



# **2020 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY**

## **CENTRAL OREGON**

This report summarizes findings from a 2020 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. This report summarizes findings from respondents in Central Oregon with additional statewide results provided for context.

# 2020 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY

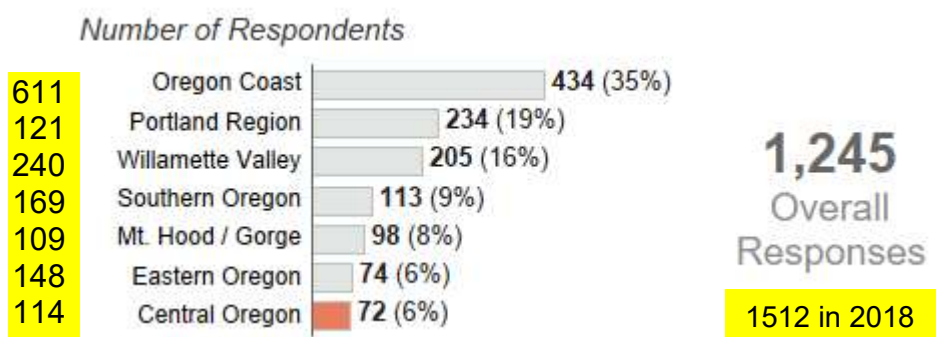
## CENTRAL OREGON

### SURVEY GOALS

The 2020 Oregon tourism engagement survey was designed to gather feedback from Oregon’s tourism industry professionals, employees, and stakeholders to provide feedback and direction for Travel Oregon and Regional Destination Management Organizations (RDMOs) in setting strategic directions and making funding and programmatic decisions in marketing, grants, tourist-related infrastructure, visitor management, and more. The survey was built on a framework of past stakeholder surveys; however, unprecedented circumstances surrounding COVID-19, wildfires, and racial injustice necessitated survey changes. The survey was developed collaboratively by Driftline Consulting, Travel Oregon, and seven RDMOs.

### DATA COLLECTION

The survey was conducted online and distributed in both English and Spanish between October 5-30, 2020, by way of direct email communications, a press release, industry newsletters and industry partners' distribution channels to an open URL hosted on Travel Oregon's industry website. The survey resulted in a total of 72 responses from Central Oregon and 1,245 responses overall. Sample sizes for individual questions vary. Results presented in this report are segmented by the region in which the respondent indicated that they live or work. Figures show results from Central Oregon compared to the statewide survey results (referred to as the “overall” in figures).



The survey results should be viewed as an aggregation of relevant and thoughtful feedback from stakeholders. 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. Because the survey was not conducted from a random sample, it is not appropriate to perform statistical tests on the data.

## **ADDITIONAL RESOURCES**

In addition to this report, results from the survey are accessible via an interactive online dashboard that enables further exploration of the data. Users of this online dashboard can segment questions by key variables to gain additional insight into segments of the Oregon tourism stakeholder population that were not addressed in this report.

The survey also resulted in an extensive number of open-ended responses. In several instances, selections of representative open-ended comments from Central Oregon respondents are presented within the report. These comments are presented in the respondents’ own words, and they do not reflect the opinions of Travel Oregon. Representative selections of open-ended responses from Central Oregon respondents are provided as an appendix to this report. All comments are viewable in an online dashboard with accompanying word clouds and bar charts.

Access the online dashboards by going to: [https://rebrand.ly/TO\\_Stakeholder2020](https://rebrand.ly/TO_Stakeholder2020)

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## KEY FINDINGS

### BUSINESS HEALTH

- Sixty-two percent of Central Oregon respondents reported their business/organization has laid off, terminated, or otherwise let go of employees in 2020, with the most layoffs occurring 4-6 months ago. About 18% anticipate layoffs/terminations at their business/organization within the next six months, while 31% are unsure if layoffs will occur within the next six months.
- Over half (51%) of Central Oregon respondents characterize the impacts of COVID-19 on their organization/business's revenue or funding as having a significant negative impact. By comparison, 18% describe the wildfires as having a significant negative impact.

### RESILIENCY, RECOVERY, & REOPENING

- Thirty percent of Central Oregon respondents are not at all concerned about promoting their community and feel it would benefit from visitors (compared to 37% statewide), while 20% expressed some or significant concern (compared to 24% statewide). When it comes to welcoming visitor's to their communities, they are most concerned with negative resident sentiment towards visitors (due to fear of COVID-19 transmissions from visitors to residents).
- By a large margin, "help advocating for effective policies and funding to support tourism businesses/organizations" is the resource that will best support Central Oregon businesses/organizations recover. "Support developing and bolstering visitor experiences that are COVID-appropriate and that enhance local livability" will best support Central Oregon communities.

### PLANNING AND MANAGEMENT

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

### DIVERSITY, EQUITY AND INCLUSION

- Fifty-nine percent of Central Oregon respondents think the tourism industry should play a role in advancing social and racial justice, more than the 54% of respondents statewide. Twenty-seven percent do not think the industry should play a role, while 14% are unsure.
- Sixty-nine percent report having received training related to cultural awareness, anti-racism, implicit bias, or some other diversity, equity, and inclusivity related training. Forty-two percent would be interested in participating in diversity, equity, and/or inclusivity related training. Nine in ten Central Oregon respondents feel somewhat or very prepared to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds.

## RESPONDENT PROFILE

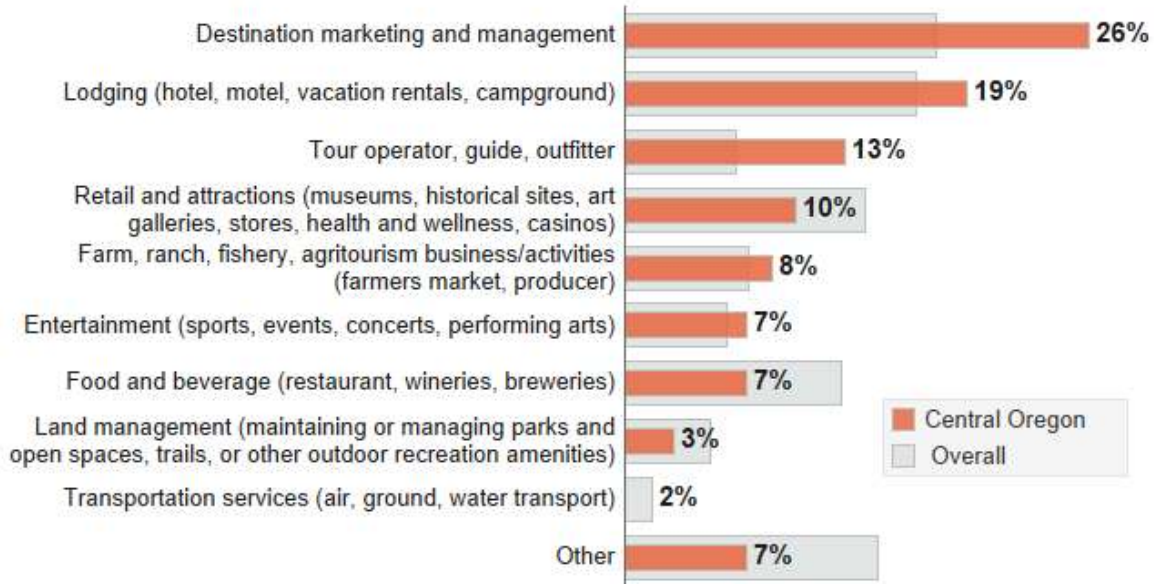
The survey received broad participation by Central Oregon’s tourism industry. Overall, the destination marketing and management sector accounted for 18% of respondents, followed by lodging (16%), retail and attractions (12%), and food and beverage (12%). “Other” write-in responses, comprising 14% of the overall responses, were diverse and reflect the broad reach of the survey. Relative to statewide overall results, respondents in Central Oregon were more likely to work in destination marketing and management and as tour operators/guides/outfitters, and less likely to work in the retail and attraction and food and beverage sectors.

Over half of all statewide respondents represent for profit businesses (56%), while 27% represent non-profit organizations. Central Oregon had greater representation among non-profit organizations (51%), relative to the statewide results.

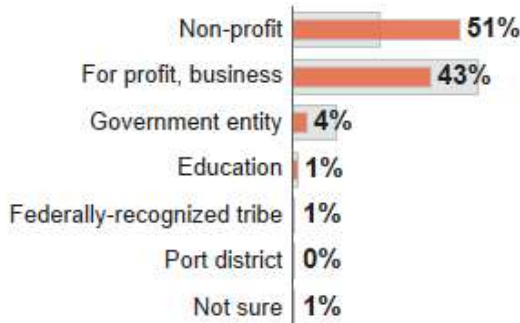
Sixty-two percent of all respondents are employed full-time in the tourism industry, 18% are employed part-time, and the remaining 10% are retired, not currently employed, or prefer not to say. Central Oregon had a greater share of full-time employees (76%) relative to the statewide overall.

### Industry Sector, Entity Type and Employment Status

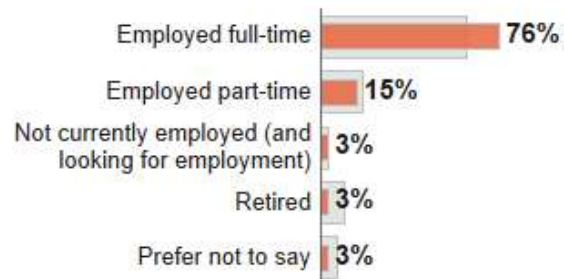
Q: In what sector of the tourism industry do you primarily work? Choose one:



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



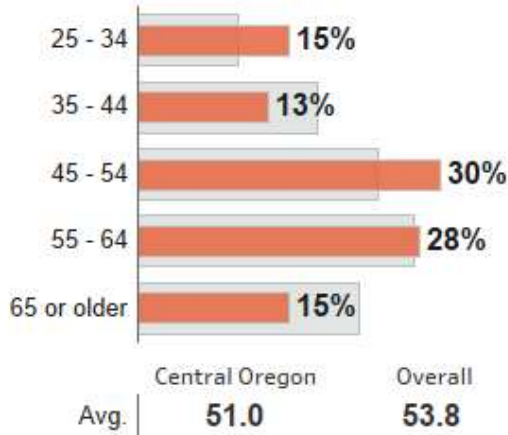
Q: Which of the following best describes your current employment status in the tourism industry?



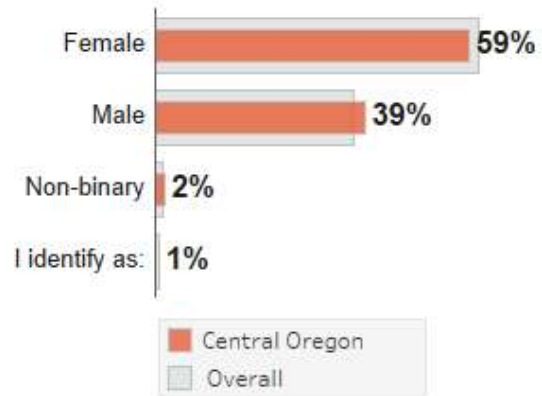
The average age of respondents overall is 54 years, with roughly half of respondents aged 55 or older, and half 55 or younger. Central Oregon respondents were slightly younger on average (51). Statewide, 61% of respondents identify as female and 37% identify as male. The distribution of respondents by age in Central Oregon aligns with the statewide results.

## Age and Gender

Q: Respondent age:



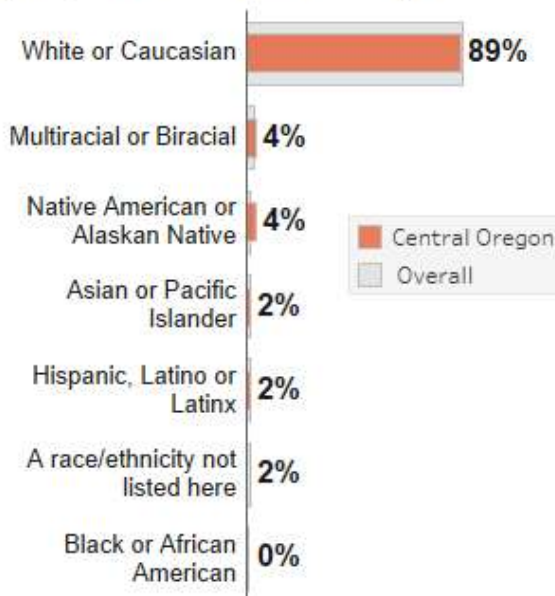
Q: What is your gender?



Both overall and in Central Oregon, nearly nine in ten respondents describe themselves as white or Caucasian. Forty-one percent of all tourism industry stakeholders in Oregon have annual household incomes of less than \$75,000. Central Oregon had fewer respondents with incomes above \$150,000, and a greater share with incomes between \$75,000 to \$149,000.

## Race and Household Income

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



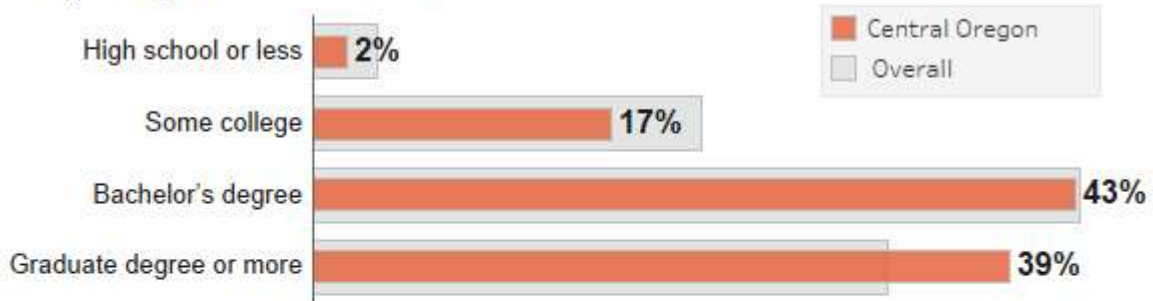
Q: Which of these categories best describes the total gross annual income of your household (before taxes)?



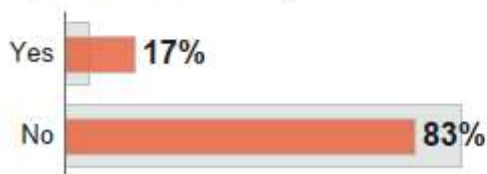
Overall, three quarters of respondents have a Bachelor’s degree or higher level of education, while a quarter did not attain their Bachelor’s degree. Relative to the statewide results, Central Oregon respondents are more likely to have a graduate degree or higher level education. Six percent of overall respondents report a disability, with “walking” most frequently identified.

## Education Level and Presence of Disabilities

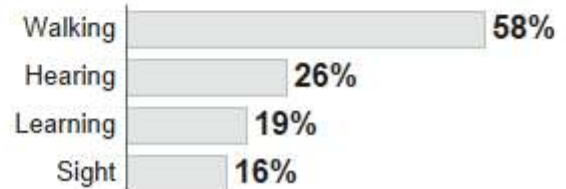
Q: What is your highest level of education?



Q: Do you have a disability?



Q: What are these disabilities? (Check all that apply)



\*Overall only due to insufficient regional sample size.

## BUSINESS HEALTH AND FUNDING SOURCES

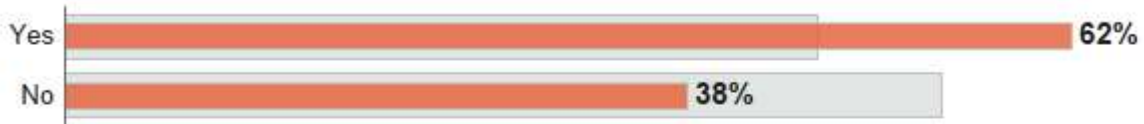
Due to recent upheavals of the travel and tourism industry and prolonged economic uncertainty, a series of questions aimed to better understand the financial impacts of COVID-19 and wildfires on Oregon tourism businesses and organizations.

Forty-six percent of statewide respondents (vs. 62% in Central Oregon) work for organizations or businesses that have laid off, terminated, or otherwise let go of employees in 2020. Statewide, the lodging and food and beverage sectors were most likely to report layoffs (63% and 61% reporting layoffs respectively), while the farm/ranch/fishery/agritourism and land management sectors were the least likely (8% and 37% respectively). Of those that reported layoffs within their organization, the median number of employees let go was 5.0 (vs. 3.0 in Central Oregon), which represented a median of 50% of employees within the organization (vs. 33% overall).

### Layoffs and Terminations

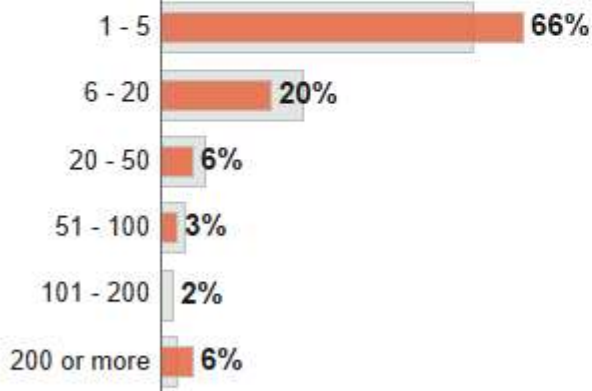
Central Oregon Overall

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



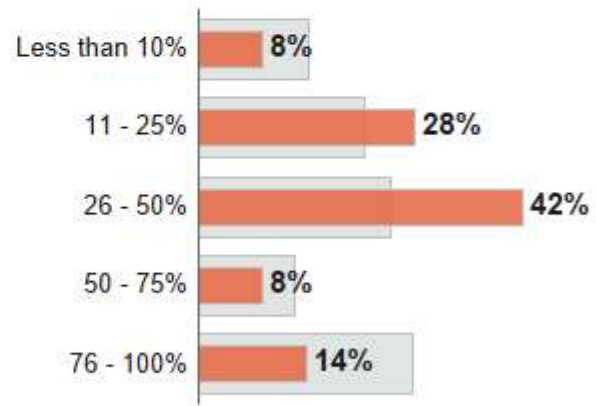
Q: [IF YES] Including both full-time and part-time employees...

roughly how many were laid off, terminated, or otherwise let go:



	Central Oregon	Overall
Average	39.3	30.4
Median	3.0	5.0

roughly what percent were laid off, terminated, or otherwise let go:



	Central Oregon	Overall
Average	41.8%	49.7%
Median	33.0%	50.0%

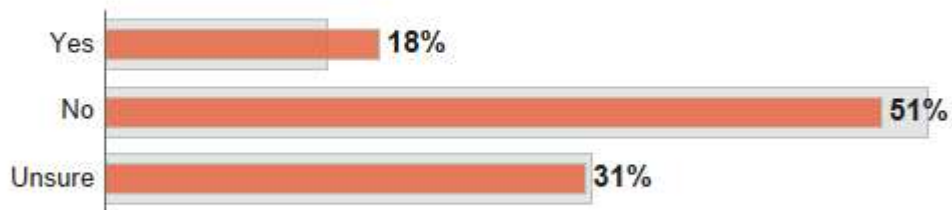
The survey asked about anticipated future layoffs, and the timing of layoffs both past and future. Statewide, 14% of respondents anticipate layoffs within their business/organization within the next six months, 54% do not anticipate layoffs, and a third (33%) are unsure. Respondents in Central Oregon are slightly more likely to anticipate layoffs (18%). The greatest share of layoffs occurred early during the pandemic, four or more months ago.



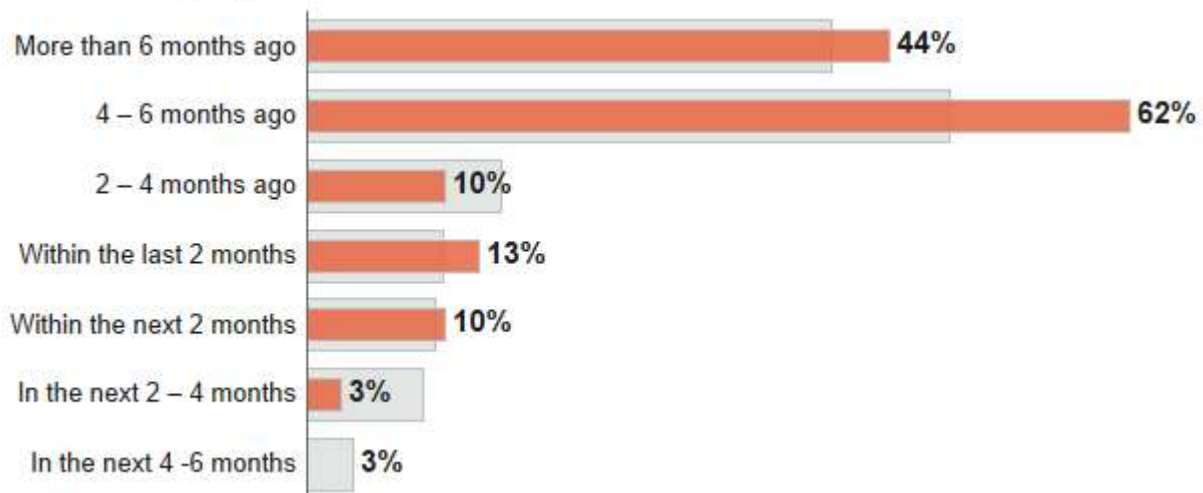
## Layoffs and Terminations

Central Oregon Overall

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



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

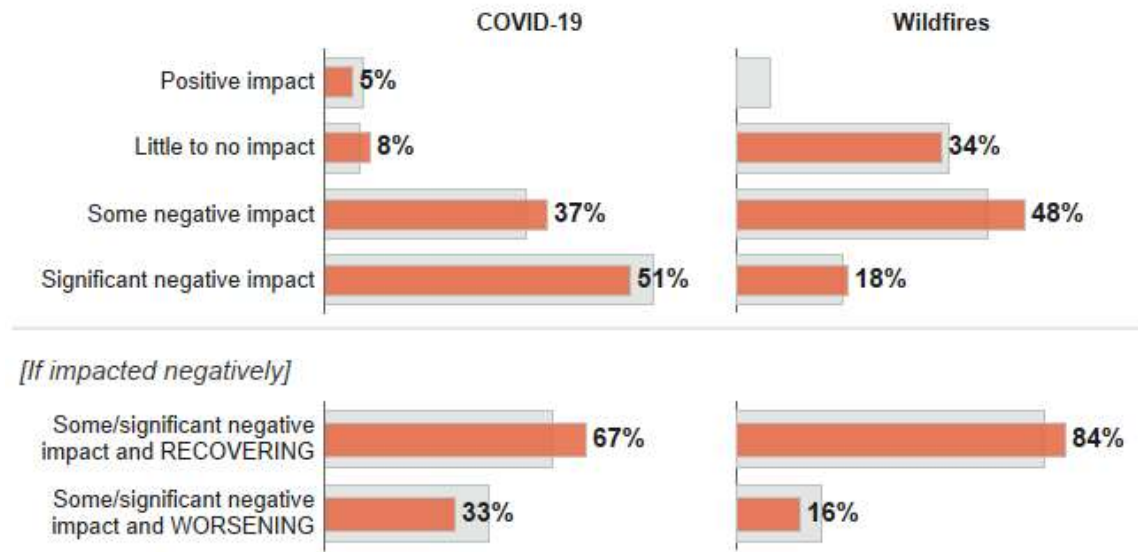


Statewide, 12% of respondents reported that COVID-19 has had little to no impact or a positive impact on their business/organization's revenue or funding. A large majority, 88%, reported some or significant negative impact. Of those that experienced a negative impact, 42% are experiencing worsening impacts, while 58% are in recovery. By comparison, wildfires negatively impacted a smaller share of overall respondents (59%). A smaller share reported significant negative impacts, and, of those negatively impacted, a greater share reports their business/organization is recovering from wildfires (79%) than from COVID-19 (58%). Relative to the statewide overall, Central Oregon respondents experienced COVID-19 and wildfire impacts at roughly equal levels, although the data suggest that of the Central Oregon businesses that experienced negative impacts, a slightly greater share are in recovery.

## COVID-19 and Wildfire Impacts

Central Oregon Overall

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

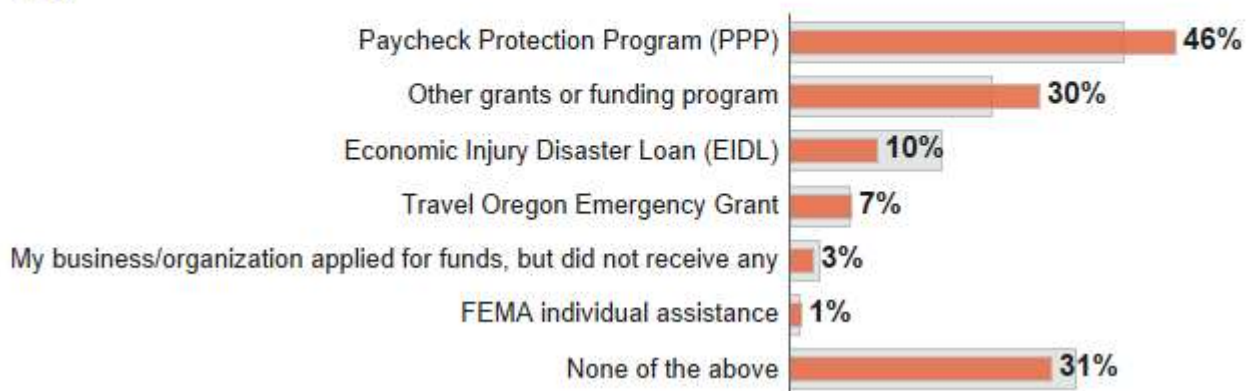


Roughly two thirds of all respondents work for businesses or organizations that sought funding, while a third neither sought, nor received funding. The Paycheck Protection Program (PPP) was the most-awarded funding source overall, followed by “other grants or funding program,” and Economic Injury Disaster Loan (EIDL). Nearly half of Central Oregon respondents received funding from the PPP (vs. 40% statewide).

## Funding Sources

Central Oregon Overall

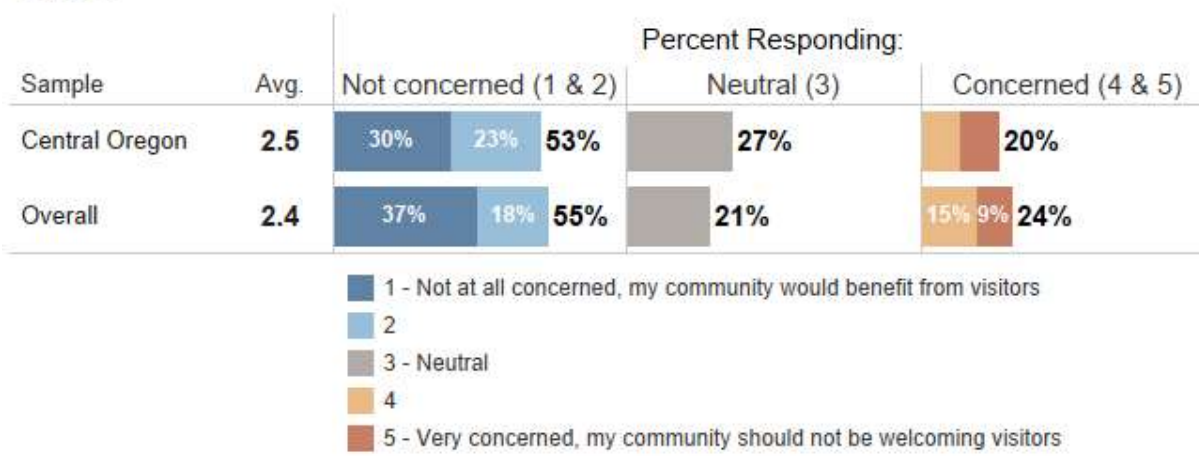
Q: Has your business or organization received funding from any of the following: (Check all that apply)



## RESILIENCY, RECOVERY AND REOPENING

During these uncertain times, it is important for the tourism industry to know how its stakeholders are feeling about reopening and their priorities concerning safety and economic issues. To broadly gauge the industry’s readiness to embrace visitation, respondents were asked to rate their level of concern with promoting their community. Overall, more than half of respondents (55%) are not concerned about welcoming visitors right now, 21% are neutral, and 24% feel their community should not be welcoming visitors. Relative to the statewide results, respondents in Central Oregon express similar levels of concern (2.5 average vs. 2.4 overall).

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



A follow-up open-ended question asked respondents: “Why do you feel that way?” The survey resulted in 526 total comments from respondents that were not concerned with promoting their community (answered 1 or 2), and 241 total comments from respondents that expressed concern (answered 4 or 5). Among those concerned, commonly cited reasons include increased risk of contracting COVID-19, the fear that tourism will lead to increased cases and further, more prolonged shutdowns, and the feeling that their destination is already at maximum capacity and/or already experiencing adverse impacts due to tourism. Those that were not concerned cited primarily economic reasons for promoting their community/destination and the sense that tourism can operate safely amidst the pandemic. An additional 162 total open-ended responses were collected from respondents that were neutral, and it is worth noting that many comments on both sides recognized the fluidity of the situation and acknowledged both the risks and rewards of tourism in their communities. Selections of comments from Central Oregon respondents by response follows. A full list of open-ended comments from Central Oregon respondents is provided in the appendix.

### CONCERNED with promotion (4 & 5): “Why do you feel that way”

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

*Because our children need to get back to school and that won't happen until the COVID numbers go down. Promoting tourism here will not get our kids back to school.*

*Covid is spreading in Oregon and my county's numbers are going up. If we become a hotspot for Covid, then all business will be affected badly.*

*I don't think people are properly set-up to mitigate COVID risks, which is shocking after six months of COVID, but I'm still seeing lots of confusion and masklessness in close quarters/public spaces*

*Bend has way too many visitors! We need to invest in sustainability, infrastructure, residents and more before we continue to attract tourism. Or at least have a plan.*

### **NOT CONCERNED with promotion (1 & 2): "Why do you feel that way"**

*Businesses have decided or are able to reopen, at a state level then trickling down by county. Our economy is reliant heavily on and even (especially) TO, benefits from tourism/marketing. So to me, there are no real, in time, accountability measures, citations, rules, regulations around visiting areas 50 miles outside your home. At the end of the day, we are trying to encourage and change human behavior. Simply saying stay home, your vacation (or whatever the verbiage is) can wait, does nothing. So might as well promote community visitation. Just mask up and follow the county rules.*

*I believe that as long as the advertisement is promoting safe activities, such as being outside, the community should still benefit from income from tourism.*

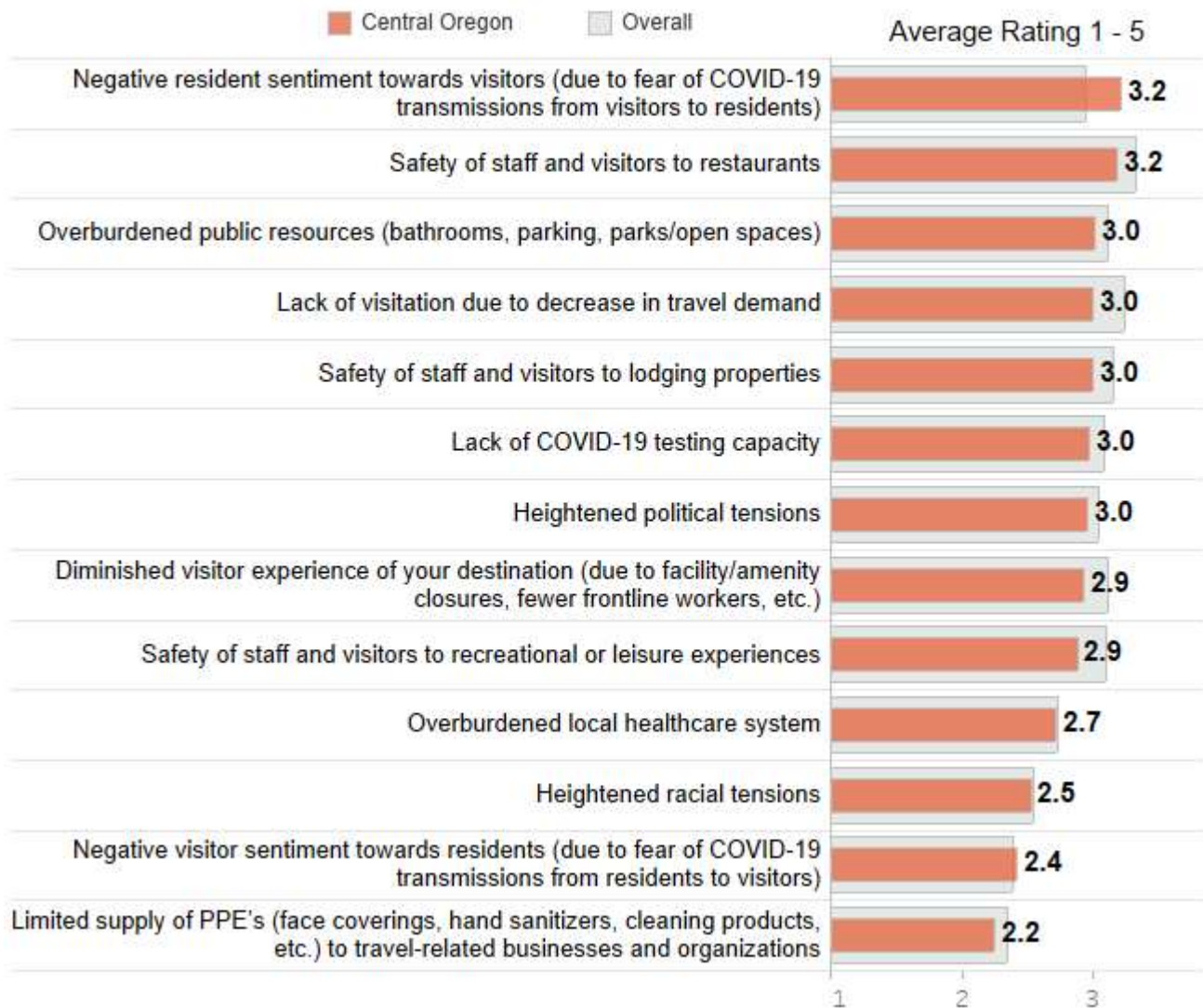
*Our business operates outdoors and is a low risk for transmission. We believe that with the right precautions in our community, out-of-towners can visit without adding undue risk. We are seeing these precautions being taken, and especially during the winter, local restaurants could still benefit from tourism, even though they'll only be offering take-out.*

*Sunriver is a recreational community and the local economy is completely dependent on tourism. In addition, Sunriver has a full time occupancy rate around 20%, which means 80% of the homes are owned by part time residents who own a primary residence outside the area or outside the state. These part time owners will always be allowed to occupy their homes. However, in regards to the pandemic, they are no different than a visitor or tourist. Therefore our community is receptive and understanding of visitors, but is very cautious.*

*While I know that others in the area disagree, we need travel and tourism for our communities to thrive and more importantly right now to recover. So many jobs have been lost and families are suffering; travel is safe, this is ridiculous!*

Respondents were asked to rate their level of concern with various aspects of welcoming visitors to their community, with “1” being “not at all concerned” and “5” being “extremely concerned.” Overall, the safety of staff and visitors to restaurants, lack of visitation due to a decrease in travel demand, and safety of staff and visitors to lodging properties emerged as top concerns. Heightened racial tensions, negative visitor sentiment towards residents, and limited supply of PPE was of relatively less concern. Respondents in Central Oregon indicated lower levels of concern across nearly all categories apart from “negative resident sentiment towards visitors (due to fear of COVID-19 transmissions from visitors to residents).” Categories in the figure below are sorted in descending order by the average rating of Central Oregon respondents.

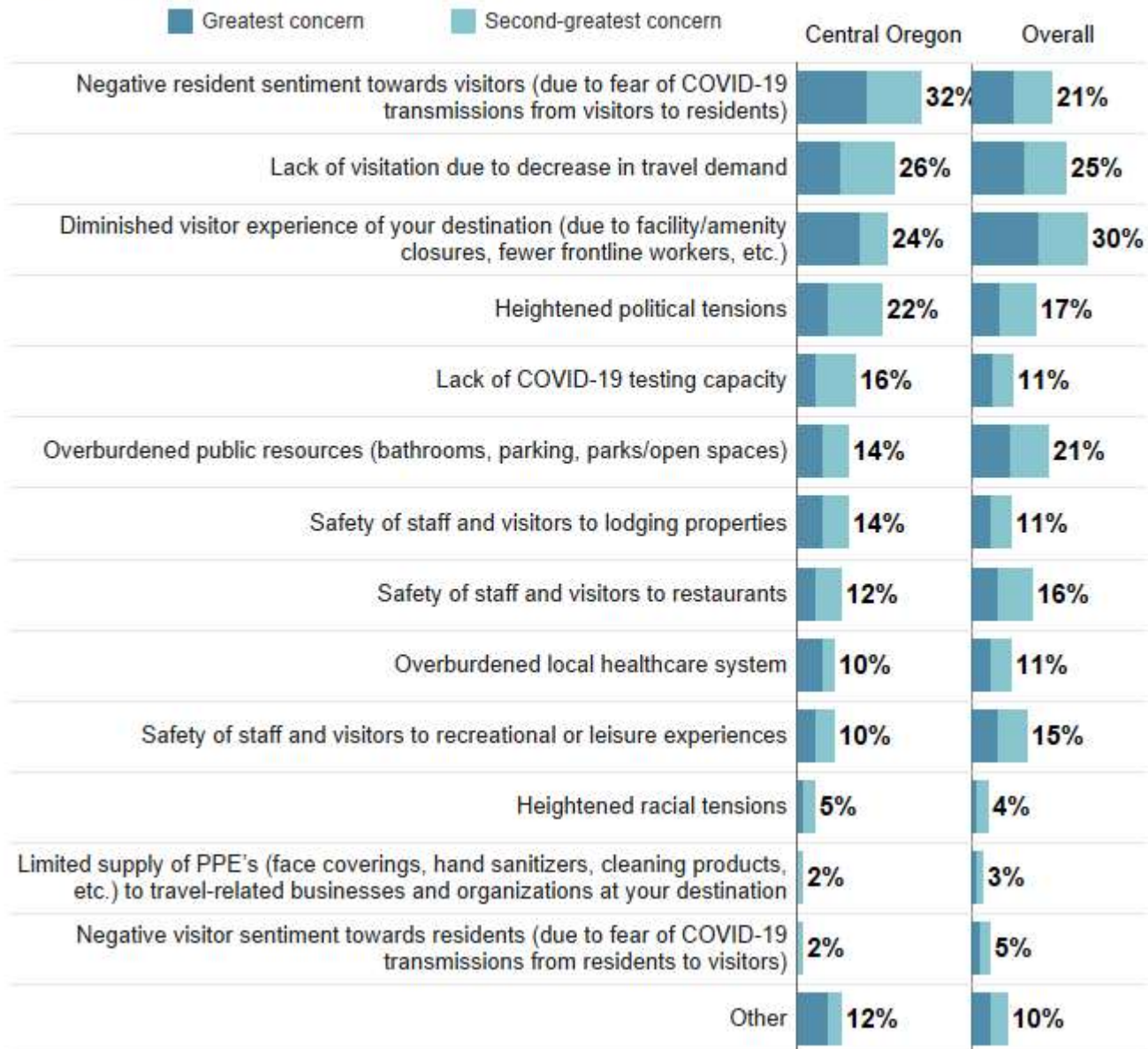
*Q: As you think about welcoming visitors to your community, how concerned are you about the following? (1 = Not at all concerned, 5 - Extremely concerned)*



To further differentiate between concerns related to welcoming visitors, respondents were then asked to identify their two greatest concerns related to welcoming visitors to their community. Diminished visitor experience and lack of visitation due to decrease in travel demand were of the greatest concern with a quarter or more of respondents identifying them among their two greatest concerns. Central

Oregon respondents were most concerned with negative resident sentiment towards visitors followed by a lack of visitation due to a decrease in travel demand. Concerns are sorted in descending order by the percent in Central Oregon responding greatest/second-greatest concern.

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



The survey asked respondents to identify the resources or programs that would best assist their business/organization, and best assist their community in resiliency, recovery, and reopening. For businesses, by a large margin, help advocating for effective policies and funding to support tourism businesses/organizations was the most favored resource/program, followed by tools and trainings to improve business communications and marketing. Help advocating for effective policies and funding to support tourism businesses/organizations was also the top resource identified in Central Oregon. Central Oregon respondents also placed a slightly greater emphasis on networking with/learning from other professionals in your sector and support adapting business plans/models.

## Buisness/Organization Assistance

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



From the perspective of their community, respondents overall favored two programs/resources: support developing and bolstering visitor experiences that are COVID-appropriate and that enhance local livability (53%), and communication tools and message frameworks to convey safe visitor behavior in towns and businesses (43%). The rank order of priorities among Central Oregon respondents was similar to the statewide results, however, they were more likely to favor retained/expanded air service frequency, although still a low priority overall.

## Community Assistance

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



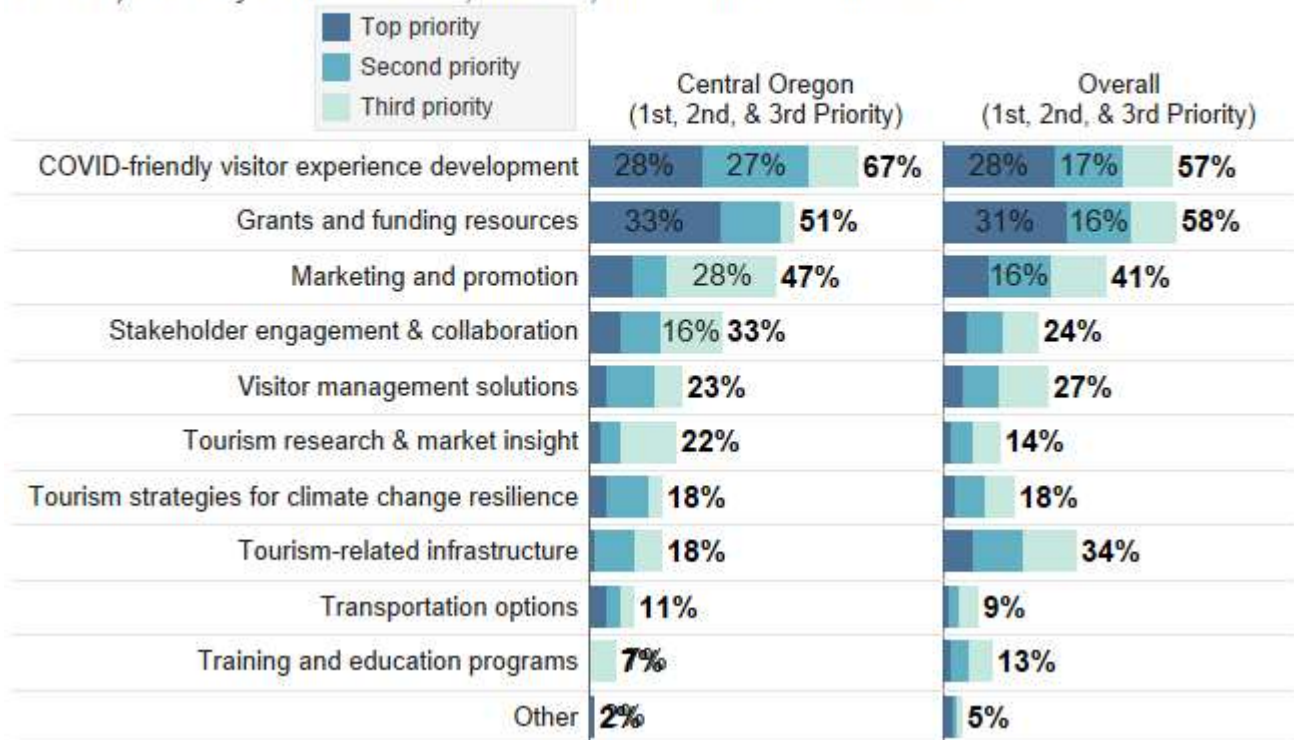


## PLANNING & MANAGEMENT

Respondents were asked to identify the three areas that should be emphasized for immediate (6 – 12 month) recovery from COVID-19, wildfires, and related economic conditions. They were then asked to prioritize the same focus areas for longer-term tourism planning over the next 2 – 5 years. In the short-term, grants and funding resources emerged as the top priority among all respondents, with 31% of respondents identifying it as their top priority and 58% identifying it among their top three highest priorities. COVID-friendly visitor experience development was a the second-most identified priority (57% among their top three), by a small margin. In Central Oregon, the second –most-identified priority was grants and funding resources as measured by top three categories combined (51%), although it had the great share identifying it as their top priority (33%).

### Short-Term Tourism Priorities & Focus Areas

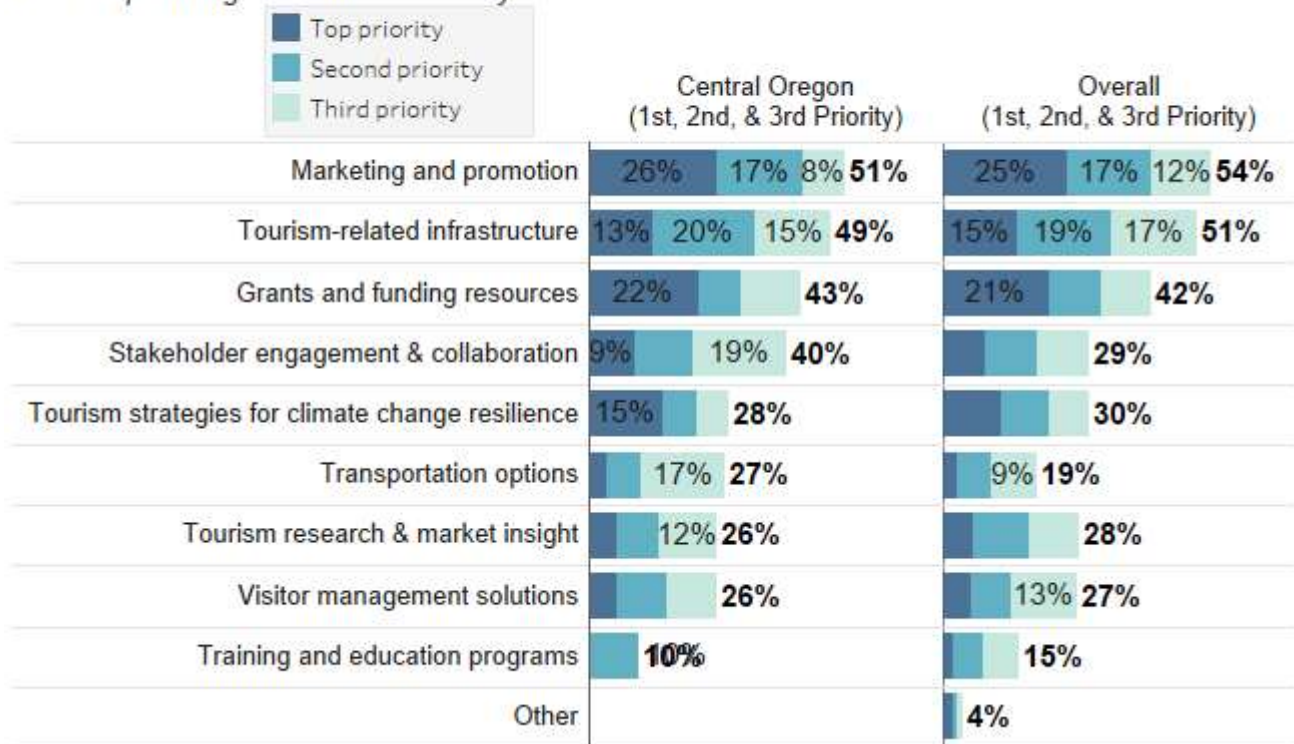
*Q: Please identify the three areas that you believe should be emphasized for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions:*



Over the long term, grants and funding resources fell to the third-highest priority behind marketing and promotion and tourism-related infrastructure. The rank order of longer-term priorities in Central Oregon are similar to the overall, although Central Oregon respondents were more likely to identify transportation options.

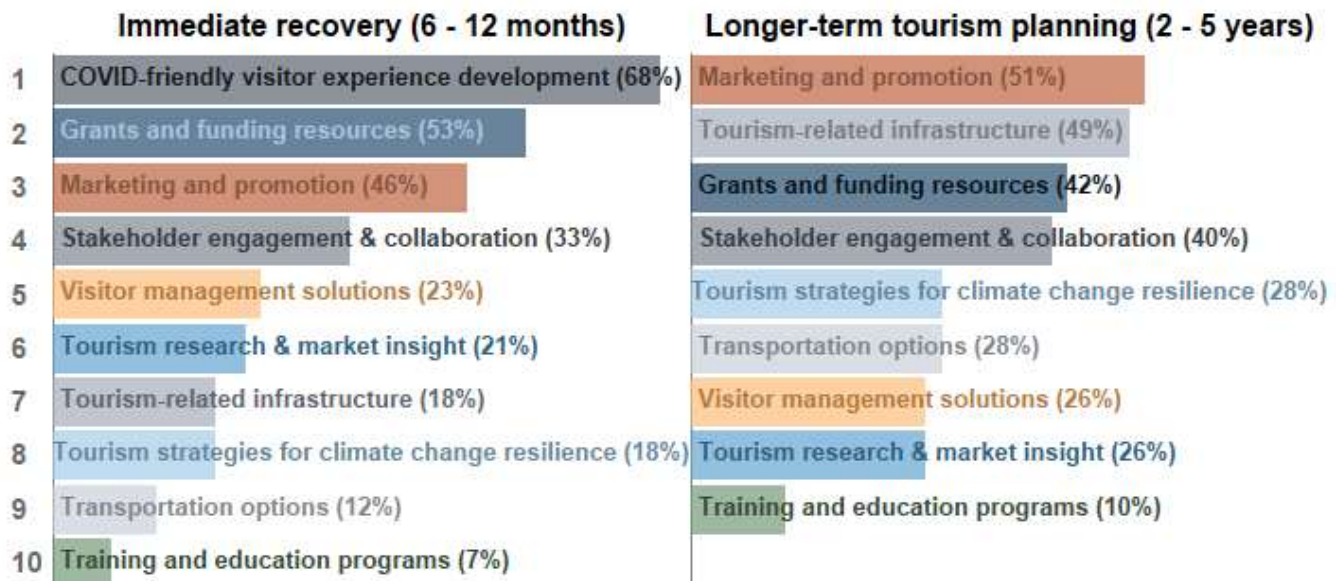
## Longer-Term Tourism Priorities & Focus Areas

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



The following figure compares the rank order of short vs. long-term priorities among Central Oregon respondents, with categories colored to more easily identify changes in rank order. Grants and funding resources, the second priority for immediate recovery in Central Oregon, falls to third in terms of longer-term planning behind marketing and promotion and tourism-related infrastructure.

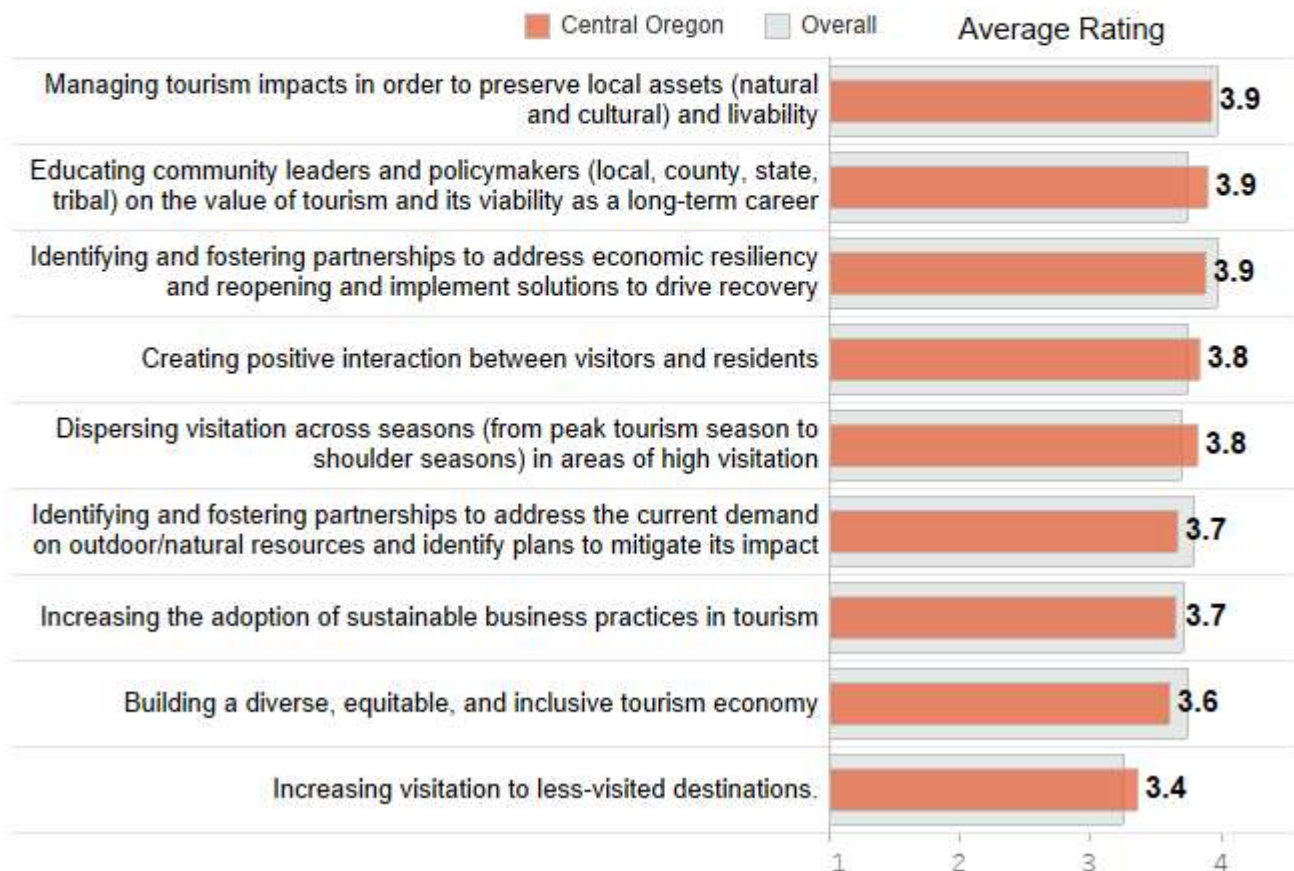
### Short vs. Long-Term Priorities: \*Central Oregon



Respondents were asked to rate on a 1-5 scale (with 1 being “not a priority” and 5 being “high priority”) various tactical planning and management opportunities. Among all respondents statewide, “identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery,” and “managing tourism impacts in order to preserve local assets (natural and cultural) and livability” were the two highest priority tactics, while “increasing visitation to less-visited destinations” was a low priority. There were six tactics that received ratings of 3.7 – 3.8, indicating a broad range of competing priorities. In Central Oregon, “educating community leaders and policymakers on the value of tourism and its viability as a long-term career” was the second-highest rated priority.

## Planning and Management

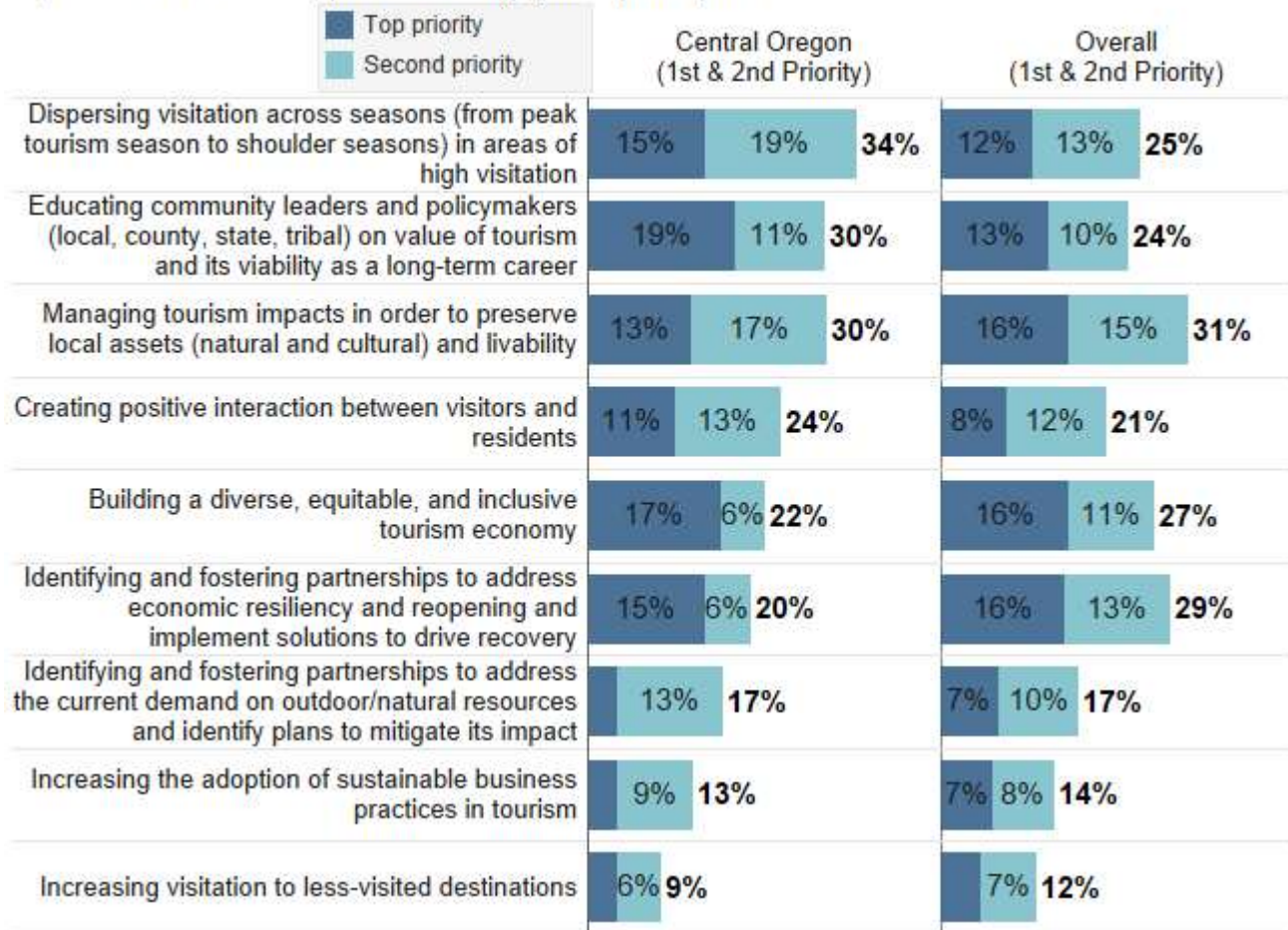
*Q: Please indicate how you would prioritize the following tactical planning and management opportunities to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available, not all tactics should be considered extremely high priorities, and some may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



This rating question formed the basis for a follow-up question that asked respondents to select their top-two highest priorities. The nature of this follow-up question helps to differentiate between tactics that, while important, may not be among the top-two highest priorities. Overall, the top three priorities were managing tourism impacts in order to preserve local assets (natural and cultural) and livability

(31%), identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery (29%), and building a diverse, equitable, and inclusive tourism economy (27%). Central Oregon respondents were especially more likely to identify dispersing visitation across seasons (from peak tourism season to shoulder seasons) in areas of high visitation (34% identifying it among their top two vs. 25% statewide).

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

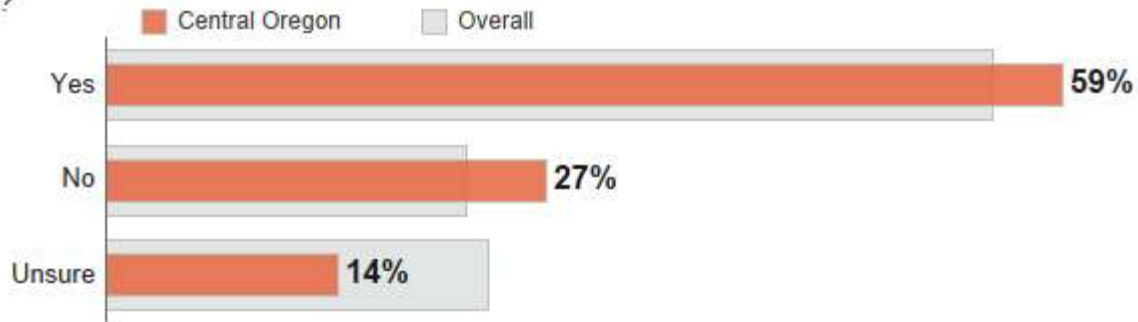


## DIVERSITY, EQUITY AND INCLUSION

With the national spotlight on inequities faced by Black, Indigenous, and people of color sparking a global movement against racial injustice, a handful of questions aimed to better understand the Oregon tourism industry’s attitudes towards this movement and preparedness to address these inequities.

Overall, 54% of respondents feel the Oregon tourism industry should play a role in advancing social and racial justice, 22% do not think the industry should play a role, and 23% are unsure. Respondents from Central Oregon were more likely to feel the industry should play a role in advancing social and racial justice (59% responding “yes”). Overall, younger respondents, those under 34 years of age, were more likely to respond “yes” (80%) than older respondents. Further, support for the industry playing a role tends to increase with education level (41% among those with high school or less and 62% among those with a graduate degree or more).

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



Respondents that indicated that the Oregon tourism industry should play a role in advancing social and racial justice were asked: “How do you see Oregon’s tourism industry playing a role in advancing social and racial justice?” Those that replied “no” or “unsure” were asked: “Do you have any comments on your response to the previous question regarding the Oregon tourism industry’s role in advancing social and racial justice?” A selection of responses to both questions from Central Oregon respondents follows:

**[If Yes] How do you see Oregon’s tourism industry playing a role in advancing social and racial justice?**

*Being a welcome location for all races, classes, abilities. This starts by employing individuals that represent those demographics so when others come to the area, they can relate.*

*By emphasizing that all are welcome here and advocating for practices within the industry that further that goal. To use the industry's marketing might to share stories of diversity that help others recognize it as a strength.*

*Ensuring that those employed in the tourism industry receive awareness of the current need for inclusion in communication. I am confused as to how to address those who do not view themselves as male or female but in transition, or both.*

*Marketing to diverse groups of people, while using diverse groups of people in the creative. Researching what biases are in the way we do business and how we can counter those.*

*Oregon has a long history of excluding different races. Perhaps begin by telling the story of place so that those in the industry understand why we don't have a rich diverse culture. Then teach us/ model how to be inclusive and equitable in the outdoors.*

**[If No/Unsure] Do you have any comments on your response to the previous question regarding the Oregon tourism industry's role in advancing social and racial justice?**

*I don't believe that it is Travel Oregon's role to take this on.*

*Central OR is NOT Portland!*

*Other than training for diversity it should not be our hallmark*

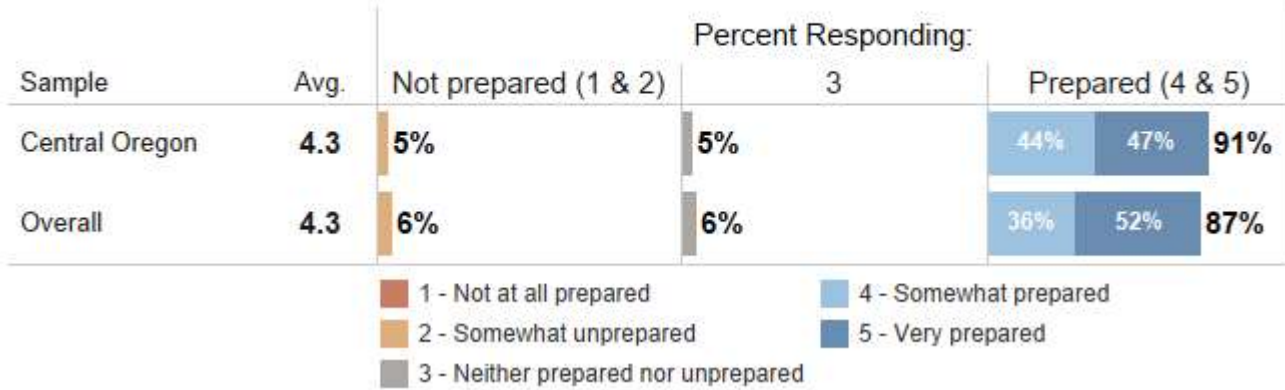
*training people to be aware of differences is different than promoting the advancement of social and racial justice, it is too big for us to do, but a needed aspect of the training for our industry.*

*We need to work on keeping our funding streams strong. If we lose funding we will all be out of business. We should focus on that first and foremost.*

Both statewide and in Central Oregon, respondents indicated high levels of preparedness to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds. Roughly nine in ten respondents, both statewide and in Central Oregon, indicated that they felt somewhat or very prepared.

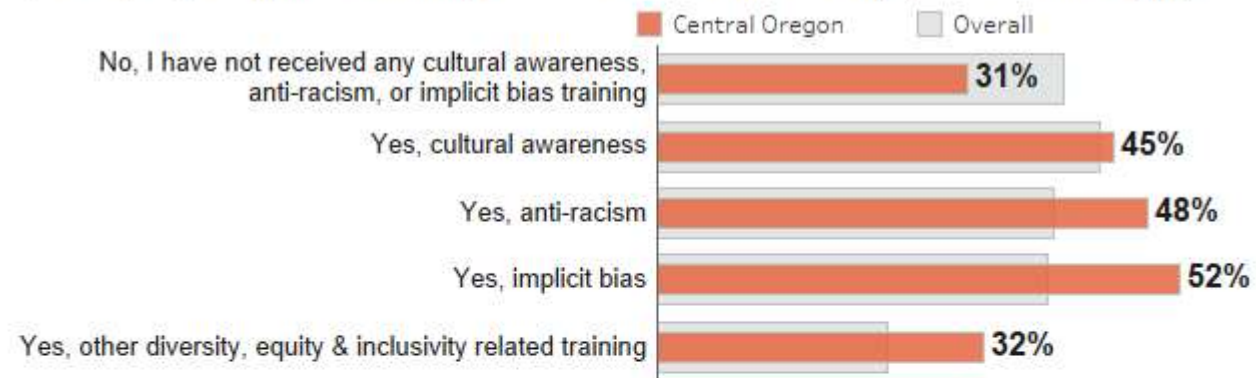
Just 6% of all respondents, and 5% in Central Oregon, indicated that they were somewhat unprepared or not at all prepared.

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

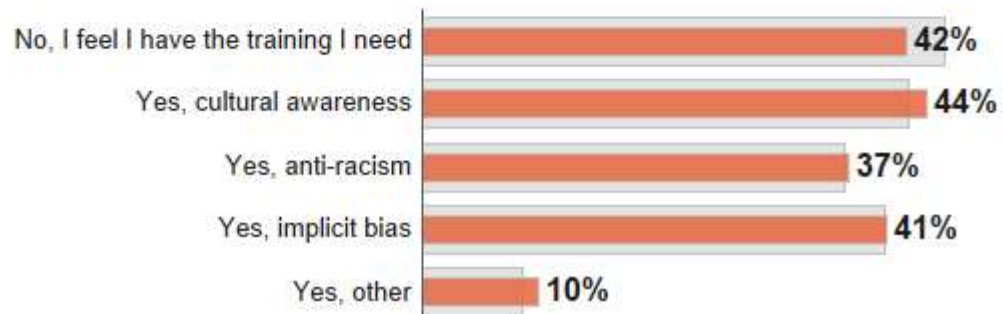


Statewide, three in five respondents indicated that they have participated in training related to cultural awareness, anti-racism, implicit bias, or other diversity, equity, and inclusivity training. Slightly more than half of all respondents (54%) would be interested in participating in such a training. Rates of participation in trainings and interest in future trainings were higher among Central Oregon respondents.

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



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

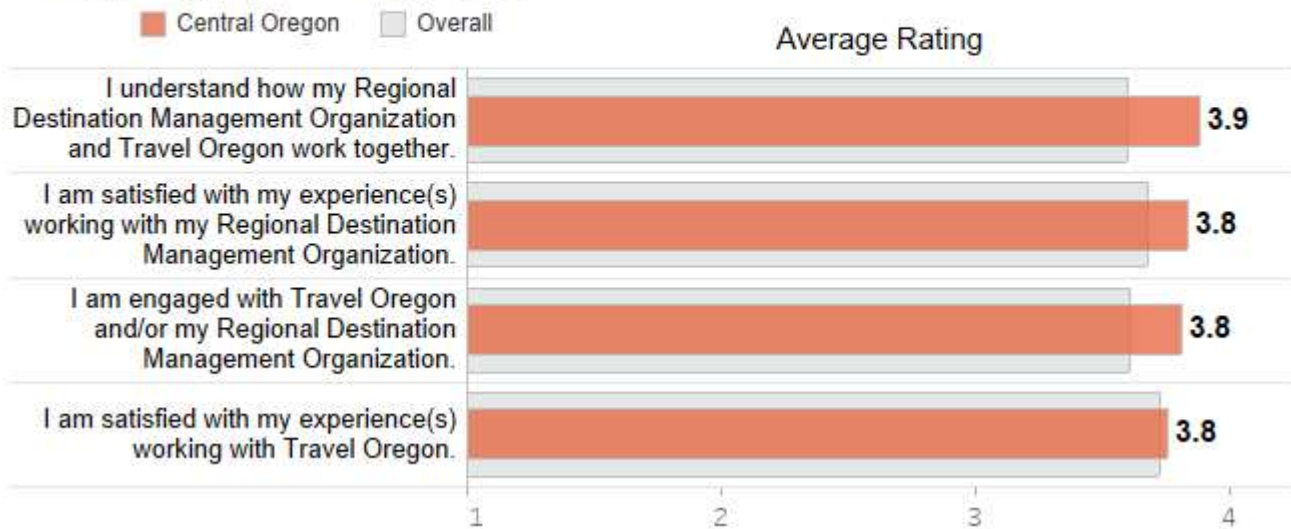


## INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Overall, respondents indicate high levels of satisfaction working with Travel Oregon and their RDMO, and high levels of engagement and understanding of how their RDMO and Travel Oregon work together. On a 1 – 5 scale of agreement, the overall average rating of all statements ranged between 3.6 and 3.7. Central Oregon respondents on average indicated more agreement with all four statements, and therefore higher levels of engagement and satisfaction.

### Industry Engagement

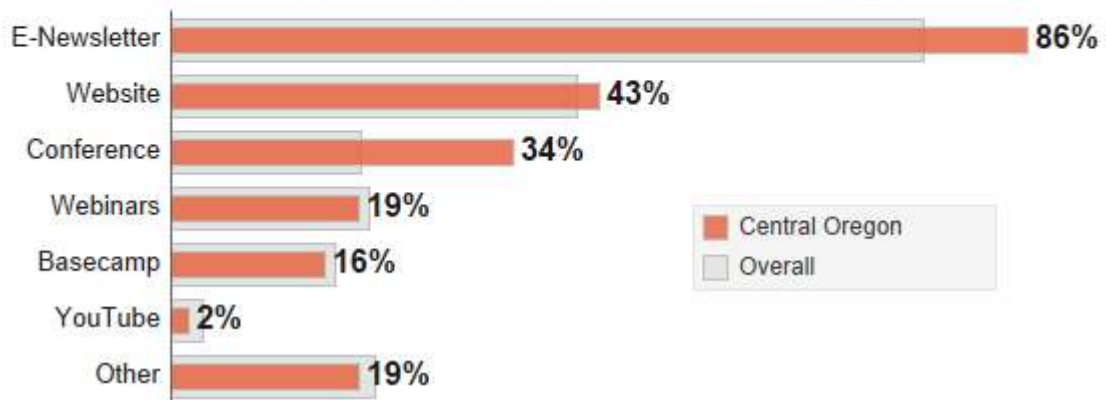
*Q: Please indicate the level to which you agree or disagree with the following statements: (1 = Strongly disagree, 5 = Strongly agree)*



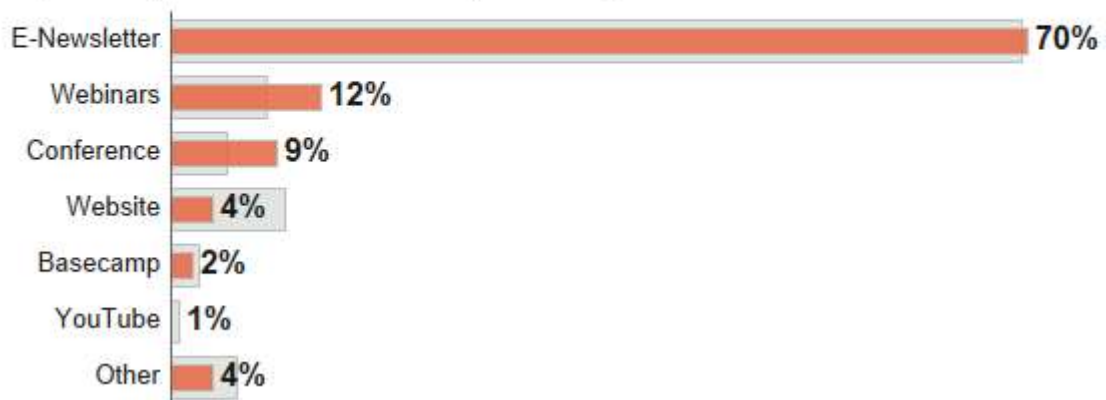
Seventy-six percent of all respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter followed by website (41%). Just 2% of all respondents currently receive information via YouTube. By a large margin, e-newsletters are considered the best way for respondents to receive information. Relative to the statewide overall, webinars and conferences are popular among respondents from Central Oregon.

## Communications

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



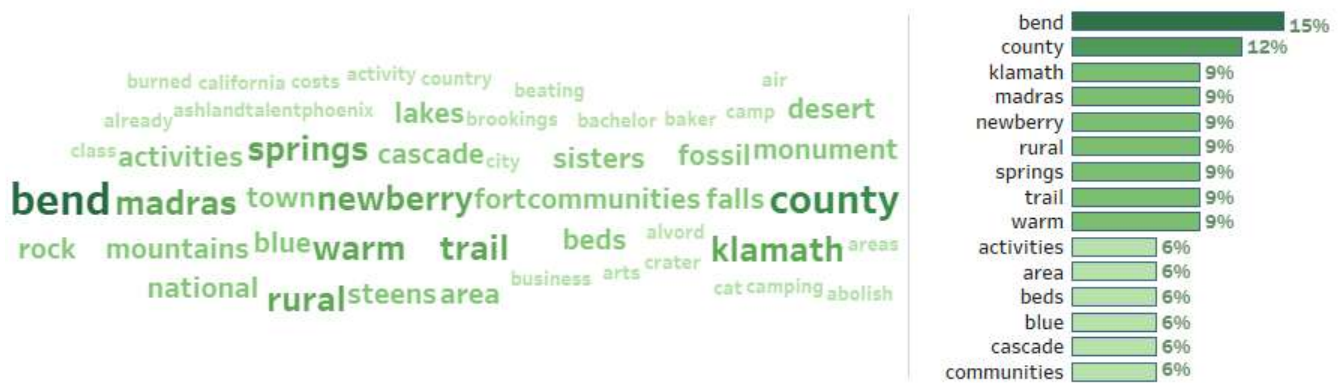
Q: What is the best way for you to receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization?



Respondents were asked to provide up to three destinations or attractions in Oregon that they believe would benefit from increased tourism development once it is considered safe to travel. The following word cloud and bar chart summarize these open-ended suggestions from Central Oregon respondents. The values of the bar chart and size of words represent the percent of Central Oregon respondents that used a particular word. Commonly used words, including “Oregon” and region names, have been omitted.



Q: Once it is considered safe to travel, are there destinations or attractions in Oregon that you believe would benefit from increased tourism development? (Provide up to three)



## CENTRAL OREGON 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.

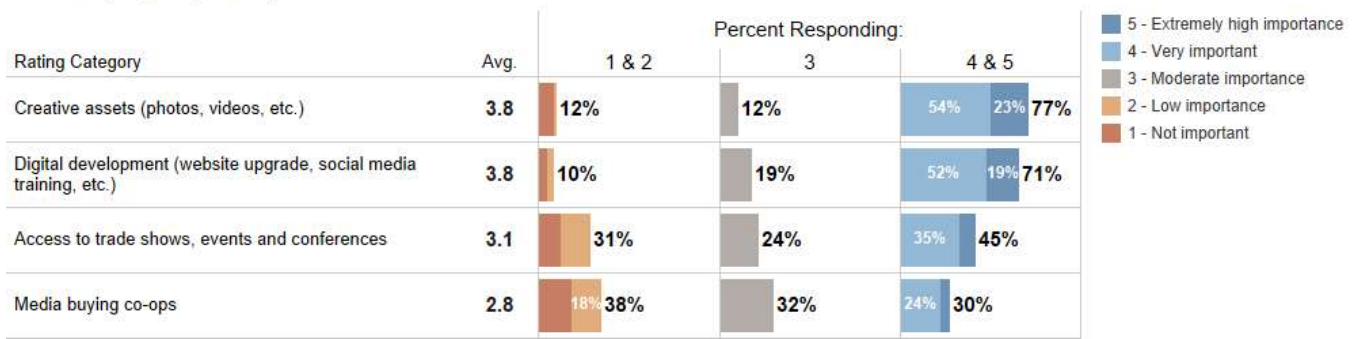
Q: Visit Central Oregon is currently working on creating opportunities for stakeholders to package their products/services with other businesses that consumers can purchase on VisitCentralOregon.com. The goal is to increase exposure for stakeholders and create a one-stop-shop for consumers. Would you be interested in having your business/organization participate?



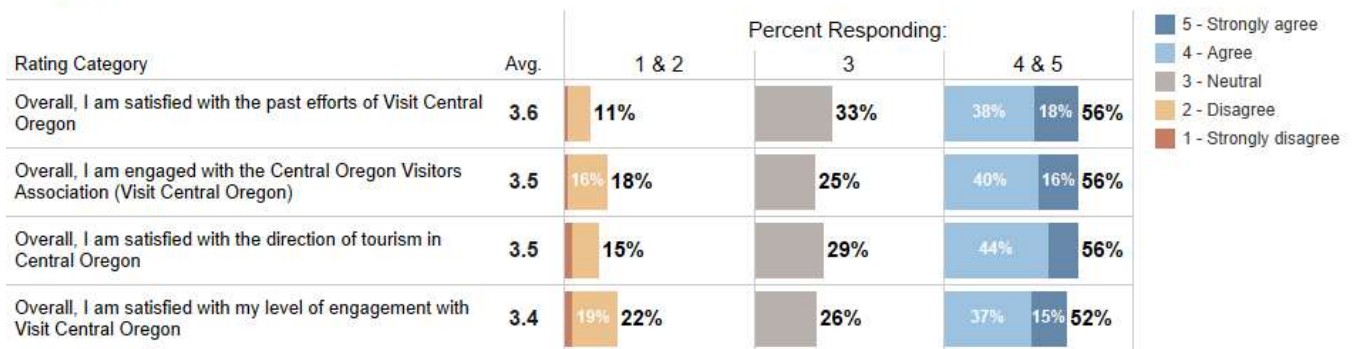
Q: Please indicate whether your business/attraction/event engaged with Visit Central Oregon in the past year in the following areas:

Area	Yes	Unsure	No
My entity was discussed in a Travel Oregon/Visit Central Oregon story, news article, Facebook or Instagram post	33%	35%	33%
My entity directly tracked business as a result of Visit Central Oregon marketing efforts	22%	31%	47%
My entity was a contributor to a Travel Oregon/Visit Central Oregon familiarization tour	18%	25%	57%
My entity directly tracked business as a result of the Visit Central Oregon visitor guide	12%	33%	56%
My entity was included in an itinerary for FIT or packaged travel experience	12%	29%	59%

Q: Thinking from the perspective of your business or organization, please indicate how important you believe each of the following Visit Central Oregon marketing tactics are to increasing tourism's economic impact. (1 = Not important, 5 = Extremely high importance)



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



## OPEN-ENDED COMMENTS

The survey resulted in an extensive number of open-ended responses. A selection of responses to the most relevant open-ended questions are presented below in the respondents' own words with no editing, spelling, or punctuation changes. The opinions expressed are the respondents' own and do not reflect the opinions of Travel Oregon. All open-ended responses are viewable in an online dashboard format with accompanying word clouds and bar charts. Included are responses to the following questions from Central Oregon respondents:

- Q: Do you have any additional comments regarding welcoming visitors to your community?
- Q: Do you have any comments on your priorities for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions?
- Q: Do you have any comments on your priorities for longer-term tourism planning over the next 2-5 years?
- Q: What topics or resources would be most beneficial when it comes to racial equity, diversity, and inclusion trainings?
- Q: In a few words, what, if anything, needs to change for your community to feel like a destination where ALL who travel can enjoy their journey and feel welcome?

- Q: Is there anything else you would like to share about the topics discussed in this survey?

**Q18: Do you have any additional comments regarding welcoming visitors to your community?**

In regards to Safety of staff and visitors to lodging, recreation and restaurants, it's not a lack of concern for these individuals. But we have all done an extraordinary job ensuring our teams and clients are safe. It would be a MAJOR concern if we were not adhering to the guidelines.

Interesting to note that vacation home rental occupancy was actually up this summer. Renting a vacation home in Sunriver and enjoying the wide open spaces is currently a popular vacation choice. However, this does not mean that businesses are prospering. Convention business disappeared, as well as events, and retail store sales are down.

My second greatest concern is that tourism gets and retains a negative connotation.

Our community depends on visitors to support the majority of our economy; it is ridiculous to be restricting travel when there is nothing locally showing negative impacts.

Please let visitors come but just make them follow the rules

Studies show that you're more likely to get COVID from visiting a restaurant, and therefore numbers are down. Plus, with the fast approaching winter I fear many small businesses including restaurants will not make it through the winter. Central Oregon does not have an issue in attracting visitors, the issue we have is that those visitors can be disrespectful and not wear masks.

The accurate reporting of this virus is crucial for renewed community and visitor confidence in resuming LIFE.

The County shutdown of short term rentals nearly ended our 35+ year company. The drive market allowed us to perform and even flourish during the Summer and Fall. We've taken all precautions for cleaning homes between guests. We've had no one trace back our area with a case of COVID due to tourism. We're honored so many have chosen to visit and stay with us in Sunriver. It shows great trust in our work.

The vast majority of visitors we've seen this summer have been lovely and cooperative with our covid protocols. Many visitors expressed support and appreciation that we stayed open and we also got good feedback on our covid protocols. Folks appreciated that we actively worked to keep them safe.

The visitors, for the most part, have been very respectful and sensitive to how the locals feel and accept them in to our community. They do really try to adhere to our requests, so far, success! Thanks

Under normal non-Covid conditions, Bend has experienced unprecedented growth and tourism that fills this town to capacity and overruns/puts extra pressure on our parks and resources. In a Covid year, this is especially felt and more people are here to recreate, ignoring warnings from Travel Bend to stay away in August through Labor Day. People didn't listen, they still came, and we are all suffering the results of that with increasing tensions, Covid cases, traffic and impact on the land. I know this economy depends upon tourism, but with restaurants already brimming with customers and wait lines long for everything, I really don't think we needed all the tourists over the top in this unique year.

We have to find a way to continue welcome visitors, but there need to be clear directives that the community gets behind, not a haphazard attempt that many businesses are self-sabotaging

WE need to make Oregon safe for visitors from Oregon and beyond. It would be great if we had some phrases that we all can use to add to our welcoming comments that would reassure our guests that we are ON IT! And we are wanting them to be safe and healthy while they are visiting our different areas.

---

We need to stop the narrative on blaming California and tourists. Our Hotel has lost group that is no longer coming back in 2021 or 2022 due to the travel order in 2020. Covid has been spread in our Community due to unmasked gatherings and parties. We have local City leaders that have chosen not to follow science (which has shown that Covid has not been spread due to tourism, but rather behavior) and have pursued bad policy which will impact future years of group business.

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We would love to have visitors but we don't have much to offer for their experience and the fires reduce the areas where folks can travel to

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**Q22: Do you have any comments on your priorities for immediate (6 – 12 months) recovery from COVID-19, wildfires, and related economic conditions?**

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Feels like we'll go into 2021 with the same covid protocols in place and eventually we'll be back to "normal". But, I'm really concerned about loss of business to climate change events such as mega fires and smoke. Maybe I'm naive but that feels more real and immediate than covid. We lost three weeks of business because the Willamette National Forest had a blanket closure for the month of September and we lost a week in Bend due to off the charts poor air quality.

---

Our priorities need to be on safety during COVID-19 and not losing anymore of our community members, we've lost 9 so far, and to get more tourism related businesses going once we can get back to "normal" operations

---

Priorities can change daily. However, keep the community safe is the number one priority at the moment.

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The industry has been closed, we need financial support

---

The travel industry has suffered significant revenue loss over the past six months. Sound businesses are failing, and their owners are moving on. We're losing good, viable businesses in travel and tourism. Funding has to be at the top of any list for recovery.

---

There is no point in marketing if we can't deliver a safe product. Most Hotels and restaurants are doing a good job. Some are not. Also, get the County or City to enforce mask violations of Guests and Visitors - not businesses. Sure, cite Businesses when they are egregiously violating policy, but stop having us go after our own customers when there is no backbone from the City.

---

We are simply trying to stay in business. Therefore funding is our highest priority.

---

WE do our best work when we are inspired and learning from our fellow dmos, attractions/assets and community leaders.

---

We have the TRT money to spend. Lets do so and bring visitors to Central Oregon.

---

We just need the ability to bide our time. If everyone could stop, calm down, and be safe for 6-12 months, without having to worry that our mortgages would come due or our health insurance would be taken away, we could just plain get through this. Being forced to take risks for tourist dollars is not helpful long term.

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**Q24: Do you have any comments on your priorities for longer-term tourism planning over the next 2-5 years?**

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Climate and land preservation concerns

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face to face collaboration - we don't do online/zoom meetings well and find them a chore- not a fun and exciting thing to do!

---

I honestly don't see a change and think we will be wearing masks for a long time (sorry). And...SARs was contained, but go to Asia - everyone wears masks on the subway. We need to look at how our Industry can evolve and adapt to virus outbreaks and climate change. Want to make us all safer? Work on getting a rebate through Energy Star or Fed for retro-fitting our buildings with higher grade MERV filters, etc. Giving me a sign asking people to wear a mask does me no good.

These three must be closely aligned for providing a sustainable future for tourism.

Until the COVID issue is properly addressed and resolved it is impossible to effectively plan for the long term.

We must protect TLT at the local and statewide levels.

We need FACETIME and usual conferences for inspiration and checking in with others about how we deal with our issues, successes and problems.

We'd like to get more tourism businesses going, both tribal government operated and private sector, and focus specific areas of the reservation that we can open up for tourism activities

**Q27: What topics or resources would be most beneficial when it comes to racial equity, diversity, and inclusion trainings?**

Appropriate communication tools for race and diversity.

Call a spade a spade. Have a training designed for older, white, male managers. Go over colloquialisms and other phrases that maybe were ok to say in the 80's but just don't fly anymore.

Cultural Bias

Disability, sight and/or hearing impaired; mental health awareness

Empathy, Class Consciousness, Believing minorities.

How to be inclusive in our marketing strategies.

How to incorporate these elements into PR and marketing strategies

I am mostly white. Perhaps you should be asking this of people of color.

If this refers to the prior topics, I think that Oregon, like many other states, has a long way to go on racial equality. We are missing a huge opportunity to transform the PNW into a place that actively courts people of color to our travel destinations.

Relating to local native tribes, sexism, and unconscious racial bias.

Ways we can help our tourism-related businesses be welcome to people from different cultures. Help creating well-researched content that can help people plan their vacation which answers questions they may have about what their experience should be when they visit our destination.

**Q29: In a few words, what, if anything, needs to change for your community to feel like a destination where ALL who travel can enjoy their journey and feel welcome?**

A better understanding of business practices including interacting with people of different backgrounds. trust for outsiders to come here and respect our culture, people, land, and mentalities that have been shaped over the past 150+ years

Acknowledgement and data that we receive visitors from many diverse cultures to show the need to adapt and welcome.

---

Businesses don't care about someone's race, gender or other. Their goal is to get customers in the door and sell their products. Businesses in small towns are likely not making customers feel unwelcome. Unless they are not wearing a mask. Then I have heard that the businesses are making them feel unwelcome and even calling the police on their customers.

---

Communitywide, awareness around microaggressions and training to avoid them might be helpful.

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Education - defining what it means to be in Central Oregon

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Every ethnicity, age, and ability (both cognitive and physical) should be represented in adventure guides, marketing materials, and outdoor industry marketing. Video should be leveraged to reduce the fear of the unknown, and more services like the bus to trail transportation needs to be created to provide transportation to green spaces for those who don't have a car, and people who have visual differences. We also need more ADA accessible trails so that those with mobility differences can leave the cars behind and enter the trees to improve their wellness.

---

I am a relative newcomer (4 years) to a heavily White community with rural Oregon heritage, which is a nice way of saying it's RACIST. Not "unconscious bias" racist, though we have that too, but embarrassingly, weirdly, blatantly racist and clueless. A friend suggested moving here and I had to tell her to reconsider because her children are non-white. I have met only one out gay male here, and he quickly moved to Portland. Lesbians of my acquaintance get told publicly on Facebook that they are unacceptable to The Lord. So, to make this place feel safe for all? You'd really have to start with the basics—PLUS getting all the well-intentioned, well-off white retirees from liberal cities to recognize their own bias. It's going to be quite an uphill climb. I try to help by writing about these issues for the local newspaper, but even I am just another well-intentioned mostly-white lady. People tell me I'm helping. Well, that's nice. It's very hard to tell. I think the school district and local newspaper would be good starting points. Get them far more educated about these matters and offer grants for actual programming that helps people of color, LGBTQ+ folks, etc., or that calls them out when they fail those communities.

---

I believe Bend and Central Oregon for the most part are welcoming of different races and diverse groups. There are however, some that are not welcoming and who are part of the systemic racism that can have a negative impact on our visitors and locals alike. I don't know what the answer is with regards to community racism that has been bred in those since childhood.

---

if visitors can see and meet people who they have something in common with that would make them feel more welcome - so diversifying our own community should come first

---

Less expectation of needing to be "elitist" outdoor recreationists/gear-head; better mass-transit/ transportation infrastructure; non-motorized traffic roads / routes. More awareness training for all places of business and organizations.

---

More focus on write-ups about our destination about different LGBTQ/BIPOC-owned businesses to show the diversity in our area and make people feel welcome and excited to visit.

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More understanding of implicit/unconscious bias within our community.

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My community is tilted toward being a white people mecca. It's skiing, paddle boarding and craft beer drinking, on the whole. We need to both show faces of color participating in these areas and need to broaden the palate of interest beyond what works for the moment and what works for white people. Ultimately, this is tied up with economic equality and a much bigger issue.

---

People need to live by the golden rule of treating others how they want to be treated. Respect is a two way street, and most people want to do the right thing.

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Those who are closed-minded and racist need to get with the program and start accepting others, without feeling threatened by people who are different from them. They need to realize and understand that pushing people away and being unwelcoming is not helping their "cause" - that the world is changing and embracing others is the only way into the future

---

We need more diversity. Our county is basically white as is most of Oregon. Our organization needs to hire to have more diversity and we would like to see more diverse visitors. Our industry unfortunately is mostly white.

---

We need more people of color to move here. And let's also have that uncomfortable conversation that straight, white people visit here too and we can market towards them as well. IE...yes, let's keep Portland weird...but acknowledge that you don't have to be weird to visit or live here either.

---

We need to make sure to include ableism and disability awareness in the DEI/JEDI trainings and education

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**Q66: Is there anything else you would like to share about the topics discussed in this survey?**

COVA rocks! What a great help they are. We are proud to be part of the Central Oregon Visitor Association

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I am disappointed that Travel Oregon has abandoned efforts to promote birding and other wildlife watching programs. You were a founding member of the Oregon Birding Trails project, and yet you no longer support the development or promotion of birding trails in Oregon.

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I have not found the local DMO or Travel Oregon to be helpful in collaboration or support with my business.

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In relation to COVA, if you are not Bend, you do not get much concern or notice.

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The funding sources for small DMO's is inadequate and inconsistent. Although considered a partner in the marketing process, ie., State to Region to Local, small DMO's do not participate in the state and regional TRT funds. Yet it is the DMO that pays the most important role in the visitor experience. State and regional marketing may have gotten the visitor here, but it is the local that interacts with the visitor, serves their needs and makes sure they come back. In addition, small DMO's, with limited staff and funding, are expected to have marketing efforts on par with the State and region. Finally, any DMO that depends on membership dues, will see a significant drop in income. However, if a business is still trying to stay open, we can not drop them for non payment. Adding to the issue is the fact that any DMO that is a 501(c6) has not qualified for any funding.

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Visit Central Oregon has taken some nice strides with its new leadership. I still feel as if Travel Oregon ignores Bend and Central Oregon. Maybe this is because of VisitBend? Not sure. I'd love to see some high profile Fam tours come through.

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Visit Central Oregon needs to expand its visible support out to other areas other than central Deschutes County.

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We welcome tourism in wheeler county. Because of covid most of our community events were cancelled.....blue grass festival, fair and rodeo, bike and motorcycle groups, street fairs, Fossil Fridays.....how can we safely have sm gatherings and how to promote we are covid sensitive.

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