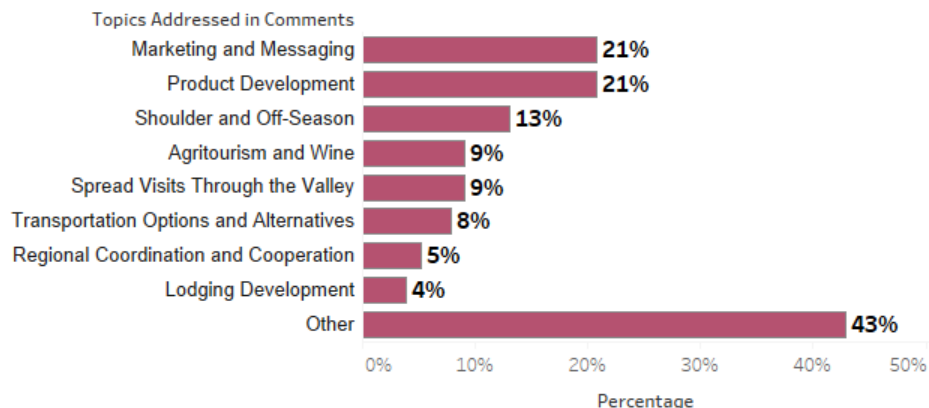
Q: Please indicate how familiar you are with the initiatives undertaken by your regional destination management organization in the following areas in the past 12 months:



Repondents were also asked to describe a specific outcome that 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, though many focused on marketing and message, and product development needs.

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.

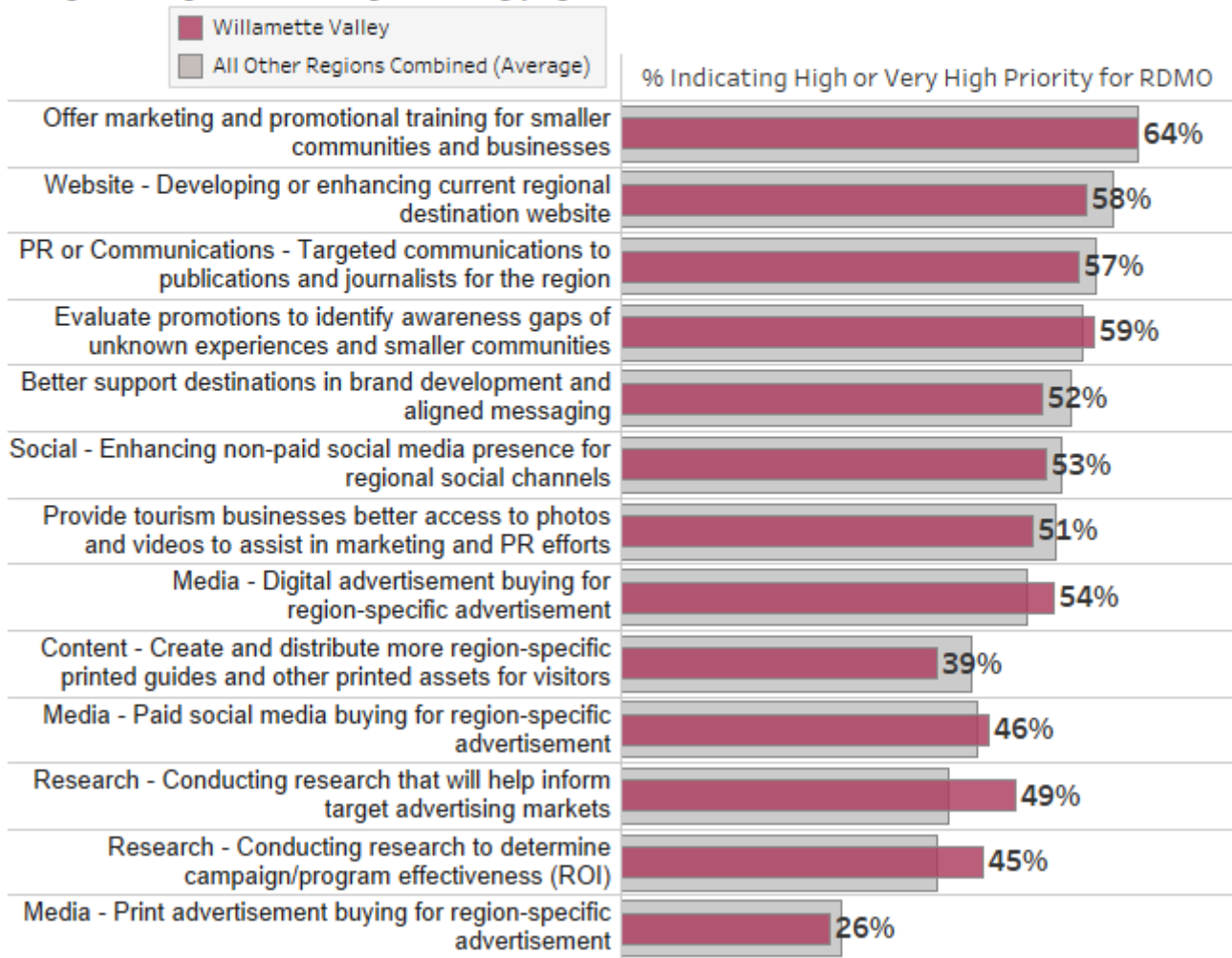


MARKETING

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.” The top priority, both overall and in the Willamette Valley, is “Offer marketing and promotional training for smaller communities and businesses.” Respondents from the Willamette Valley expressed more support for conducting research (both to inform target markets and to determine campaign effectiveness (ROI) relative to all other regions combined.

Tactical Opportunities - Marketing




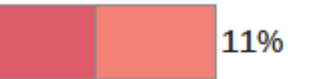

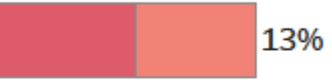
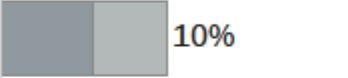

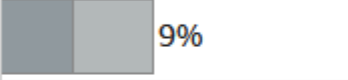
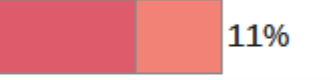
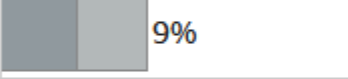
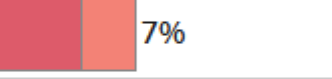
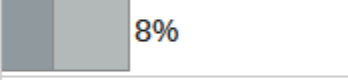

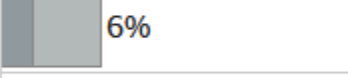
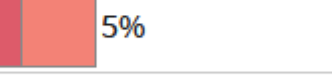
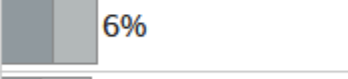
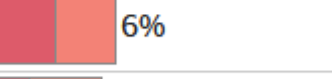

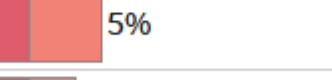






Q: Please indicate how you would prioritize the following tactical MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available not all items should be considered to be an extremely high priority and some may not even be 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 Central Oregon, offering marketing and promotional training for smaller communities and businesses and evaluating promotions to identify awareness gaps were most cited among the top-two priorities.

Tactical Opportunities - Marketing

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

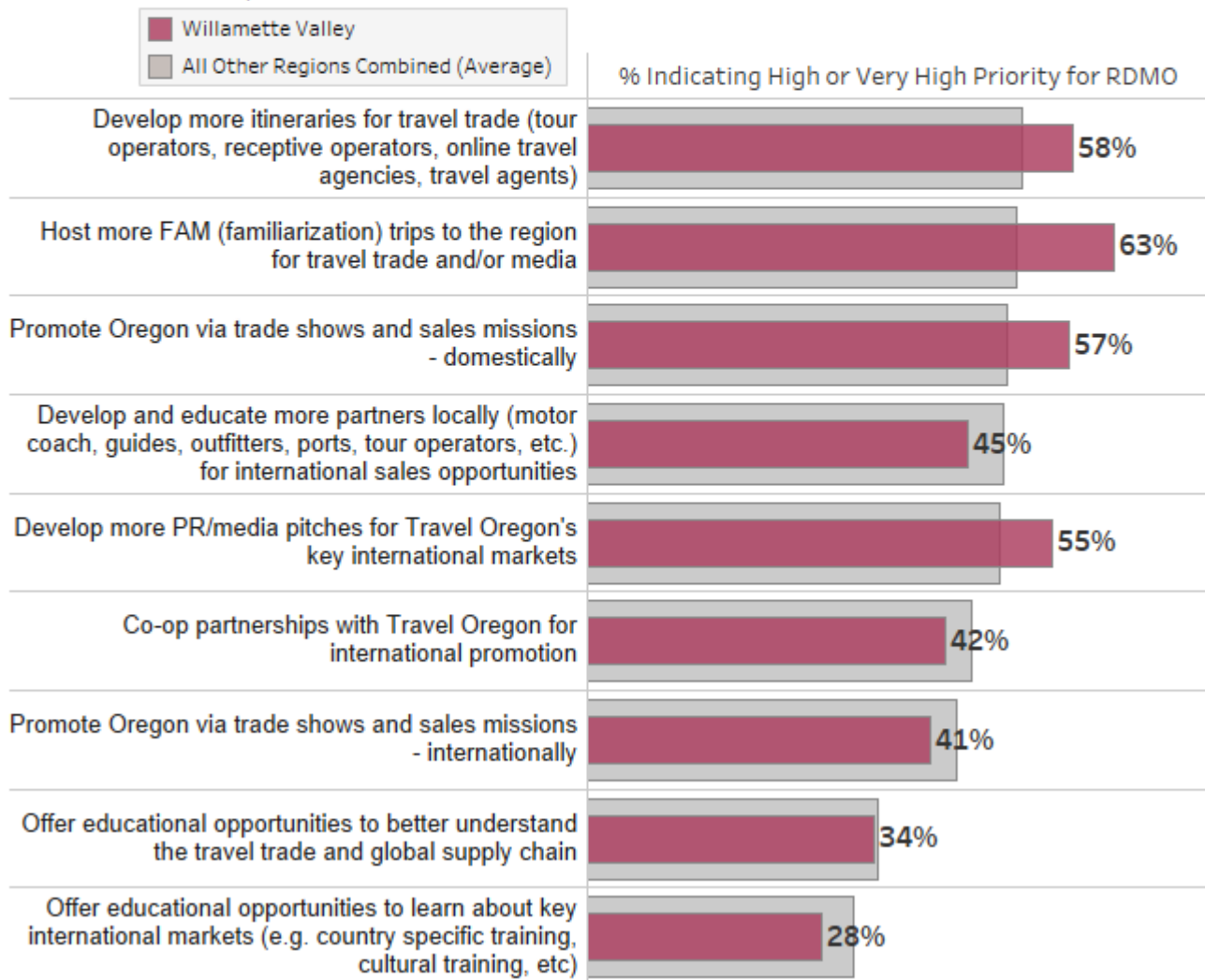
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Offer marketing and promotional training for smaller communities and businesses	 16%	 13%
Better support destinations in brand development and aligned messaging	 11%	 11%
Evaluate promotions to identify awareness gaps of unknown experiences and smaller communities	 11%	 13%
Website - Developing or enhancing current regional destination website	 10%	 10%
PR or Communications - Targeted communications to publications and journalists for the region	 9%	 11%
Content - Create and distribute more region-specific printed guides and other printed assets for visitors	 9%	 7%
Provide tourism businesses better access to photos and videos to assist in marketing and PR efforts	 8%	 6%
Social - Enhancing non-paid social media presence for regional social channels	 6%	 5%
Media - Digital Advertisement Buying for region-specific advertisement	 6%	 6%
Research - Conducting research that will help inform target advertising markets	 5%	 5%
Media - Paid Social Media Buying for region-specific advertisement	 5%	 4%
Research - Conducting research to determine campaign/program effectiveness (ROI).	 4%	 6%
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 Willamette Valley rated, “Host more FAM (familiarization) trips to the region for travel trade and/or media” highest followed by, “Develop more itineraries for travel trade (tour operators, receptive operators, online travel agencies, travel agents).” 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, the rank order of results differs from the statewide results. Promoting Oregon via trade shows and sales

missions rose in rank indicating that people feel strongly about its importance. Hosting FAM trips was chosen most frequently as a top priority among Willamette Valley respondents.

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:

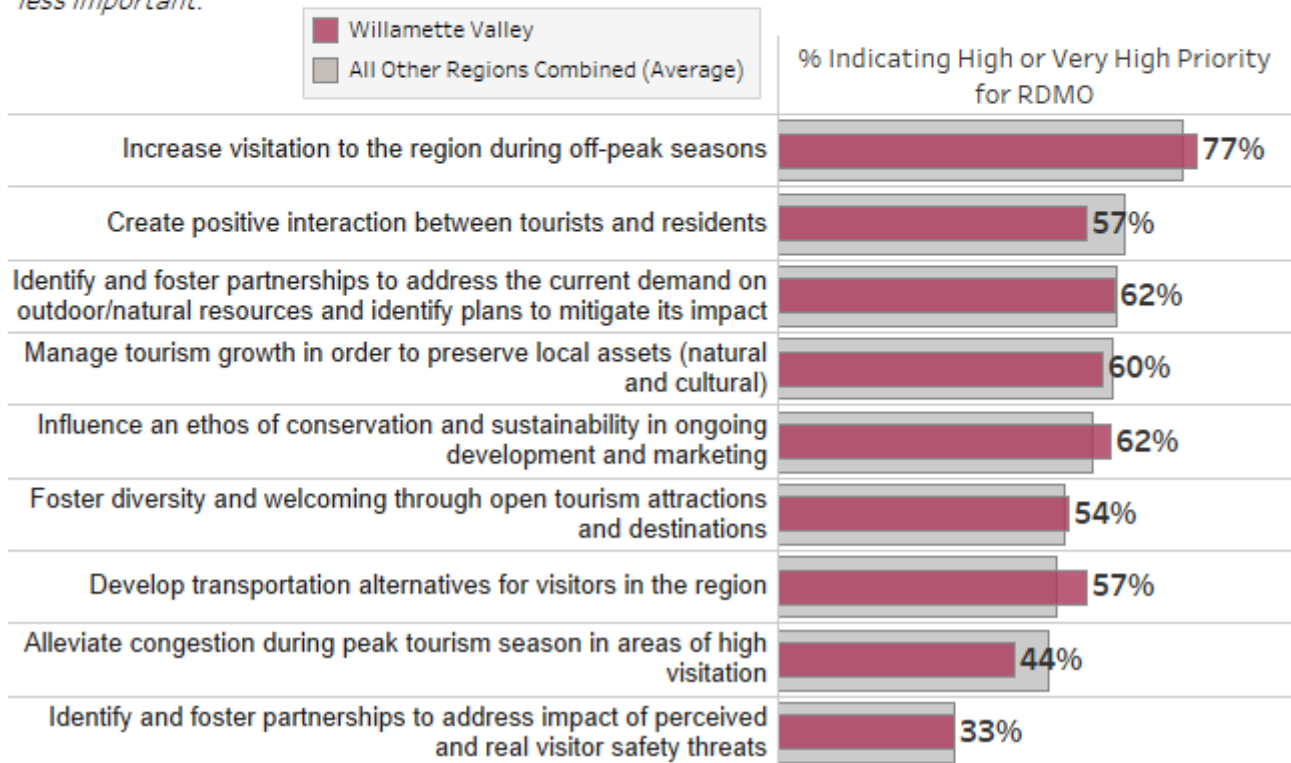
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Develop and educate more partners locally (motor coach, guides, outfitters, ports, tour operators, etc.) for international sales opportunities	16%	11%
Develop more itineraries for travel trade (tour operators, receptive operators, online travel agencies, travel agents)	14%	15%
Host more FAM (familiarization) trips to the region for travel trade and/or media	14%	16%
Promote Oregon via trade shows and sales missions - domestically	13%	16%
Co-op partnerships with Travel Oregon for international promotion	11%	8%
Develop more PR/media pitches for Travel Oregon's key international markets	10%	12%
Promote Oregon via trade shows and sales missions - internationally	7%	9%
Offer educational opportunities to better understand the travel trade and global supply chain	7%	5%
Offer educational opportunities to learn about key international markets (e.g. country specific training, cultural training, etc)	6%	7%

DESTINATION DEVELOPMENT

Stakeholders in Willamette Valley 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 four priorities which more than two-thirds of respondents identified as a “very high priority” or a “high priority.” These four are: “increase visitation to the region during off-peak seasons,” “provide more opportunities for visitors to experience locally grown and produced foods,” “educate community leaders and policymakers (local, county, state) on value of tourism and its viability as a long-term career,” and “develop skills, knowledge and networks to build local capacity for developing and managing tourism.”










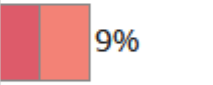


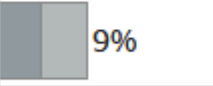
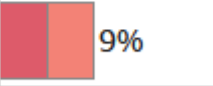
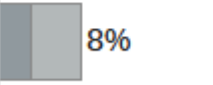
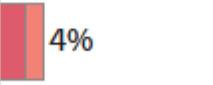

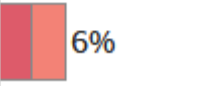
Tactical Opportunities - Destination Development: Planning and Management

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.



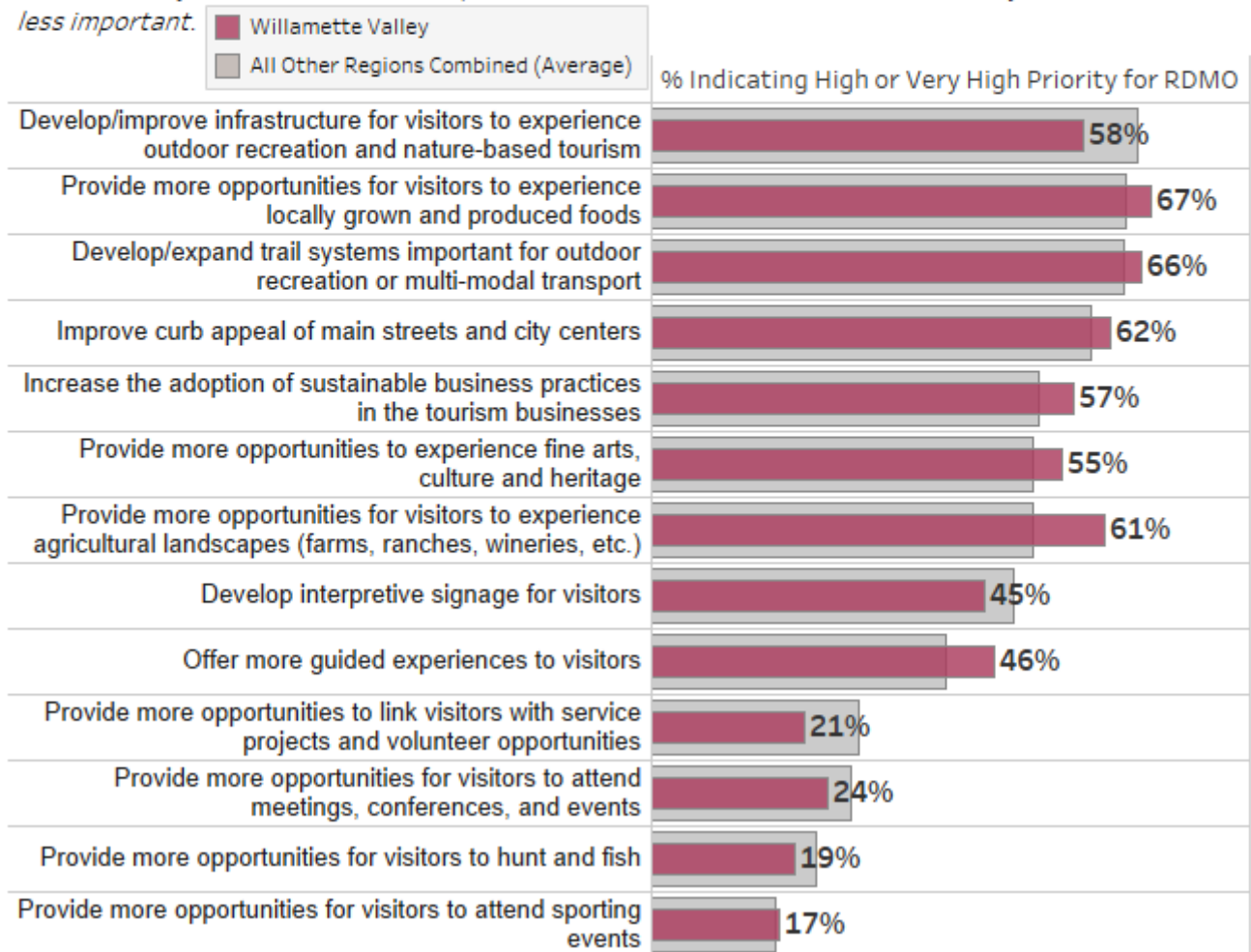
Tactical Opportunities - Destination Development: Planning and Management

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%	 21%
Manage tourism growth in order to preserve local assets (natural and cultural)	 14%	 14%
Identify and foster partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact	 12%	 10%
Develop transportation alternatives for visitors in the region	 11%	 13%
Create positive interaction between tourists and residents	 10%	 9%
Influence an ethos of conservation and sustainability in ongoing development and marketing	 10%	 13%
Foster diversity and welcoming through open tourism attractions and destinations	 9%	 9%
Work with partners to help alleviate congestion during peak tourism season in areas of high visitation	 8%	 4%
Identify and foster partnerships to address impact of perceived and real visitor safety threats including homeless	 5%	 6%




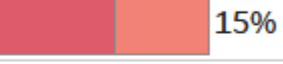


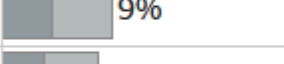
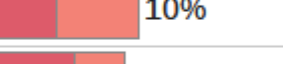
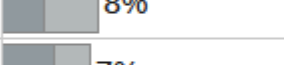
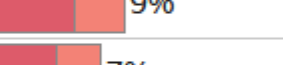

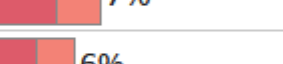
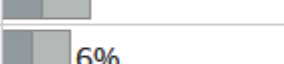


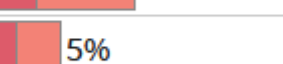


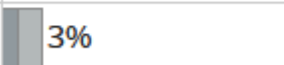
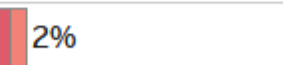






Tactical Opportunities - Destination Development: Product Development

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.



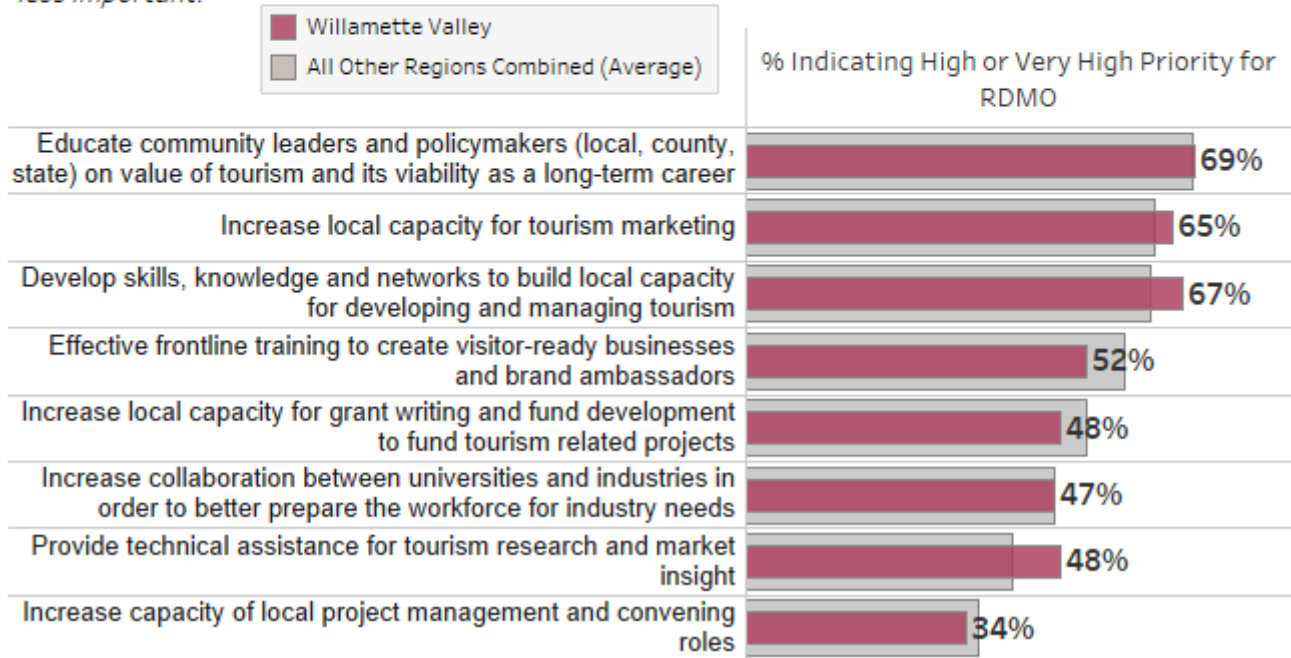
Tactical Opportunities - Destination Development: Product Development

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%	 15%
Improve curb appeal of main streets and city centers	 16%	 15%
Develop/expand trail systems important for outdoor recreation or multi-modal transport	 14%	 14%
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%	 9%
Provide more opportunities to experience fine arts, culture and heritage	 7%	 7%
Develop interpretive signage for visitors	 7%	 6%
Provide more opportunities for visitors to experience agricultural landscapes	 6%	 10%
Offer more guided experiences to visitors	 4%	 5%
Evaluate and focus product development opportunities to include more conferences	 3%	 3%
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%	 1%
Evaluate and focus product development opportunities to include more sporting events	 1%	 2%

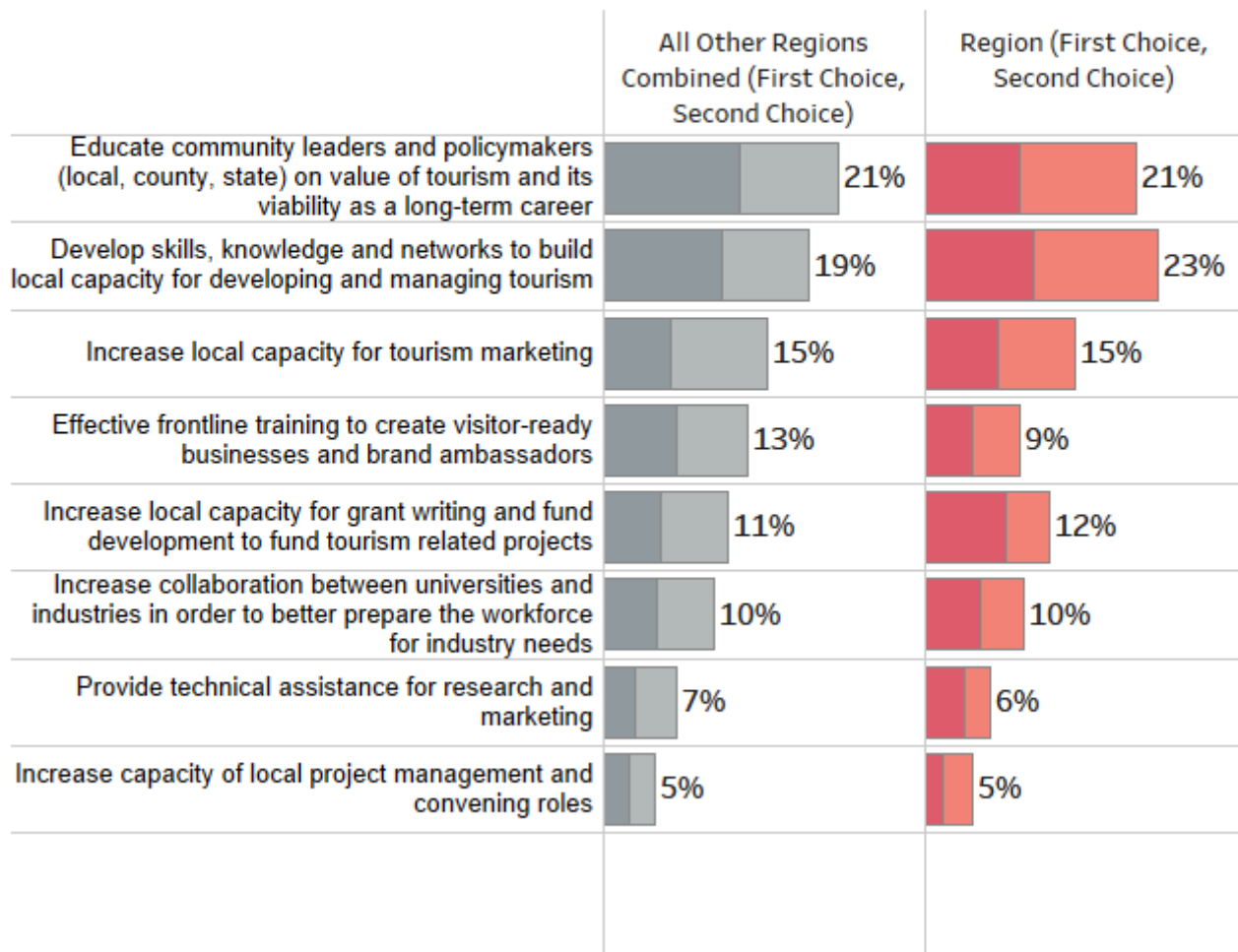
Tactical Opportunities - Destination Development: Training and Capacity Building

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:

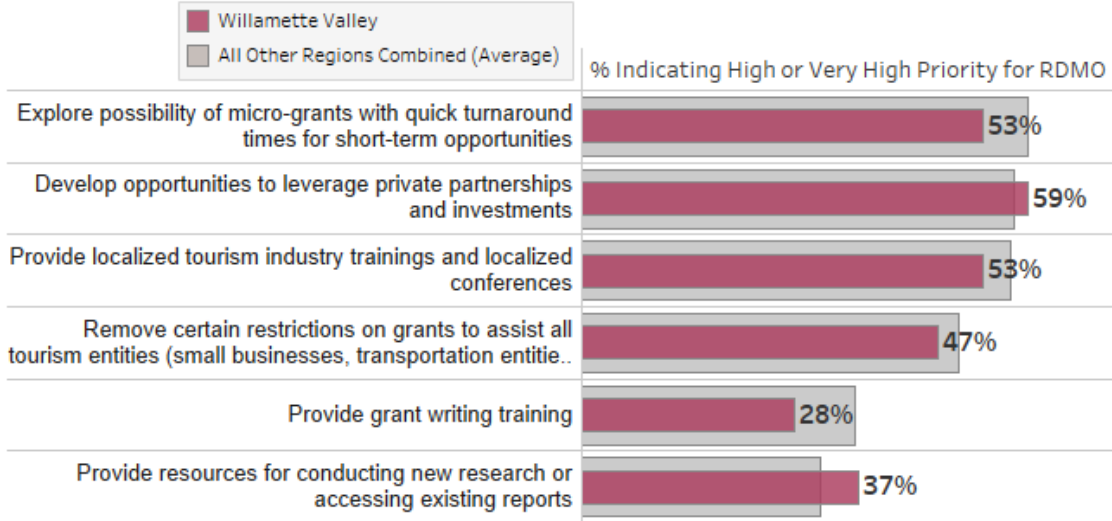


GLOBAL STRATEGIC PARTNERSHIPS

Stakeholders used the same rating system as in previous sections to prioritize specific global strategic partnership initiatives. Though no specific activities were rated as a “very high priority” or a “high priority” by more than two-thirds of respondents (as in other sections), there are still clear initiatives that stakeholders have identified as relatively higher priorities. Developing opportunities to leverage private partnerships and investments was rated as a “very high priority” or a “high priority” by 59% of Willamette Valley stakeholders.

Tactical Opportunities - Global Strategic Partnerships

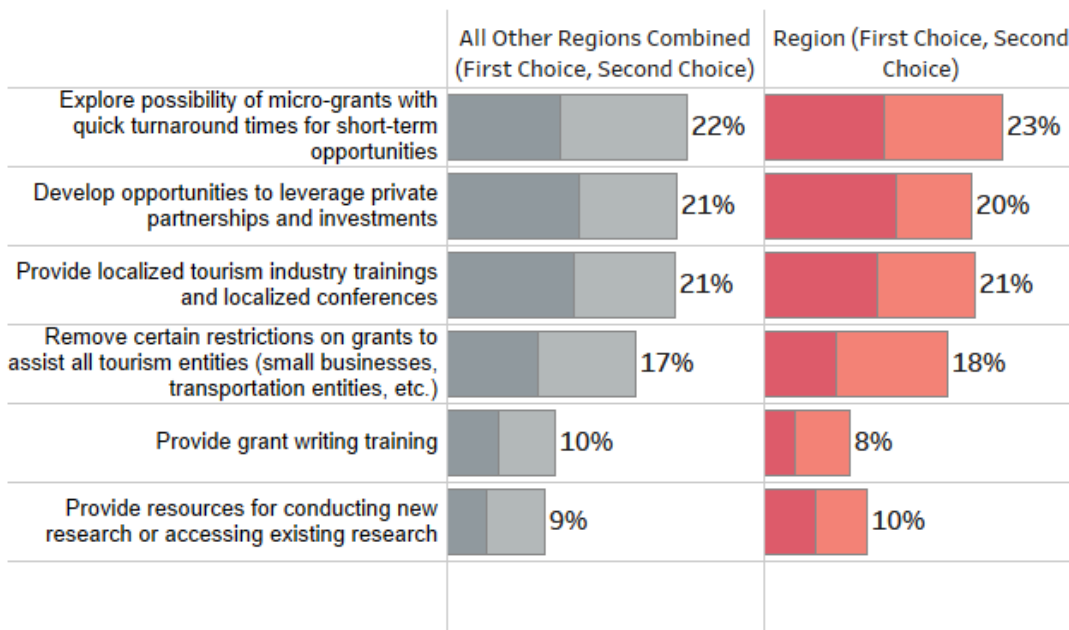
Q: Please indicate how you would prioritize the following tactical STRATEGIC PARTNERSHIP OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may 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 Willamette Valley favored exploring the “possibility of micro-grants with quick turnaround times for short-term opportunities,” with 23% of Willamette Valley respondents saying it is among their top-two highest priorities, and 9% citing it as their top priority. Eleven percent of respondents rated “develop opportunities to leverage private partnerships and investments” as their top priority.

Tactical Opportunities - Global Strategic Partnerships

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

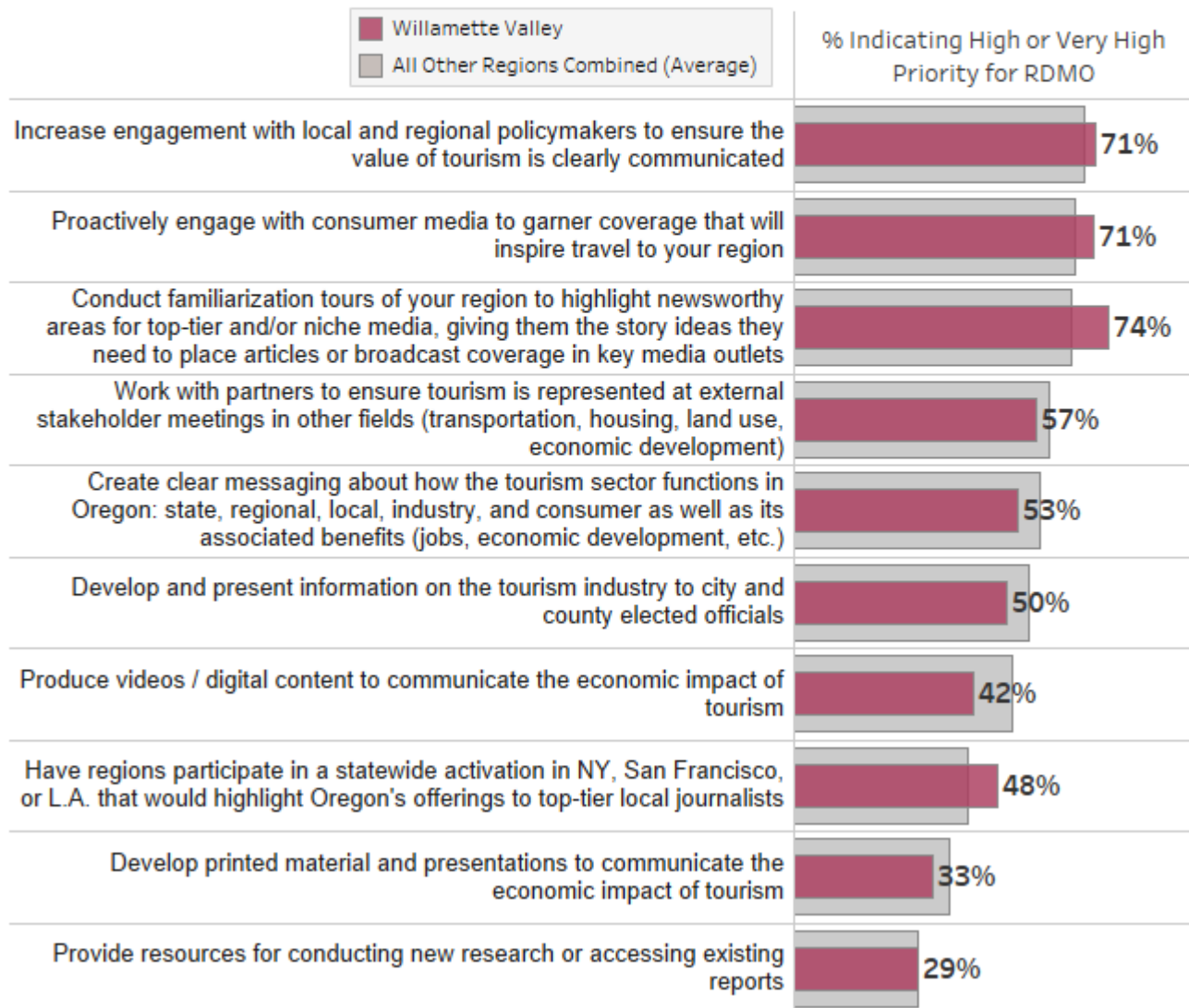


PUBLIC AFFAIRS AND COMMUNICATIONS

Using the same rating scale as in previous sections, Willamette Valley stakeholders evaluated several tactics related to public affairs and communications. Statewide, respondents prioritized increasing engagement with local and regional policymakers to ensure the value of tourism is clearly communicated highest. Willamette Valley respondents were more likely to prioritize conducting familiarization tours, with nearly three quarters indicating it as a high or very high priority (9% more than 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:

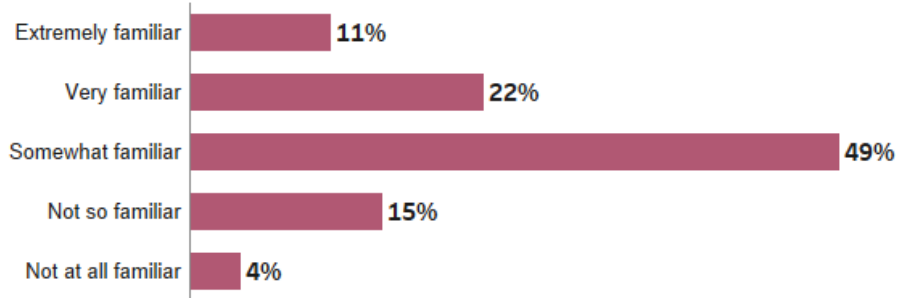
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Conduct familiarization tours of your region to highlight newsworthy areas for top-tier and/or niche media	17%	22%
Proactively engage with consumer media to garner coverage that will inspire travel to your region	16%	18%
Increase engagement with local and regional policymakers to ensure the value of tourism is clearly communicated	14%	12%
Work with partners to ensure tourism is represented at external stakeholder meetings in other fields	11%	9%
Create clear messaging about how the tourism sector functions in Oregon	11%	10%
Develop and present information on the tourism industry to city and county elected officials	10%	8%
Produce videos / digital content to communicate the economic impact of tourism	7%	7%
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%	3%
Develop printed material and presentations to communicate the economic impact of tourism	4%	5%

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. Custom questions that contained open-ended comments appear in the open-ended comment appendix.

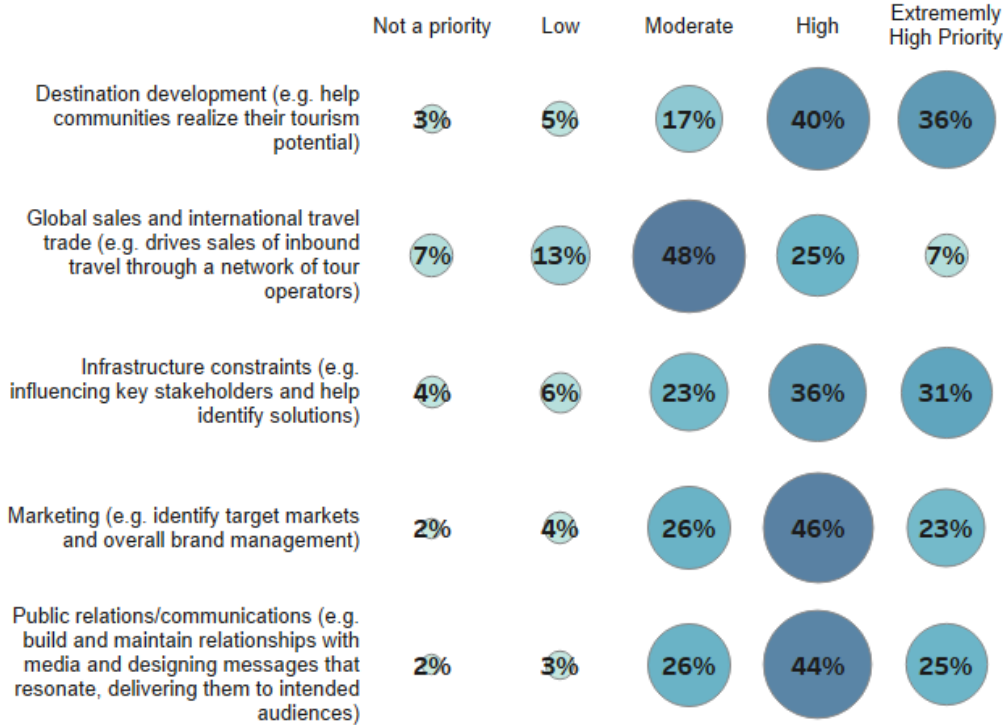
Familiarity with Willamette Valley Visitor's Association

Q: How familiar are you with the work of the Willamette Valley Visitors Association, which markets the region as Oregon Wine Country and serves as the Regional Destination Management Organization for the Willamette Valley?



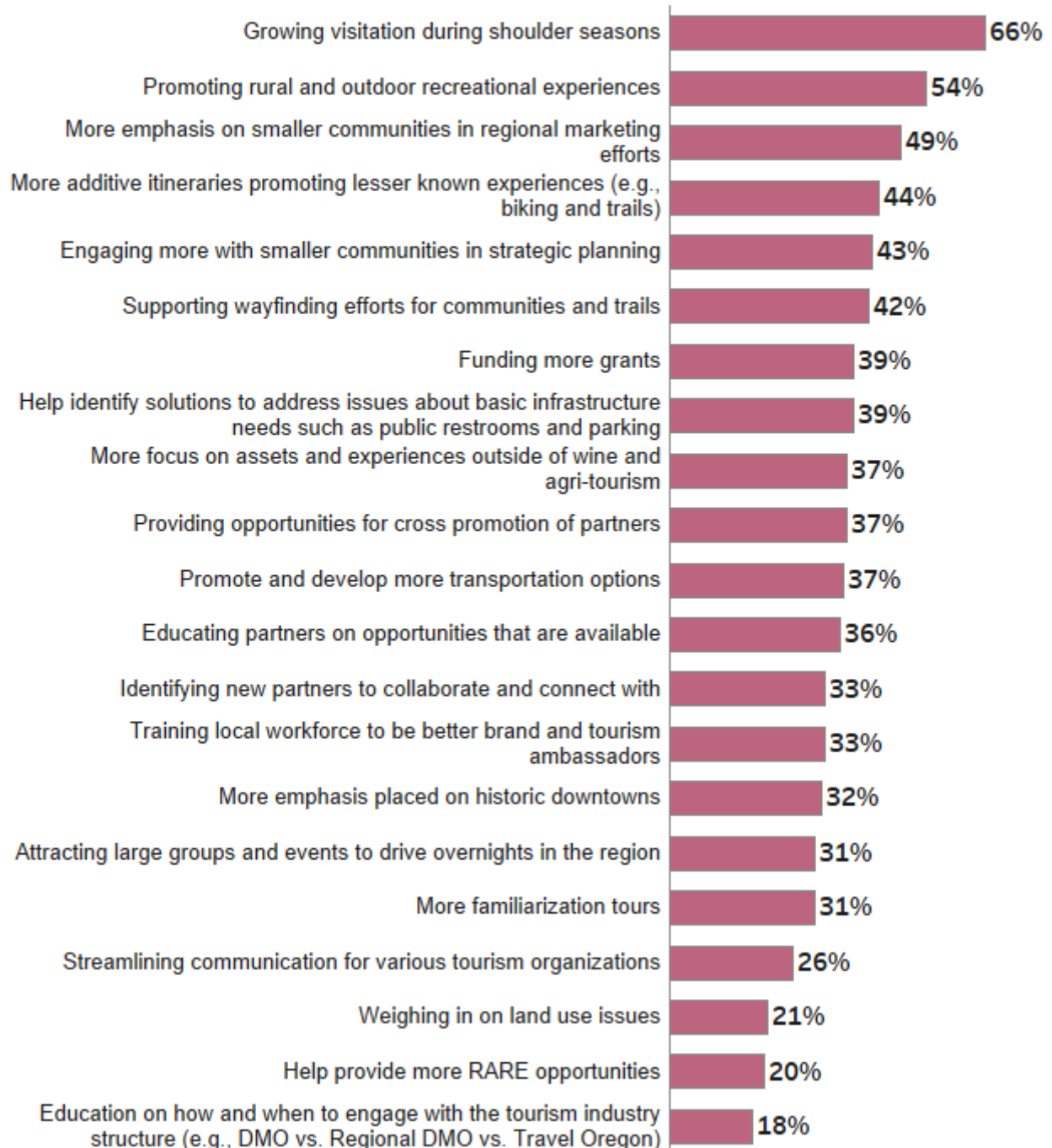
Willamette Valley Program Priorities

Q: Please indicate how you would prioritize the following program areas for the Willamette Valley Regional DMO over the next two years.



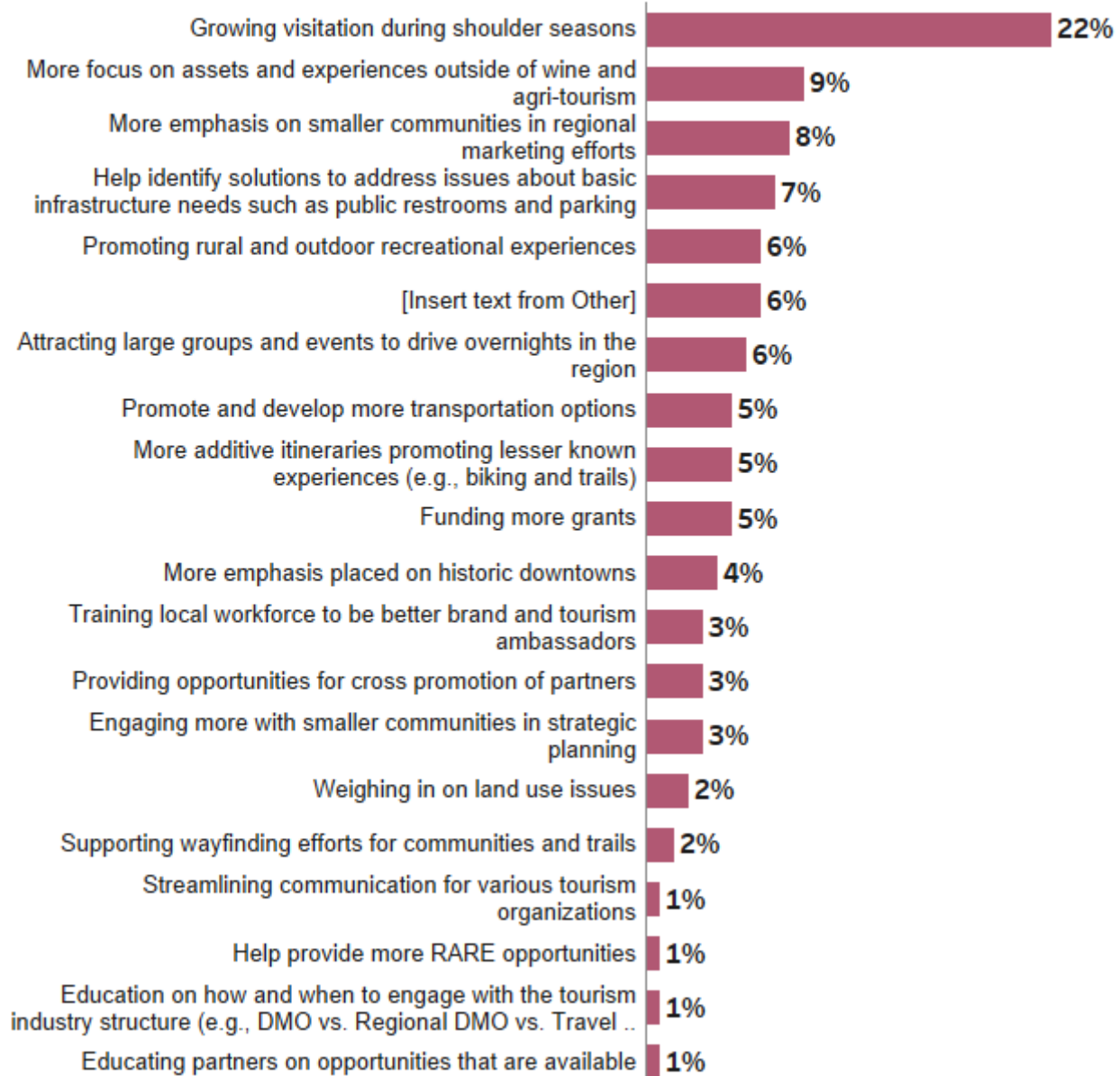
Willamette Valley Regional DMO Goals

Q: Listed below are goals developed from the Willamette Valley stakeholder listening sessions and surveys over the past two years. Please indicate which goals you want the Willamette Valley Regional DMO to address in the next two-year plan. (Select all that apply)



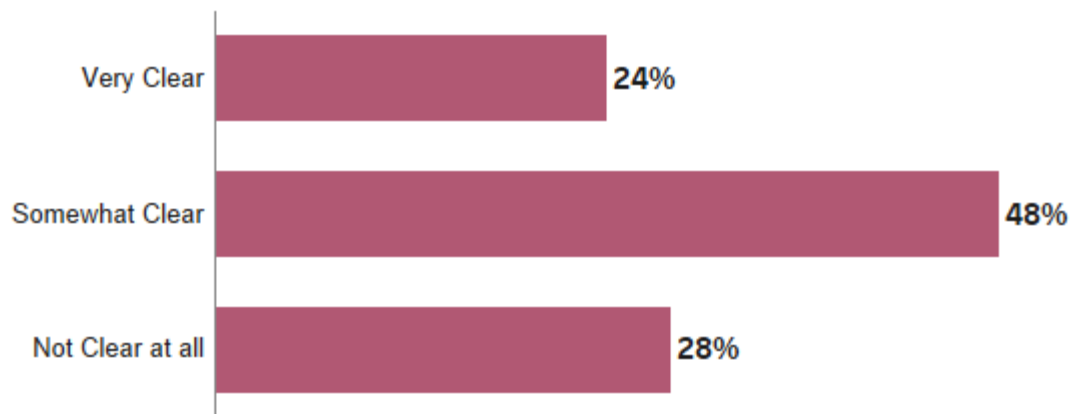
Familiarity with Willamette Valley Visitor's Association

Q: Of the goals you indicated you would like the Willamette Valley Regional DMO to achieve, please select which one is the most important to you.



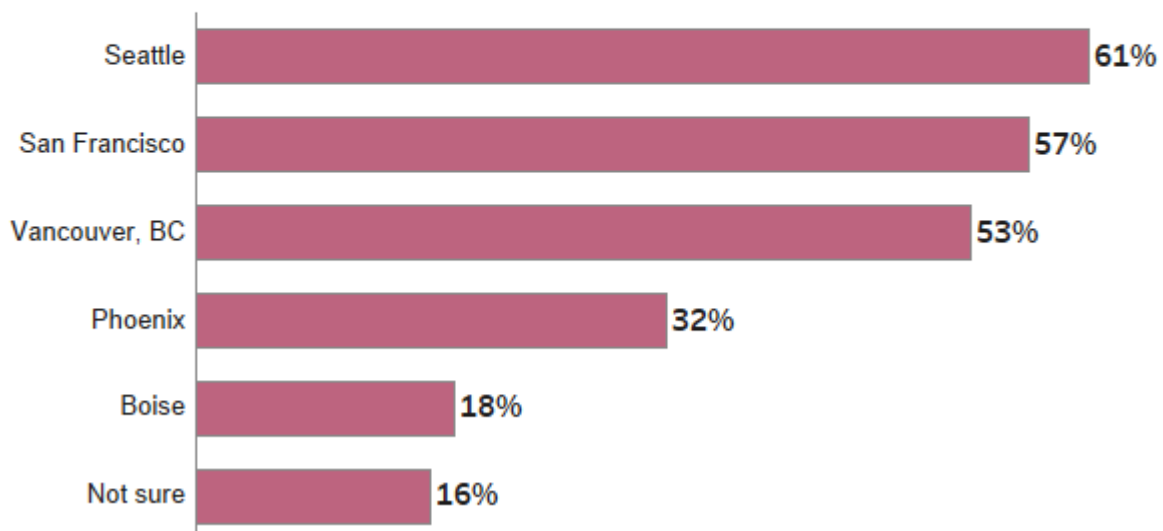
Familiarity with Willamette Valley Visitor's Association

Q: Please indicate your clarity level on when and how to engage with the different tourism structure levels (e.g., local DMO vs. regional DMO vs. Travel Oregon)?



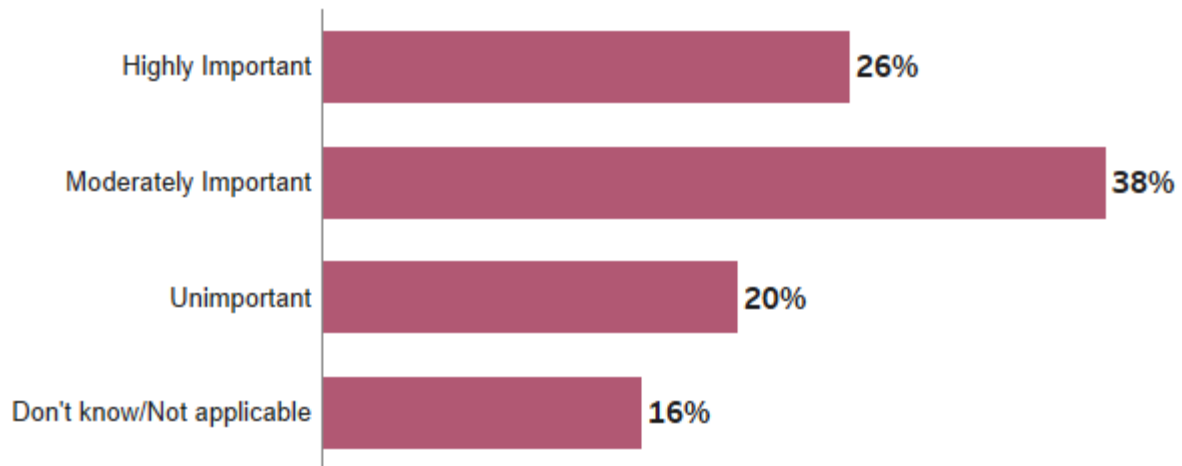
Preferred Out-of-State Feeder Markets

Q: According to the legislation that governs the Willamette Valley Regional DMO's funding, the organization's marketing dollars must be spent out-of-state. Please provide input on which out-of-state feeder markets you would prefer to see these marketing dollars spent in. (Select all that apply)



Familiarity with Willamette Valley Visitor’s Association

Q: The Oregon Restaurant and Lodging Association Education Foundation, in partnership with Travel Oregon, is creating a new Oregon version of the Guest Service Gold program. Using the seven core principles of the (updated) Golden Opportunities Curriculum created by the American Hotel & Lodging Educational Institute (AHLEI), will allow ORLA to extend its focus to be applicable to more members of the hospitality industry in addition to lodging. With this in mind, how important is it to the success of your business or organization that you have access to frontline service training.



Question	Average
Without knowing the specific details of the program, approximately how much would you be willing to pay per person for this type of online training? Scale from \$0 (not willing to pay) to \$60 per person	\$24
Without knowing the specific details of the program, approximately how much would you be willing to pay per person for this type of in-person training? Scale from \$0 (not willing to pay) to \$100 per person	\$32

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>	Other	Marketing and Messaging	Product Development	Shoulder and Off-Season	Lodging Development	Agritourism and Wine	Spread Visits Through the Valley	Regional Coordination and Cooperation	Transportation Options and Alternatives
Willamette Valley	■	■	■	■	■	■	■	■	■
• Increase infrastructure (lodging, eateries) to attract additional visitors.					■				
• Again - please find a way to make sure the McKenzie River area gets the attention it needs (I imagine Oakridge is in the same boat) - We are in the wester part of the Cascade mountains but the majority of the promotion for the cascades goes to Central Oregon (Bend and Sisters).							■		
• Because of our small population we would benefit from an allotment to manage tourism activity locally.	■								
• I would like more local people in Portland, Salem to know the locations and what small Willamette Valley towns offer. We should be on their quick-weekend getaway agenda.							■		
• Increased shoulder-season visitation				■					
• Address homelessness and the perceived/real safety/optics of panhandling, loitering, and anti-social behavior.	■								
• We'd like to see North Santiam River Country become a known and beloved destination in its own right, with a robust outdoor recreation product, a strong regional tourism stakeholder network that collaborates across community lines to promote "others" w/in our micro-region beyond their own personal turf, and a well-oiled marketing channel through our DMO, RDMO and TO that brings visitors to our area & leverages our local marketing capacity to reach the world.							■	■	
• Increased tourism through longer stays. Develop and implement strategies to address impacts of tourism on natural resources and community livability.	■								
• I would like to see live cams that could be viewed at several destinations.		■	■						
• We really need help with promoting our area on professional websites and professional social media sites. This would be a huge benefit to partner on with Travel Oregon, and would take some of the pressure off of volunteers at the Main Street level.		■							
• Focus on what is most unique, sustainable, and authentically Oregon besides wine all the time	■	■							
• Attract more visitors to the area between late October and early May.				■					
• More travel to driving-distance attractions in smaller towns, especially for day trips, from metropolitan areas like Portland and Eugene							■		
• Year round tourism for wine tasting				■		■			
• By focusing on sustainable rural business development, visitors and residents will benefit. As rural Oregon thrives, jobs and housing (2 big challenges) will expand naturally.	■		■				■		
• Considering building a tourism infrastructure with accessibility at the forefront because everyone will benefit from this design.	■								
• Completing key segments of the Oregon Coast Trail will have a large impact on people visiting the coast and can be used to promote visitation.			■						
• Actual family wage jobs would help us. A focus on tourism just widens the economic gap for people trying to live on tourism (minimum wage) jobs	■								
• Set a goal to produce a "fully-informed" cadre of local, regional, and state representatives/legislators who can act to influence and increase the presence and importance of sports tourism.							■		
• Focus on the destigmatization of cannabis by highlighting educational and friendly, welcoming atmosphere for the industry.	■	■							

<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>	Other	Marketing and Messaging	Product Development	Shoulder and Off-Season	Lodging Development	Agritourism and Wine	Spread Visits Through the Valley	Regional Coordination and Cooperation	Transportation Options and Alternatives
Willamette Valley									
<ul style="list-style-type: none"> Develop a program offering small businesses low interest loans for development projects. Even with excellent credit history, many small business struggle to develop / improve existing properties. 									
<ul style="list-style-type: none"> Oregon is already very appealing. The infrastructure needs to live up to the expectations that visitors have. You can find cool places to visit anywhere, but everyone understands how much it sucks to be in traffic, or waiting for a bus with 30 min headways, or being limited to wherever MAX goes. If tourists can't get around, they won't go anywhere. 									
<ul style="list-style-type: none"> I don't feel that paying people to fly around the world and waste tax payer dollars to "promote" Oregon is an effective use of money. There are PLENTY of tourists here already. Concentrate on managing what we already have. 									
<ul style="list-style-type: none"> Oregon cities and counties should not discriminate against the naturist/ clothing optional communities. Otherwise, all the rhetoric about diversity, equity and inclusion is meaningless. Enact laws clearing the way for expansion of C.O. tourism everywhere in the state. 									
<ul style="list-style-type: none"> Appreciation and support for the varied types of recreation. Recognition that while we all enter the outdoors for different reasons, our shared love of the outdoors should bind us. Breakdown the growing tension between recreators who perceive their form of recreation to be morally superior. 									
<ul style="list-style-type: none"> We need to "round out" the Willamette Valley visitor experiences to enhance their experiences and increase the duration of their visits. 									
<ul style="list-style-type: none"> Develop a systems solution for the development of the Willamette Falls area (both sides) to maximize tourism potential. 									
<ul style="list-style-type: none"> Main Street Roads and building improvements, homeless population safety issues and providing resources to local officials to better understand impact of tourism on small businesses. 									
<ul style="list-style-type: none"> Create and maintain a successful workforce development and training program for workers for the future of tourism and the hospitality industry 									
<ul style="list-style-type: none"> More mid-range traveler accommodation options, more rental units for hospitality staff, better transportation options - why is Uber/Lyft so severely lacking in wine country? It is the lifeline of tourism and we're missing a huge target market (21-40 years olds) by not having flexible transportation options. That generation is unlikely to hire day tours/private drivers - we need Uber/Lyft in the absence of any decent public transportation in wine country. 									
<ul style="list-style-type: none"> Have a functioning Travel Yamhill County organization. 									
<ul style="list-style-type: none"> I am tired of our beautiful state being overrun and developed to the detriment of all by tourists and developers. Something has to be done to get a little sanity here. We are loving our state to death - especially the lush western half of the state. It is not just Oregon's problem, it is a global problem. 									
<ul style="list-style-type: none"> Promotions to increase tourism in the offseason! 									
<ul style="list-style-type: none"> A functioning RDMO that focuses on Yamhill County and promoting off-season business (Nov-Apr). 									
<ul style="list-style-type: none"> I'd love WVVA to be an effective RDMO that represents all the DMOs. I think you know WVVA has problems at the base and so it's hard to imagine specific programs being carried out. Functional RDMO would be a great outcome. 									
<ul style="list-style-type: none"> I would like for the tourism growth geared toward the Oregon wine industry to impact the entire Willamette Valley and not just the northern Willamette Valley. 									

<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>	Other	Marketing and Messaging	Product Development	Shoulder and Off-Season	Lodging Development	Agritourism and Wine	Spread Visits Through the Valley	Regional Coordination and Cooperation	Transportation Options and Alternatives
Willamette Valley									
<ul style="list-style-type: none"> Promote the Oregon Pledge idea. That is absolutely critical for our natural landscapes. Our scenery and opportunities are what bring people here in the first place. We need to communicate with tourists to preserve them. 									
<ul style="list-style-type: none"> Complete the Willamette Water Trail project to include all communities along it and improve recreation access 									
<ul style="list-style-type: none"> Encourage more off-season travelers and spread the visitation throughout the valley, and not just to the main cities. 									
<ul style="list-style-type: none"> Transportation networks that allow tourists to access and explore our region comfortably and conveniently while minimizing environmental impact. I would love to see a light rail or other mass transit system through the western side of the W. Valley that connects PDX to Eugene, with a spur to Salem, and excellent local public transit at the stops. (Ideally replacing helicopters - they are becoming an incredible nuisance in the W Willamette Valley but are currently the only way to offer high end visitors a convenient way to access the region) 									
<ul style="list-style-type: none"> I would like to see the implementation of a TID to boost marketing and development opportunities of the region. 									
<ul style="list-style-type: none"> A hotel in Downtown Albany. 									
<ul style="list-style-type: none"> Develop Oakridge into a true mountain bike mecca with a real bike park and more trails. 									
<ul style="list-style-type: none"> Expand transportation options to alleviate congestion in areas of high tourism, and assist small businesses with marketing and tourism outreach 									
<ul style="list-style-type: none"> I would like my region to pursue a music festival event that enhances our overall visibility. 									
<ul style="list-style-type: none"> Funding for paid positions. Currently dependent on volunteers. 									
<ul style="list-style-type: none"> We would like to see an economic benefit/impact to our region through tourism that is consistent and see that a wider variety of stakeholders are involved. Our rural areas need more lodging/accommodation options to really thrive. I would love to see some grants to help facilitate this in our region. 									
<ul style="list-style-type: none"> Be better at promoting all tourism opportunities - heritage in particular. Be better at not assuming one person only has one interest. 									
<ul style="list-style-type: none"> While encouraging use, keep Oregon clean, safe, and friendly. 									
<ul style="list-style-type: none"> A tighter relationship between the destinations and the DMO/RDMOs. How does my destination/promotion end up in Travel Oregon's visitor guide, or get to be a stop on a FAM tour? I don't think this is very clear to most destinations in our region. 									
<ul style="list-style-type: none"> How to increase off season business 									
<ul style="list-style-type: none"> The area is looking for funds, in order to do that you must use what resources available already in the region, dont create new industry until current is fully utilized. Create this area as a destination, make the area "look cool" it needs to offer interesting points to sell to the public/visitors. Model after Hood River, that city has done a great job getting visitors to spend money that people want to be there. Maybe create a busing system from the Airport to The dalles a few times a week, create a travel package including ag processing plants, wineries, local breweries with nightly music, outdoor activities, river rafting, fishing, power plant tours, include skamania lodge, spas, soaking pools, golfing. Advise travel trailer parking/night stays, KOA camp grounds locally. Money is spent by families, millennials and retirees basically include/sell all aspects i noted above for every generation... 									
<ul style="list-style-type: none"> Continuous improvement of air travel services, making it more convenient and affordable to fly in and out of the region. 									

<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>	Other	Marketing and Messaging	Product Development	Shoulder and Off-Season	Lodging Development	Agritourism and Wine	Spread Visits Through the Valley	Regional Coordination and Cooperation	Transportation Options and Alternatives
Willamette Valley	■	■	■	■	■	■	■	■	■
<ul style="list-style-type: none"> Farmers markets are awesome - and can be more prominently featured in agritourism efforts (ie not just on-farm opportunities). 		■				■			
<ul style="list-style-type: none"> We are a small community, and run our tourism with volunteers who may not have the professionalism to effectively handle their roles. They tend to focus on wine tourism only, because that is in their realm of experience - but this often results in missed opportunities. Building our capacity and professionalism across a wide swath of engaged community members would benefit our small community as well as non-wine related small businesses. 		■				■			
<ul style="list-style-type: none"> Create some activity or event that would create at least one busy week or weekend every month . 				■					
<ul style="list-style-type: none"> I would like my region to have a way to reach out to national and international audiences to promote unique activities in our communities. 		■							
<ul style="list-style-type: none"> More food/farm-focused tourism opportunities. 						■			
<ul style="list-style-type: none"> Transportation/infrastructure improvements or alternative methods of travel created to get visitors out to the region without always having to drive themselves 								■	
<ul style="list-style-type: none"> I would like to see less heavy emphasis on wine and more on art and other attractions. 						■			
<ul style="list-style-type: none"> More agritourism and focus on our wine, beer, and distilling industries. 						■			
<ul style="list-style-type: none"> Clean up downtown Eugene, get control over the homeless problem that is very prominent where tourists would like to visit. Promote Oregon's beauty to the world. 	■								
<ul style="list-style-type: none"> Enhanced communication and availability of alternative means of transport, alongside increased, but sustainable, outdoor recreation. 		■						■	
<ul style="list-style-type: none"> Identifying and supporting smaller local municipalities that have most potential for increased ROI for tourism. Geographically underperforming destinations... while increasing multimodal transportation and decreasing bottlenecks in peak seasons. 						■			
<ul style="list-style-type: none"> Increase development of sustainable products/experiences that accurately reflect the authentic character/nature of our region. 			■						
<ul style="list-style-type: none"> Maintain status as best wine region in country to visit. 						■			
<ul style="list-style-type: none"> We would like our region's multiple assets to be highlighted more equally with opportunities for people from a variety of demographics to enjoy; for our tourism industry partners and front line to be educated as to the value of hospitality and be prepared to welcome visitors with grace and care; and for our policy and decision makers to be educated so they recognize the value of tourism as an economic driver and also as an opportunity to improve the quality of life and pride in community for residents. Our region is working on these areas using a variety of tactics and we would like to see these efforts continue over the next several years. 	■	■					■		
<ul style="list-style-type: none"> To be able to instill upon our elected officials the importance of tourism to our communities enlght of so many trying to recreate themselves due to severe decline in natural resource extraction. 	■								
<ul style="list-style-type: none"> I would like to see our region create clear marketing goals and desired outcomes, such as intentional partnerships with key industries, use of data to create marketing personas/target demographics and then align paid and non-paid media opportunities to reach those people, and better and more frequent communication about long term opportunities - our stakeholders do want to hear about wins, but they also want to know how they can access and be a part of future opportunities or have the ability to participate in promoting key messages before they happen, not after. 		■							

<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>	Other	Marketing and Messaging	Product Development	Shoulder and Off-Season	Lodging Development	Agritourism and Wine	Spread Visits Through the Valley	Regional Coordination and Cooperation	Transportation Options and Alternatives
Willamette Valley									
<ul style="list-style-type: none"> Our region needs to become much more strategic with its initiatives and much more capable of providing an ROI on existing programs. For instance, in a recent meeting, our RDMO used two different data sets to define the ROI of a campaign. Achieving these two points would allow its DMOs and key stakeholders to have more confidence in our RDMOs ability to function. 									
<ul style="list-style-type: none"> More clearly articulate how improvements for tourists are also improvements for locals, and develop tools/opportunities that meet both groups' needs/desires. (I.e. a slick website that has all local trails in a region for visitors to access will also be used by locals) 									
<ul style="list-style-type: none"> I live and my business in on the fringe of a RMO. Much of the effect of my business will therefore go well beyond my specific area and yet I have to identify with only one area - and in my area that does not necessarily mean the larger/more populated area. 									
<ul style="list-style-type: none"> Oregon is losing out on a sector that provides steady, recession-resistant travel: sports tourism. We desperately need assistance with marketing, branding, trade show representation, national and international visibility and outreach, fairs, grants/funding. 									
<ul style="list-style-type: none"> Expand on the arts and culture in our area and other key industries rather than focusing on the one primary one. 									
<ul style="list-style-type: none"> The natural beauty of Oregon is something that can't be improved upon. Let's get more people here to enjoy it, especially when they are already here for conferences and other events. 									
<ul style="list-style-type: none"> I'd like to see increased visitor-ship to our region during the 'off-season.' There are adventures to be had and places to visit in our region even when it's raining! 									
<ul style="list-style-type: none"> Fires and smoke hinder tourism. Put them out. More focus on non season dates - Winter/Spring. Need More conferences. 									

Appendix, Continued – Open-Ended Responses

Choose the top five Travel Oregon programs that you believe are the most impactful: Other (please specify)
coordinating communication/marketing/messaging up and down the DMO/RDMO/TO vertical structure

I don't know enough about these programs - therefore I can't select 5.

I'm having a hard time seeing any impact from Travel Oregon in our community in the McKenzie River area of the Western Cascades

I'm new to working with Travel Oregon so I don't have a lot of data to work with for deciding what's the most impactful- but the first I heard of it was the "Only Slightly Exaggerated" animated video. Saw that when I lived in Arizona, everyone I knew shared it with each other, now I live here and am working with a city trying to further their tourism market. So that was impactful to me personally.

People come to our small communities, fall in love and wind up staying. Yes, business in general loves the short term \$ that roll in but in the long run these small lovable communities are growing out of the small cute stage into sprawling urban centers that people won't want to continue coming to see. Soon we will be one big urban sprawl connected to Portland and Salem like LA and who would want to live in a mess like that. In the past 60 years I have watched our town go from a quiet one stop light town to an urban nightmare with traffic jams. Not my idea of livability or of progress. Sure, someone from LA will still see it as quaint but not the majority of long time residents. Most of us wish we could put Governor Tom McCall's signs back up on the borders. - enjoy your visit but don't stay. or something to that effect. I saddens me to see so much prime farmland going under strip malls and housing developments.

Regulatory Relief

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:

Focusing some attention on other areas of tourism, i.e., sports tourism, events and conventions/conferences. Travel Oregon could greatly assist with national and international visibility which would provide valuable support to smaller destinations in the state.

How to keep Oregon livable while encouraging more outdoor recreation and increasing the state's population

I hate Oregon becoming so touristy. It encourages people to move here and contributes to overcrowding, traffic issues, and homelessness.

Supporting local government efforts to address costs related to visitors: law enforcement, search-and-rescue, downtown beautification efforts

Sure, encourage visitors but not to move here. As I mentioned previously; People come to our small communities, fall in love and wind up staying. Yes, business in general loves the short term \$ that roll in but in the long run these small lovable communities are growing out of the small cute stage into sprawling urban centers that people won't want to continue coming to see. Soon we will be one big urban sprawl connected to Portland and Salem like LA and who would want to live in a mess like that. In the past 60 years I have watched our town go from a quiet one stop light town to an urban nightmare with traffic jams. Not my idea of livability or of progress. Sure, someone from LA will still see it as quaint but not the majority of long time residents. Most of us wish we could put Governor Tom McCall's signs back up on the borders. - enjoy your visit but don't stay. or something to that effect. I saddens me to see so much prime farmland going under strip malls and housing developments.

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:

address gen x, y, z communication channels in marketing mix for rural areas

Create a Farm Loop in Yamhill County Create safe cycling opportunities

Cross-promotion in partnership with other industry sectors that impact tourism, such as agriculture.

Helping stakeholders engage in current marketing efforts.

Identify and develop unusual, off-beat activities in small rural communities

Increased focus on value of agritourism in Oregon, expansion to include farmers markets

Appendix, Continued – Open-Ended Responses

It's very important that all marketing efforts have a clear target market in mind and clear goals/ROI before starting. Our region lacks data and understanding of who our target markets are and where they are, so marketing efforts are often "one and done" or are deemed a success when no baseline of success was ever determined. Also, the website is highly visited but is not helpful to consumers wanting to plan a trip to our region, instead forcing them to click through a lot of places to then be redirected to sub-regional websites. I would like to see the website re-thought out and establish clear goals.

Local broadcast television has a large footprint and would be extremely effective in showcasing areas of the state that would be great to visit. Promote local get-a-ways. Oregon is a very transient state and a large segment of the population don't even know what is available within a days drive. The local attractions would encourage people to visit and stay in those areas.

Market to promote accessible outdoor experiences that display people with disabilities and diverse people authentically experiencing the outdoors.

Once you capture individuals or groups interested in visiting, hand them off to the local areas more cleanly (engage with local groups and don't direct traffic to Expedia)

Our region often gets overlooked as we are in the cascade mountains but we are in the Willamette valley zone. I hope Travel Oregon can find a way to market teh McKenzie River Valley better. We are a small community but have crazy high value tourism attractions.

Outreach to smaller local city councils.

Please help us market in the sports tourism sector!

TBD

use all free advertising first before paying for advertising see what works then go from there.

Visit but don't stay.

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:

Add a cruise ship port in Newport.

beer/wine/culinary media & adventure travel

Branding & marketing of Oregon outdoors so that it is globally recognized and admired.

Have the media actually stay in/on a ag area to do the tour and spend a couple of days. Small farms offer experiences and education to visitors.

It would be nice for Travel Oregon to create a scholarship fund for small operators to participate in international trade shows/promotions.

More direct partnership opportunities between TO and businesses in the industry to promote specific and destination marketing

Need to educate the local market before developing internationally.. Get the base running well and build from there

OR21 host community connections

Relationships with local media outlets

TBD

Teach those providing Oregon tourism oportunties to also educate their clients to respect the land and Oregon communities to keep Oregon livable.

We need to train our workers to engage on the global tourism platform in order to accommodate the business from your hard work.

Work closely with chambers and economic development policy makers.

Work with small individual properties for FAM trips and travel trade (I know it's supposed to happen at the RDMO level, but it doesn't with WVVA)

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:

Allow for profit businesses to obtain grants.

Appendix, Continued – Open-Ended Responses

Beat the drum as often as possible, w/in local communities & stakeholders out to policy wonks & legislators, re: the value of tourism to the Oregon economy (i.e. this is not a minor sideline); talk more about tourism careers as a viable career path (does not just mean housekeeping at a hotel for minimum wage); encourage more cross-promotion across intra-regional lines (wineries w/ outdoor rec destinations; cultural heritage w/ sporting events, etc) -- we live too much in our silos and will get more visitors to stay longer in the region if they have an interesting, diverse range of activities from which to draw; teach more about the value of collaborating w/ and marketing each other's communities, events and attractions in our own mini-regions and intra-regionally -- we still get too caught up in wanting "mine" without reference to what the visitor may want to experience beyond our mini-region borders

Broaden the base of local participants to include organizations (cultural, education, etc.) that do not see themselves as part of a local tourism initiative.

Can small communities opt out of increasing tourism in their area? Training to respect the land and vehicle laws (i.e. parking on hwy 101 to access the Hobbit trails). Provide alternative park and ride options

Expand naturist/clothing optional recreation in the state. It is the fastest growing travel sector and participants are generally more environmentally conscious than the general population.

Focus on rural communities so tourism can branch out from the population centers and tourists can enjoy the beauty of the state as a whole

Help for smaller communities that have lost their representation and identity because there is not an active Travel organization representing them any more (Yamhill County).

I am seeing smaller communities not wanting any tourism. It's kind of a "I want my little town to be like it was 50 years ago before all these tourists found us." EX: Manzanita stopped its fireworks for Fourth of July. The public sentiment was: too many tourists.

I believe the tourism industry's potential with transportation is to partner with private business and lobby governmental bodies to educate and inform - the tourism industry should not be creating transportation options themselves as suggested here. However, transportation is a huge need in our region & other rural areas, and I believe the opportunity lies in partnership to create more/better transportation. Outdoor rec investments, unless the opportunities can drive tourism in the off season as well as summer, should be limited. Much more communication and involvement should be done by regional and state tourism agencies to educate leaders in business and government on the opportunities in tourism and appropriate ways to spend tourism dollars. I see a lot of grant dollars going to one-off campaigns or events that have no long term effects; if grants are going to be a continued focus there should be priority for efforts that have long-term plans. Tourism workforce training and partnership with school/universities is a must.

I don't think increasing tourism is a high priority.

It would be neat to have TO develop a internship framework for tourism companies to easily acquire interns.

None.

Provide training on how to create welcome for people with disabilities, special needs, multicultural people, non-English speaking people, refugees, and people of color

TBD

Training and support for other, statewide entities that intersect with the tourism industry and have overlapping regional/local stakeholder groups.

Turning back the clock to the 1956's

Working with local municipalities to develop leadership and better understanding of tourism opportunities and the importance partnerships and small town destination development.

You cannot read the choices on this entire survey to identify the top two choices. And they are not in order.

You need the local leaders involved, of course, but they are swayed politically, election-wise, etc., by local citizens who may or may not be savvy in the terms the value of tourism. I think there needs to be a more grass roots approach added on to reach the everyday 'local ' citizen to truly sustain progress in this area. More visibility of RDMO's in the local area.

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

Appendix, Continued – Open-Ended Responses

A lot of confusion in our region comes from the lack of targeted marketing and limited communication on what's coming up for the industry - instead, the communication is about what's already been done. There is a lot of misunderstanding by tourism stakeholders about the value of tourism, a lack of understanding about how the tourism industry works, and a lack of communication and open mindedness about how businesses can partner with tourism to better achieve everyone's goals. This leads to a lot of work and running around trying to figure things out. The RCTP tracker on the industry page is a start, but how does this relate to stakeholders who don't understand what it means? I'd like to see a clearly communicated plan/calendar of activities for the coming two years, with areas clearly marked where businesses and stakeholders will have the opportunity to participate so all can anticipate and plan and combine efforts, rather than just hearing about something at the last minute or after it's already been done.

Allow partners to work with Travel Oregon to access the media resources and tools and connections that you have to help us conduct our work that ultimately serves all Oregonians and the tourism industry.

creating networks of communities to advertise and promote

Develop stronger relationships with state and local arts/cultural heritage agencies & providers

Ease or remove ODOT highway access permitting controls so tourists can get to venues where desired.

education and training along with funding need to be met before doing anything else

Finding partnerships between local potential partners/sponsors and the events you are bringing in to the state.

Food-based and agritourism

I think you need to work with local city councils on the value of tourism to their communities.

None.

opportunities for family oriented tourism

Partnerships with Department of Ag and others to promote "Made in Oregon" purchases out of state. People who have a great experience here will be more likely to buy blueberries, flyrods, etc. back home if they know it comes from Oregon.

Preserve what we have, even if that means not advancing tourism.

Professionals in tourism should be assertive in providing corrective help to communities.

Provide video that can be viewed online to educate about grant writing or industry trainings. They can then be viewed at the participants time.

removal of county permitting restrictions that prevent small business development in rural communities aimed at attracting and serving tourists

Restricting grants to only non profits has been a restriction that has hampered our community's ability to tap into the benefits of the grants.

Sales tax for tourists

Support and invite nontraditional tourism industries; innovators, farmers, students, etc to learn about the tourism industry. Create opportunities for people to become involved in the industry.

Tapping into the growing minority populations

TBD

This survey is way too long.

Travel Oregon does not "hand off" to the local areas very well, either with media tours or online tourism research.

We have seen very little outreach or communication from Travel Oregon to our small charming town. A stronger communication system with small town to build a cohesive marketing partnership to promote all areas, not just the favored few. By providing a diversity to our tourism we will stay stronger should there be an unexpected loss of one sector.

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.

1. Infrastructure that supports safe cycling for cyclists and motorists 2. Farm loop for the Willamette Valley - Yamhill County

Appendix, Continued – Open-Ended Responses

A lot of the choices were based off old thinking where we create content and videos. I believe the world has moved to using social media influencers to create brand awareness. Perhaps we could take a more modern approach and utilize social media influencers to carry the messages. In essence it already happens but now its a free for all with influencers posting about a place and their followers over running it.

Again, focusing on sports tourism in the PR/communications sector would be invaluable assistance.

Any tourism promotion efforts also need to emphasize sustainability. It does little good to promote outdoor recreation if that activity results in destruction or diminishment of the natural resources that make it possible.

Developing videos and digital content importance doesn't tell the story you are wanting - needs to be connected with HOW THEY WILL BE UTILIZED as well.

Direct relationships with local media organizations

Increase access via public transportation

Local municipalities (city councils) are the key to unlocking, planning, and delivering authentic tourism experiences within the limitations of its infrastructure and proximity to desirable natural resources and visitor experiences.

Money needs to allocated to those business that directly deal with travelers, such as promotion of major events happening during the year.. like how hood river has developed. People from PDX think HR is cool, they think nothing of the Dalles as a destination!

My concerns are mostly about making sure our area is represented. Seems we get left out.

Our region tends to focus on non-paid opportunities in PR and media relations, rather than making strategic investments based on data-supported targeted campaigns. I'd like to see this change in the coming year.

Reach out to AANR and The Naturist Society to promote clothing optional tourism opportunities and develop additional designated locations for them.

Reflect the community at large in the PR/Comm. Potential visitors are more apt to seek out outdoor tourism if they see someone that looks like them or represents them doing the same activity.

Respect of the land such as "pack it in pack it out". Encourage recycling and if there is no parking, don't park on the road. There is a substantial visual increase of garbage and dog doo (I am a dog owner and love that they can share outdoor adventures) on hiking trails. Vehicles parked roads reduce a two lane road to a single lane, which is not allowed here in Oregon. Approx 20 cars parked on highway at winter falls at Silver falls SP earlier this year. The message of welcoming ppl to Oregon needs to include keeping the state safe and clean. Don't come here to trash it. Not sure why we want to continue to encourage over use and abuse of the land for the sake of tourism. Balance it by educate that littering is not only against the law but affects the beauty of the land. Have recycle bins available with bags for packing out garbage. Put up reminder signs for those who are not aware of Oregon's recycling programs. Have law enforcement keep the roads clear when it's used for parking. For example if travel Oregon's goal is to double the use recreation, then double the parking, education, restrooms, garbage cans, law enforcement, etc. It's very lopsided. Recruit volunteers at parks and trails to educate and encourage respectful use of the land. Have PSA with tips of what to do if parking lots are full or how to properly dispose of garbage

TBD

This survey is way, way too long

Videos are great to show at civic groups, organizations, community meetings - easily gets the message of Travel Oregon out there and helps invoke discussion.

Way, way better communication with all stakeholders. Not just the big ones.

Why focus on NY, SF, and LA, the most jaded of all US markets? Go for B- or C-markets that will be much more receptive to our region. Those 3 cities mentioned won't be nearly as intrigued/interested.

Work with smaller communities not just the larger cities. There is lots of information for eg. Portland, Eugene, etc.

Yamhill County might need help teaching the county that a TLT is good.

According to the legislation that governs the Willamette Valley Regional DMO's funding, the organization's marketing dollars must be spent out-of-state. Please provide input on which out-of-state feeder markets you would prefer to see these marketing dollars spent in. (Select all that apply): Other city outside of Oregon (please specify):

Appendix, Continued – Open-Ended Responses

any desert city!

Austin

Austin, TX

Chicago

Chicago, DC

Chicago, Miami, New York, Dallas

Chicago, NYC, Texas, Georgia, Denver, Boston

Chicago: Many daily flights to OR: They have a food show, we should participate

colorado, arizona

Dallas

Dallas, Chicago

Dallas, TX

Denver

Denver, Chicago

Denver, Chicago,

Denver, Chicago, NY, Florida, Texas

Dixie Washington

Houston or Dallas

How would I know? Why is the funding so restrictive?

LA

Los Angeles

Los Angeles Area

Los Angeles, Chicago, Miami

Memphis

Note: Canadian market very dependent on currency exchange rate

NYC

Pittsburgh, PA

San Diego

Texas - Dallas, Austin, Houston - Chicago

Vancouver, WA

Wherever your research indicates the best opportunities lie

Please share any additional feedback you believe would be helpful for the Willamette Valley Regional DMO to have in order to help grow your community and/or organization.

A lot of agritourism has been focused on on-farm activities. We would love to see farmers markets promoted (even more) as key agritourism assets as well!

Be inclusive. Ask questions of the community you're trying to grow. Partner with organizations that reflect the community for outreach purposes and design.

Both weighing in on land use issues (i.e. responsible development of food offerings on farms) and public transportation options/development are high priorities.

Clothing optional resorts in town are needed to reduce travel to remote areas.

cross marketing opportunities /orgs to linger longer and promote overnight stays

Cross marketing opportunities with different businesses / attractions

Appendix, Continued – Open-Ended Responses

Despite our best efforts, we run into two issues consistently in North Santiam River Country: 1. running back into our silos and promoting our own event or attraction w/out connecting to those of others, which dilutes the potential visitor experience. This is not intentional but usually an outgrowth of a lot of volunteer effort going into one particular project, so we can get myopic & forget to poke our heads up and send visitors to other places nearby (and sometimes it's still the fear that "if we share visitors w/ others we will lose out," though more of our stakeholders than ever are understanding the value of collaborating across community lines; and 2. we have many well-meaning enthusiastic people who want to market our area or their own biz/attraction w/out having a defined product first. Though we've beat the drum often about needing a viable product (including a good experience once visitors get here) before you can market it, we need more training/reminders about how tourism works when it's effective. Will also add that we greatly appreciate the marketing channels that our DMO provides and this really helps leverage our local capacity. None of our communities or organizations has the marketing horsepower to get the message out about who we are and what we have to offer here, so this connection, and its links up the food chain to WVVA and Travel Oregon, is vital to our success.

Develop and promote offseason experiences

Focus on the unique needs of McKenzie River and Oakridge

Growing shoulder-season visitation should be top goal.

I have a sense that the WVVA has historic roots that connect it most strongly to Salem and the south valley. I know they're trying to overcome this but they have quite a bit of work to do still.

I would like to see a data-driven targeted marketing strategy with clear opportunities for a variety of stakeholders (communities, businesses, etc.) to collaborate on. I would also like to see more partnership with organizations that align with the region's goals, like cycling organizations, the Willamette Valley Wineries' Association, and others. Lastly, it would be helpful to have a strategic vision for our region's tourism growth developed and communicated clearly to all stakeholders.

If WVVA is going to continue to market itself at Oregon Wine County, it would be best if the RDMO worked in conjunction with existing wine associations on branding, messaging and strategies. Right now, there is a lot of duplication and little influence on promotional efforts from WVVA/sub AVAs.

It would be helpful to have outreach from the DMO to better understand how it fits in with all levels of tourism structure and how best to interact with staff.

Make time to visit us

Marketing should be focused on places that don't have what Oregon has to offer. I grew up in LA and the very green pictures of the northwest always appealed to me. Rain seemed magical. Embrace Oregon's strengths to attract people from places like NV, UT, NM, AZ, TX, eastern CA.

More collaboration between local vineyards, brewers, and downtown small community restaurants to highlight unique local and regional destinations.

Not sure what the methodology was for selecting the outside of state target markets - seems rather random and not based on data

Please do not ignore the sports tourism market.

Promote and develop the authentic character of our region. The wine industry does not have universal application.

Promote east of the Rockies

Seriously, drop the focus on wine. You exclude huge segments of the visiting public when everything is about wine (even if it's wine+).

Spend more money with the WVVA and not waste money on trivial programs.

Stop pushing for growth or we will look like LA in a few years. No one that truly loves Oregon wants to live in a Hell hole like LA

TBD

Using OTIS to capture all resources in our region.

We need more information on who the DMO is;; how to contact them; what types of information they can use for media release; help to have visitors stay in the area rather than stay in Portland and make a day trip.

What's a DMO? This survey is WAY too specific and uses undefined acronyms, which prevents answering these questions intelligently.