



# **2020 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY**

## **EASTERN 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 Eastern Oregon with additional statewide results provided for context.

# 2020 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY

## EASTERN OREGON

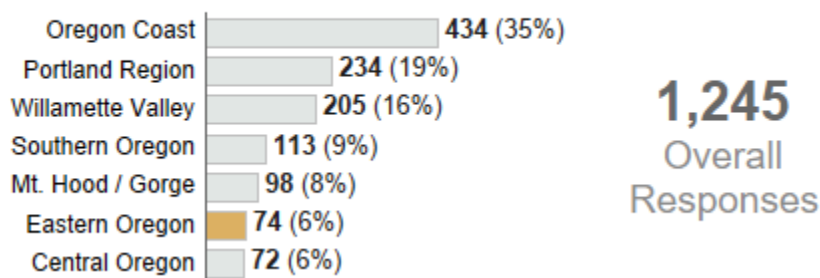
### SURVEY GOALS

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 decision 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 74 responses from Eastern 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 Eastern Oregon compared to the overall statewide survey results (referred to as the “overall” in figures).

*Number of Respondents*



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 the 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 Eastern Oregon respondents are presented within the report. These comments are presented in the respondents' own words, and they do not represent the opinions of Travel Oregon. Representative selections of open-ended responses from Eastern 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

- Forty percent of Eastern 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 11% anticipate layoffs/terminations at their business/organization within the next six months, while 24% are unsure if layoffs will occur within the next 6 months.
- Over half (55%) of Eastern Oregon respondents characterize the impacts of COVID-19 on their organization/business's revenue or funding as having a significant negative impact. By comparison, 5% describe the wildfires as having a significant negative impact.

### RESILIENCY, RECOVERY AND REOPENING

- Forty-six percent of Eastern Oregon respondents are not at all concerned about promoting their community and feel it would benefit from visitors (compared to 37% statewide), while 19% expressed some or significant concern (compared to 24% statewide). When it comes to welcoming visitor to their communities, they are most concerned with a diminished visitor experience due to facility/amenity closures, fewer frontline workers, etc.
- "Help advocating for effective policies and funding to support tourism businesses/organizations" is the resource that will best support Eastern Oregon businesses/organizations recover, followed by "tools and trainings to improve business communications and marketing." "Support developing and bolstering visitor experiences that are COVID-appropriate and that enhance local livability" will best support Eastern Oregon communities.

### PLANNING AND MANAGEMENT

- From a list of ten actions that would aid in recovery from COVID-19, wildfires, and related economic conditions, Eastern Oregon respondents identified grants and funding resources as their top priority. Marketing and promotion should be a key focus area in the longer term (next two to five years).
- "Identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery" 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

- Thirty-eight percent of Eastern Oregon respondents think the tourism industry should play a role in advancing social and racial justice, a smaller share than the 54% of statewide respondents. Thirty-nine percent do not think the industry should play a role, while 23% are unsure.
- Fifty-two percent of Eastern Oregon respondents report having received training related to cultural awareness, anti-racism, implicit bias, or some other diversity, equity, and inclusivity related training. Two thirds (66%) would be interested in participating in diversity, equity, and/or inclusivity related training. Nine in ten Eastern Oregon respondents feel somewhat or very prepared to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds.

## RESPONDENT PROFILE

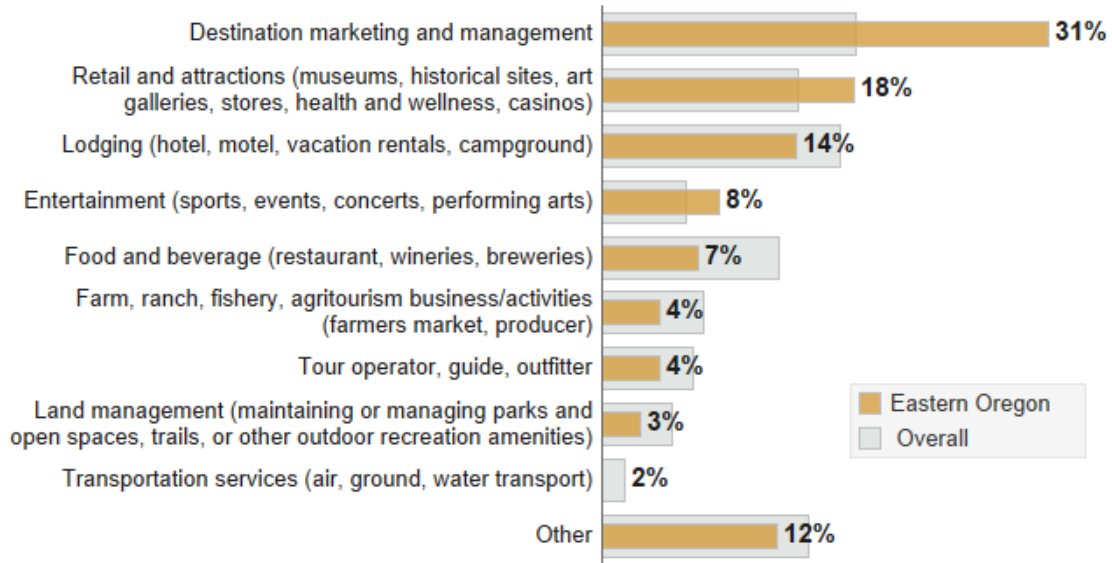
The survey received broad participation by tourism industry sector. Overall, the destination marketing and management sector accounted for 18% of respondents, followed by lodging (16%), retail and attractions (12%), and food and beverage (both 12%). “Other” write-in responses, comprising 14% of the overall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

Over half of all statewide respondents represent for profit businesses (56%), while 27% represent non-profit organizations. Eastern Oregon had slightly less representation among for profit organizations (46%), relative to the statewide results, a roughly equal share of non-profit, and a greater share of government entities.

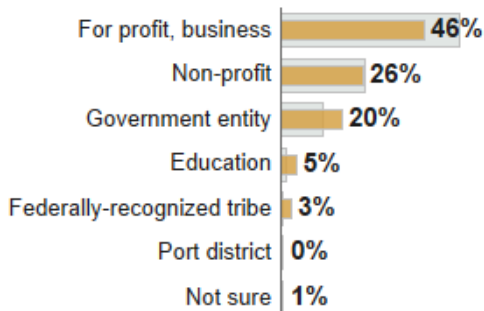
Statewide, sixty-two percent of all respondents are employed full-time in the tourism industry, 18% are employed part-time, and the remaining 10% are retired, not currently employed, or prefer not to say. The distribution of results by employment status in Eastern Oregon generally align with the statewide overall results.

### Industry Sector, Entity Type and Employment Status

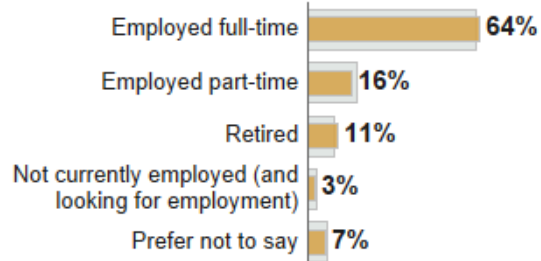
Q: In what sector of the tourism industry do you primarily work? Choose one:



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



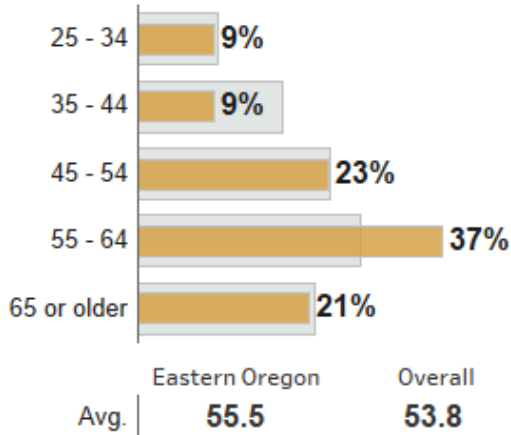
Q: Which of the following best describes your current employment status in the tourism industry?



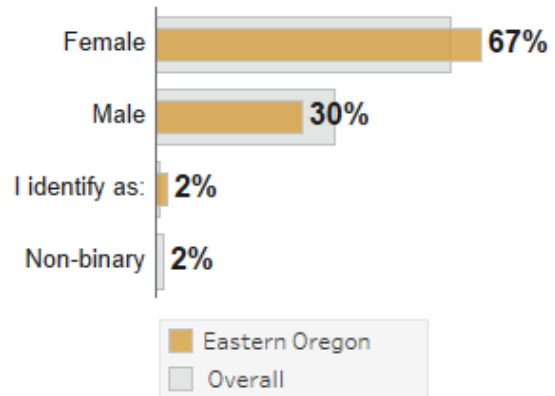
The average age of respondents statewide is 54 years with roughly half of respondents aged 55 or older, and half 55 or younger. The average age in Eastern Oregon was slightly older at 56, with a greater share of respondents aged 55-64. Eastern Oregon respondents skewed slightly more female (67% vs. 61% statewide).

## Age and Gender

Q: Respondent age:



Q: What is your gender?

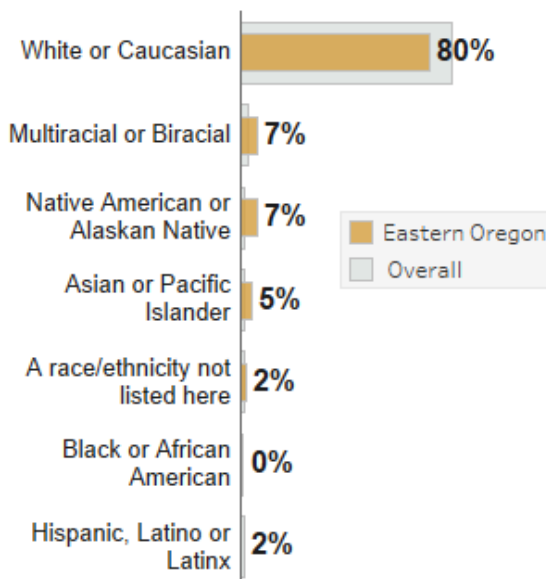


Statewide, nearly nine in ten respondents describe themselves as white or Caucasian. Eastern Oregon is somewhat more diverse at (80% White/Caucasian).

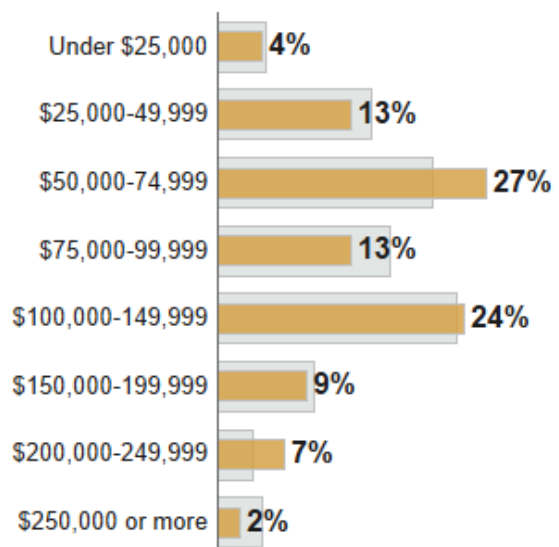
Forty-one percent of all tourism industry stakeholders in Oregon have annual household incomes of less than \$75,000. Broadly speaking, incomes in Eastern Oregon align with the statewide overall results.

## Race and Household Income

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



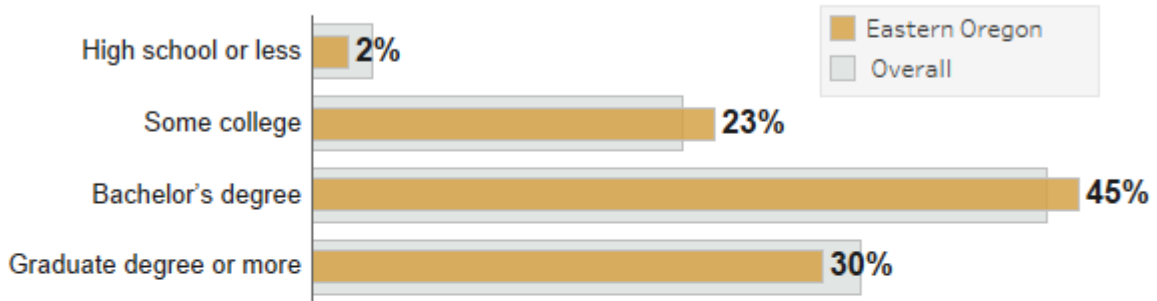
Q: Which of these categories best describes the total gross annual income of your household (before taxes)?



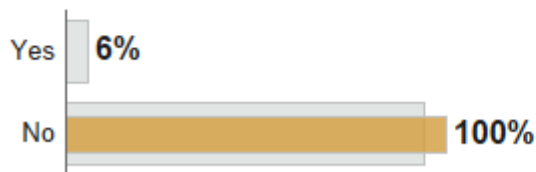
Statewide, three quarters of respondents have a Bachelor's degree or higher level of education, while a quarter did not attain their Bachelor's degree. Six percent of overall respondents statewide report a disability, with "walking" most frequently identified. Reported levels of education in Eastern Oregon are similar to the statewide results.

## Education Level and Presence of Disabilities

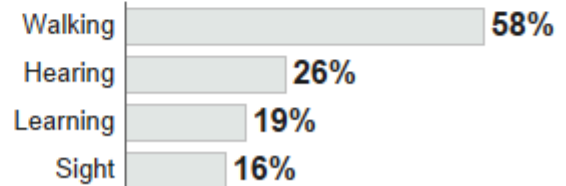
Q: What is your highest level of education?



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 all respondents (vs. 40% in Eastern 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. 4.0 in Eastern Oregon), which represents a median of 50% of employees within the organization (37% in Eastern Oregon).

### Layoffs and Terminations

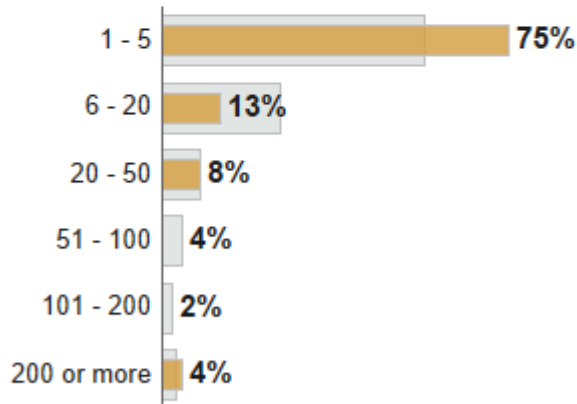
■ Eastern Oregon    ■ Overall

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



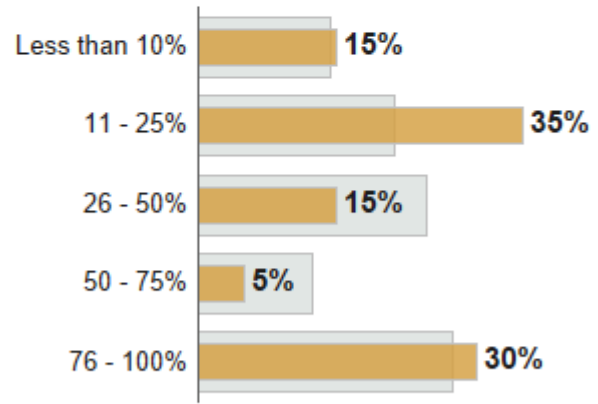
Q: [IF YES] Including both full-time and part-time employees...

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



	Eastern Oregon	Overall
Average	44.4	30.4
Median	4.0	5.0

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



	Eastern Oregon	Overall
Average	45.4%	49.7%
Median	27.5%	50.0%

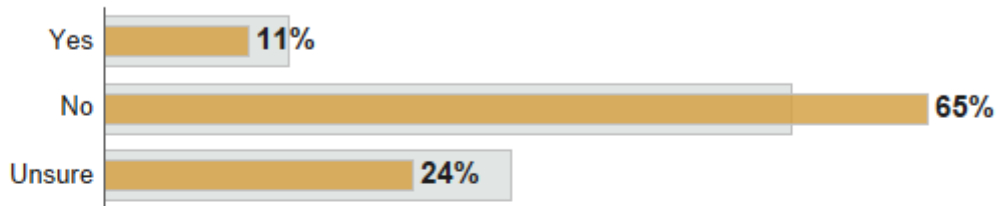


The survey asked about anticipated future layoffs, and the timing of layoffs both past and future. Statewide, 14% of respondents anticipate layoffs within their business/organization within the next six months, 54% do not anticipate layoffs, and a third (33%) are unsure. Respondents in Eastern Oregon are slightly less likely to anticipate layoffs (11%). The greatest share of layoffs occurred early during the pandemic, four or more months ago.

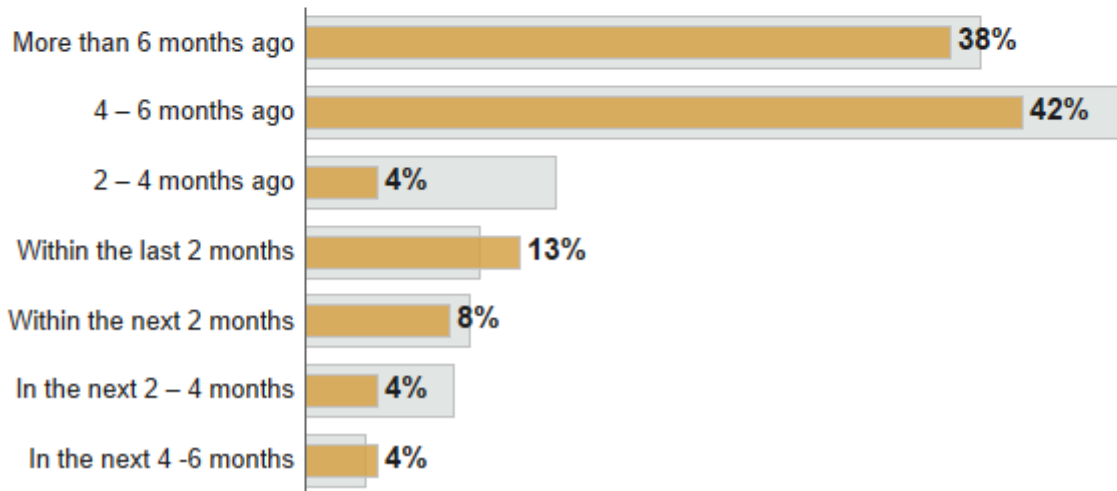
## Layoffs and Terminations

■ Eastern 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)*

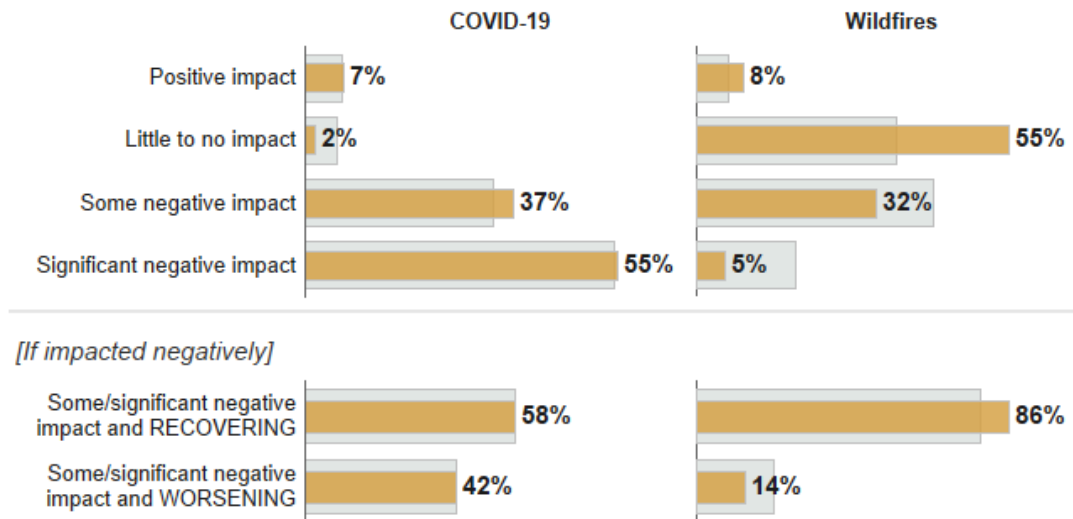


Statewide, 12% of respondents reported that COVID-19 has had little to no impact or a positive impact on their business/organization’s revenue or funding. A large majority (88%) reported some or significant negative impact. Of those that experienced a negative impact, 42% are experiencing worsening impacts, 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 results, Eastern Oregon respondents were slightly more impacted by COVID-19 and slightly less impacted by recent wildfires.

## COVID-19 and Wildfire Impacts

■ Eastern Oregon ■ Overall

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

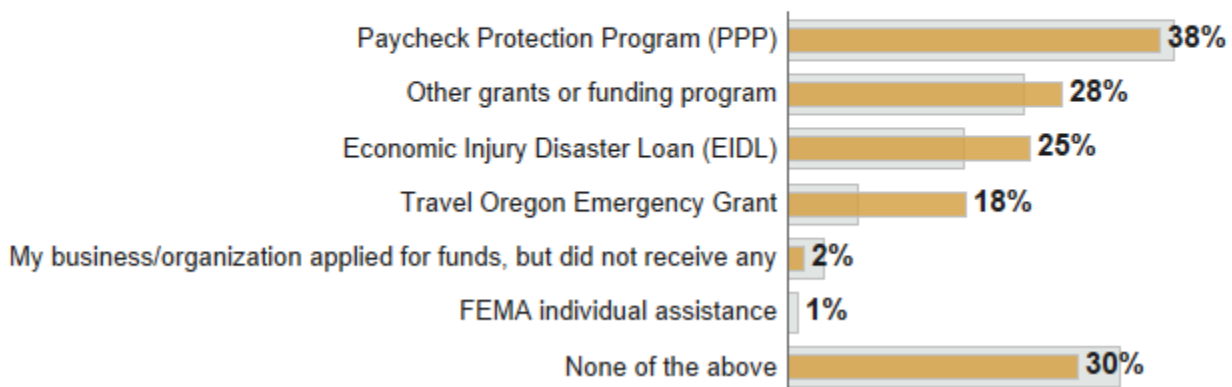


Roughly two thirds of all respondents work for businesses or organizations that sought funding, while a third neither sought, nor received funding. The Paycheck Protection Program (PPP) was the most-awarded funding source overall, followed by “other grants or funding program,” and Economic Injury Disaster Loan (EIDL). Just 4% of all respondents work for business/organizations that applied for funds but did not receive any. Eastern Oregon respondents were especially more likely to be the recipients of the Travel Oregon Emergency Grant funding.

## Funding Sources

■ Eastern Oregon ■ Overall

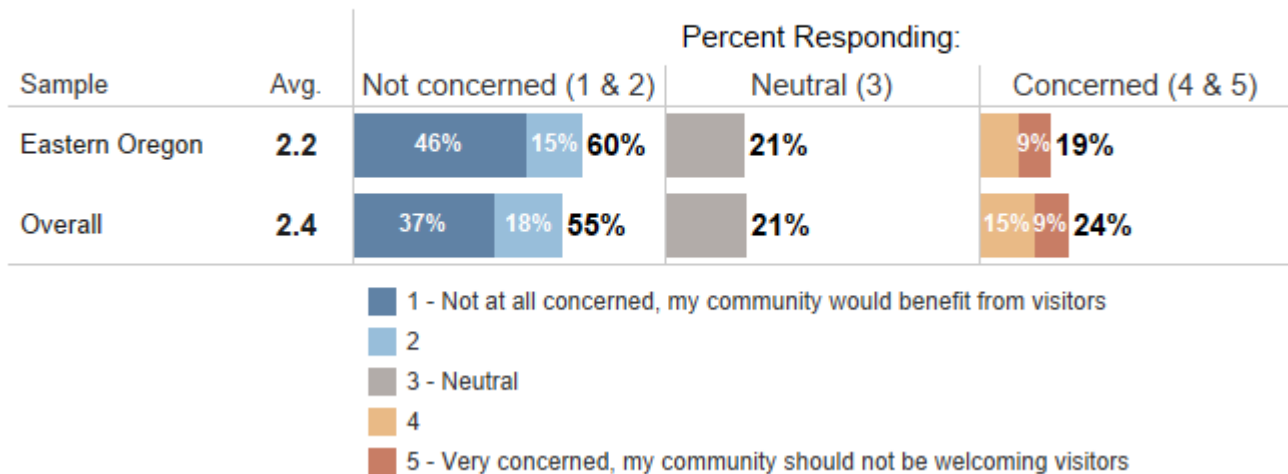
Q: Has your business or organization received funding from any of the following: (Check all that apply)



## 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. Statewide, more than half of respondents (55%) are not concerned about welcoming visitors right now, 21% are neutral, while 24% feel their community should not be welcoming visitors. Respondents in Eastern Oregon express relatively less concern about welcoming visitors, with 60% responding “2” or “1” (“not at all concerned, my community would benefit from visitors”).

*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 Eastern Oregon respondents by response follows. A full list of open-ended comments from Eastern Oregon respondents is provided in the appendix.

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

*Our numbers are being watched carefully. If the state sees the numbers rise again (including prison populations), the governor will take us back to baseline.*

*I almost lost my husband six months ago. Unless there is some kind of a safe way travelers are educated and committed to safety procedures and can prove they are healthy we do not want them at this time.*

*Oregon is being overrun by tourists that are often inconsiderate & oblivious to local culture. We are surrounded by small business owners (mostly wine people) who continue to gather in LARGE groups even with CoVid. They never wear masks. We are hugely tired of TOURISTS & want them to go away soon!!! Greedy local business owners can go too!!*

*This is the wrong time to promote visitation. Travel Oregon should be supporting capacity building among visitor services and facilities, until Covid dangers show clear abatement.*

*If people here and visitors would wear masks all the time and social distance, I would feel there is not a problem. Too many people think they can go about the same as always, before C19 that is.*

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

*Economic concerns weigh more heavily on my business and my community than viral concerns. I trust visitors, my staff, and my community to take whatever steps are necessary to continue life as normally as possible while maintaining health safety.*

*Keeping with the state mandates of social distancing, masks and such I believe that we can function close to normal and help create/build economic vitality to our communities and struggling businesses.*

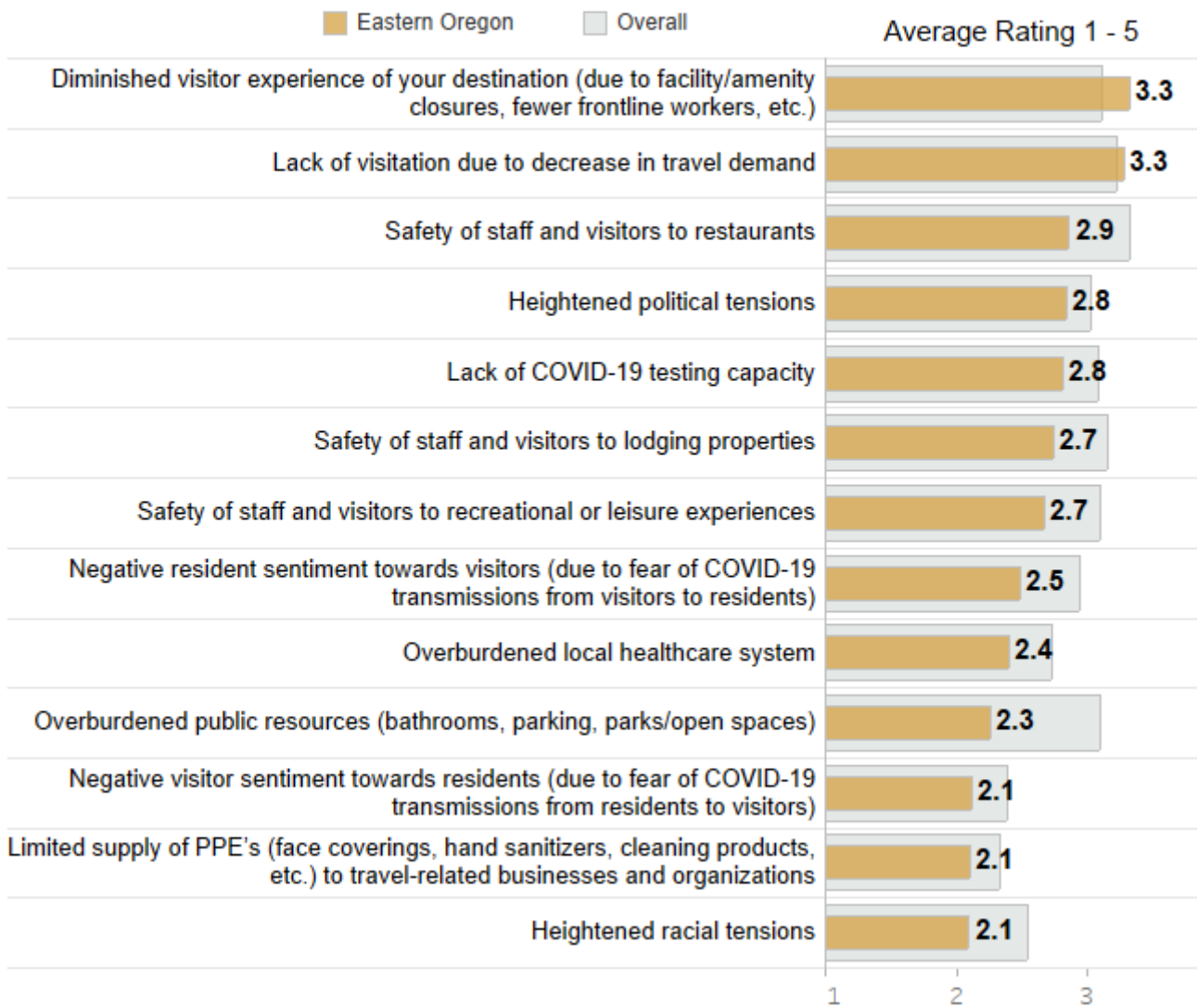
*Tourism is economic catalyst that keeps our community open. Cases of Covid have leveled off and we need to welcome guests*

*Visitors from within and outside Oregon have greatly helped keep the economy going this year. However, there is some added risk of COVID19 infections, brought by visitors from more highly infected areas. Overall, I think the positive has outweighed the negative.*

*We have to get our heads around the fact that our lives have changed, and that for the foreseeable future we must follow CDC safety protocols. But we can do that and still get back to near normal operations in most business sectors.*

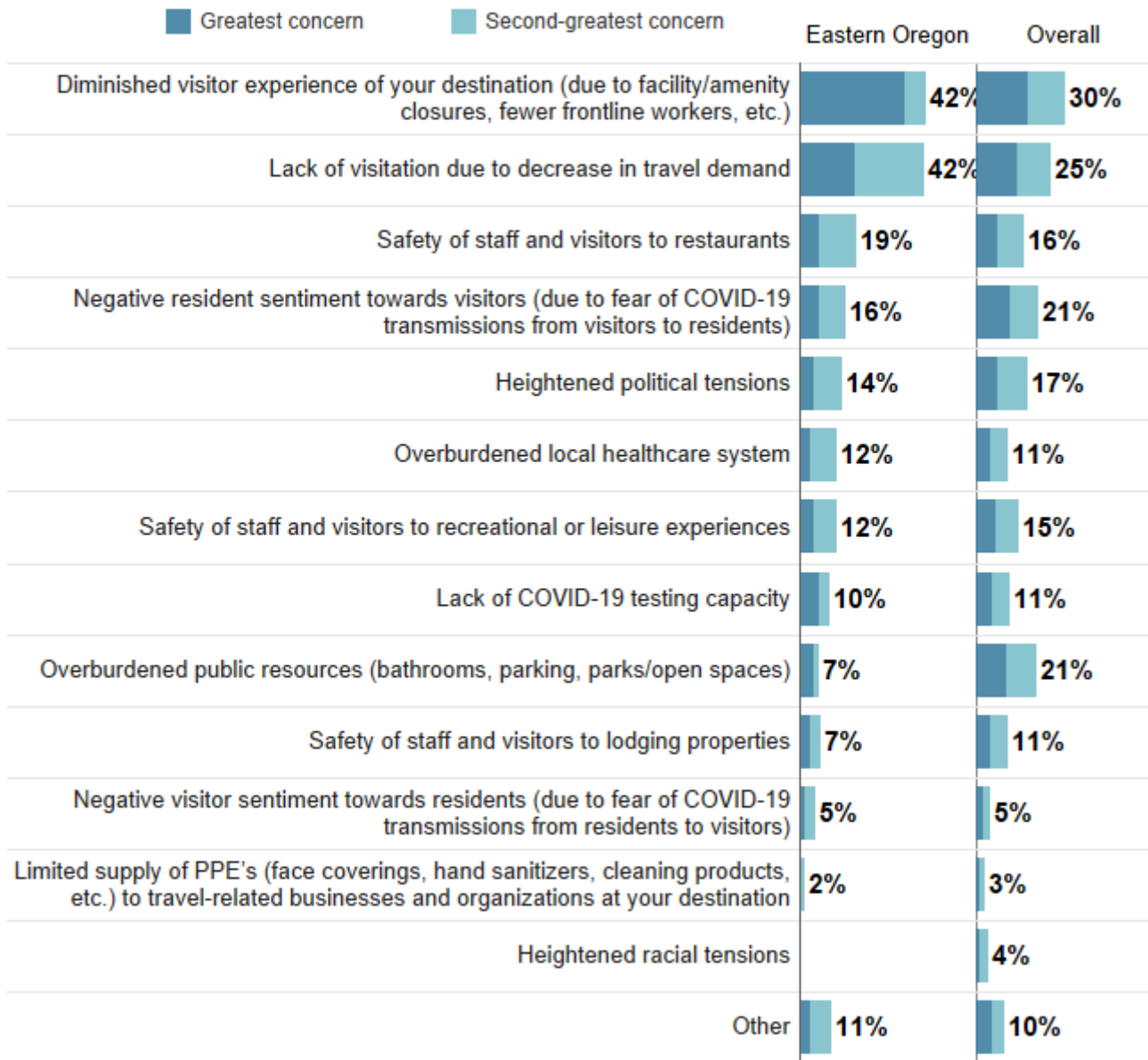
All respondents were asked to rate their level of concern with various aspects of welcoming visitors to their community, with “1” being “not at all concerned” and “5” being “extremely concerned.” Overall, the safety of staff and visitors to restaurants, lack of visitation due to a decrease in travel 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 Eastern Oregon indicated lower levels of concern across all categories apart from “diminished visitor experience of your destination” and “lack of visitation due to decrease in travel demand.” The findings suggest Eastern Oregon stakeholders are eager to attract visitors. Categories in the figure below are sorted in descending order by the average rating of Eastern 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. Eastern Oregon shared these top concerns to an even greater degree, with more than two-fifths of respondents identifying them among their two greatest concerns. Overburdened public resources, which was of high concern statewide, was of relatively little concern to Eastern Oregon respondents. Concerns are sorted in descending order by the percent in Eastern 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. Demand for tools and trainings to improve business communications and marketing were higher in Eastern Oregon relative to the rest of the state.

## Business/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, overall results 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 Eastern Oregon respondents was similar to the statewide results, however, they were more likely to identify communication tools and message frameworks to drive overnight visitation and increase visitor spending.

## 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)

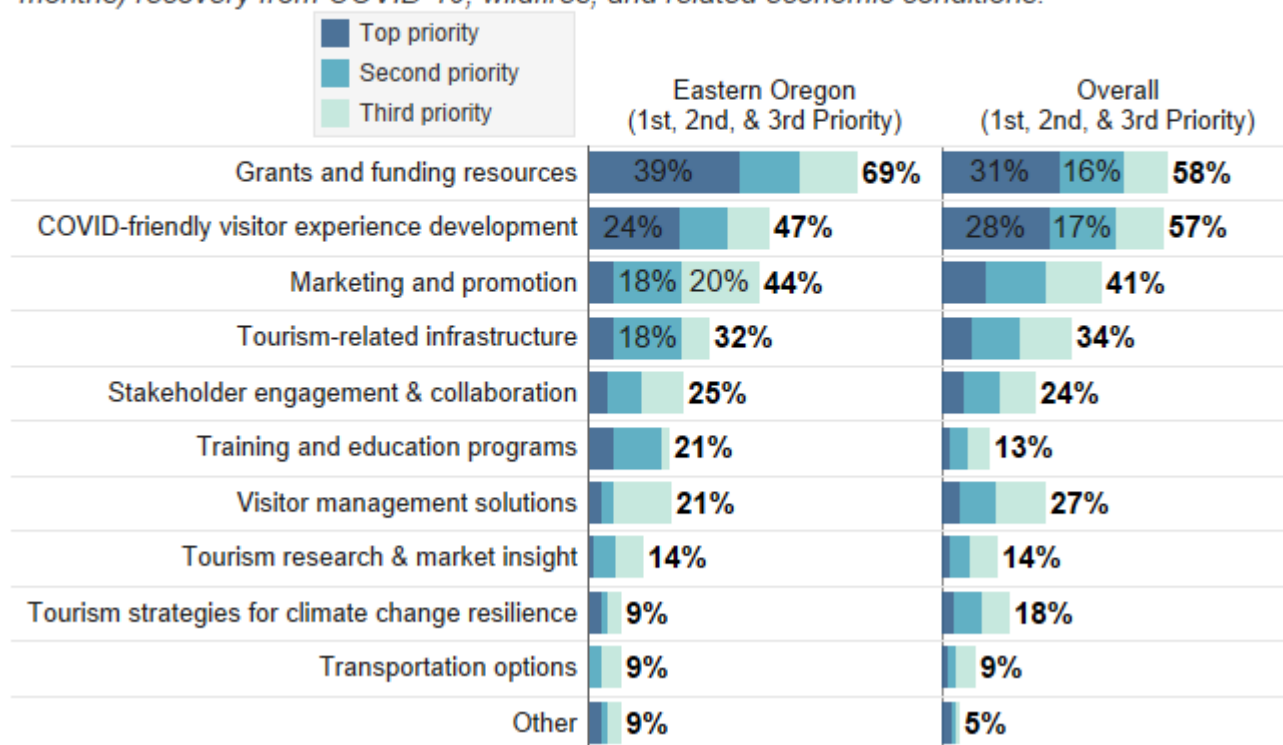


## PLANNING AND MANAGEMENT

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 the second most-identified priority (57% among their top three), by a small margin. Grants and funding resources was a particularly high short-term priority in Eastern Oregon.

### 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:*

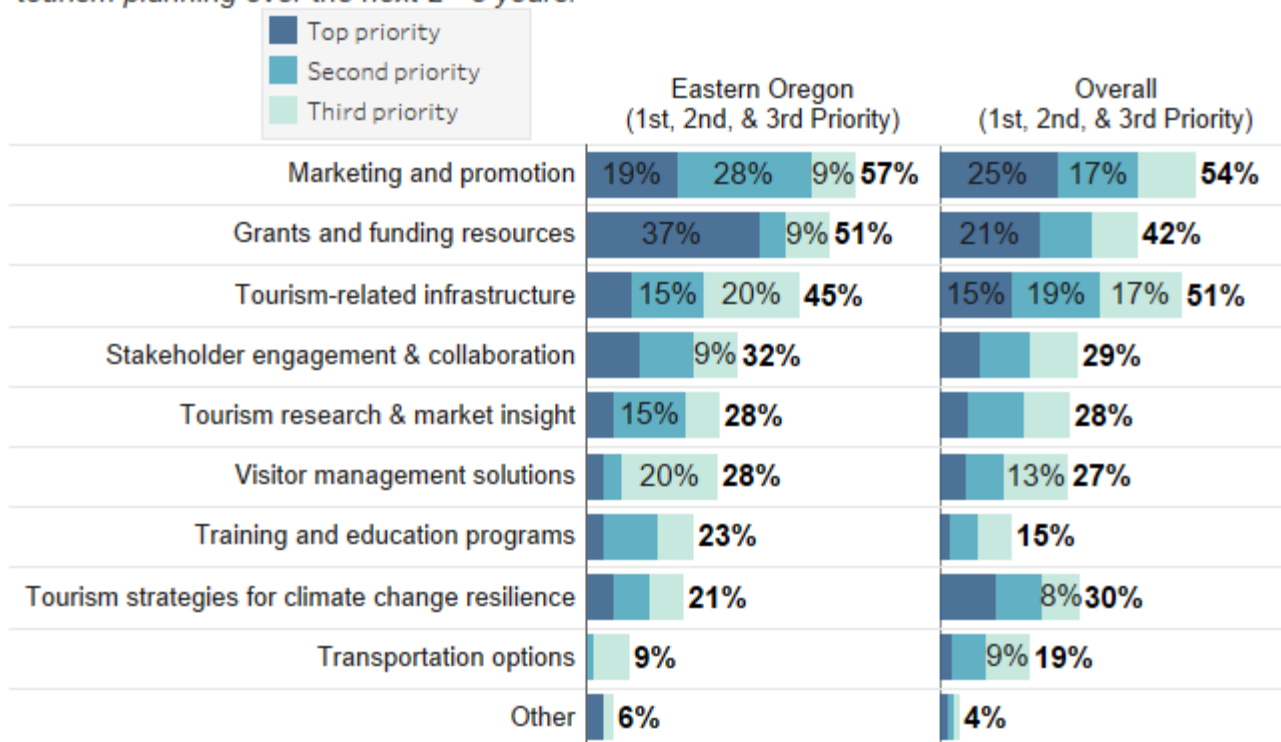


Over the long term, grants and funding resources fell to the third-highest priority behind marketing and promotion and tourism-related infrastructure. As in the short-term, grants and funding resources are of particular importance to Eastern Oregon respondents.



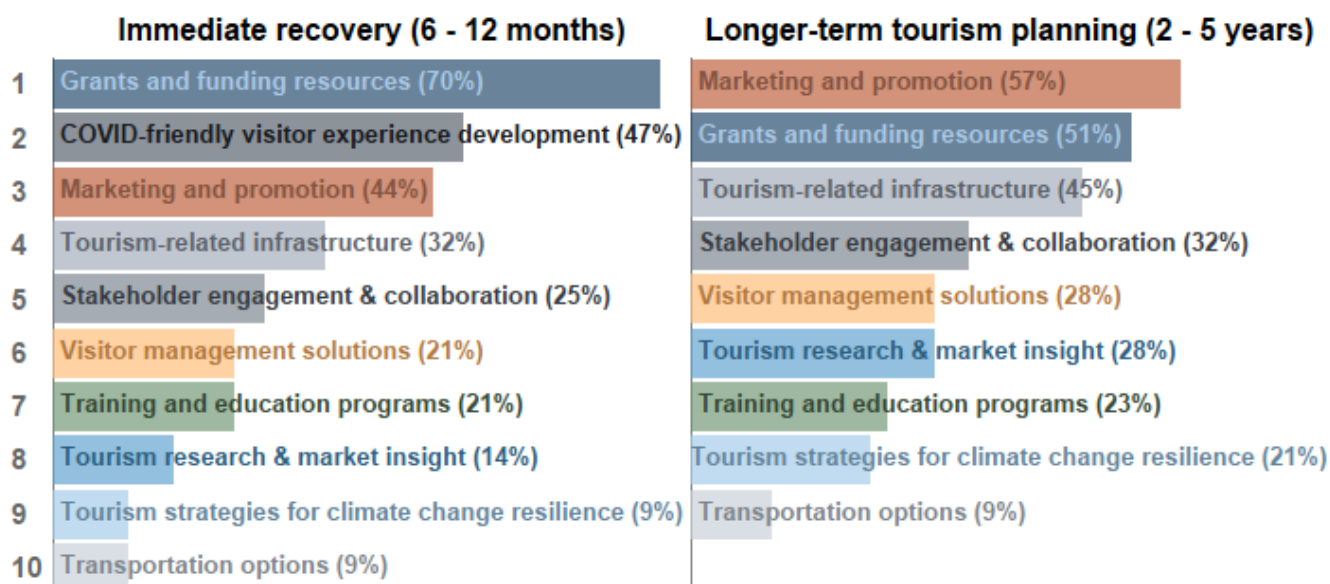
## Longer-Term Tourism Priorities & Focus Areas

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 Eastern Oregon respondents, with categories colored to more easily identify changes in rank order. Grants and funding resources, the top priority for immediate recovery in Eastern Oregon, falls to second in terms of longer-term planning behind marketing and promotion.

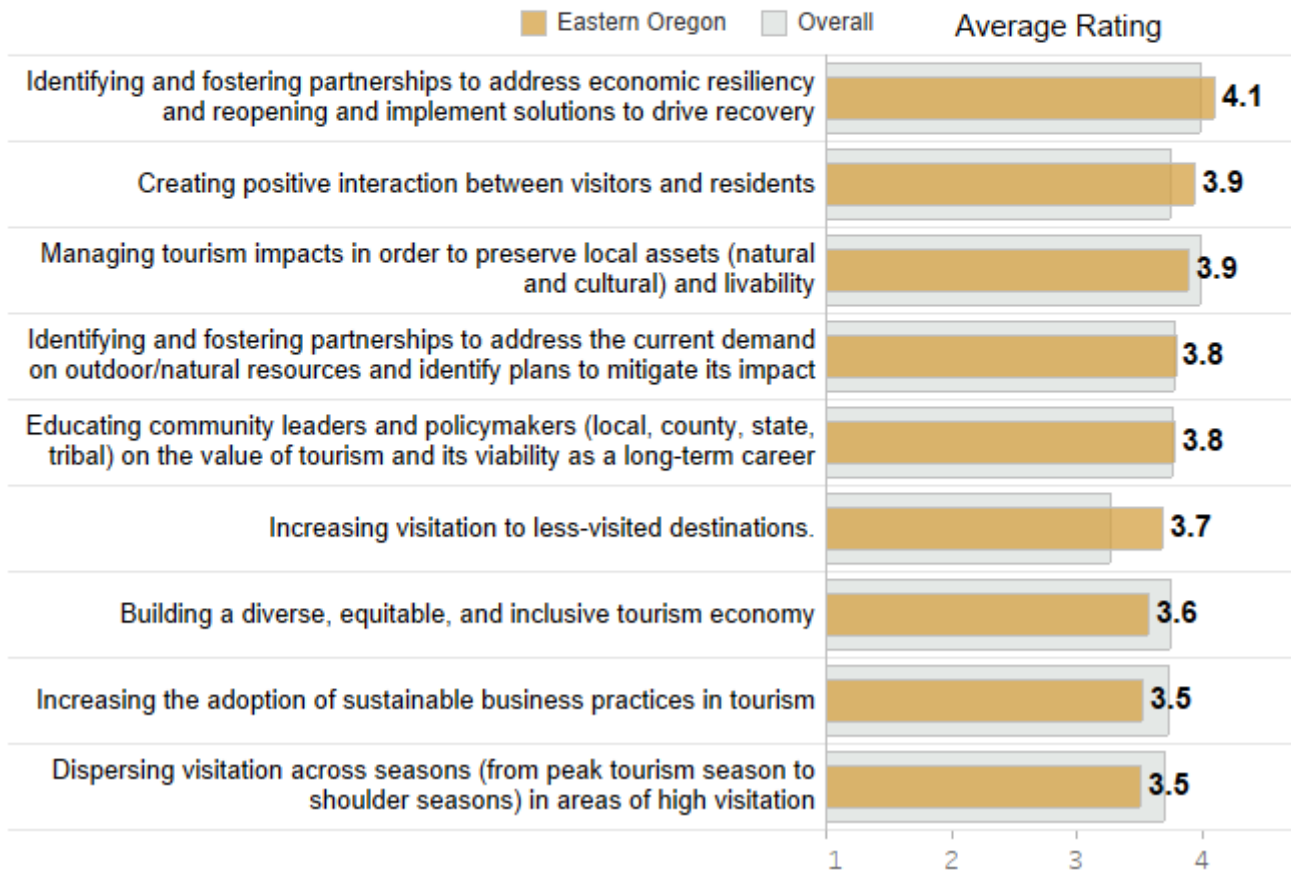
### Short vs. Long-Term Priorities: \*Eastern Oregon



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. Increasing visitation to less-visited destinations, a relatively low priority among respondents overall, was of higher importance to Eastern Oregon respondents.

## Planning and Management

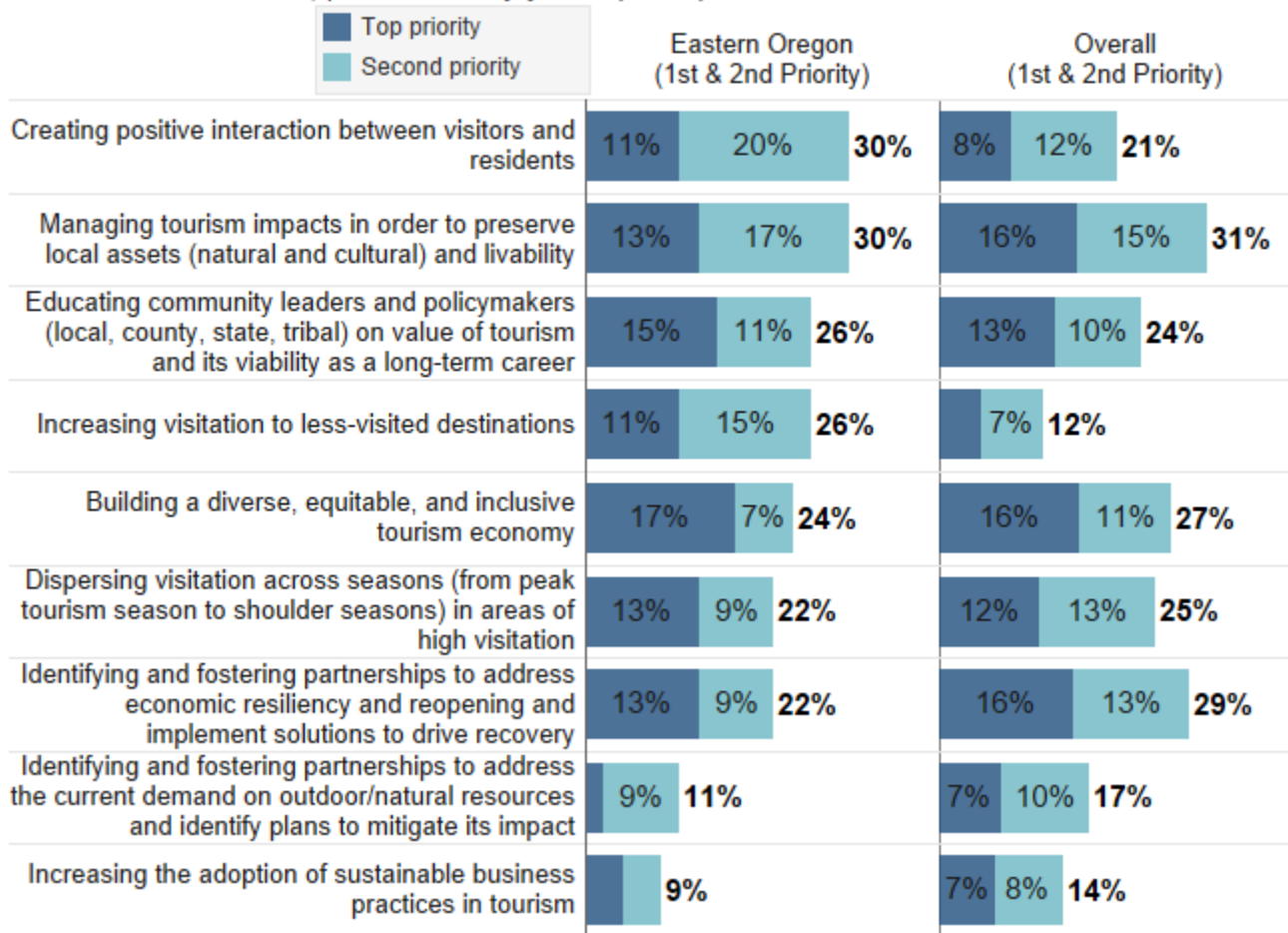
*Q: Please indicate how you would prioritize the following tactical planning and management opportunities to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available, not all tactics should be considered extremely high priorities, and some may 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%). Relative to the statewide results, respondents from Eastern Oregon were more likely to prioritize creating positive interaction between visitors and residents (30%). Increasing visitation to less-visited destinations, the least selected answer option overall (12%), was prioritized fourth in Eastern Oregon.

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

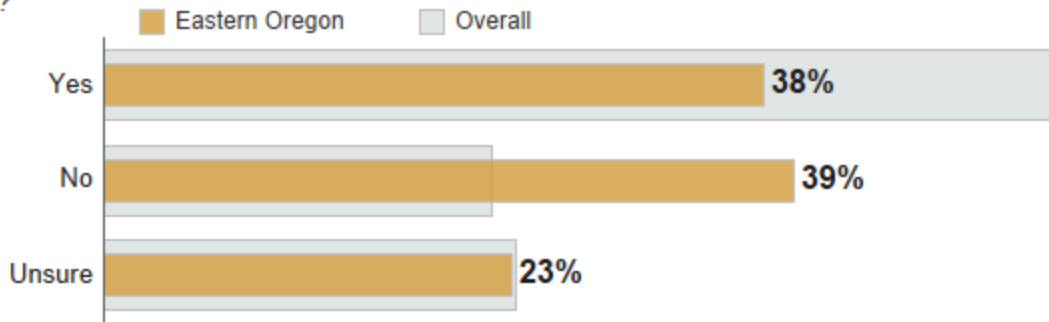


## DIVERSITY, EQUITY AND INCLUSION

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

Statewide, 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. 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). Respondents from Eastern Oregon were less inclined to feel the industry should play a role in advancing social and racial justice (38% responding “yes”). Younger respondents, those under 34 years of age, were more likely to respond “yes” (80%) than older respondents.

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 Eastern Oregon respondents follows:

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

*By creating a lively and engaging campaign that addresses "travel issues" (COVID-19, urban-rural divide, socioeconomic and racial differences, lifestyle values) to be used as an example even if these same issues arise in same town situations. How do we come together as humanity instead of focusing on our differences? Can't we learn from each other? I see a really well produced video that could address these issues and also provide humor around it, which lessens tensions.*

*I think you need to speak directly to BIPOC and LGBTQ+ communities to hear what they have not say, not me. What do they need to feel comfortable traveling to small rural areas in eastern Oregon? What are their recommendations?*

*Our area is popular for its outdoor recreation opportunities like hiking, boating, biking etc. We hardly have any advertising showing people of color doing these activities when our area is promoted. Also showing the main points of interest (Painted Hills, Sheep rock, Blue Basin etc.) with diverse groups of people would create an image that the area is welcoming to everyone interested doing these activities, and wanting to see our highlights.*

*Supporting and promoting and marketing low cost family or group travel experiences and lodging options, rural-urban community exchanges.*

*The tourism industry serves as a bridge between our rural and urban population, as well as local/non-local populations. I think we have a huge responsibility in how and what stories we tell about Oregon's past, present, and future, as well as who we are welcoming to those spaces and who benefits from the visitor dollars that come into communities. I think the tourism also has the opportunity to push the conversation because you are attaching the economic vitality of places to their willingness to progress. Finally, I think Travel Oregon has a role to place in advancing conversations by the programming/trainings they choose, messaging they promote, and projects they invest in.*

**[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?**

*No because I do not see problems, but we live in a small town and are somewhat oblivious to racial justice as everyone is treated the same here.*

Yes, actually. I do not think about race period, other than a person's color is a descriptive adjective. People have a name and each is an individual. His name is Al. Color is irrelevant.

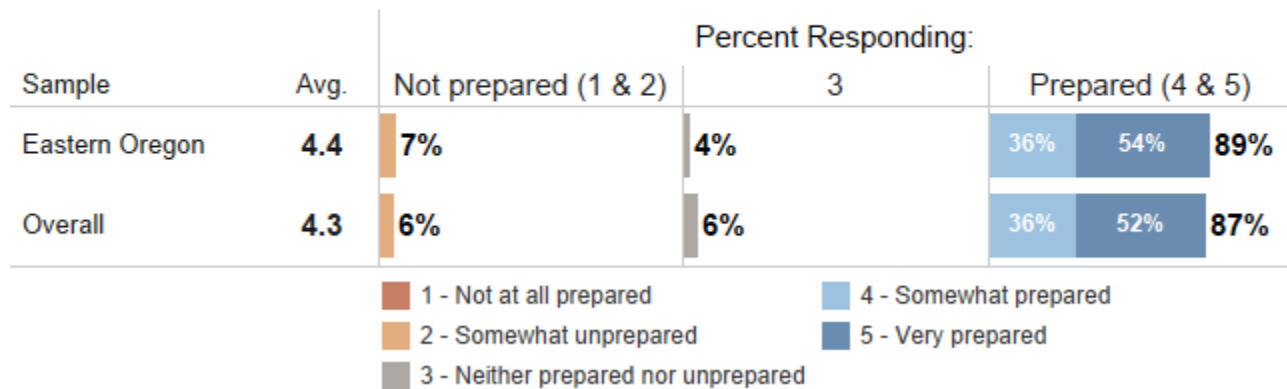
Yes, thank you! I think you should advocate for social justice and stay away from racial justice. Social justice raises us all; however, any racial discussion immediately divides people. Race, along with many other factors, is a part of social justice.

Tourism throughout the world is very diverse, which is why it's also exciting and allows visitors to experience new adventures. Training, education, and compassion is what advances social and racial equality. These things need to be part of the state's culture, not side mission for the tourism industry.

There are other organizations that can fill that role with expertise. I look to Travel Oregon for travel/tourism help. TO's role should focus on making all POC feel welcome to Oregon, not in advancing social and racial justice.

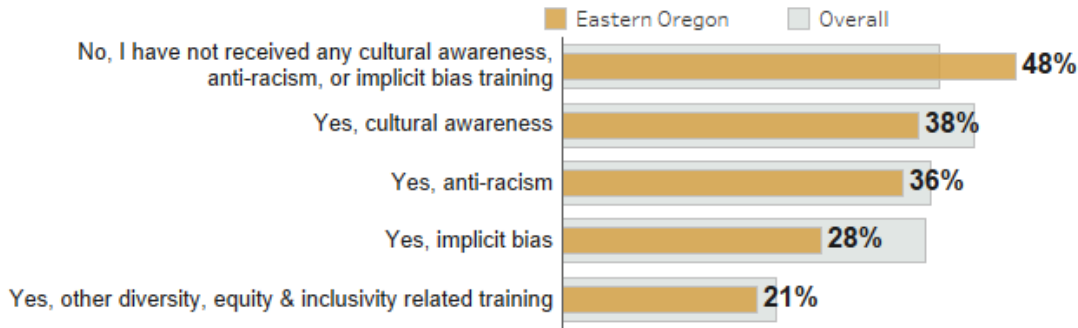
Both statewide and in Eastern Oregon, respondents indicated high levels of preparedness to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds. Nearly nine in ten respondents indicated that they felt somewhat or very prepared. Just 6% of all respondents (7% in Eastern 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?*

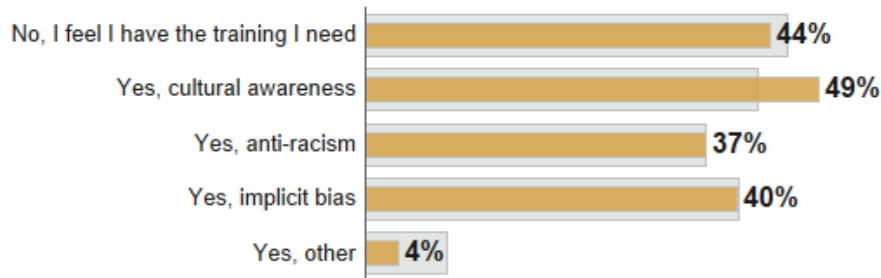


Statewide, three in five respondents indicated that they have participated in training related to cultural awareness, anti-racism, implicit bias, or other diversity, equity, and inclusivity training. Slightly more than half of all respondents (54%) would be interested in participating in such a training.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

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)

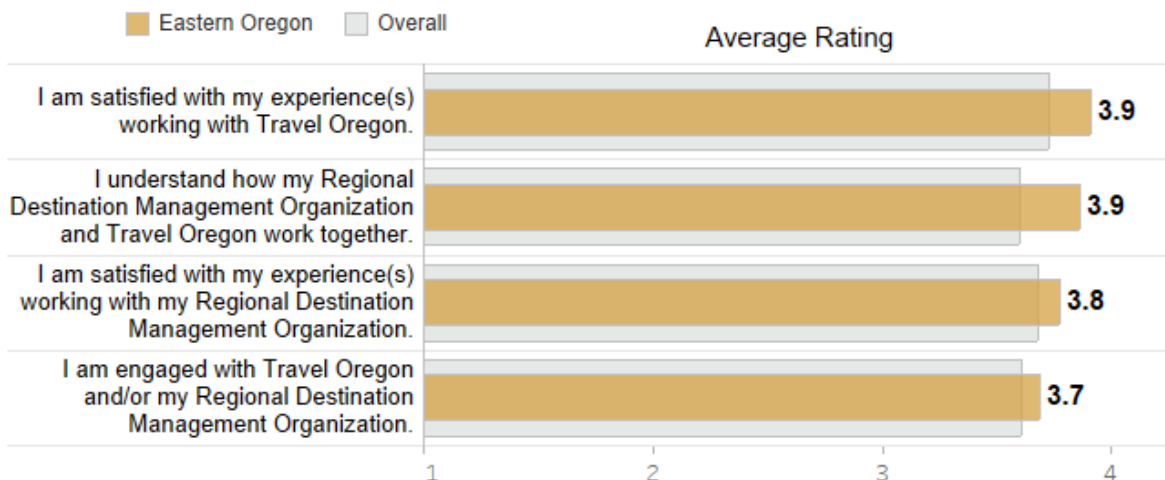


## INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Statewide, 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. Eastern Oregon respondents on average indicated more agreement with all four statements, and therefore higher levels of engagement and satisfaction.

### Industry Engagement

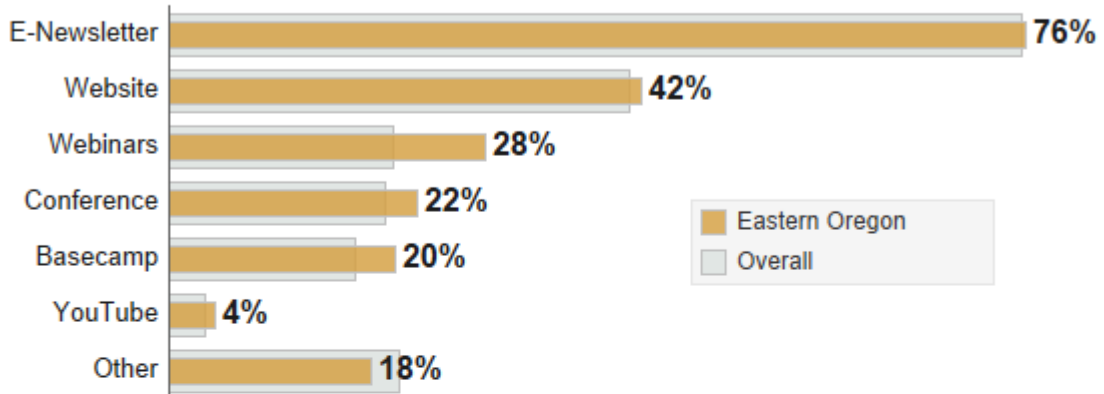
Q: Please indicate the level to which you agree or disagree with the following statements: (1 = Strongly disagree, 5 = Strongly agree)



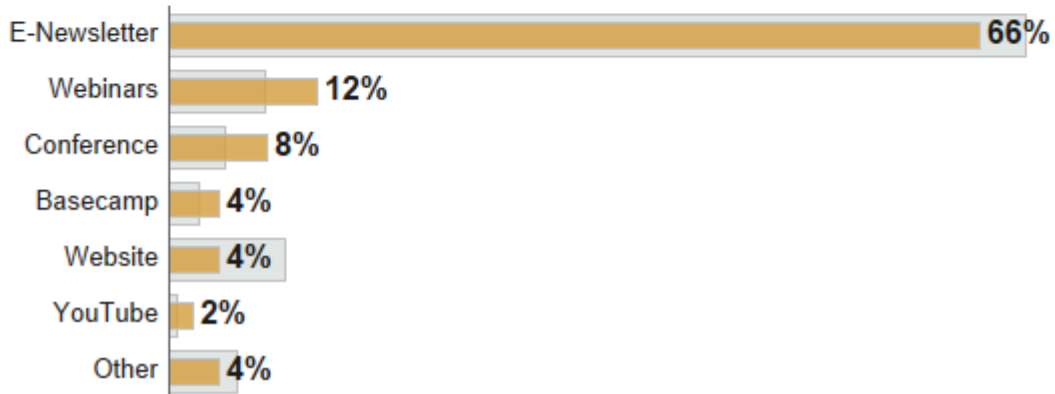
Seventy-six percent of all respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter, followed by website (41%). Just 3% of all respondents currently receive information via YouTube. By a large margin, e-newsletters are considered the best way for respondents to receive information. Relative to the statewide results, Eastern Oregon respondents were more likely to prefer webinars and conferences.

## 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?*

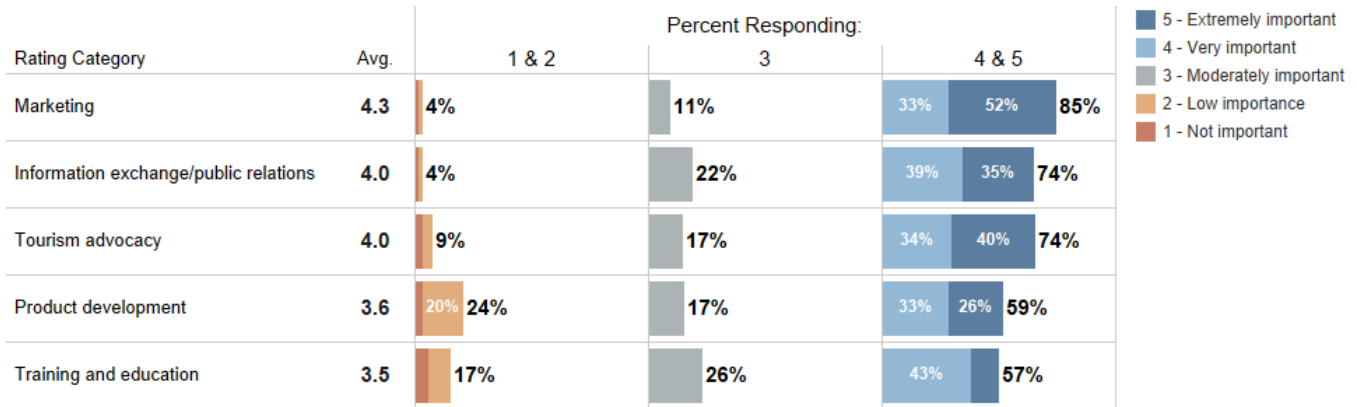


Respondents were asked to provide up to three destinations or attractions in Oregon that they believe would benefit from increased tourism development once it is considered safe to travel. The following word cloud and bar chart summarize these open-ended suggestions from Central Oregon respondents. The 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: EOVA has five primary objectives as an organization. Please rate the importance of these objectives to you personally for your business or organization. (1 = Not important, 5 = Extremely important)



## 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 Eastern 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: If you would like, please explain any of your ratings with your satisfaction with your local or regional DMOs. (\*Asked of Eastern Oregon respondents only, includes all responses).
- Q: With respect to strategic planning for your business or organization, what do you see as your greatest need to help your business grow over the next 3-5 years that EOVA can help facilitate or develop? (\*Asked of Eastern Oregon respondents only, includes all responses).
- 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?

The Covid -19 rules and regulations such as social distancing and wearing masks when engaging with others have become basic practices that make it possible for businesses to stay open and for visitors to come out and enjoy our area. My experience of the last months have been challenging but also positive to see most of us rise to the occasion.

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Although only in phase 2 of Oregon's COVID plan, we are getting visitors from Idaho at our tasting rooms. We don't have hotel capacity, we are getting visitors through Air BNB and vacation rentals or by overnights in nearby Walla Walla.

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If locals were more on board with enforcing mask requirements, the danger of transmission would be less.

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It would be great during this "holding time" to address urban-rural tensions and develop a better understanding why it exists. All it takes is one rude local gas station attendant or one smug and dismissive city dweller to affect a positive experience and result in visitor decline and a drop in business. I also think some of the advertisement budget could be spent helping towns spruce up their settings and develop small businesses that increase a town's amenities and readiness for visitors at a later time. For an example: there is a great motel in Spray but the owner has no restaurant or food cart to send guests to.

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No, except I wish they would stay home. Because people can't leave the country or fly anywhere pretty much, they are deciding it is okay and safe to come here. It is NOT okay. I have not traveled and basically stayed home - here in my community - for the past 11 months. But what is the point of all the precautions when others aren't also doing it? Its like being the only person wearing a mask at a crowded stadium. Why bother?

---

Our community just doesn't have any great restaurants that are open all day. Many just at noon and all of course, have restricted dining areas.

---

Our region has abundant outdoor recreation resources and opportunities. Many of our current COVID travelers are looking for these experiences to get outside and remain active but relatively isolated. However many of these visitors are new to outdoor activities or at least some of the regional sites and activities. Know Before You Go, Take Care Out There, and other messaging highlighting safety including CDC Guidelines, wildfire safety and general outdoor safety are all important and helpful.

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Parts of Eastern Oregon have actually seen an increase in visitors over recent years, due to people seemingly looking for closer and safer destinations. At the same time, some of our attractions have not been open and there has been a shortage of visitor service employees to fill jobs in lodging and dining facilities. Some lodging companies had to open fewer rooms because they hire enough staff to do the work. This led to uneven impacts, both positive and negative, across the region.

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Please don't come at all. Stay in your own backyard. Really! Tourists have become parasitic in our beautiful Oregon & often move here. Please STOP encouraging this. We are out of room & out of Welcome Mats! No More!!

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Related challenge is cancellation of all regional events that attract visitors to the John Day Basin(local businesses and attractions), especially 2020 Cycle Oregon.

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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?**

I think we should expect that COVID will be a factor for some time and should assist businesses in adapting for that. Another takeaway this year is that there is huge demand for outdoor recreation. Unfortunately, this comes at a time when public land managers are having to do big layoffs and have even further limited capacity to keep up with visitors. This is an area that needs investment to keep the land healthy, and visitors and locals happy.

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If you are to promote tourism they must be educated and using proper covid procedures.

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Lack of adequate marketing dollars for eastern Oregon!

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Malheur County currently has about 75 active cases of Corvid-19 and many of those are at the Prison. So those of us who are active in the community have to be constantly on guard as to where we go and to wear our masks and wash our hands. Sadly we don't have quick Covid tests and probably don't have any of the therapeutic drugs available if we catch the disease. The fires are of no concern except for those who have asthma. But our economy has really taken a hit from all the shutdowns and reduced hours and activity.

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Our businesses have been following the State of Oregon's COVID guidelines. Grant opportunities are welcome to keep doors open. Because of COVID restrictions on numbers of visitors, money for marketing opportunities are not available. Businesses would welcome limited cost marketing opportunities.

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Personal responsibility should be a priority over government mandates.

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Some businesses have curtailed activity significantly but have promise of rebounding. While they are in this "down time" it would be great if they were offered marketing training and small grants to help with websites, newsletters, etc. to prepare for upturn in potential visitation.

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Stop pushing Tourism in Wallowa County. It's a very short term and unstable solution. Tourism revenue is seasonal, benefits only a specific set of the population, and competes with all other tourist destinations. A much stronger long term strategy would be to focusing on supporting product development/creation and industry an area or town can produce.

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The hospitality industry needs money to survive. With winter starting now, we don't lose the ability to serve guests outside.

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The most significant and noteworthy impact we've noticed during the pandemic is the overuse and disuse of our Eastern Oregon forests. For our region, I think this is our most pressing challenge prior to next summer.

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We need to shift our economic model and take a hard look at our priorities. Tourism is NOT where we should be focusing all our time, energy and resources.

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

Again, without substantial funding or a bail out, there won't be enough hospitality businesses to capitalize on future visitors.

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Covid friendly Visitor experience is the most important for me since we'll have to educate an entire society that we can't go back to our old "normal" in our traveling experiences and expectations. How can we integrate the new rules of conduct ( masks, social distancing, and other protections) into a positive vacation experience?

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I see the covid issue driving the bus right now. NO uneducated or trained visitors until we get this thing to turn around..period.

---

Make them take buses to gorge areas. Tourists have ruined our lifestyles here & continue to devalue everything. Where is Tom McCall when we need him??

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Our City Councils must make this a priority, along with the reopening of our businesses.

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Tourism should be low-impact and not result in additional development, infrastructure and more people. We like our community as is, but the more people who come here, the more vacation homes get built and the more part-time residents we have. We do not want to be loved to death. We have to find a sustainable way for tourists to enjoy this area. They should leave it better than when they came and they should be contributing to keeping this place healthy and ecologically resilient.

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Travel Oregon has been very successful at developing destinations. Now it's time to focus on helping communities manage those destinations. It seems that with wildfires we'll see more concentrated patterns of tourism across the state as well, as people travel to avoid air quality and other hazards. Communities need tools to be ready for these spikes in demand.

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

Have trainings with spokespeople who have direct experience with the issues. The subtleness of these issues. Most people believe they don't have any biases. I can include myself with having some unconscious blind spots never having experienced racial or economic inequity

How to navigate differences of opinions: conflict management Training to rid small towns of "shaming" behaviors How to address the urban-rural divide

I think a training on actionable strategies would be nice. Even if I have an understanding of implicit bias, racism, etc. it's not always clear how to translate that to inclusive marketing or conversations.

People are attending these trainings for all the wrong reasons - mainly because their employer forces them to. We need to figure out how to get beyond that and have people attend these training because they want to.

Safety on public lands, and more generally, how can predominately white communities better prepare to create a safe and welcoming environment for diverse visitors when their populations are so homogenous. Ongoing training about current activities and history of Native Americans in Oregon would also be helpful.

Self-awareness; how to deal with others in heated situations or workplace conflicts.

So far our tourism partners in my area, have done a great job welcoming people with equity. I have noticed more people of color at our wine tasting rooms and there is no awkwardness which is such a relief.

Working in rural non-diverse communities to help bring DEI understanding

**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?**

As a white person, I can't answer that question very well. I imagine that one issue is that some people in my community haven't had the opportunity to hear the perspectives of people of color on what it's like to travel in these areas. I think more information-sharing on those experiences would be helpful because in many cases people don't know the things they are doing that are sending a negative or threatening message.

Change of political leadership. difficult to even have this discussion with active members of 3%, Oath Keepers, and others similar organizations, holding elected positions of leadership. Re question 26. Yes the tourism industry should play a role, BUT it is critical that that role be collaborative and not condescending and self righteous. The goal must be to bring others along on this issue not brow beat them into compliance which will only deepen resentment and further polarization.

Grant County needs to realize people can be different and being a different color, speaking a foreign language does not make these visitors 'dangerous'. Grant County needs to be more diverse and not suspicious of people from outside the community.

I don't believe that racism is a problem in Enterprise and Joseph.

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I feel our stakeholders/businesses/experiences are open for ALL travelers. Where any problems arise are separate individuals. Eastern Oregon is more inclusive than not.

I'm not sure. We have many visitors from foreign countries, but not many Oregonians of color who would chose to travel to our area. It's a county with small tight knit mostly white communities, with very conservative backgrounds. There is hardly any racial diversity. Any lasting change would have to start with education of the next generations.

Inclusion of all races and religions in all we do. Turn the page

Information and tourist handouts in multiple languages to welcome non-English speakers.

Less negativity from the locals. They do not understand the impact tourism has in the communitu.

More basic visitor services for visitors, either in town or nearby campgrounds, such as Laundry services, public showers, camping supplies,

More cautious behavior by all in public places; slowing of the Covid-19 positive testing rate.

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

There are serious biases (and at times outwardly expressed aggression) against anyone who even remotely looks to be a liberal. This has amplified this last year, but it has always been there. On the other side of the spectrum, liberal-minded visitors come in to town as though they own it and need to teach locals about the better way to live. It would be great to address this in some campaign, perhaps in a humorous way, and also provide training to all local officials so they can address it in their own town.

Tough one. I think training to all front-end employees would be a start. We lack diversity in a lot of ways and I think many people know that before they come, and then come hesitantly. I want everyone to feel like they can travel here safely, but don't want to paint an untrue picture.

We have prioritized a proactive workplace culture of zero tolerance of harassment or discrimination. We also give have always given "the edge" to hires who are diverse; race, ethnicity, orientation, place or origin. This has allowed us to have a diverse workforce. In that way staff subtly educates each other about culture and race justice issues. Not only is this consistent with the owner's ethos, it has the distinct benefit of communicating to our diverse guests that we are prepared to properly serve them. In other words, no this is no Deliverance movie set you've stepped into!

**Q63: If you would like, please explain any of your ratings with your satisfaction with your local or regional DMOs.**

Currently, our Milton Freewater has been closed for almost a year. The City of Milton Freewater offices are closed to the public. In the past, I was able to communicate with city tourism entities by in person meetings. That is not an option at the moment.

EOVA is not as involved with our area anymore s it used to! I do miss Alice Tsindle! She was always available and directly accessible for any concerns, suggestions, or feedback. I focus more on my connection with JDRT. I'm very happy with the leaders there.

Friendly people to work with and always helpful

Grant County Chamber has been a key figure in the success of the Prairie City Fiber Festival.

I am new to this so don't really have an opinion.

I am the chamber president, so I am a bit biased. The chamber is doing amazing work during this pandemic, and I am extremely proud of the CEO and staff!

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I'm new to the area and have not had the opportunity to adequately engage with the DMO or EOVA.

Our chamber has never been contacted by Eastern Oregon RDMO (not sure what the initials stand for) or Eastern Oregon Visitors Association. I am not sure of their contact information other than the website.

Recent arrival. Just getting involved.

Stop promoting Wallowa county. Keep it a secret please. Send them anywhere else but this way! We need a robust economy not solely based on visors.

The Dalles Chamber should get an award for their service during this time,

They seem deaf to the real industry that they are supposed to serve. Maybe because they are so politicized by the nature of their organization and funding. No opportunity for input into any aspect of their planning. Slow to no response to requests for info or guidance. We do hear when they want \$ or other resources though.

Work in close proximity with the local Chamber, get a lot of tourism information through them.

Working with my DMOs and TO has been a priority since starting the business, I understand how the chain of command works in theory, however I still don't know the best ways to work with EOVA. I want to work more closely with EOVA in ways that are greater than simply tagging a social media post, etc. I think some clear information or steps on the best ways to engage would be nice- from EOVA's point of view. This is a two way street- I'd like to help from our end as well, but it seems like a lot of the work often gets outsourced when it could be done locally. For instance, photography and video assets- I see these being done by people from Western Oregon or even farther afield, when we have a ton of local talent that would probably be cheaper and better equipped.

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**Q64: With respect to strategic planning for your business or organization, what do you see as your greatest need to help your business grow over the next 3-5 years that EOVA can help facilitate or develop?**

Branding our area ( JDRT, John Day Fossil Beds National Monument, Sutton Mountain, The John Day River, Wheeler County, Mitchell) as a unique and spectacular place for outdoor recreation, star gazing, wildlife and bird watching, and natural retreat from the busy city life style.

More Advocacy for identified, priority regional projects, to generate federal, regional, and local engagement and resources.

Access to funding and training so small businesses can grow and meet their potential.

Advertising and funding.

Assistance with getting other tourism entities to meeting where decisions about strategic planning are made. The same people attend the stakeholder meetings and the same people make the decisions and some of them form opinions based on a more negative level and are not represented by a lot of our tourism entities. Many of the Mom and Pop operators cannot attend during business hours. The regional strategic plan is skewed more to the negative side. The vocal naysayers are commended as they participate and the others don't but it is also skewed to the ones who can attend during the business hours.

Encourage tourism business starts in our county.

Engage/include our District services (low interest loans, housing repairs for low to moderate income, grant application assistance) in marketing

EOVA contact in more dispersed manner. Traveling to Baker City or Pendleton is not easy for those in other areas of eastern Oregon.

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EOVA Guide Magazine

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FAM Tours Media Leads

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Financial help to expand the advertising for the Prairie City Fiber Festival.

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Get to know the true issues and concerns of locals and provide assistance. The new EOVA director is removed from the voice of locals, rarely visits, yet makes decisions that affect the region. It might be helpful to split up the Eastern Oregon area, as she might have too much to cover. But I don't think that is the issue: she comes across dismissive in meetings and it has led to people having feelings that she is not representing their voice. Also, many promises are made for funding, and none of the projects come to fruition.

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Getting our small businesses to recover from the lockdowns. Besides finances, personal stress is taking a huge toll on everyone.

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Gosh, they are just not players, helpers or contributors for us at all. I cant begin to write the dozens of ways in which they COULD be helpful. Consider the fact that the question above has NEVER been asked by EOVA. I dont think they consider how to help any tourism business or organization.

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Helping me develop a website to market the County.

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Increasing promotion of non-peak season tourism.

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Manufacturing of products, utilization of local natural resources, less tourism and a good bunch of money to develop new products and longer term industry in eastern Oregon. Tourism is not a sustainable long term strategy.

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Marketing, PR in eastern Oregon

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Marketing. Helping us to attract more visitors to our area (as a destination) and increasing awareness of the multitude of amenities available onsite and in the community for a broad demographic; providing research so we can best anticipate desires/needs of locals and travelers; helping us to discover new opportunities to pursue.

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Not sure

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Open the state up. We will have lost so many businesses due to this farce.

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Overall vision and communications plan. ways we can work together more collaboratively.

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Stone House Museum and Malheur Historical Societies will need to get some younger members and funding to keep going

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Understanding the long term post COVID changes in the travel industry. and how to adapt to those changes that are here to stay

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We would like to continue to position ourselves as sort of a local DMC for Eastern Oregon, connecting people to a wide range of experiences around the region. Working with EOVA as boots on the ground for media and FAM trips is a goal.

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

Don't forget about the small rural communities.

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EOVA has undergone a huge transformation in the last two years including a new Director for the first time in nearly 30 years, While COVID has definitely impacted the transition and stalled some efforts as EOVA like every organization, has shifted to response and recovery, the leadership transition and transformation at EOVA has been very positive and successful. While EOVA is stretched to full capacity at the moment, current leadership at both staff and Board levels seem fully engaged and well prepared to lead the region to recovery.

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I wish there were grants and rallied support to low income counties such as Wheeler to assist with small businesses that could alter the lifestyle in a very positive manner. Everyone talks about the serious loss of community if the Dayville Cafe closes. Can't we find government programming and housing that would entice a burnt-out city chef or a local chef with aspirations to live in a remote area to keep the cafe open or to open another community based cafe in Spray? Or funding to open a rural art school that is welcoming to all? Look at Tieton, WA as an example. One company moved their tiling business there and also emphasized art and it rejuvenated a town and made it a destination at designated times of the year, boosting their business income.

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Keep doing amazing work!!

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Now more than ever, our regions need guidance, grant opportunities, and networking opportunities as we phase into an in person world again. Don't know the answer but we need more representation across our tourism partners. More back end work needs to be done to find out the issues. By making time to visit with Grant County Chamber of Commerce, I learned that the negativity started with the first Brand USA road rally when no one stopped at the businesses. By doing face to face meetings when planning the next Road Rally in John Day and by the Global Sales team including mandatory stops, we have moved forward and improved relationships.

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Send them anywhere but Wallowa County! We don't want them. Keep this place a secret!

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Team Travel Oregon, you rock! Appreciate you all!

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Thank you for opportunity to share my opinions.

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Thank you for your support. Look forward to participating regionally and statewide.

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Thanks for all you do on our behalf.

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Thanks for everything, keep up the good work through the pandemic, and let us know how we can help.

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The eastern two-thirds of Oregon is a world away from the Willamette Valley and the Portland area. We are basically Conservative folk compared to the Liberal thinking over in the valley and frankly we don't have the real or supposed social problems that the Valley has. And yet we are sympathetic to those problems. Our problems are more of the order of getting crops in, watering them and then the harvest. We are concerned with the attention, primarily from Idaho, that the Hemp and Marijuana crops have brought us. This includes Covid-19 from the burgeoning cases now in Idaho. We believe the Valley folks could take some lessons from us. We don't have major racial problems over here. We all get along quite well.

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