2020 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY

Driftline Consulting

November, 2020

PURPOSE

The 2020 Oregon Tourism Industry Stakeholder Survey was designed on behalf of the Oregon Tourism Commission, dba Travel Oregon and the state's seven official regional destination management organizations (RDMOs), to elicit feedback from individuals and organizations linked to the tourism industry. The results of the survey will help set strategic direction for Travel Oregon and the regional partners. It will also be used to make funding and programmatic decisions in marketing, grants, tourism-related infrastructure, visitor management, and more.

DATA COLLECTION

- The survey was conducted online and distributed in both English and Spanish between October 5-30, 2020, by way of direct email communications, a press release, industry newsletters and industry partners' distribution channels to an open URL hosted on Travel Oregon's industry website.

- A total of 1,245 valid responses were collected.

ADDITIONAL RESOURCES

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

- The survey also resulted in an extensive number of open-ended responses. Selections of open-ended responses are provided throughout this report. These comments are presented in the respondents' own words, and they do not reflect the opinions of Travel Oregon. All comments are viewable in the online dashboard with accompanying word clouds and bar charts.

- Access the online dashboards by going to: https://rebrand.ly/TO_Stakeholder2020

KEY FINDINGS
BUSINESS HEALTH

- 46% of respondents reported their business/organization has laid off, terminated, or otherwise let go of employees in 2020, with the most layoffs occurring 4-6 months ago (roughly April through June). 14% anticipate layoffs/terminations at their business/organization within the next six months, while 32% are unsure if layoffs will occur within the next six months.

- Over half (54%) of respondents characterize the impacts of COVID-19 on their organization/business's revenue or funding as having a significant negative impact. By comparison, 17% describe the wildfires as having a significant negative impact.

KEY FINDINGS
RESILIENCY, RECOVERY, & REOPENING

- 37% of respondents are not at all concerned about promoting their community and feel it would benefit from visitors, while 24% expressed some or significant concern. When it comes to welcoming visitor to their communities, respondents are most concerned with "diminished visitor experience at their destination due to facility/amenity closures, fewer frontline workers, etc."

- By a large margin, "help advocating for effective policies and funding to support tourism businesses/organizations" is the resource that will best support Oregon businesses/organizations recover. "Support developing and bolstering visitor experiences that are COVID-appropriate and that enhance local livability" will best support Oregon communities, followed by "communication tools and message frameworks to convey safe visitor behavior in town and businesses."

KEY FINDINGS
PLANNING AND MANAGEMENT

- From a list of ten actions that would aid in recovery from COVID-19, wildfires, and related economic conditions, respondents believe grants and funding resources should be the top priority. Marketing and promotion should be a key focus area in the longer term (next 2 to 5 years).

- "Managing tourism impacts in order to preserve local assets (natural and cultural) and livability" is the top tactical planning and management strategy that will advance the economic impact of tourism and ensure its vitality and sustainability.

KEY FINDINGS
DIVERSITY, EQUITY & INCLUSION

- 44% of respondents think the tourism industry should play a role in advancing social and racial justice. 22% percent do not think the industry should play a role, while 23% are unsure.

- 61% report having received training related to cultural awareness, anti-racism, implicit bias, or some other diversity, equity, and inclusivity related training. 54% percent would be interested in participating in diversity, equity, and/or inclusivity related training.

- Nearly 9 in 10 Oregon respondents feel somewhat or very prepared to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds.

KEY FINDINGS
INDUSTRY ENGAGEMENT & COMMUNICATIONS

- 61% of respondents agree or strongly agree with the statement, "I am satisfied with my experience(s) working with Travel Oregon." Just 3% strongly disagree. To a slightly lesser degree on average, respondents are satisfied working with their RDMO.

- By a large margin, respondents currently receive tourism-related information from Travel Oregon and their RDMO from e-newsletters (85%). Website was the next most-cited information source at 46%. Over two-thirds of respondents prefer to receive industry-related information via e-newsletter.

RESPONSES BY REGION

A total of 1,245 valid responses were collected.

Number/Share of Respondents

Region	Number	Share
Oregon Coast	434	35%
Portland Region	234	19%
Willamette Valley	205	16%
Southern Oregon	113	9%
Mt. Hood / Gorge	98	8%
Eastern Oregon	74	6%
Central Oregon	72	6%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

TIMELINE

May 29: Rioting in Portland following killing of George Floyd. State of emergency declared.

Aug. 16: Lionshead, Beachie Creek, Indian Creek, White River fires, among others, ignite.

Sept 7: Holiday Farm, Slater, Riverside, Archie Creek fires, among others, ignite.

Nov. 3: Election.

Survey Fielded

7-Day Avg. of New Cases in Oregon

7-Day Avg. of Daily New COVID-19 Cases

1600
1400
1200
1000
800
600
400
200
0

Mar 1, 20   Apr 1, 20   May 1, 20   Jun 1, 20   Jul 1, 20   Aug 1, 20   Sep 1, 20   Oct 1, 20   Nov 1, 20   Dec 1, 20   Jan 1, 21

RESPONDENT PROFILE

TOURISM INDUSTRY SECTOR

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

Sector	%
Destination marketing and management	18%
Lodging (hotel, motel, vacation rentals, campground)	17%
Retail and attractions (museums, historical sites, art galleries, stores, health and wellness, casinos)	14%
Food and beverage (restaurant, wineries, breweries)	12%
Farm, ranch, fishery, agritourism business/activities (farmers market, producer)	7%
Tour operator, guide, outfitter	6%
Entertainment (sports, events, concerts, performing arts)	6%
Land management (maintaining or managing parks and open spaces, trails, or other outdoor recreation amenities)	5%
Transportation services (air, ground, water transport)	2%
Other	14%

"Other" write-in responses:
Elected Official/City Government ~2%
Media (Photography, writer, etc.) ~1%
Retired ~1%
Real Estate ~1%
Misc. Other ~9%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

EMPLOYMENT STATUS

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

Category	Percentage
Employed full-time	62%
Employed part-time	18%
Retired	10%
Not currently employed (and looking for employment)	3%
Prefer not to say	7%
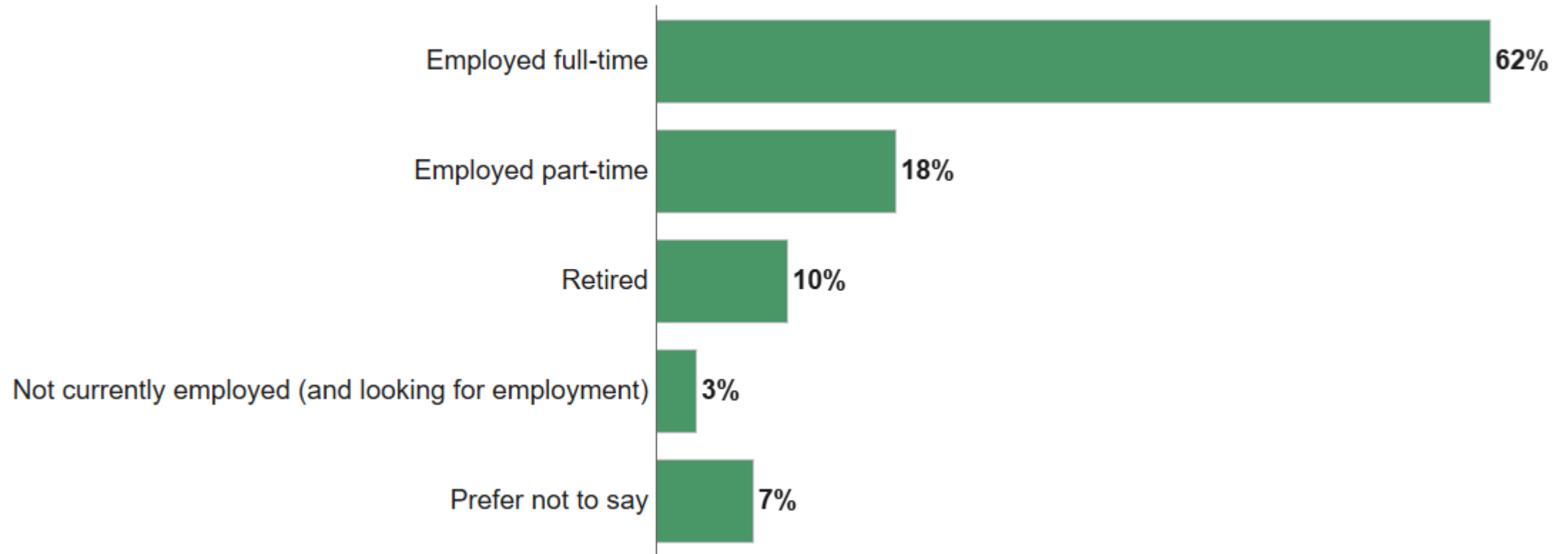
Source: 2020 Oregon Tourism Industry Stakeholder Survey

ENTITY TYPE

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

Entity Type	Percentage
For profit, business	57%
Non-profit	27%
Government entity	13%
Education	1%
Federally-recognized tribe	1%
Port district	0%
Not sure	1%
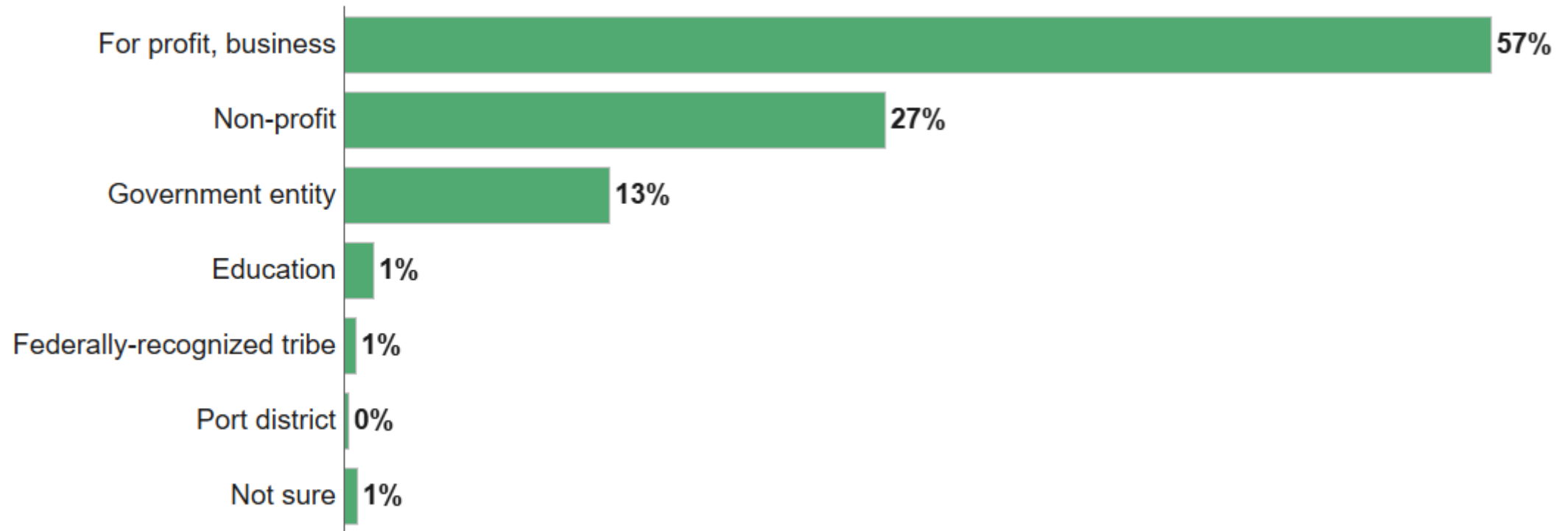
AGE & GENDER

Q: *Respondent age:*

Age	Percentage
25 - 34	10%
35 - 44	18%
45 - 54	24%
55 - 64	27%
65 or older	22%
Avg.	53.8

Q: *What is your gender?*

Gender	Percentage
Female	61%
Male	37%
Non-binary	2%
I identify as:	1%
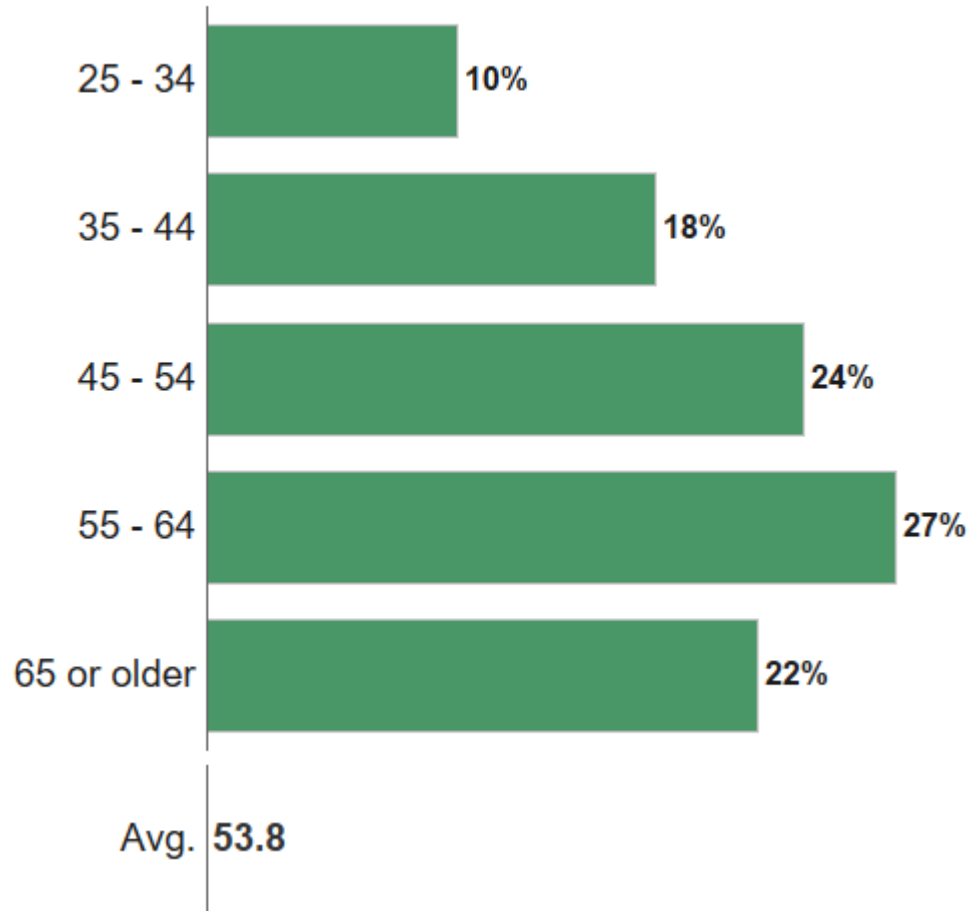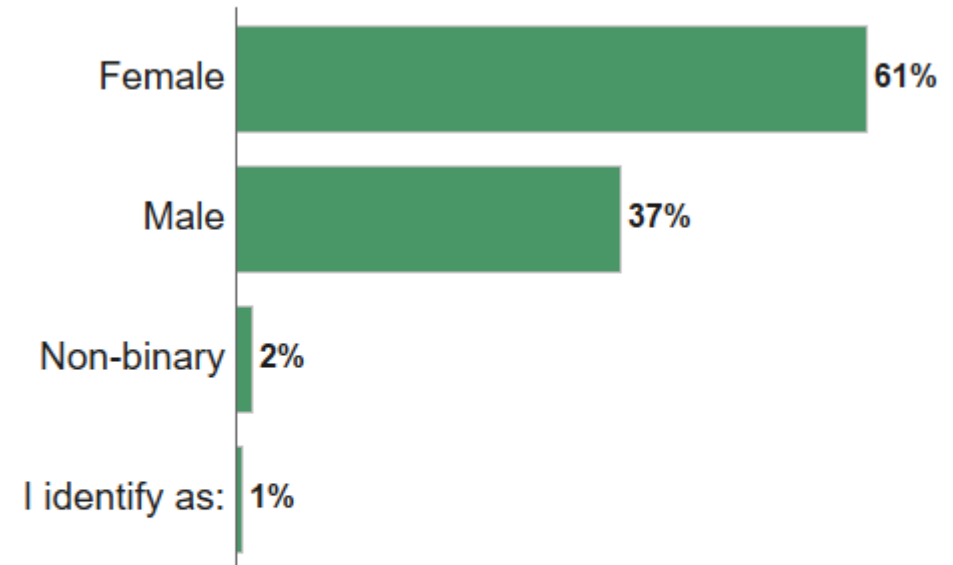
RACE & INCOME

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

Race/Ethnicity	Percent
White or Caucasian	89%
Multiracial or Biracial	3%
Asian or Pacific Islander	2%
Hispanic, Latino or Latinx	2%
Native American or Alaskan Native	2%
A race/ethnicity not listed here	2%
Black or African American	0%
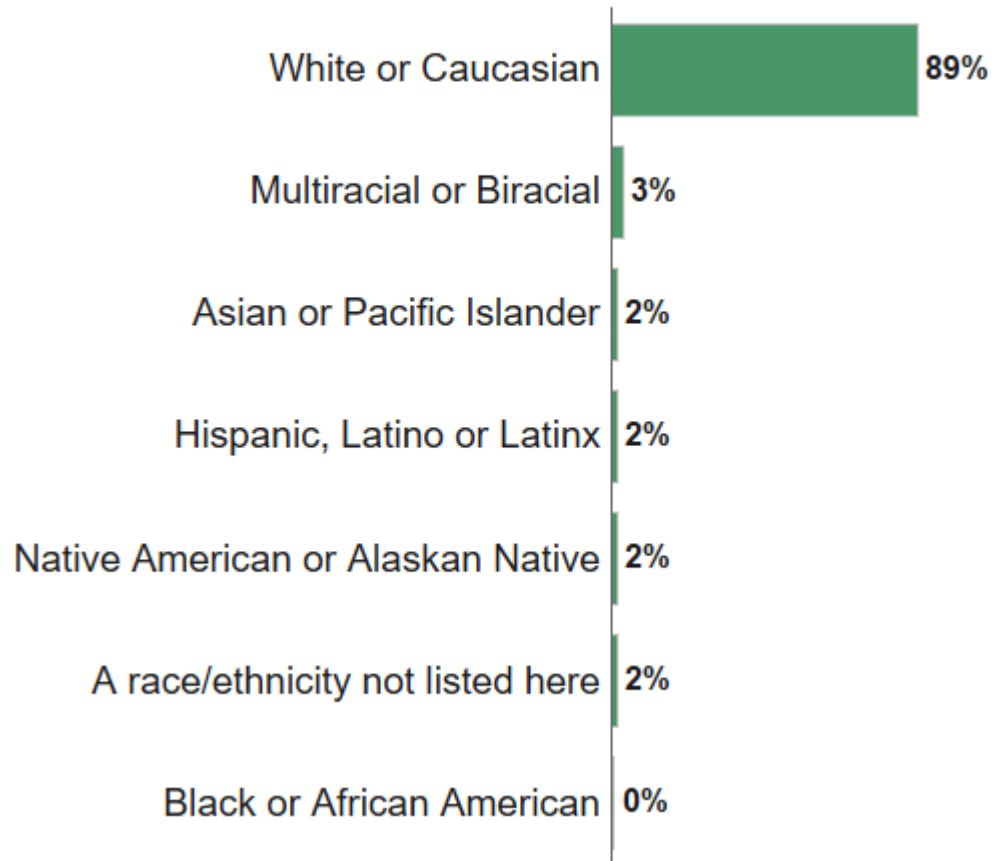
Q: Which of these categories best describes the total gross annual income of your household (before taxes)?

Income	Percent
Under $25,000	4%
$25,000-49,999	14%
$50,000-74,999	19%
$75,000-99,999	15%
$100,000-149,999	21%
$150,000-199,999	9%
$200,000-249,999	3%
$250,000 or more	4%
Prefer not to respond	10%
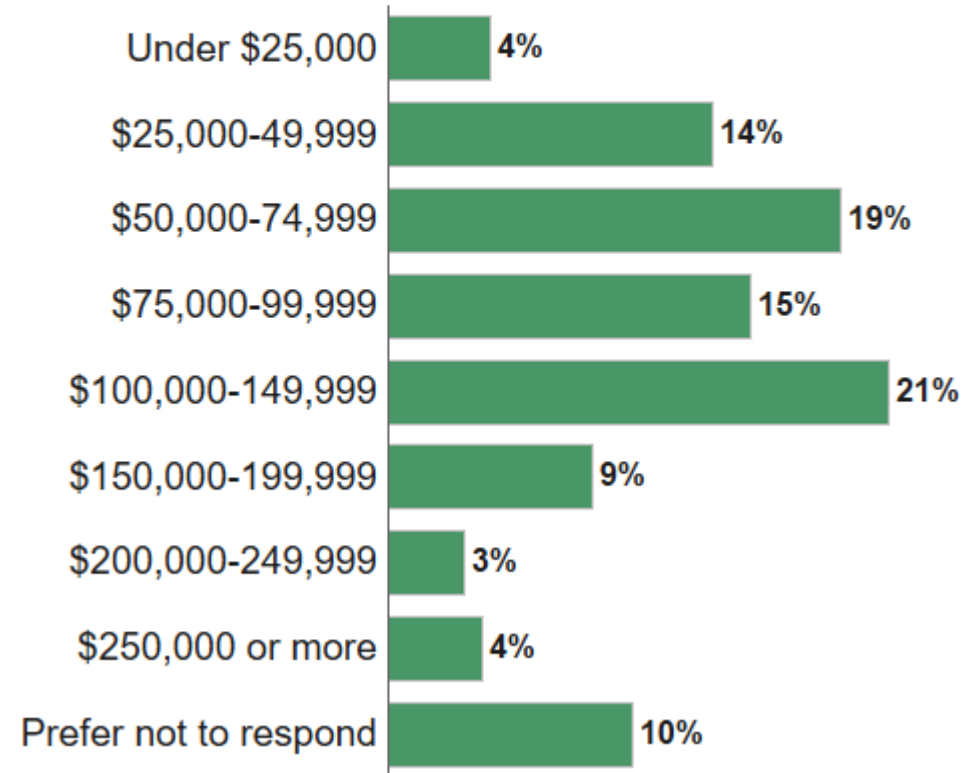
EDUCATION

Q: What is your highest level of education?

Graduate degree or more	32%
Bachelor's degree	43%
Some college	22%
High school or less	4%
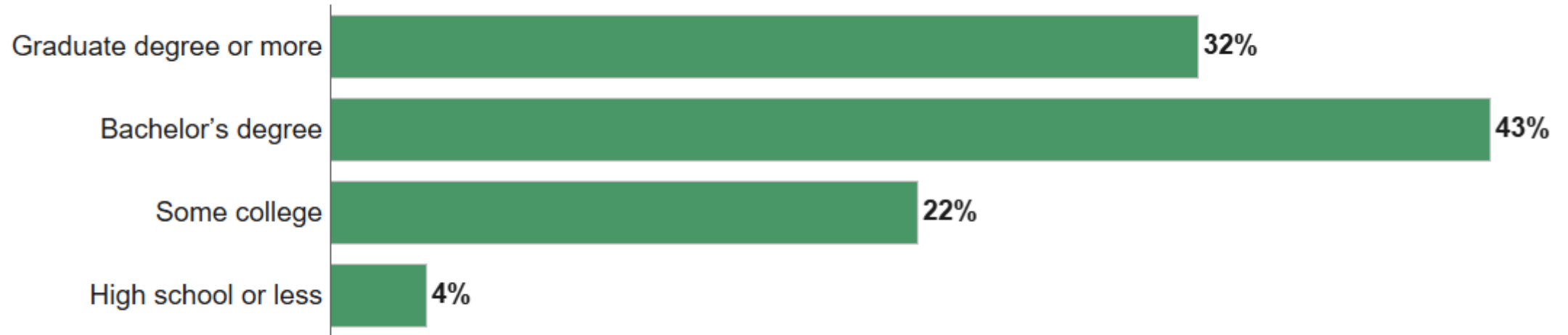
Source: 2020 Oregon Tourism Industry Stakeholder Survey

EDUCATION
BY SECTOR

Q: What is your highest level of education?
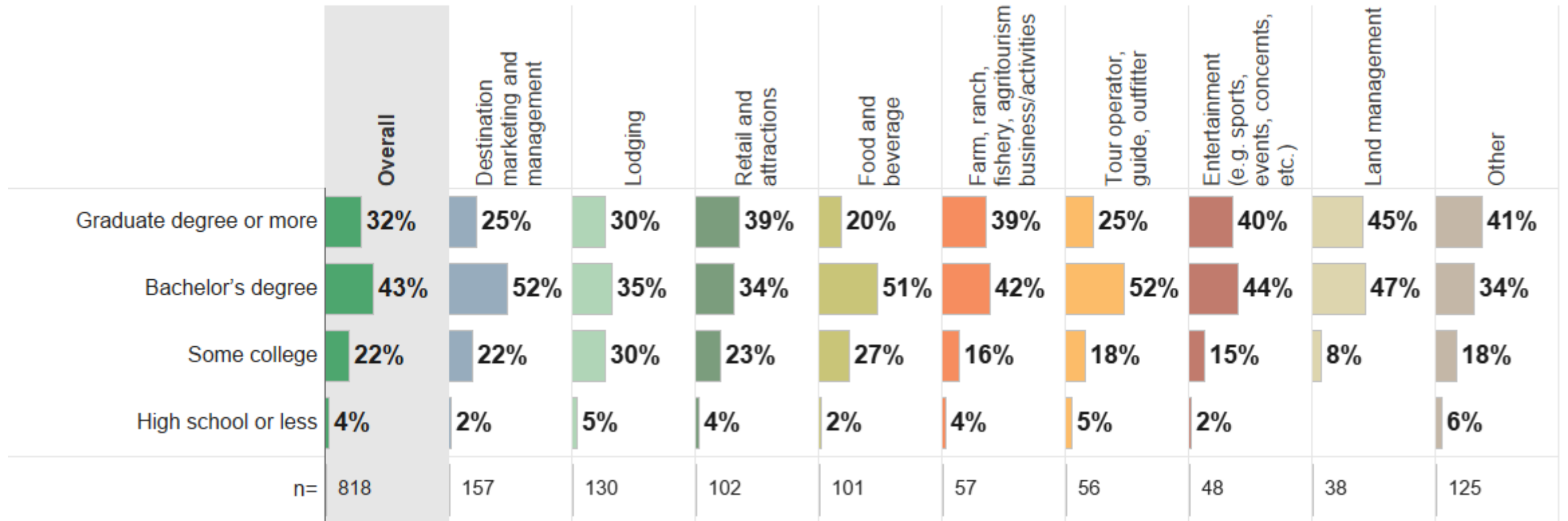
	Overall	Destination marketing and management	Lodging	Retail and attractions	Food and beverage	Farm, ranch, fishery, agritourism business/activities	Tour operator, guide, outfitter	Entertainment (e.g. sports, events, concerts, etc.)	Land management	Other
Graduate degree or more	32%	25%	30%	39%	20%	39%	25%	40%	45%	41%
Bachelor's degree	43%	52%	35%	34%	51%	42%	52%	44%	47%	34%
Some college	22%	22%	30%	23%	27%	16%	18%	15%	8%	18%
High school or less	4%	2%	5%	4%	2%	4%	5%	2%		6%
n=	818	157	130	102	101	57	56	48	38	125

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

PRESENCE OF A DISABILITY

Q: *Do you have a disability?*

Yes	6%
No	94%

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

Walking	58%
Hearing	26%
Learning	19%
Sight	16%
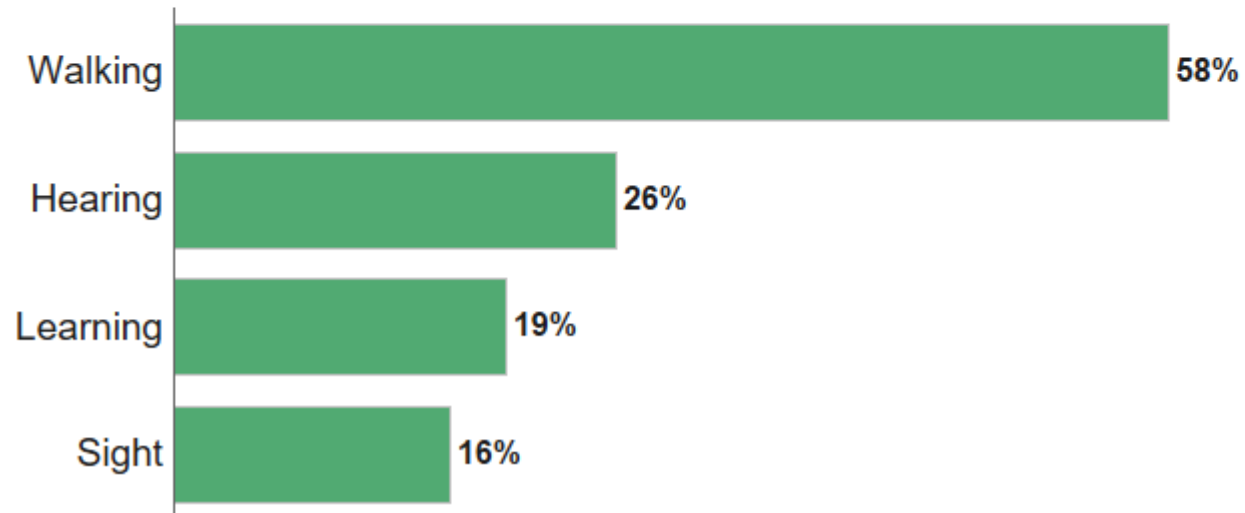
FUNDING SOURCES & BUSINESS HEALTH

FUNDING SOURCES

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

- Paycheck Protection Program (PPP) — 40%
- Other grants or funding program — 24%
- Economic Injury Disaster Loan (EIDL) — 18%
- Travel Oregon Emergency Grant — 7%
- My business/organization applied for funds, but did not receive any — 4%
- FEMA individual assistance — 1%
- None of the above — 34%

Common "Other" write-in responses: CARES ACT, Oregon Cultural Trust, Business Oregon, miscellaneous other.
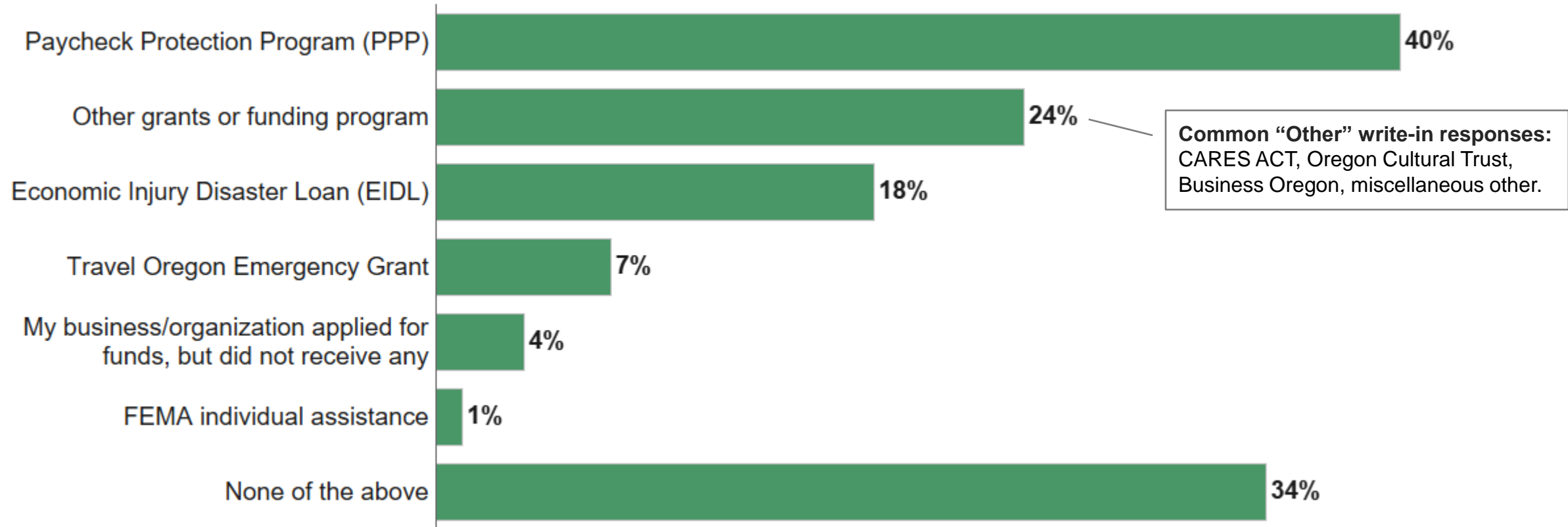
Source: 2020 Oregon Tourism Industry Stakeholder Survey

FUNDING SOURCES
BY SECTOR

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

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

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

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PAST & FUTURE LAYOFFS

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

- Yes — 46%
- No — 54%

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

- Yes — 14%
- No — 54%
- Unsure — 32%
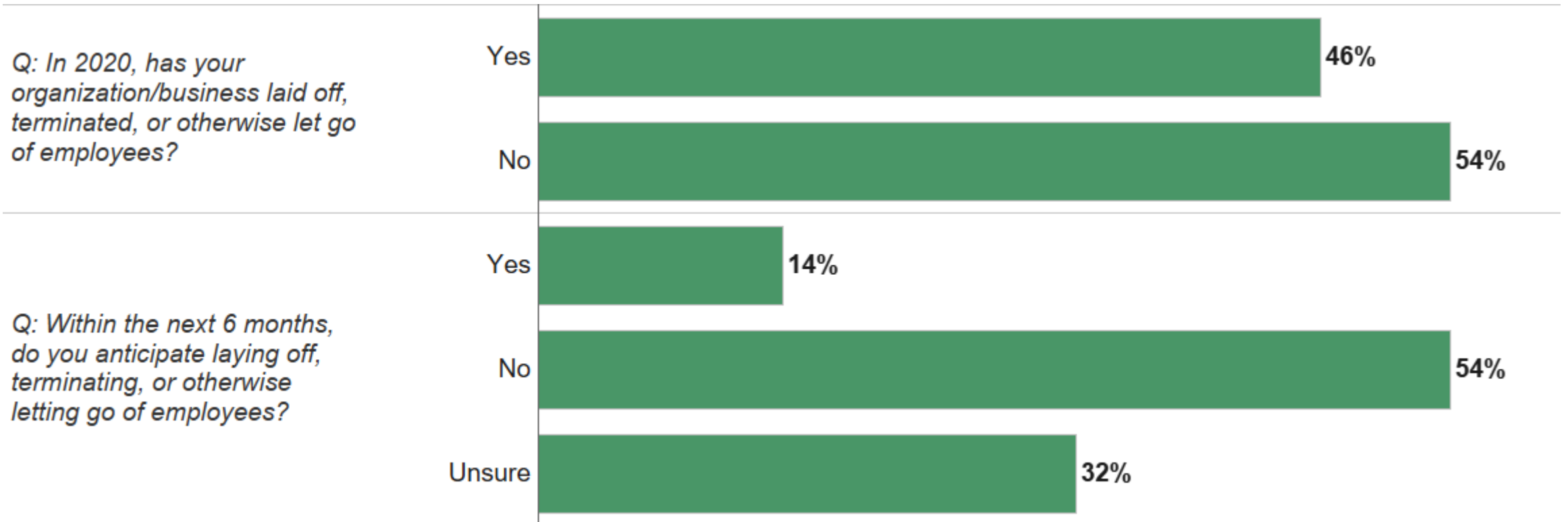
PAST & FUTURE LAYOFFS
BY REGION

		Overall		Region						
			Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
Q: In 2020, has your organization/business laid off, terminated, or otherwise let go of employees?	Yes	46%	62%	40%	44%	42%	54%	39%	46%
	No	54%	38%	60%	56%	58%	46%	61%	54%
	n=	1,018	68	62	82	322	193	102	181
Q: Within the next 6 months, do you anticipate laying off, terminating, or otherwise letting go of employees?	Yes	14%	18%	11%	11%	13%	22%	12%	13%
	No	54%	51%	65%	52%	55%	49%	55%	54%
	Unsure	32%	31%	24%	37%	32%	30%	33%	33%
	n=	1,017	67	62	82	322	193	102	181

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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PAST & FUTURE LAYOFFS
BY SECTOR

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

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

TIMING OF LAYOFFS

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

More than 6 months ago	~Prior to April	39%
4 – 6 months ago	~April - June	48%
2 – 4 months ago	~July - August	15%
Within the last 2 months	~September - October	10%
Within the next 2 months	~October - November	10%
In the next 2 – 4 months	~December - January	9%
In the next 4 -6 months	~February - March	3%
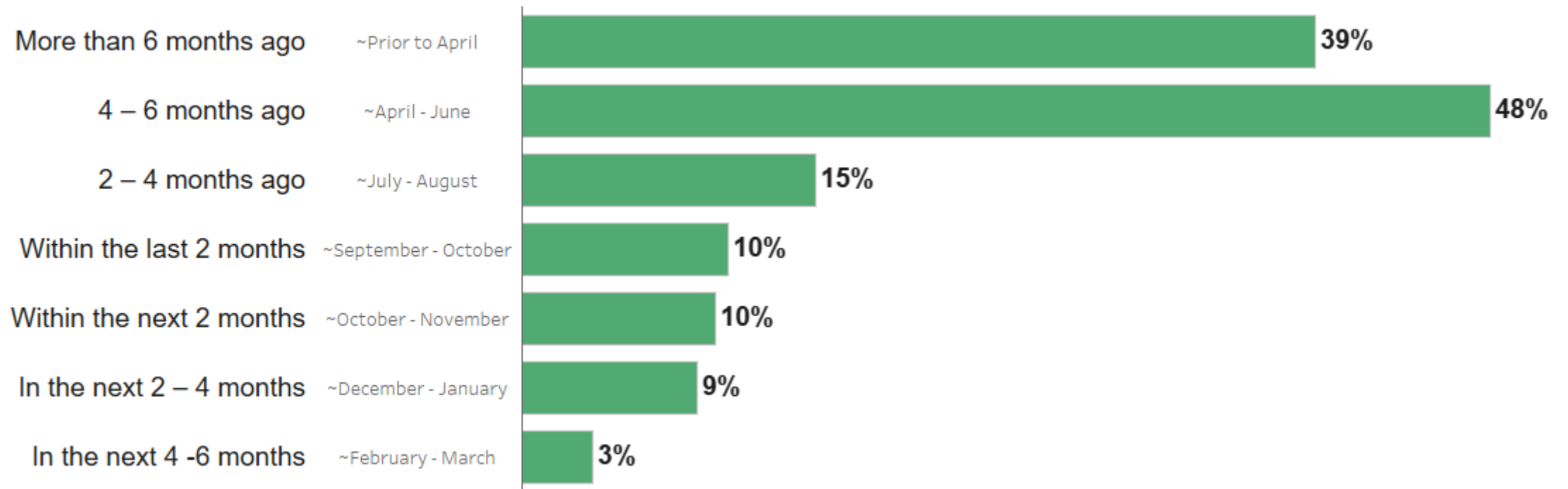
Source: 2020 Oregon Tourism Industry Stakeholder Survey

*Data collection occurred throughout the month of October. Month labels are approximations.

TIMING OF LAYOFFS
BY REGION

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

		Overall	Region						
			Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
More than 6 months ago	Prior to April	39%	44%	38%	43%	43%	35%	33%	39%
4 – 6 months ago	~April - June	48%	62%	42%	46%	45%	48%	48%	48%
2 – 4 months ago	~July - August	15%	10%	4%	5%	12%	20%	14%	21%
Within the last 2 months	~September - October	10%	13%	13%	5%	5%	13%	19%	12%
Within the next 2 months	~October - November	10%	10%	8%	24%	7%	9%	12%	7%
In the next 2 – 4 months	~December - January	9%	3%	4%	8%	9%	13%	10%	7%
In the next 4 - 6 months	~February - March	3%		4%		3%	6%	5%	2%
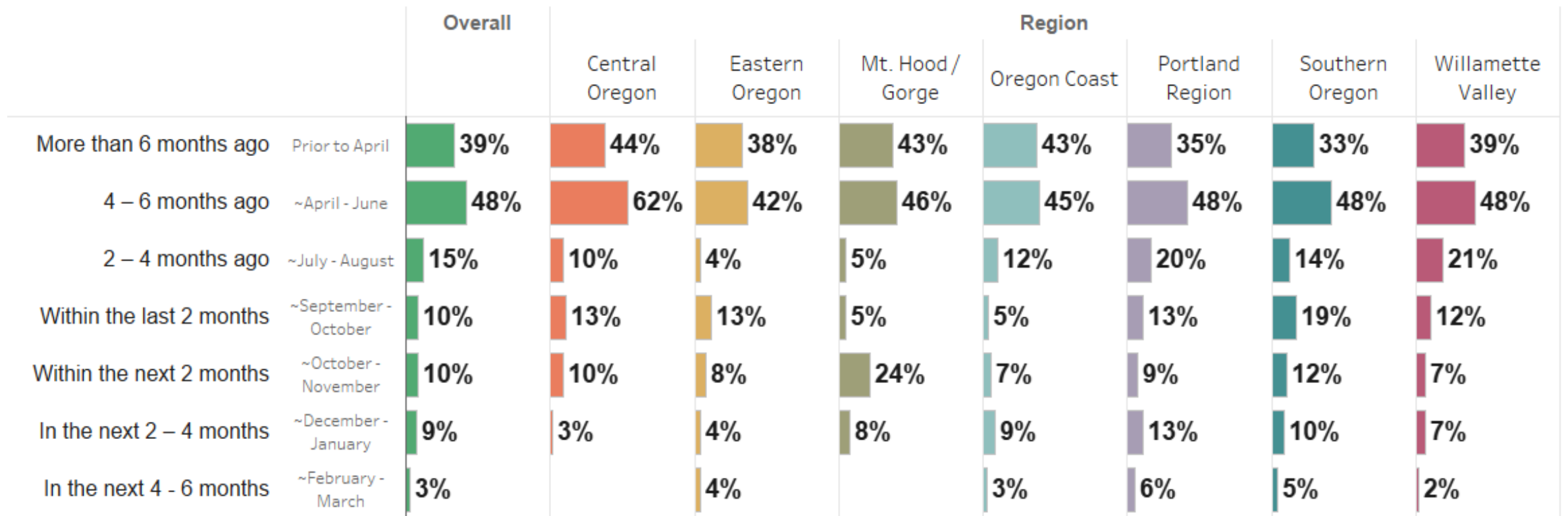
Source: 2020 Oregon Tourism Industry Stakeholder Survey

*Data collection occurred throughout the month of October.

IMPACTS ON REVENUE/FUNDING

Q: How would you characterize the impacts of the following on your organization/business's revenue or funding?
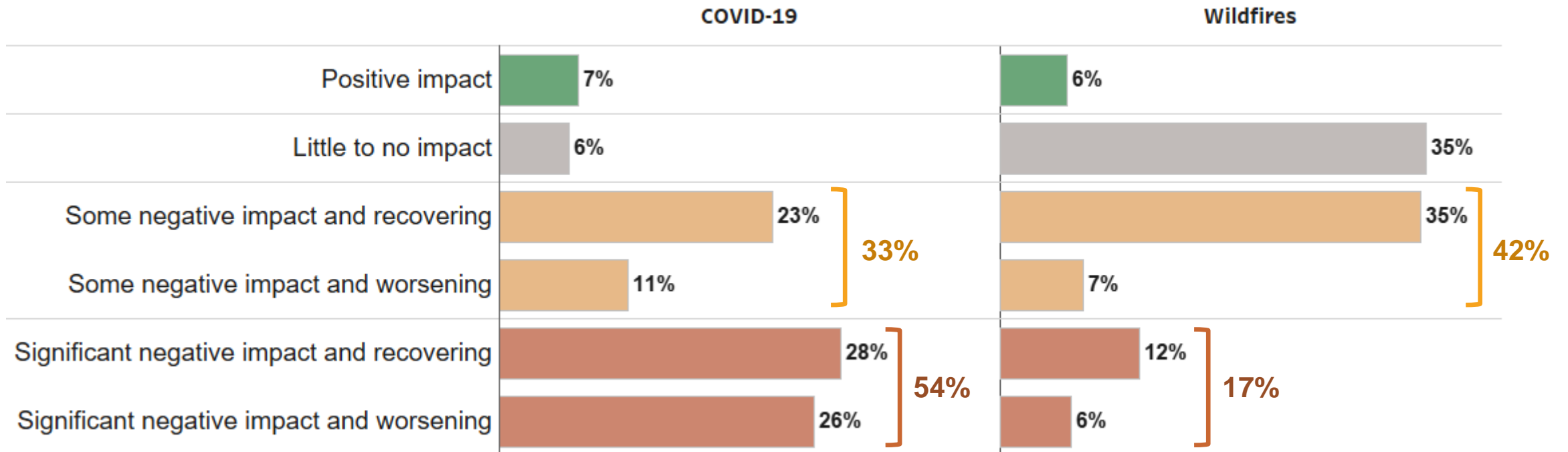
COVID-19 | Wildfires

	COVID-19	Wildfires
Positive impact	7%	6%
Little to no impact	6%	35%
Some negative impact and recovering	23%	35%
Some negative impact and worsening	11%	7%
	33%	42%
Significant negative impact and recovering	28%	12%
Significant negative impact and worsening	26%	6%
	54%	17%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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COVID-19 IMPACTS ON REVENUE/FUNDING
BY REGION

Q: How would you characterize the impacts of COVID-19 on your organization/business's revenue or funding?

Region	Positive impact	Little to no impact	Some negative impact	Significant negative impact
Overall	7%	6%	33%	54%
Willamette Valley	9%	7%	29%	55%
Southern Oregon	11%	4%	37%	48%
Oregon Coast	7%	6%	38%	49%
Central Oregon	5%	8%	37%	51%
Mt. Hood / Gorge	5%	5%	35%	54%
Eastern Oregon	7%		37%	55%
Portland Region		6%	24%	67%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

Legend:
- Positive impact
- Little to no impact
- Some negative impact (recovering and worsening)
- Significant negative impact (recovering and worsening)

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

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COVID-19 IMPACTS ON REVENUE/FUNDING
BY SECTOR

Q: How would you characterize the impacts of COVID-19 on your organization/business's revenue or funding?

Sector	Positive impact	Little to no impact	Some negative impact	Significant negative impact
Overall	7%	6%	33%	54%
Farm, ranch, fishery, agritourism business/activities	22%	12%	46%	19%
Land management	8%	14%	36%	42%
Food and beverage	8%		34%	55%
Lodging	5%	4%	18%	73%
Entertainment (e.g. sports, events, concernts, etc.)	4%	4%	26%	66%
Tour operator, guide, outfitter	4%		30%	63%
Retail and attractions	6%		28%	65%
Destination marketing and management		5%	41%	52%
Other	8%	13%	41%	38%

Legend:
- Positive impact
- Little to no impact
- Some negative impact (recovering and worsening)
- Significant negative impact (recovering and worsening)

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

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

WILDFIRE IMPACTS ON REVENUE/FUNDING
BY SECTOR

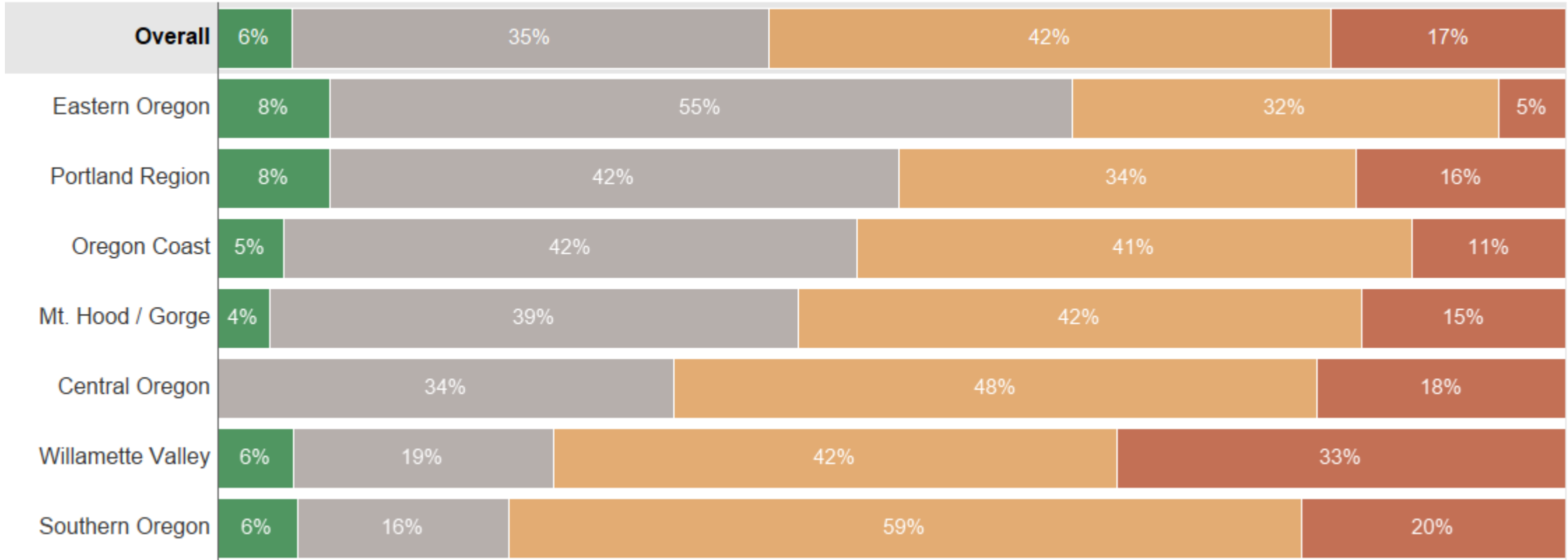*Q: How would you characterize the impacts of the 2020 wildfires on your organization/business's revenue or funding?*

Sector	Positive impact	Little to no impact	Some negative impact	Significant negative impact
Overall	6%	35%	42%	17%
Entertainment (e.g. sports, events, concernts, etc.)	4%	55%	34%	8%
Destination marketing and management	7%	45%	36%	12%
Farm, ranch, fishery, agritourism business/activities		40%	45%	13%
Retail and attractions		34%	47%	16%
Lodging	15%	20%	42%	22%
Land management	4%	28%	44%	24%
Food and beverage		22%	47%	28%
Tour operator, guide, outfitter		19%	53%	29%
Other	5%	55%	33%	7%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

Legend:
- Positive impact
- Little to no impact
- Some negative impact (recovering and worsening)
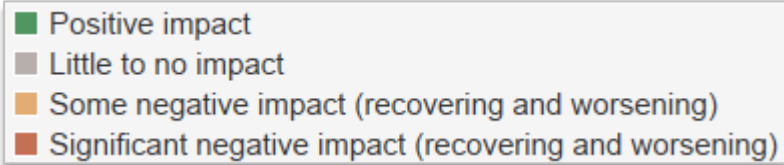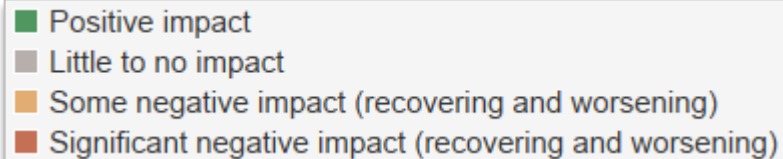- Significant negative impact (recovering and worsening)

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

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

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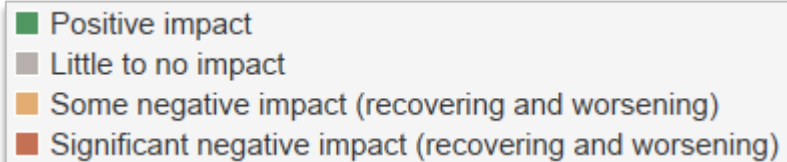
RESILIENCY, RECOVERY AND REOPENING

WELCOMING VISITORS

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

1 - Not at all concerned, my community would benefit from visitors	37%
2	18%
3 - Neutral	21%
4	15%
5 - Very concerned, my community should not be welcoming visitors	9%
Avg.	2.4

55%

24%
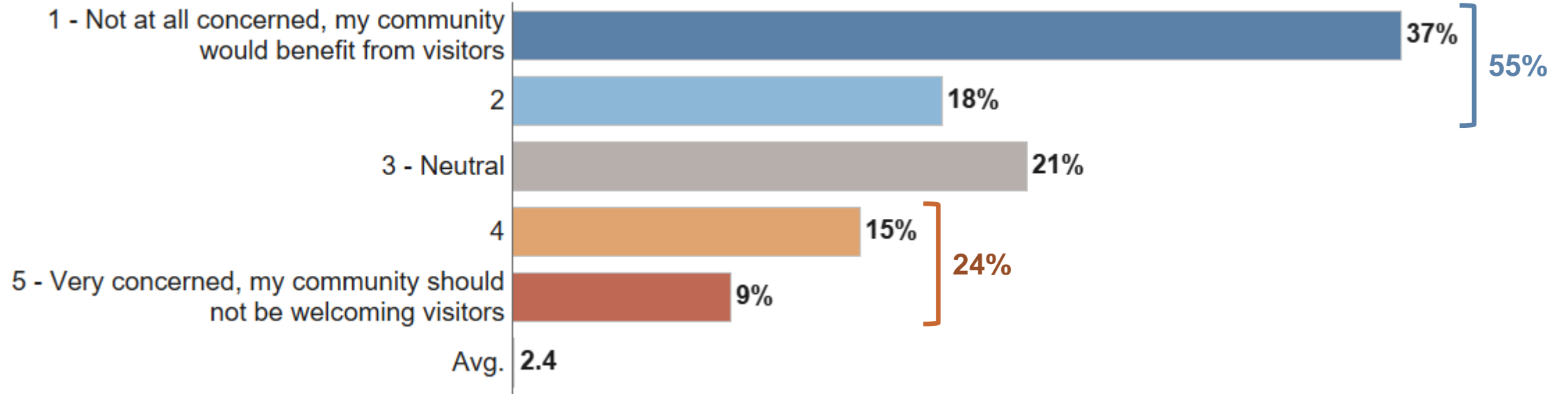
WELCOMING VISITORS
BY REGION

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

Region	Avg.	1	2	3 - Neutral	4	5
Oregon Coast	Avg. 2.7	31%	16%	23%	18%	12%
Central Oregon	Avg. 2.5	30%	23%	27%	10%	10%
Willamette Valley	Avg. 2.4	37%	19%	22%	14%	9%
Mt. Hood / Gorge	Avg. 2.3	40%	16%	26%	13%	6%
Portland Region	Avg. 2.2	40%	21%	21%	13%	6%
Eastern Oregon	Avg. 2.2	46%	15%	21%	10%	9%
Southern Oregon	Avg. 2.0	51%	19%	11%	11%	7%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

- 1 - Not at all concerned, my community would benefit from visitors
- 2
- 3 - Neutral
- 4
- 5 - Very concerned, my community should not be welcoming visitors
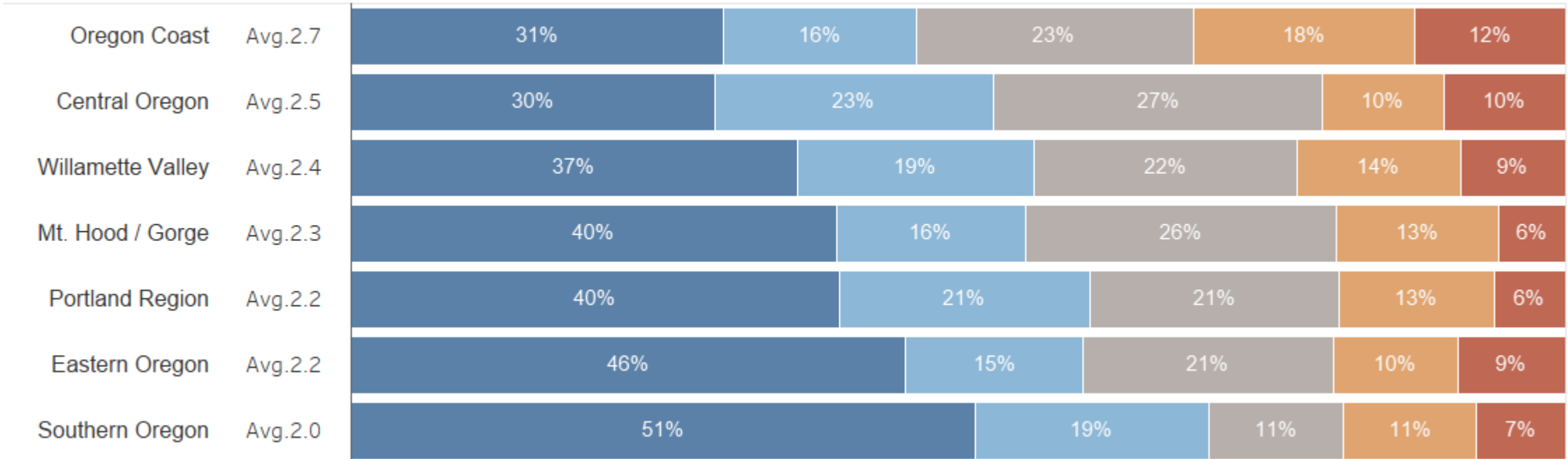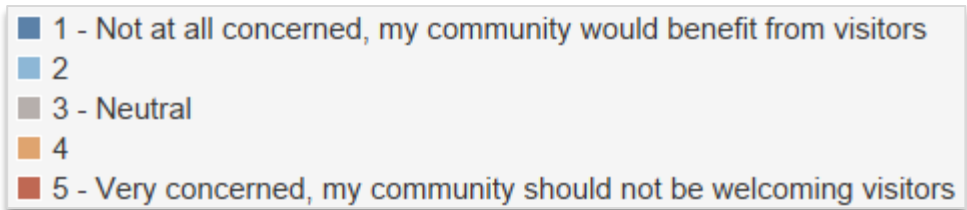
*Regions are sorted in descending order by the average rating, most concerned to least concerned.

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WELCOMING VISITORS
BY SECTOR

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

Sector	Avg.	1	2	3	4	5
Land management	Avg. 3.1	17%	13%	29%	25%	15%
Entertainment (e.g. sports, events, concernts, etc.)	Avg. 2.8	24%	25%	21%	10%	19%
Farm, ranch, fishery, agritourism business/activities	Avg. 2.6	36%	16%	17%	16%	15%
Tour operator, guide, outfitter	Avg. 2.3	38%	16%	26%	14%	6%
Food and beverage	Avg. 2.3	38%	17%	24%	14%	6%
Destination marketing and management	Avg. 2.3	33%	26%	23%	13%	5%
Retail and attractions	Avg. 2.3	42%	18%	18%	14%	8%
Lodging	Avg. 1.9	55%	18%	16%	6%	5%
Other	Avg. 2.7	31%	11%	24%	22%	13%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

Legend:
- 1 - Not at all concerned, my community would benefit from visitors
- 2
- 3 - Neutral
- 4
- 5 - Very concerned, my community should not be welcoming visitors

*Sectors are sorted in descending order by the average rating, most concerned to least concerned. Responses from the Transportation Services sector are combined with "Other."

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

Respondents were asked to explain their response to the previous question, "How would you feel if you saw an advertisement promoting your destination to visitors?" Comments are summarized by the respondent's rating response. Selections of open-ended responses are on the following slide.

Most Used Words by Response:

Not concerned about welcoming visitors (1 & 2)	Neutral (3)	Concerned about welcoming visitors (4 & 5)
526 comments	162 comments	241 comments

- Most open-ended comments from respondents not concerned with promotion cited the economic necessity of tourism to their local economy and the desire to remain open for business. Many also expressed confidence in their ability to operate safely.

- Comments from neutral respondents tended to weigh the economic benefits of tourism against the potential risk of increased COVID-19 cases. In the words of one respondent, "I recognize that so much of our local economy is dependent on tourism, but with relatively few COVID cases here currently, it feels like a huge risk to encourage visitors at this time."

- Open-ended responses from respondents concerned about promotion were primarily related to COVID-19, although some noted over-tourism concerns independent of the virus. Respondents were concerned that increased tourism would lead to increased cases.

WELCOMING VISITORS
OPEN-ENDED: "WHY DO YOU FEEL THAT WAY"

Example Responses:

Not concerned about welcoming visitors (1 & 2)	Concerned about welcoming visitors (4 & 5)
Beyond the fact that it's my job to promote travel here, our destination has thankfully been spared by wildfire impacts & our COVID precautions & lodging options (including isolated VRDs) ensure visitors can safely spend time here while social distancing. Plus travel can be a balm for troubled times.	*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.*
We have had a successful summer of welcoming tourism and there are no cases of COVID in our area. We are demonstrating that we can offer services and keep our staff and local residents safe. Winter is going to be challenging, any encouragement for visitors would greatly help!	*Covid cases continue to be on the rise as are case positivity rates especially in our county. As a destination we receive visitors from other communities with even higher case loads. It's not responsible for us to be promoting travel at this time until there is a vaccine or cure.*
We have had a normal amount of visitors this summer after rebounding from closure and have had no major outbreaks since them. With masks and social distancing in place, we feel we are being protected.	*COVID-19 rates are rising in our county. There has been a lot of tourism over the summer, which has been good for businesses struggling from COVID related shutdowns this spring, but the community does feel somewhat overwhelmed with tourists and may need a little time to recover before the next wave of tourism.*
At this phase of the pandemic, there are segments of the larger population willing to travel for work and leisure. Tourism sector businesses who remain open have taken the necessary steps to ensure the safety and perception of visitors. Messaging which conveys that "travel may not be for everyone right now. However, we stand ready to welcome and serve those who travel with safety and responsibility as priorities" is entirely appropriate and reflects the early messaging that will lead the recovery. We must not engage in an industry-wide staring contest, waiting for others to lead.	*Many visitors are still coming, despite no marketing or advertising, and discouragement of non-essential travel. Our community benefits from the visitation, thus lessening the economic impact of the pandemic and recent wildfires. What is concerning is COVID cases are increasing again; schools are still closed and winter is coming - forcing everyone to stay indoors. As long as people are moving around from community to community - it seems likely that cases will continue to spread and increase throughout the state.*

Q: As you think about welcoming visitors to your community, how concerned are you about the following? (1 = Not at all concerned, 5 - Extremely concerned), TOP 7 CATEGORIES
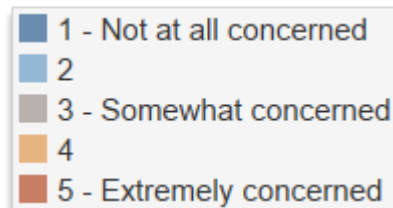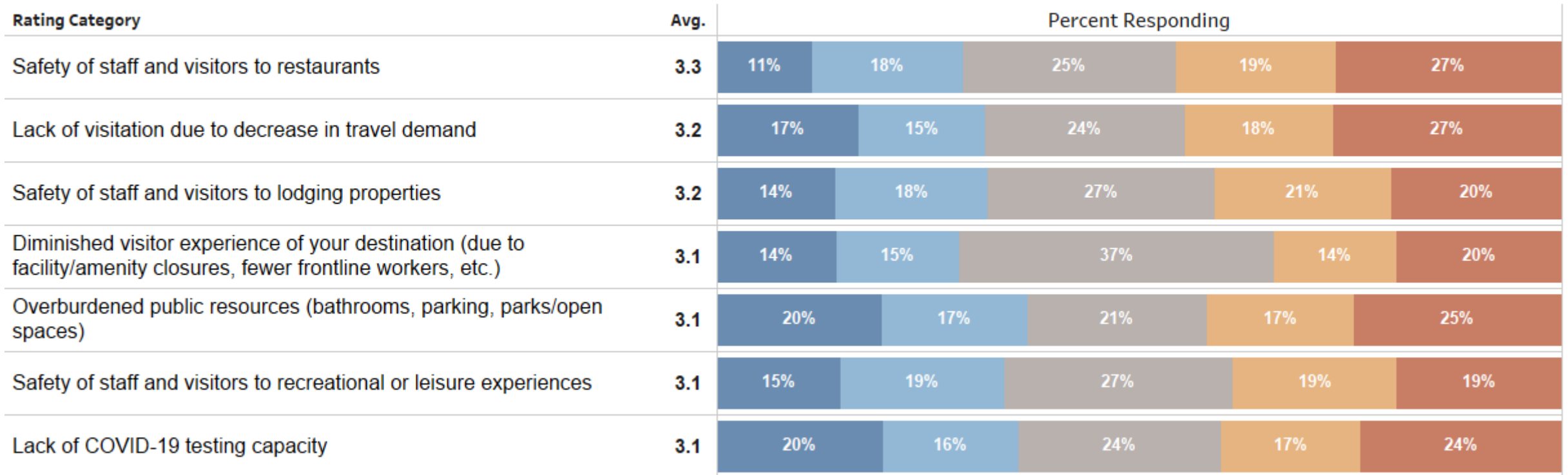
Rating Category	Avg.	Percent Responding				
Safety of staff and visitors to restaurants	3.3	11%	18%	25%	19%	27%
Lack of visitation due to decrease in travel demand	3.2	17%	15%	24%	18%	27%
Safety of staff and visitors to lodging properties	3.2	14%	18%	27%	21%	20%
Diminished visitor experience of your destination (due to facility/amenity closures, fewer frontline workers, etc.)	3.1	14%	15%	37%	14%	20%
Overburdened public resources (bathrooms, parking, parks/open spaces)	3.1	20%	17%	21%	17%	25%
Safety of staff and visitors to recreational or leisure experiences	3.1	15%	19%	27%	19%	19%
Lack of COVID-19 testing capacity	3.1	20%	16%	24%	17%	24%

Legend:
- 1 - Not at all concerned
- 2
- 3 - Somewhat concerned
- 4
- 5 - Extremely concerned

Source: 2020 Oregon Tourism Industry Stakeholder Survey

*Categories are sorted in descending order by the average rating

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Q: As you think about welcoming visitors to your community, how concerned are you about the following? (1 = Not at all concerned, 5 - Extremely concerned), BOTTOM 6 CATEGORIES

Rating Category	Avg.	Percent Responding				
Heightened political tensions	3.0	20%	16%	26%	16%	22%
Negative resident sentiment towards visitors (due to fear of COVID-19 transmissions from visitors to residents)	2.9	15%	22%	32%	15%	16%
Overburdened local healthcare system	2.7	24%	25%	22%	14%	16%
Heightened racial tensions	2.5	31%	22%	21%	13%	13%
Negative visitor sentiment towards residents (due to fear of COVID-19 transmissions from residents to visitors)	2.4	29%	28%	27%	9%	8%
Limited supply of PPE's (face coverings, hand sanitizers, cleaning products, etc.) to travel-related businesses and organizations	2.3	32%	28%	21%	11%	8%

- 1 - Not at all concerned
- 2
- 3 - Somewhat concerned
- 4
- 5 - Extremely concerned

Source: 2020 Oregon Tourism Industry Stakeholder Survey

*Categories are sorted in descending order by the average rating

TOP 2 CONCERNS ABOUT WELCOMING VISITORS

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

Concern	Greatest concern	Second-greatest concern	Total
Diminished visitor experience of your destination (due to facility/amenity closures, fewer frontline workers, etc.)	18%	13%	30%
Lack of visitation due to decrease in travel demand	14%	11%	25%
Negative resident sentiment towards visitors (due to fear of COVID-19 transmissions from visitors to residents)	11%	10%	21%
Overburdened public resources (bathrooms, parking, parks/open spaces)	10%	11%	21%
Heightened political tensions	7%	10%	17%
Safety of staff and visitors to restaurants	7%	9%	16%
Safety of staff and visitors to recreational or leisure experiences	7%	8%	15%
Lack of COVID-19 testing capacity	6%	6%	11%
Overburdened local healthcare system	5%	6%	11%
Safety of staff and visitors to lodging properties	5%	6%	11%
Negative visitor sentiment towards residents (due to fear of COVID-19 transmissions from residents to visitors)	2%	3%	5%
Heightened racial tensions		3%	4%
Limited supply of PPE's (face coverings, hand sanitizers, cleaning products, etc.) to travel-related businesses and organizations at your destination		2%	3%
Other	5%	4%	10%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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TOP 2 CONCERNS ABOUT WELCOMING VISITORS
BY REGION

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

■ Greatest concern
■ Second-greatest concern

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
Diminished visitor experience of your destination (due to facility/amenity closures, fewer frontline workers, etc.)	30%	24%	42%	36%	20%	35%	40%	35%
Lack of visitation due to decrease in travel demand	25%	26%	42%	42%	10%	25%	36%	36%
Negative resident sentiment towards visitors (due to fear of COVID-19 transmissions from visitors to residents)	21%	32%	16%	19%	34%	9%	9%	14%
Overburdened public resources (bathrooms, parking, parks/open spaces)	21%	14%	7%	23%	35%	10%	18%	11%
Heightened political tensions	17%	22%	14%	10%	15%	31%	16%	12%
Safety of staff and visitors to restaurants	16%	12%	19%	19%	14%	16%	16%	18%
Safety of staff and visitors to recreational or leisure experiences	15%	10%	12%	15%	10%	15%	20%	22%
Lack of COVID-19 testing capacity	11%	16%	10%	5%	14%	10%	6%	13%
Overburdened local healthcare system	11%	10%	12%	9%	16%	8%	5%	6%
Safety of staff and visitors to lodging properties	11%	14%	7%	11%	11%	9%	11%	11%
Negative visitor sentiment towards residents (due to fear of COVID-19 transmissions from residents to visitors)	5%	2%	5%	2%	6%	5%	4%	6%
Heightened racial tensions	4%	5%		4%	2%	13%	3%	4%
Limited supply of PPE's (face coverings, hand sanitizers, cleaning products, etc.) to travel-related businesses and organizations at your destination	3%	2%	2%	2%	4%	1%	3%	5%
Other	10%	12%	11%	3%	9%	14%	11%	7%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

RESOURCES/PROGRAMS TO ASSIST YOUR BUSINESS/ORGANIZATION

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

Resource/Program	Percentage
Help advocating for effective policies and funding to support tourism businesses/organizations	52%
Tools and trainings to improve business communications and marketing	30%
Networking with/learning from other professionals in your sector	24%
Support transitioning to online and expanded sales/business platforms	24%
Technical assistance navigating business recovery funding and loans	23%
Support adapting business plan/model	20%
Help complying with Governor recommended COVID-19 safety protocols	19%
Other	19%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

RESOURCES/PROGRAMS TO ASSIST YOUR BUSINESS/ORGANIZATION
EXAMPLE "OTHER" RESPONSES

Q: Which of the following resources or programs would best assist your BUSINESS/ORGANIZATION in resiliency, recovery, and reopening? – Other (please specify):

help	9%
funding	8%
business	8%
businesses	7%
need	7%
support	7%
assistance	6%
grants	6%
people	6%
marketing	5%
covid	4%
get	4%
local	4%
open	4%
community	4%

Example Responses:

"Other" write-in responses were diverse in nature; however, the need for additional grant and funding resources was especially common.

> Funding and training. Small businesses need loans and training on how to adapt in this new business environment. The local banks Columbia and us bank are not lending to many of the small businesses that need help now. We need alternative sources of funding.

> Nonprofit funding streams have completely shifted to respond to COVID but don't consider recreation/tourism worthwhile avenues for COVID relief.

> We always need funds. Advertising is important and we are always looking for grant money.

> We have done all of the above - we need additional funding to make it through the winter.

RESOURCES/PROGRAMS TO ASSIST YOUR BUSINESS/ORGANIZATION
BY ENTITY TYPE

Q: Which of the following resources or programs would best assist your BUSINESS/ORGANIZATION in resiliency, recovery, and reopening? (Select up to three answer options)
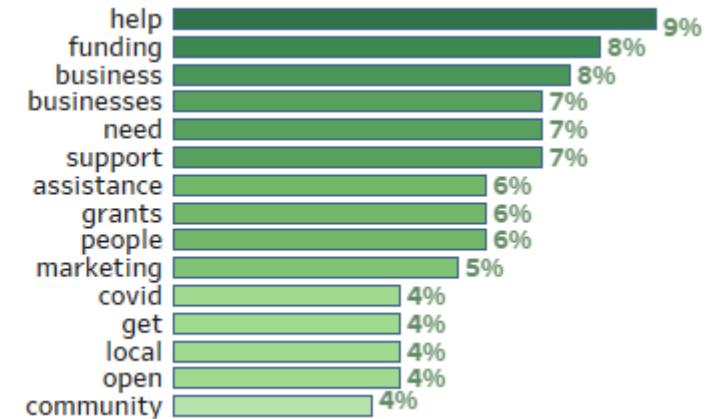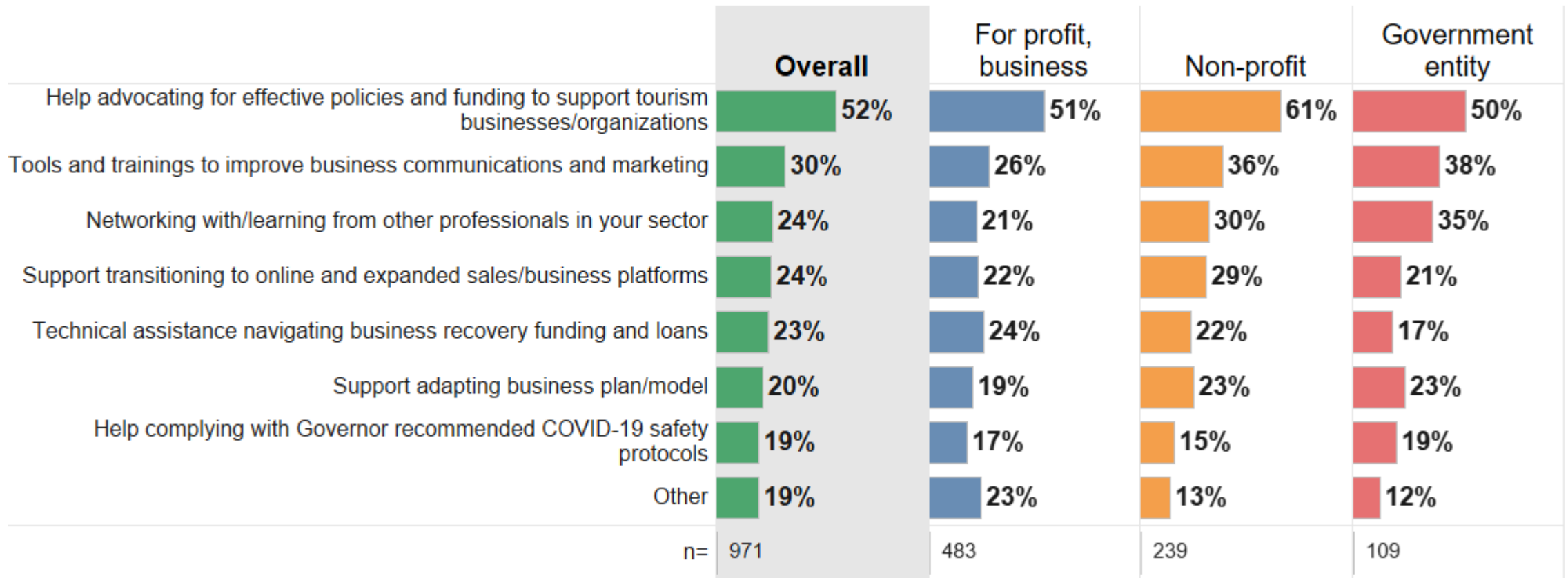
	Overall	For profit, business	Non-profit	Government entity
Help advocating for effective policies and funding to support tourism businesses/organizations	52%	51%	61%	50%
Tools and trainings to improve business communications and marketing	30%	26%	36%	38%
Networking with/learning from other professionals in your sector	24%	21%	30%	35%
Support transitioning to online and expanded sales/business platforms	24%	22%	29%	21%
Technical assistance navigating business recovery funding and loans	23%	24%	22%	17%
Support adapting business plan/model	20%	19%	23%	23%
Help complying with Governor recommended COVID-19 safety protocols	19%	17%	15%	19%
Other	19%	23%	13%	12%
n=	971	483	239	109

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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RESOURCES/PROGRAMS TO ASSIST YOUR BUSINESS/ORGANIZATION

BY SECTOR

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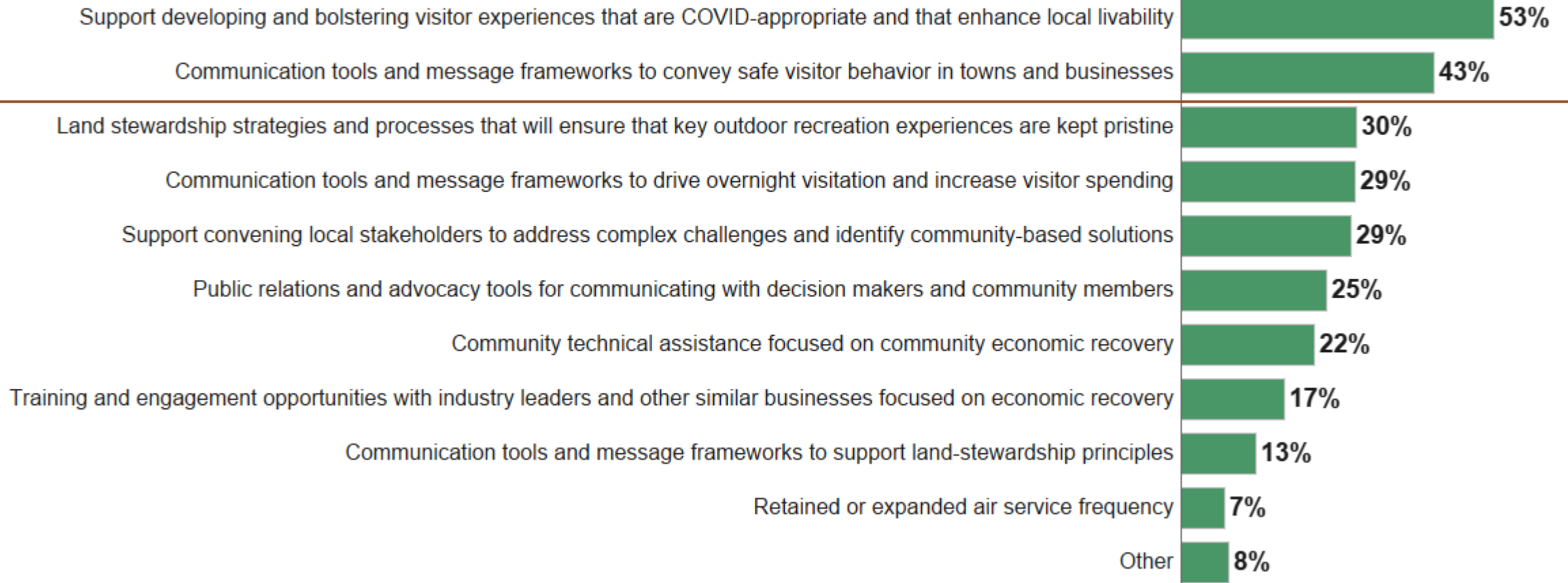
	Overall	Destination marketing and management	Lodging	Retail and attractions	Food and beverage	Farm, ranch, fishery, agritourism business/activities	Entertainment (e.g. sports, events, concerts, etc.)	Tour operator, guide, outfitter	Land management	Other
Help advocating for effective policies and funding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

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

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RESOURCES/PROGRAMS TO ASSIST YOUR COMMUNITY

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

Support developing and bolstering visitor experiences that are COVID-appropriate and that enhance local livability	53%
Communication tools and message frameworks to convey safe visitor behavior in towns and businesses	43%
Land stewardship strategies and processes that will ensure that key outdoor recreation experiences are kept pristine	30%
Communication tools and message frameworks to drive overnight visitation and increase visitor spending	29%
Support convening local stakeholders to address complex challenges and identify community-based solutions	29%
Public relations and advocacy tools for communicating with decision makers and community members	25%
Community technical assistance focused on community economic recovery	22%
Training and engagement opportunities with industry leaders and other similar businesses focused on economic recovery	17%
Communication tools and message frameworks to support land-stewardship principles	13%
Retained or expanded air service frequency	7%
Other	8%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

PLANNING & MANAGEMENT

SHORT-TERM PRIORITIES

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

Priority	Top priority	Second priority	Third priority	Total
Grants and funding resources	31%	16%	11%	58%
COVID-friendly visitor experience development	28%	17%	12%	57%
Marketing and promotion	11%	16%	14%	41%
Tourism-related infrastructure	8%	12%	13%	34%
Visitor management solutions	5%	9%	13%	27%
Stakeholder engagement & collaboration	6%	9%	9%	24%
Tourism strategies for climate change resilience	3%	7%	7%	18%
Tourism research & market insight	2%	5%	7%	14%
Training and education programs		5%	6%	13%
Transportation options		2%	5%	9%
Other	3%			5%

Legend:
- Top priority
- Second priority
- Third priority
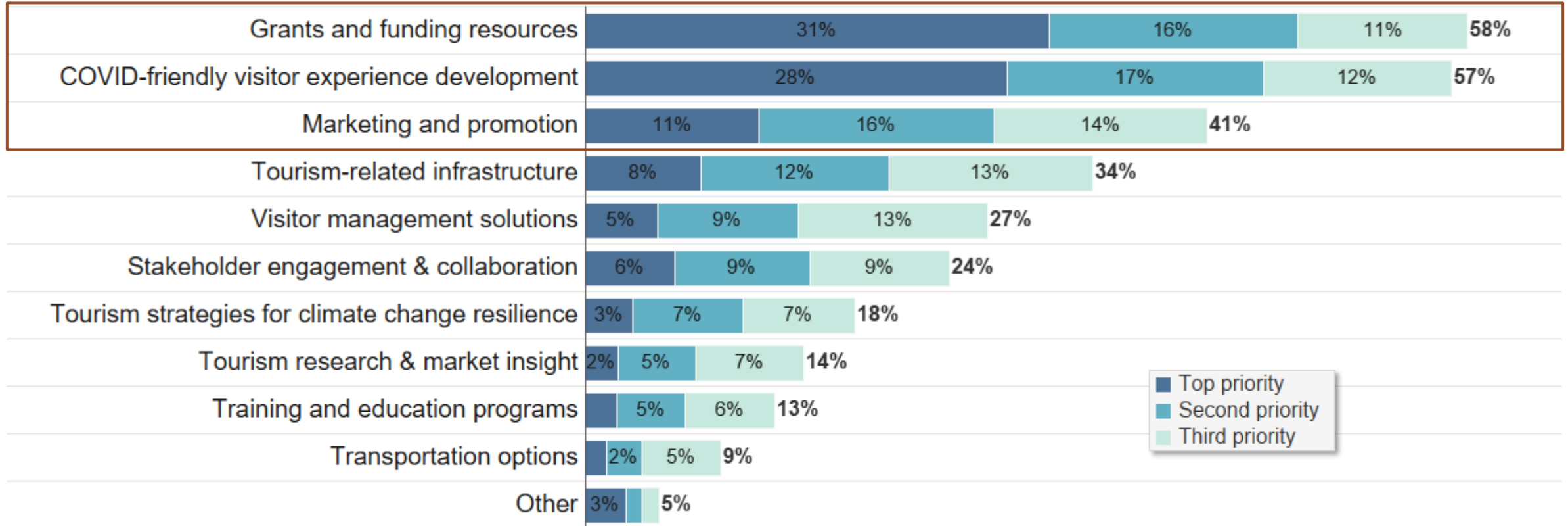
Source: 2020 Oregon Tourism Industry Stakeholder Survey

SHORT-TERM PRIORITIES: TOP PRIORITY BY REGION
1) GRANTS AND FUNDING RESOURCES

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

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

SHORT-TERM PRIORITIES: TOP PRIORITY BY REGION
2) COVID-FRIENDLY VISITOR EXPERIENCE DEVELOPMENT

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

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

Source: 2020 Oregon Tourism Industry Stakeholder Survey

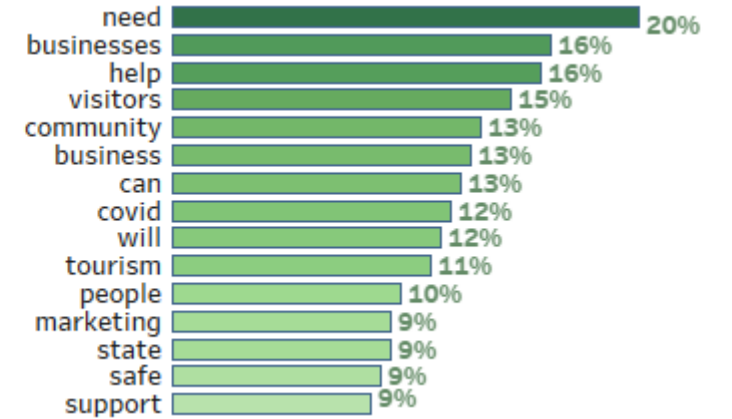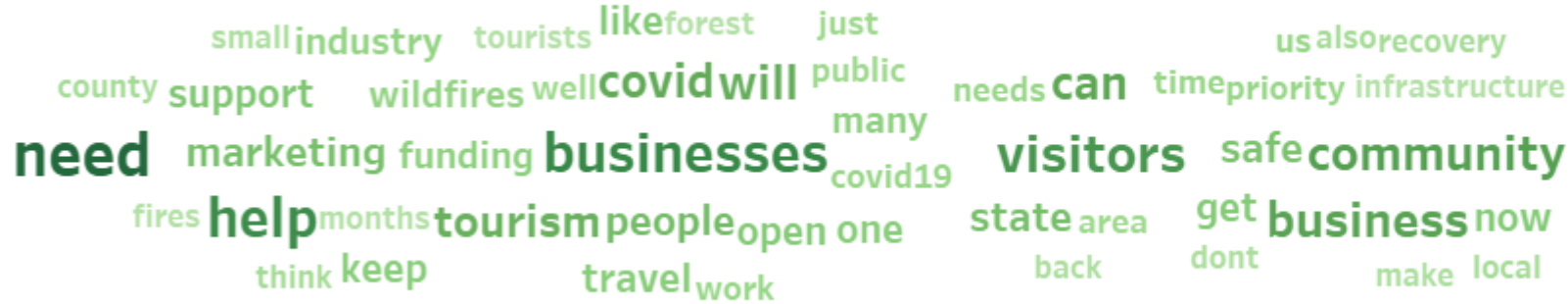# SHORT-TERM PRIORITIES: TOP PRIORITY BY REGION
2) MARKETING AND PROMOTION

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

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

SHORT-TERM PRIORITIES
OPEN-ENDED RESPONSES

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

Word cloud including: small, industry, tourists, like, forest, just, county, support, wildfires, well, covid, will, public, needs, can, time, priority, infrastructure, us, also, recovery, many, need, marketing, funding, businesses, covid19, visitors, safe, community, fires, help, months, tourism, people, open, one, state, area, get, business, now, think, keep, travel, work, back, dont, make, local

Bar chart:
Term	%
need	20%
businesses	16%
help	16%
visitors	15%
community	13%
business	13%
can	13%
covid	12%
will	12%
tourism	11%
people	10%
marketing	9%
state	9%
safe	9%
support	9%

Example Responses:

The most common theme in open-ended responses was the need to sustain businesses while maintaining public safety.
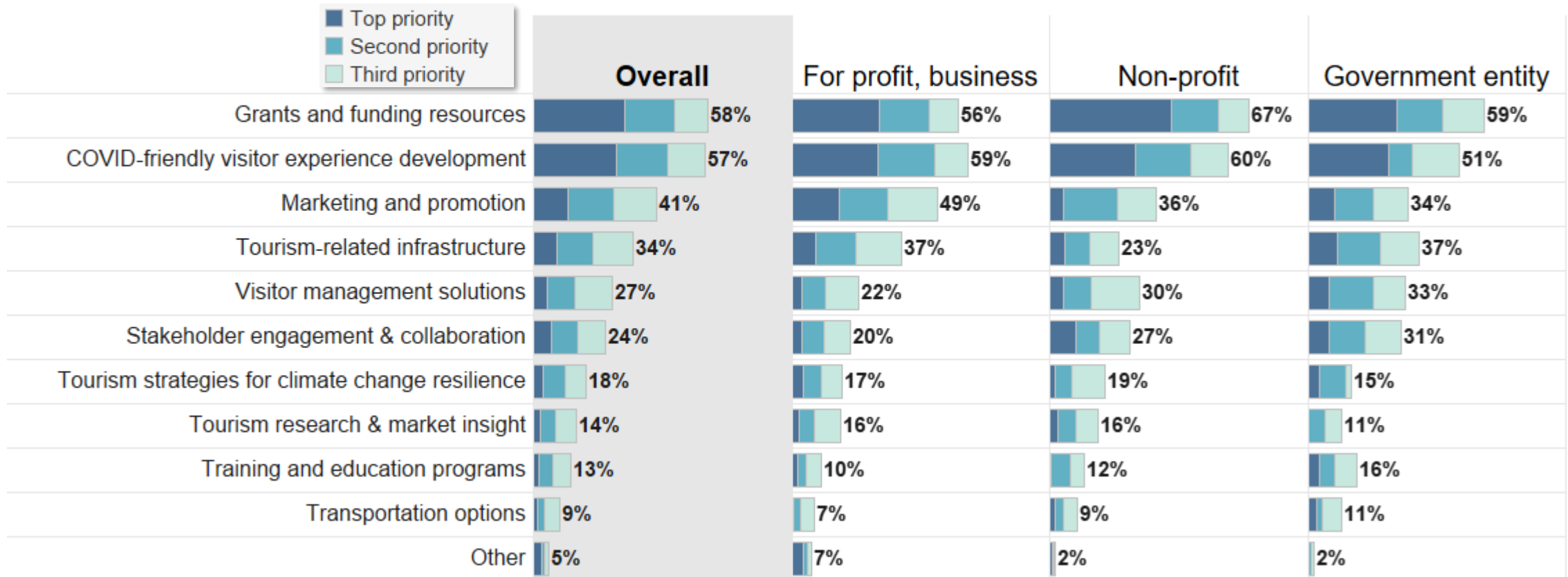
Recovery starts with COVID-19 friendly visitor experiences and those are most likely found in outdoor recreation. Those experiences need to be developed or enhanced and then promoted. Meanwhile, additional research would help the overall Oregon tourism industry understand why this is important.

Covid-19 may not be the last health related issue we'll have to deal with in the near future. I believe that, in order the weather the coming months we need to drive people to want to travel, to believe there are safe ways to vacation. That is, in my opinion, the way to sustain growth in our industry. Moving forward, supporting struggling businesses to help keep them afloat is also important.

We are just trying to survive. We can barely maintain ourselves, much less have the bandwidth to plan 6-12 months ahead. We need help with consulting but no money to pay for it. Grant opportunities are very competitive. We primarily need financial support

SHORT-TERM PRIORITIES
BY ENTITY TYPE

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

Legend:
- ■ Top priority
- ■ Second priority
- □ Third priority

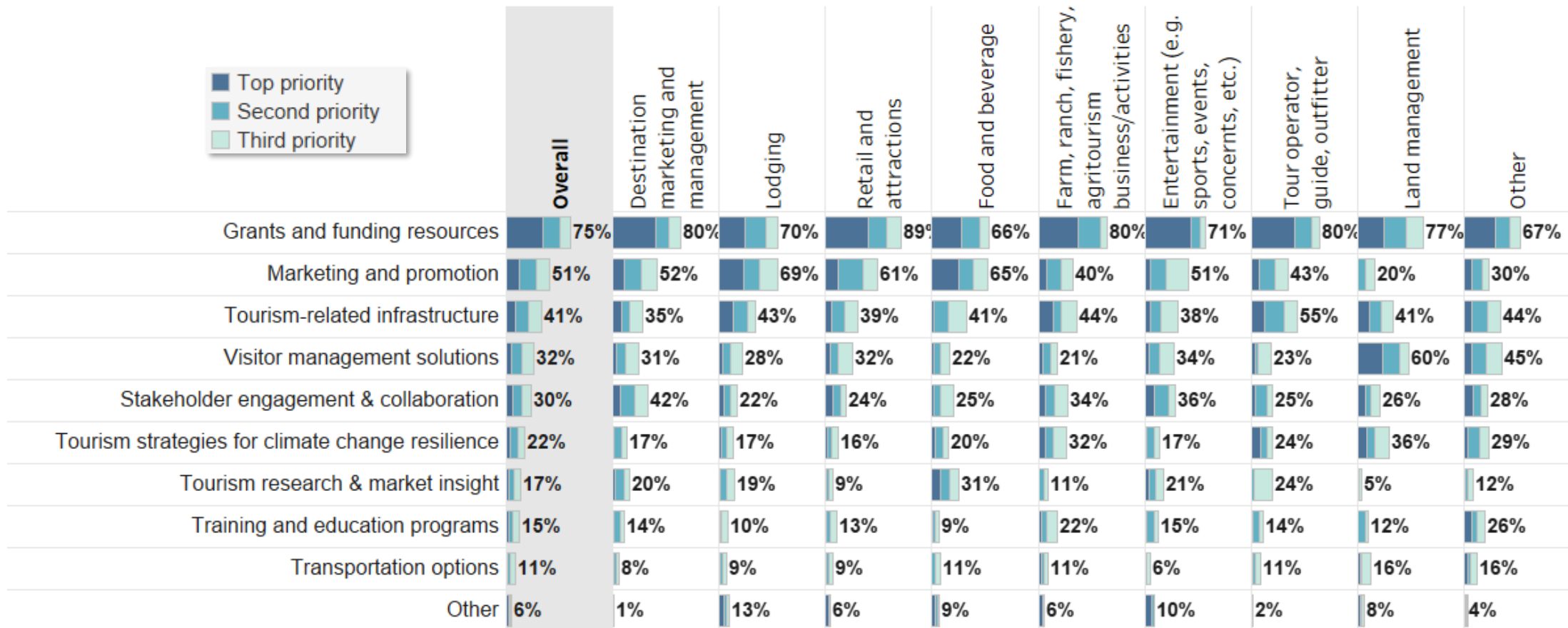|	Overall	For profit, business	Non-profit	Government entity
Grants and funding resources	58%	56%	67%	59%
COVID-friendly visitor experience development	57%	59%	60%	51%
Marketing and promotion	41%	49%	36%	34%
Tourism-related infrastructure	34%	37%	23%	37%
Visitor management solutions	27%	22%	30%	33%
Stakeholder engagement & collaboration	24%	20%	27%	31%
Tourism strategies for climate change resilience	18%	17%	19%	15%
Tourism research & market insight	14%	16%	16%	11%
Training and education programs	13%	10%	12%	16%
Transportation options	9%	7%	9%	11%
Other	5%	7%	2%	2%

SHORT-TERM PRIORITIES
BY SECTOR

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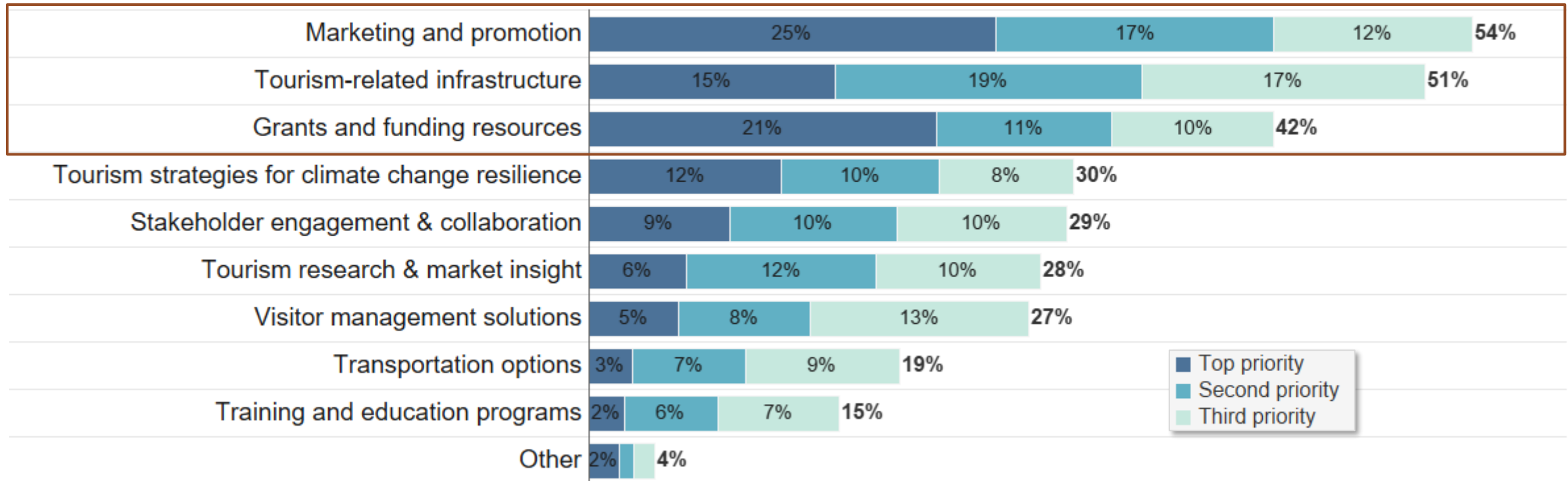
Legend:
- Top priority
- Second priority
- Third priority

	Overall	Destination marketing and management	Lodging	Retail and attractions	Food and beverage	Farm, ranch, fishery, agritourism business/activities	Entertainment (e.g. sports, events, concernts, etc.)	Tour operator, guide, outfitter	Land management	Other
Grants and funding resources	75%	80%	70%	89%	66%	80%	71%	80%	77%	67%
Marketing and promotion	51%	52%	69%	61%	65%	40%	51%	43%	20%	30%
Tourism-related infrastructure	41%	35%	43%	39%	41%	44%	38%	55%	41%	44%
Visitor management solutions	32%	31%	28%	32%	22%	21%	34%	23%	60%	45%
Stakeholder engagement & collaboration	30%	42%	22%	24%	25%	34%	36%	25%	26%	28%
Tourism strategies for climate change resilience	22%	17%	17%	16%	20%	32%	17%	24%	36%	29%
Tourism research & market insight	17%	20%	19%	9%	31%	11%	21%	24%	5%	12%
Training and education programs	15%	14%	10%	13%	9%	22%	15%	14%	12%	26%
Transportation options	11%	8%	9%	9%	11%	11%	6%	11%	16%	16%
Other	6%	1%	13%	6%	9%	6%	10%	2%	8%	4%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

LONG-TERM PRIORITIES

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

Priority Area	Top priority	Second priority	Third priority	Total
Marketing and promotion	25%	17%	12%	54%
Tourism-related infrastructure	15%	19%	17%	51%
Grants and funding resources	21%	11%	10%	42%
Tourism strategies for climate change resilience	12%	10%	8%	30%
Stakeholder engagement & collaboration	9%	10%	10%	29%
Tourism research & market insight	6%	12%	10%	28%
Visitor management solutions	5%	8%	13%	27%
Transportation options	3%	7%	9%	19%
Training and education programs	2%	6%	7%	15%
Other	2%			4%

Legend: Top priority, Second priority, Third priority

Source: 2020 Oregon Tourism Industry Stakeholder Survey

LONG-TERM PRIORITIES: TOP PRIORITY BY REGION
1) MARKETING AND PROMOTION

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

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette Valley
1	1 25%	1 26%	37%	28%	24%	1 30%	1 32%	1 34%
2	21%	22%	2 19%	2 22%	2 17%	21%	23%	21%
3	15%	15%	12%	13%	17%	13%	14%	17%
4	12%	13%	10%	12%	12%	11%	11%	9%
5	9%	9%	6%	9%	9%	7%	10%	8%
6	6%	6%	6%	9%	8%	7%	4%	5%
7	5%	6%	4%	3%	4%	3%	2%	3%
8	3%	4%	4%	3%	3%	3%	2%	2%
9	2%		4%	1%	3%	2%	1%	1%
10	2%			1%	2%	2%	1%	1%

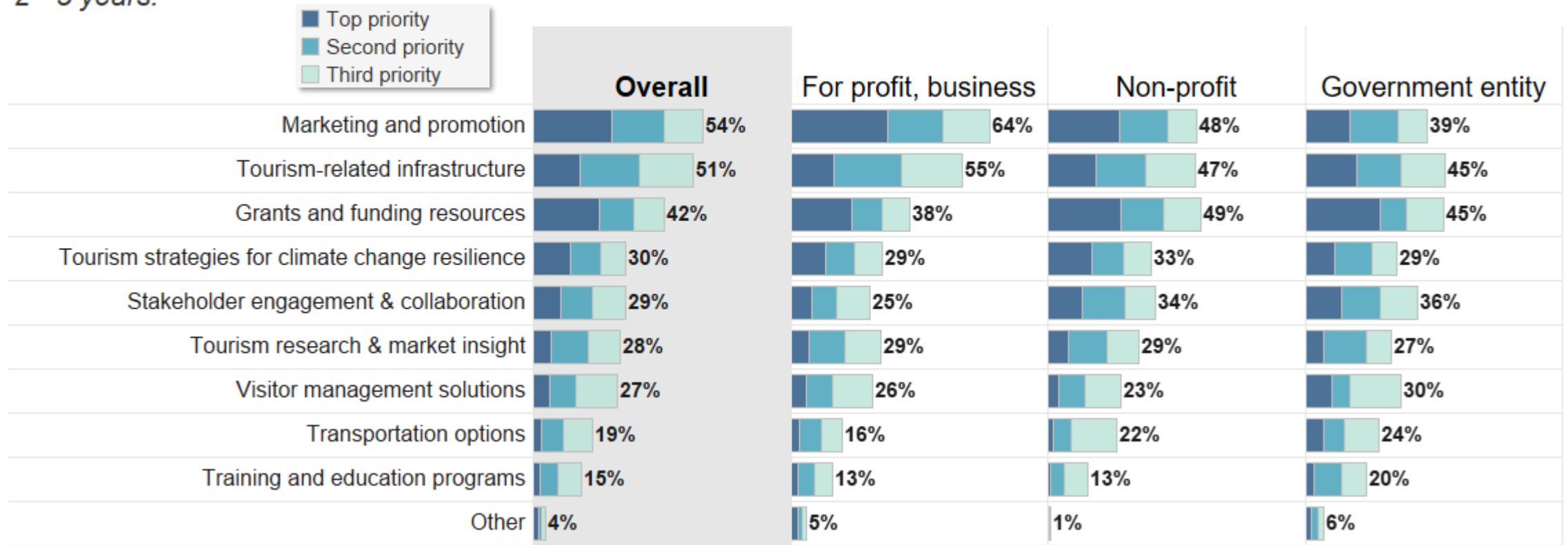Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette Valley
1	25%	26%	1 37%	1 28%	24%	30%	32%	34%
2	2 21%	2 22%	19%	22%	17%	2 21%	2 23%	2 21%
3	15%	15%	12%	13%	3 17%	13%	14%	17%
4	12%	13%	10%	12%	12%	11%	11%	9%
5	9%	9%	6%	9%	9%	7%	10%	8%
6	6%	6%	6%	9%	8%	7%	4%	5%
7	5%	6%	4%	3%	4%	3%	2%	3%
8	3%	4%	4%	3%	3%	3%	2%	2%
9	2%		4%	1%	3%	2%	1%	1%
10	2%			1%	2%	2%	1%	1%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

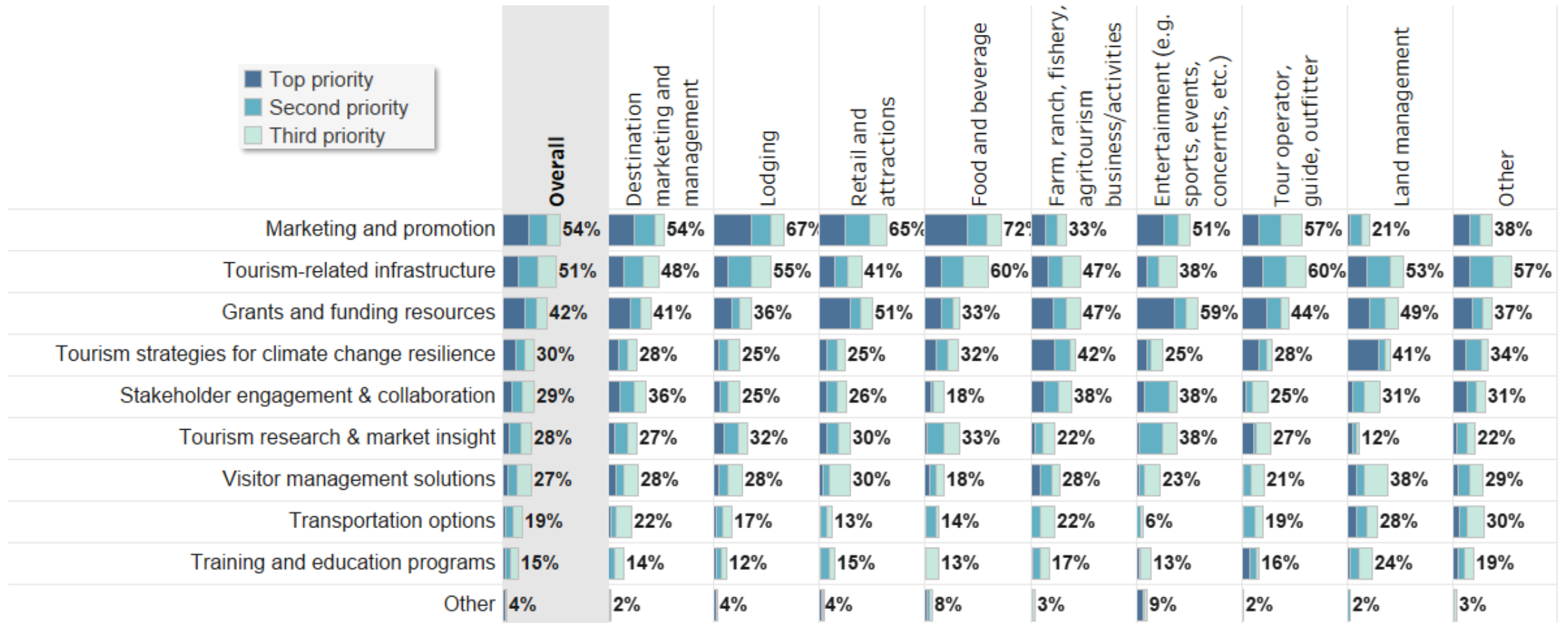# LONG-TERM PRIORITIES: TOP PRIORITY BY REGION
3) TOURISM RELATED INFRASTRUCTURE

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

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette Valley
1	25%	26%	37%	28%	**1 24%**	30%	32%	34%
2	21%	22%	19%	22%	17%	21%	23%	21%
3	**3 15%**	15%	12%	13%	17%	13%	**3 14%**	17%
4	12%	**4 13%**	**4 10%**	**4 12%**	12%	**4 11%**	11%	9%
5	9%	9%	6%	9%	9%	7%	10%	**5 8%**
6	6%	6%	6%	9%	8%	7%	4%	5%
7	5%	6%	4%	3%	4%	3%	2%	3%
8	3%	4%	4%	3%	3%	3%	2%	2%
9	2%		4%	1%	3%	2%	1%	1%
10	2%			1%	2%	2%	1%	1%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

LONG-TERM PRIORITIES
BY ENTITY TYPE

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

Legend:
- ■ Top priority
- ■ Second priority
- ■ Third priority

	Overall	For profit, business	Non-profit	Government entity
Marketing and promotion	54%	64%	48%	39%
Tourism-related infrastructure	51%	55%	47%	45%
Grants and funding resources	42%	38%	49%	45%
Tourism strategies for climate change resilience	30%	29%	33%	29%
Stakeholder engagement & collaboration	29%	25%	34%	36%
Tourism research & market insight	28%	29%	29%	27%
Visitor management solutions	27%	26%	23%	30%
Transportation options	19%	16%	22%	24%
Training and education programs	15%	13%	13%	20%
Other	4%	5%	1%	6%

LONG-TERM PRIORITIES
BY SECTOR

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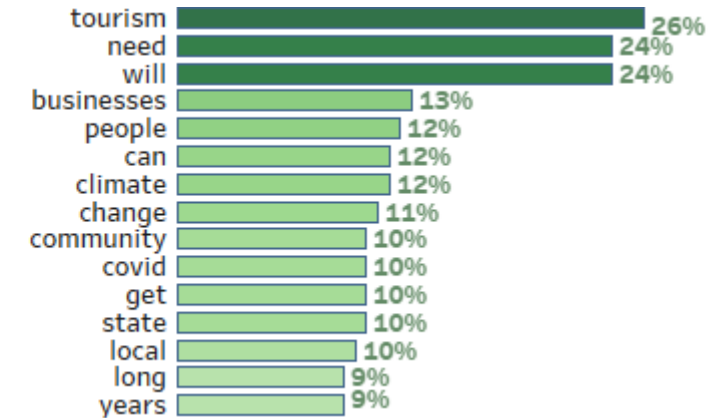
Legend:
- ■ Top priority
- ■ Second priority
- ■ Third priority

	Overall	Destination marketing and management	Lodging	Retail and attractions	Food and beverage	Farm, ranch, fishery, agritourism business/activities	Entertainment (e.g. sports, events, concernts, etc.)	Tour operator, guide, outfitter	Land management	Other
Marketing and promotion	54%	54%	67%	65%	72%	33%	51%	57%	21%	38%
Tourism-related infrastructure	51%	48%	55%	41%	60%	47%	38%	60%	53%	57%
Grants and funding resources	42%	41%	36%	51%	33%	47%	59%	44%	49%	37%
Tourism strategies for climate change resilience	30%	28%	25%	25%	32%	42%	25%	28%	41%	34%
Stakeholder engagement & collaboration	29%	36%	25%	26%	18%	38%	38%	25%	31%	31%
Tourism research & market insight	28%	27%	32%	30%	33%	22%	38%	27%	12%	22%
Visitor management solutions	27%	28%	28%	30%	18%	28%	23%	21%	38%	29%
Transportation options	19%	22%	17%	13%	14%	22%	6%	19%	28%	30%
Training and education programs	15%	14%	12%	15%	13%	17%	13%	16%	24%	19%
Other	4%	2%	4%	4%	8%	3%	9%	2%	2%	3%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

LONG-TERM PRIORITIES
OPEN-ENDED RESPONSES

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

Word	%
tourism	26%
need	24%
will	24%
businesses	13%
people	12%
can	12%
climate	12%
change	11%
community	10%
covid	10%
get	10%
state	10%
local	10%
long	9%
years	9%

Example Responses:

COVID distracted us from the perils of climate change. incorporating environmental stewardship into tourism messaging will be important to changing behaviors that impact our ocean.

Continuing with #takecareoutthere and other programs that encourage responsible recreation

Stakeholders need to believe that within the next 2-5 years there will likely be necessary adjustments to visitor marketing strategies - so building flexibility and resiliency is essential. Our small businesses have a focus on building and sustaining a re

Please take good long look at infrastructure and how the tourist industry should be responsible for the impact of tourism on the local communities. How might the planning address the ability of the locals to conduct a normal daily life when the roads are so congested that we cannot access food, health care, and emergencies.

SHORT VS. LONG-TERM PRIORITIES
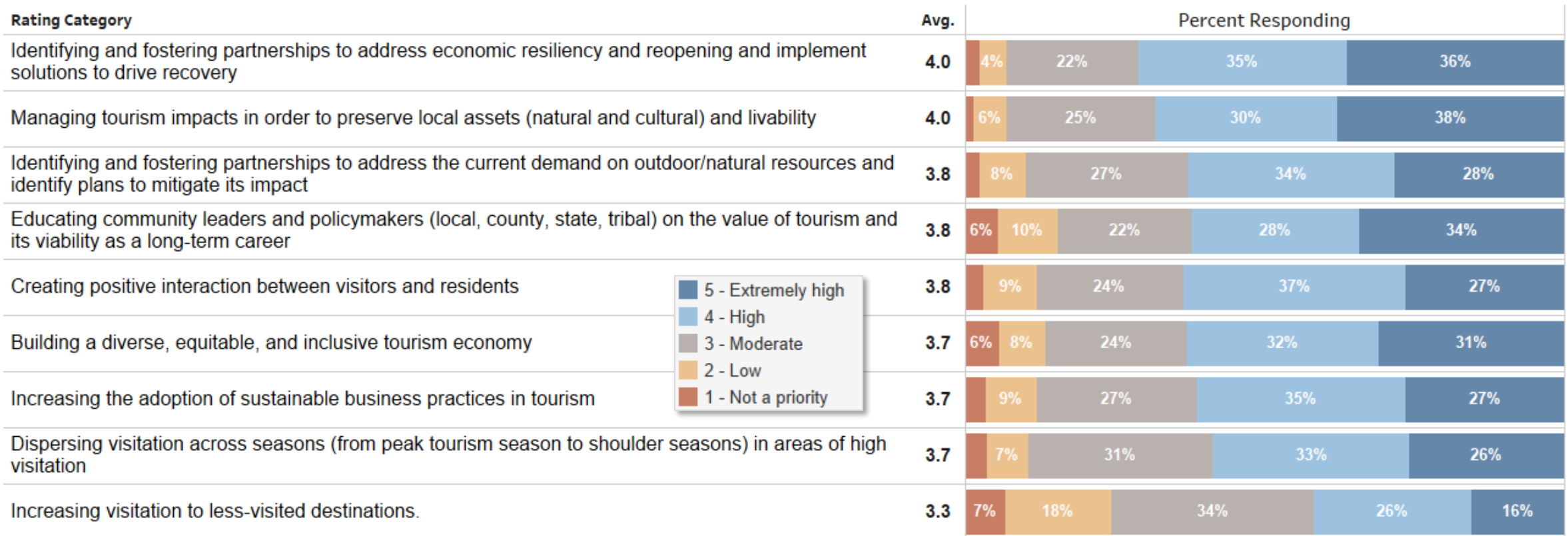## TOP 3 COMBINED

Immediate recovery (6 - 12 months)

1. Grants and funding resources (59%)
2. COVID-friendly visitor experience development (58%)
3. Marketing and promotion (41%)
4. Tourism-related infrastructure (33%)
5. Visitor management solutions (26%)
6. Stakeholder engagement & collaboration (24%)
7. Tourism strategies for climate change resilience (18%)
8. Tourism research & market insight (14%)
9. Training and education programs (12%)
10. Transportation options (9%)

Longer-term tourism Planning (2 - 5 years)

1. Marketing and promotion (54%)
2. Tourism-related infrastructure (51%)
3. Grants and funding resources (42%)
4. Tourism strategies for climate change resilience (30%)
5. Stakeholder engagement & collaboration (29%)
6. Tourism research & market insight (28%)
7. Visitor management solutions (27%)
8. Transportation options (19%)
9. Training and education programs (15%)
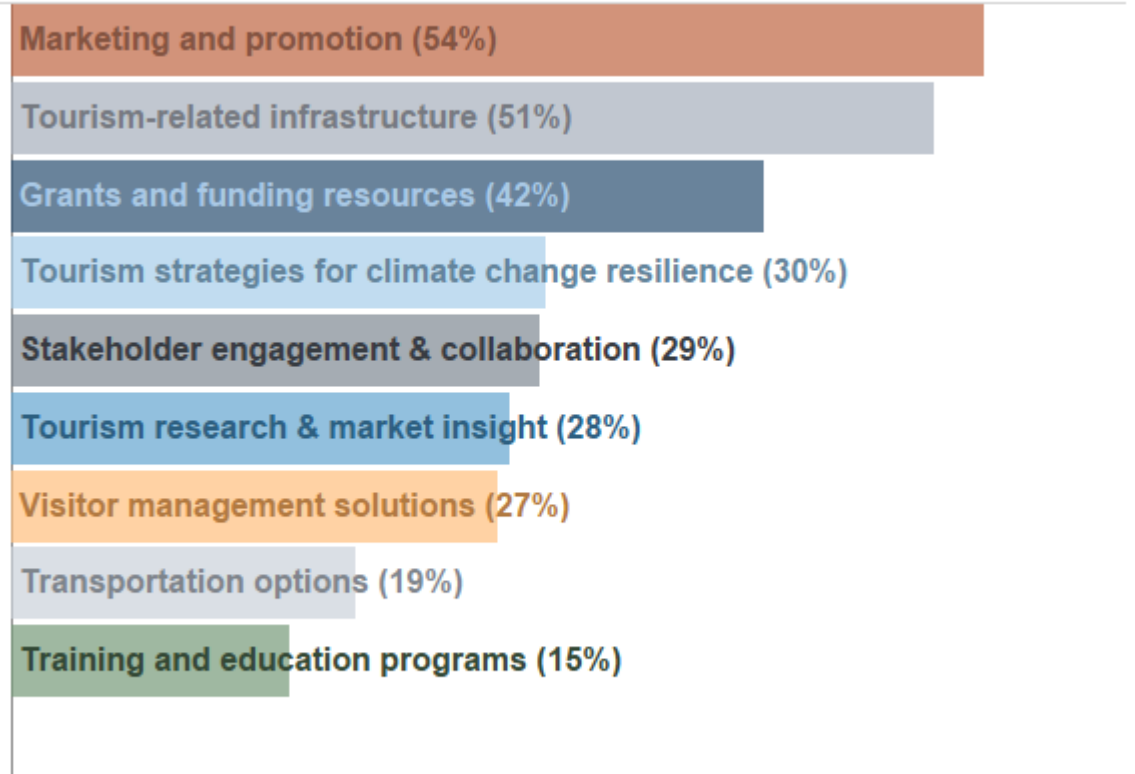
Source: 2020 Oregon Tourism Industry Stakeholder Survey

TACTICAL PLANNING & MANAGEMENT: RATINGS

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

| Rating Category	Avg.	Percent Responding
Identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery	4.0	4% / 22% / 35% / 36%
Managing tourism impacts in order to preserve local assets (natural and cultural) and livability	4.0	6% / 25% / 30% / 38%
Identifying and fostering partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact	3.8	8% / 27% / 34% / 28%
Educating community leaders and policymakers (local, county, state, tribal) on the value of tourism and its viability as a long-term career	3.8	6% / 10% / 22% / 28% / 34%
Creating positive interaction between visitors and residents	3.8	9% / 24% / 37% / 27%
Building a diverse, equitable, and inclusive tourism economy	3.7	6% / 8% / 24% / 32% / 31%
Increasing the adoption of sustainable business practices in tourism	3.7	9% / 27% / 35% / 27%
Dispersing visitation across seasons (from peak tourism season to shoulder seasons) in areas of high visitation	3.7	7% / 31% / 33% / 26%
Increasing visitation to less-visited destinations.	3.3	7% / 18% / 34% / 26% / 16%

Legend:
- 5 - Extremely high
- 4 - High
- 3 - Moderate
- 2 - Low
- 1 - Not a priority

TACTICAL PLANNING & MANAGEMENT: TOP 2 PRIORITIES

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

Priority	Top priority	Second priority	Total
Managing tourism impacts in order to preserve local assets (natural and cultural) and livability	16%	15%	31%
Identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery	16%	13%	29%
Building a diverse, equitable, and inclusive tourism economy	16%	11%	27%
Dispersing visitation across seasons (from peak tourism season to shoulder seasons) in areas of high visitation	12%	13%	25%
Educating community leaders and policymakers (local, county, state, tribal) on value of tourism and its viability as a long-term career	13%	10%	24%
Creating positive interaction between visitors and residents	8%	12%	21%
Identifying and fostering partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact	7%	10%	17%
Increasing the adoption of sustainable business practices in tourism	7%	8%	14%
Increasing visitation to less-visited destinations	5%	7%	12%

Legend:
- ■ Top priority
- ■ Second priority

Source: 2020 Oregon Tourism Industry Stakeholder Survey

TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:
1) MANAGING TOURISM IMPACTS IN ORDER TO PRESERVE LOCAL ASSETS (NATURAL AND CULTURAL) AND LIVABILITY

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

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

TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:
2) IDENTIFYING AND FOSTERING PARTNERSHIPS TO ADDRESS ECONOMIC RESILIENCY AND REOPENING AND IMPLEMENT SOLUTIONS TO DRIVE RECOVERY

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

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

TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:
3) BUILDING A DIVERSE, EQUITABLE, AND INCLUSIVE TOURISM ECONOMY

Q: From the list above, please identify your top two priorities:
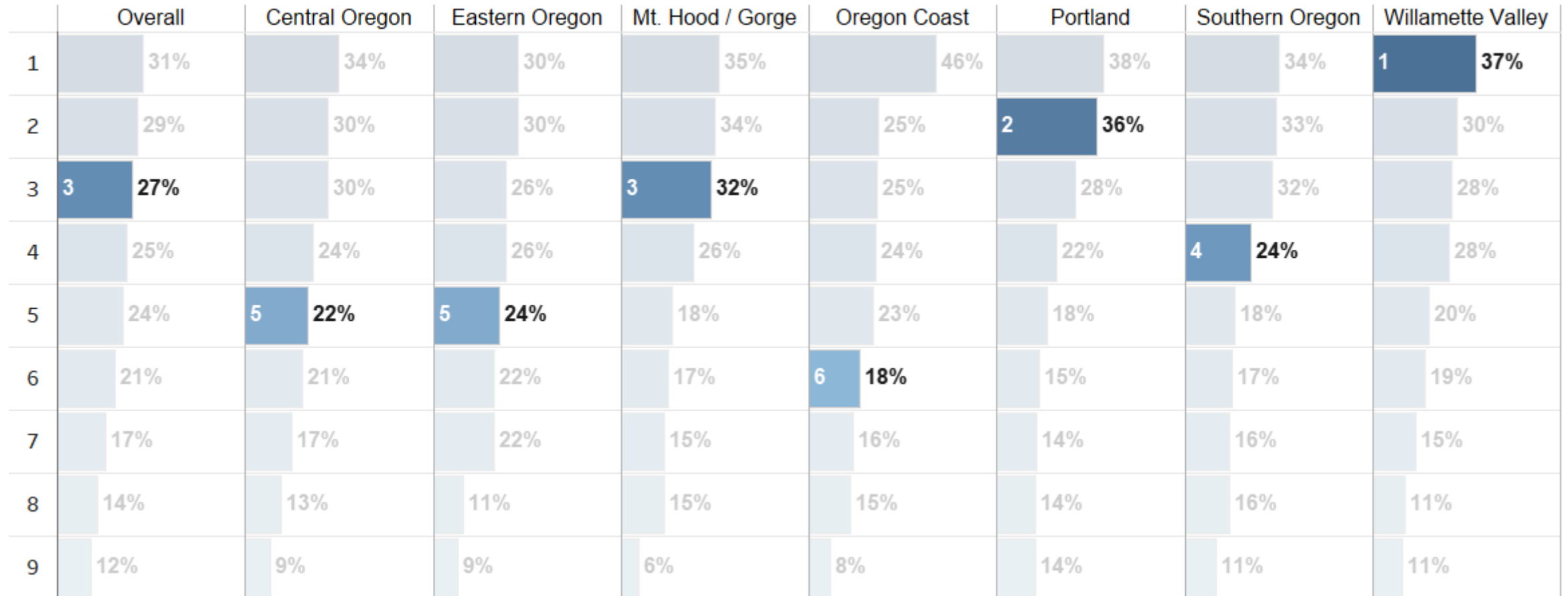
	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland	Southern Oregon	Willamette Valley
1	31%	34%	30%	35%	46%	38%	34%	**1** 37%
2	29%	30%	30%	34%	25%	**2** 36%	33%	30%
3	**3** 27%	30%	26%	**3** 32%	25%	28%	32%	28%
4	25%	24%	26%	26%	24%	22%	**4** 24%	28%
5	24%	**5** 22%	**5** 24%	18%	23%	18%	18%	20%
6	21%	21%	22%	17%	**6** 18%	15%	17%	19%
7	17%	17%	22%	15%	16%	14%	16%	15%
8	14%	13%	11%	15%	15%	14%	16%	11%
9	12%	9%	9%	6%	8%	14%	11%	11%

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

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

5) EDUCATING COMMUNITY LEADERS AND POLICYMAKERS (LOCAL, COUNTY, STATE, TRIBAL) ON VALUE OF TOURISM AND ITS VIABILITY AS A LONG-TERM CAREER

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

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

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TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:
6) CREATING POSITIVE INTERACTION BETWEEN VISITORS AND RESIDENTS

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

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

TACTICAL PLANNING & MANAGEMENT: TOP PRIORITIES BY REGION:
7) IDENTIFYING AND FOSTERING PARTNERSHIPS TO ADDRESS THE CURRENT DEMAND ON OUTDOOR/NATURAL RESOURCES AND IDENTIFY PLANS TO MITIGATE ITS IMPACT

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

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

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

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

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

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

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

Legend:
- Top priority (dark blue)
- Second priority (light blue)

	Overall	For profit, business	Non-profit	Government entity
Managing tourism impacts in order to preserve local assets (natural and cultural) and livability	31%	29%	26%	34%
Identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery	29%	29%	29%	33%
Building a diverse, equitable, and inclusive tourism economy	27%	28%	33%	16%
Dispersing visitation across seasons (from peak tourism season to shoulder seasons) in areas of high visitation	25%	29%	26%	22%
Educating community leaders and policymakers (local, county, state, tribal) on value of tourism and its viability as a long-term career	24%	25%	24%	17%
Creating positive interaction between visitors and residents	21%	22%	19%	17%
Identifying and fostering partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact	17%	13%	16%	29%
Increasing the adoption of sustainable business practices in tourism	14%	14%	15%	13%
Increasing visitation to less-visited destinations	12%	10%	12%	18%

Source: 2020 Oregon Tourism Industry Stakeholder Survey

DIVERSITY, EQUITY & INCLUSION

TOURISM INDUSTRY'S ROLE IN ADVANCING SOCIAL & RACIAL JUSTICE

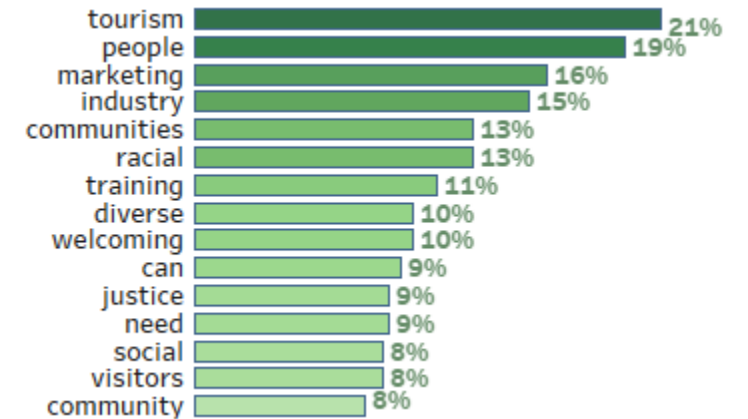*Q: Do you think the Oregon tourism industry should play a role in advancing social and racial justice?*

Yes	54%
No	22%
Unsure	23%
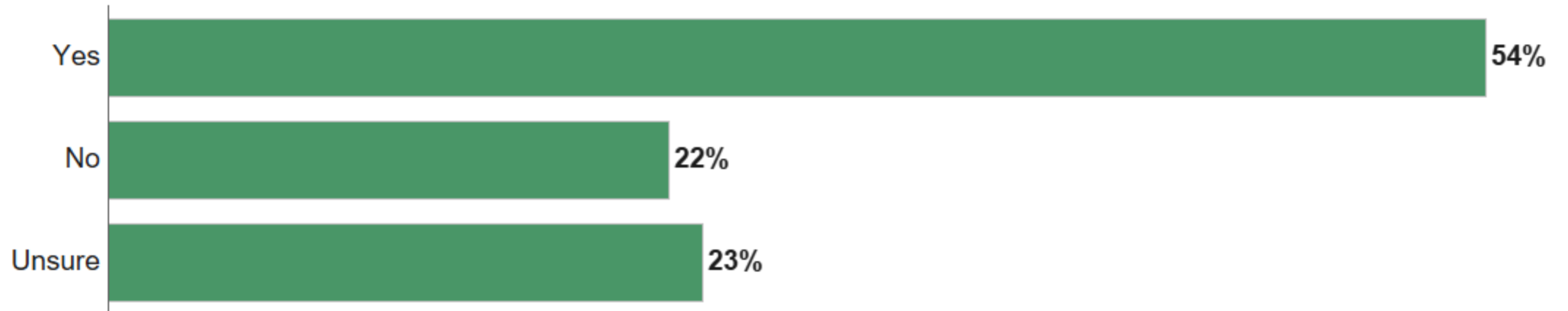
Source: 2020 Oregon Tourism Industry Stakeholder Survey

TOURISM INDUSTRY'S ROLE IN ADVANCING SOCIAL & RACIAL JUSTICE
BY AGE

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

	Overall	25 - 34	35 - 44	45 - 54	55 - 64	65 or older
Yes	54%	80%	57%	53%	48%	53%
No	22%	5%	17%	20%	28%	22%
Unsure	23%	15%	26%	27%	24%	25%
n=	945	74	133	175	203	162

Source: 2020 Oregon Tourism Industry Stakeholder Survey

79
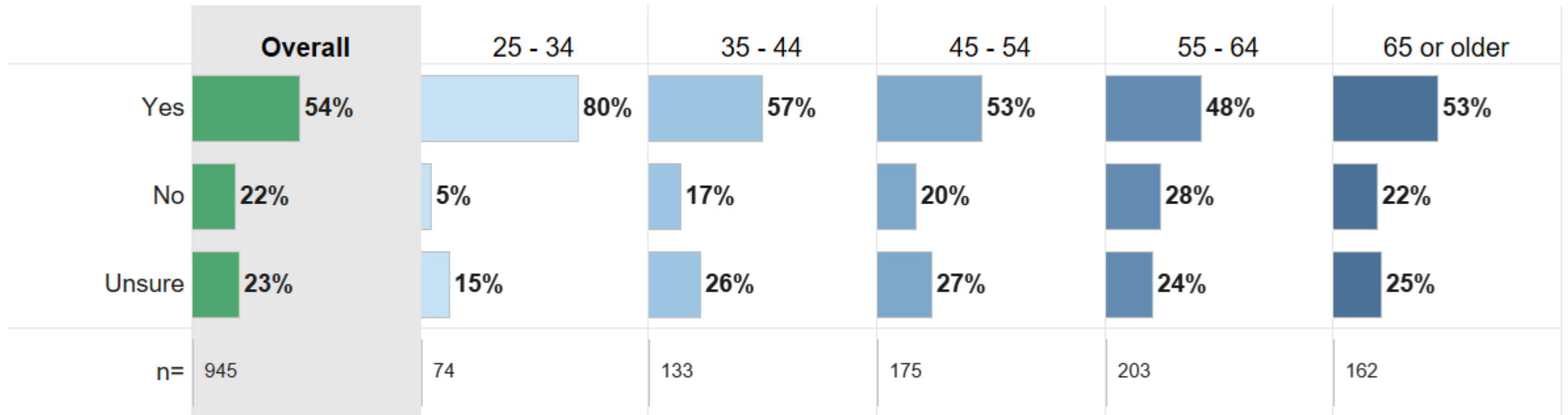
TOURISM INDUSTRY'S ROLE IN ADVANCING SOCIAL & RACIAL JUSTICE
BY LEVEL OF EDUCATION

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

	Overall	High school or less	Some college	Bachelor's degree	Graduate degree or more
Yes	54%	41%	47%	56%	62%
No	22%	34%	28%	18%	18%
Unsure	23%	24%	25%	26%	20%
n=	945	*29	174	348	260
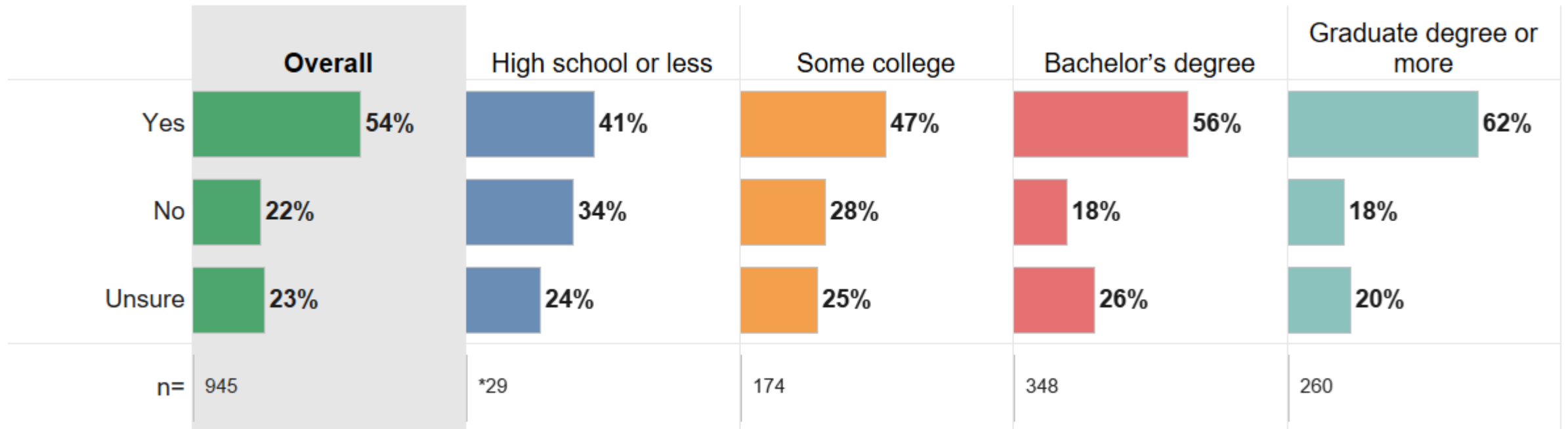
Source: 2020 Oregon Tourism Industry Stakeholder Survey
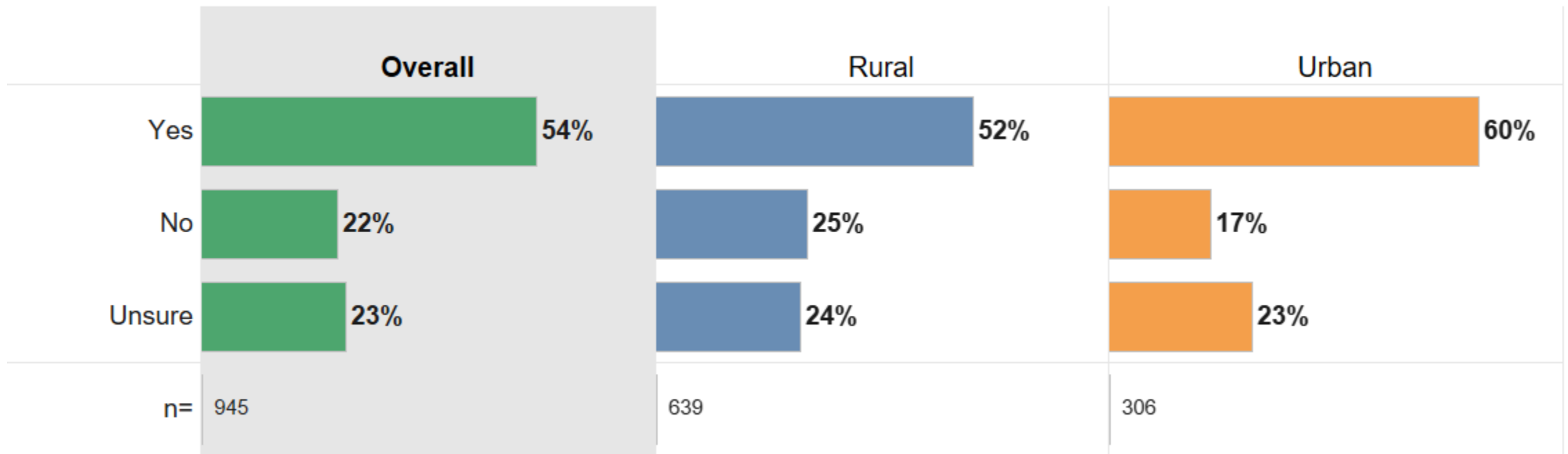
Source: 2020 Oregon Tourism Industry Stakeholder Survey

TOURISM INDUSTRY'S ROLE IN ADVANCING SOCIAL & RACIAL JUSTICE

BY REGION

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

	Overall	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
Yes	54%	59%	38%	53%	55%	58%	40%	63%
No	22%	27%	39%	25%	20%	19%	29%	15%
Unsure	23%	14%	23%	22%	24%	24%	31%	22%
n=	945	63	56	77	313	165	100	168

Source: 2020 Oregon Tourism Industry Stakeholder Survey

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

	Overall	Destination marketing and management	Lodging	Retail and attractions	Food and beverage	Farm, ranch, fishery, agritourism business/activities	Tour operator, guide, outfitter	Entertainment (e.g. sports, events, concerts, etc.)	Land management	Other
Yes	54%	53%	53%	50%	49%	62%	59%	56%	64%	57%
No	22%	21%	24%	19%	28%	20%	25%	25%	9%	22%
Unsure	23%	26%	24%	31%	24%	18%	16%	18%	27%	20%
n=	945	178	152	131	119	65	61	55	44	134
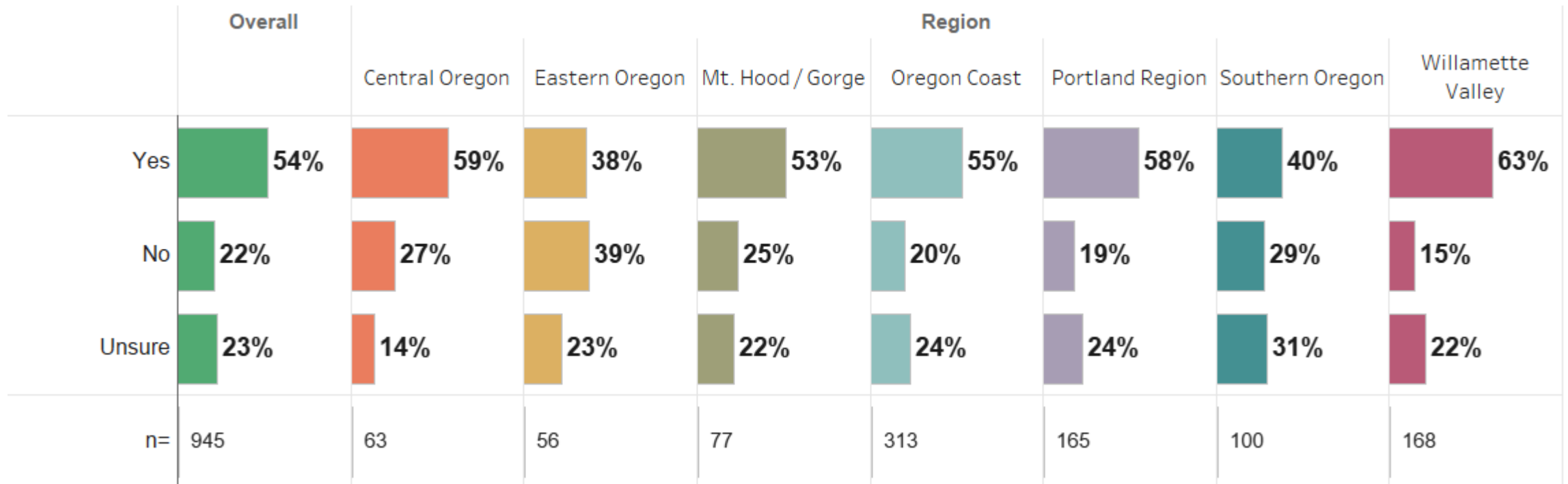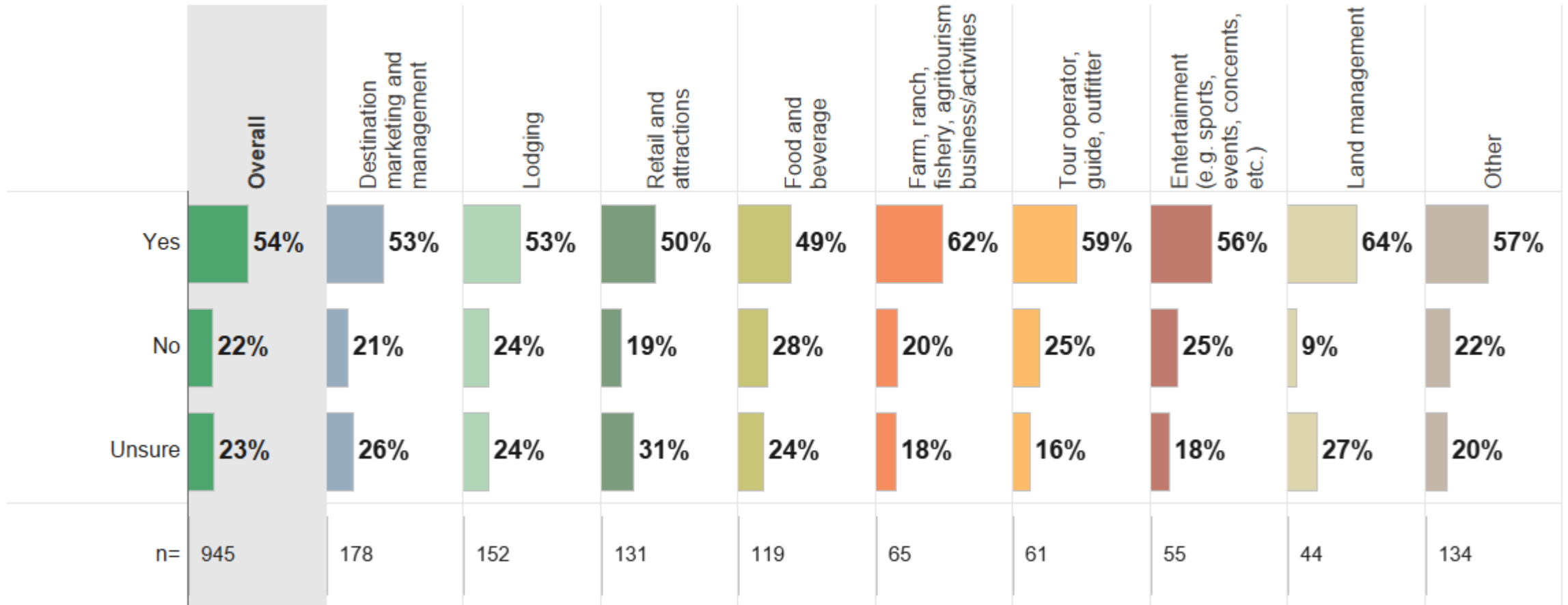
Respondents that indicated that the Oregon tourism industry should play a role in advancing social and racial justice were asked: "How do you see Oregon's tourism industry playing a role in advancing social and racial justice?" The most used words and a selection of responses follows:

Word	%
tourism	21%
people	19%
marketing	16%
industry	15%
communities	13%
racial	13%
training	11%
diverse	10%
welcoming	10%
can	9%
justice	9%
need	9%
social	8%
visitors	8%
community	8%

Inclusive marketing, more education and training opportunities, and more diverse representation in the workforce were the most cited roles that respondents see Travel Oregon playing in order to advance social and racial justice.

Example Responses:

At a bare minimum, we should make sure that our marketing reflects a positive stance on advancing social and racial justice.

By offering training to all people in the industry, whether you are a marketing manager or the clerk at a front desk of a hotel. You can't make it mandatory, but you can offer certifications for those who choose to avail themselves of it. I can't believe I still live in a world filled with social and racial injustices. Things need to change. Now.

By accurately sharing the stories and history of Oregon. In context, and from multiple perspectives.

Ensuring that their organizations are diverse and honor diversity in their practices and marketing/promotion campaigns.

Respondents 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 follows:

tourism	41%
social	31%
justice	25%
racial	24%
industry	23%
people	18%
dont	16%
role	16%
think	16%
travel	12%
feel	10%
focus	10%
need	10%
advancing	10%
just	10%
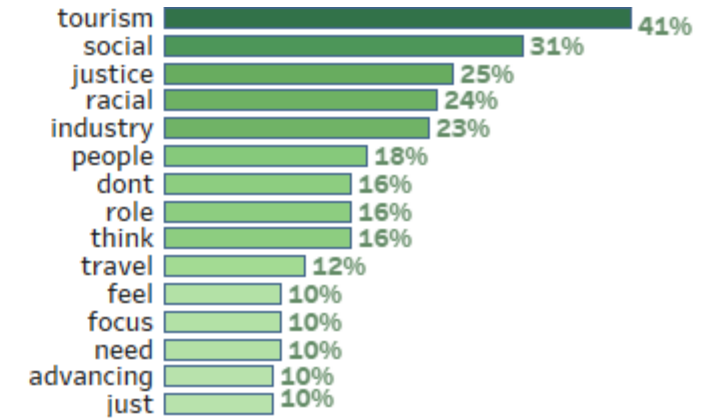
Common themes included the belief that this is not a part of Travel Oregon's job, that social and racial justice is a political issue that should not concern Travel Oregon, or that there is nothing Travel Oregon could do to help the situation.

Example Responses:

> That should not be your mission. Do what you currently do and do it well. Society will sort itself out without your help. Help create jobs, economic development and respect for Oregon's destinations. Travel Oregon simply cannot be all things to all people.

> I don't feel the tourism industry has a place in political issues. We simply address people without any interest in their sex or race; these simply have no place in our efforts. They don't relate to what we are trying to accomplish. Neither is any of our business.

> I think this is the role of communities and their social services, not tourism.

> It is complicated. I think we all have a responsibility to work towards social and racial justice but how it ties into this industry, other than creating a welcoming environment for all, I am not sure.

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DIVERSITY/EQUITY/INCLUSIVITY TRAINING

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

Category	Percentage
No, I have not received any cultural awareness, anti-racism, or implicit bias training	40%
Yes, cultural awareness	44%
Yes, anti-racism	39%
Yes, implicit bias	39%
Yes, other diversity, equity & inclusivity related training	23%

DIVERSITY/EQUITY/INCLUSIVITY TRAINING

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

Category	Percentage
No, I feel I have the training I need	46%
Yes, cultural awareness	42%
Yes, anti-racism	37%
Yes, implicit bias	40%
Yes, other	9%
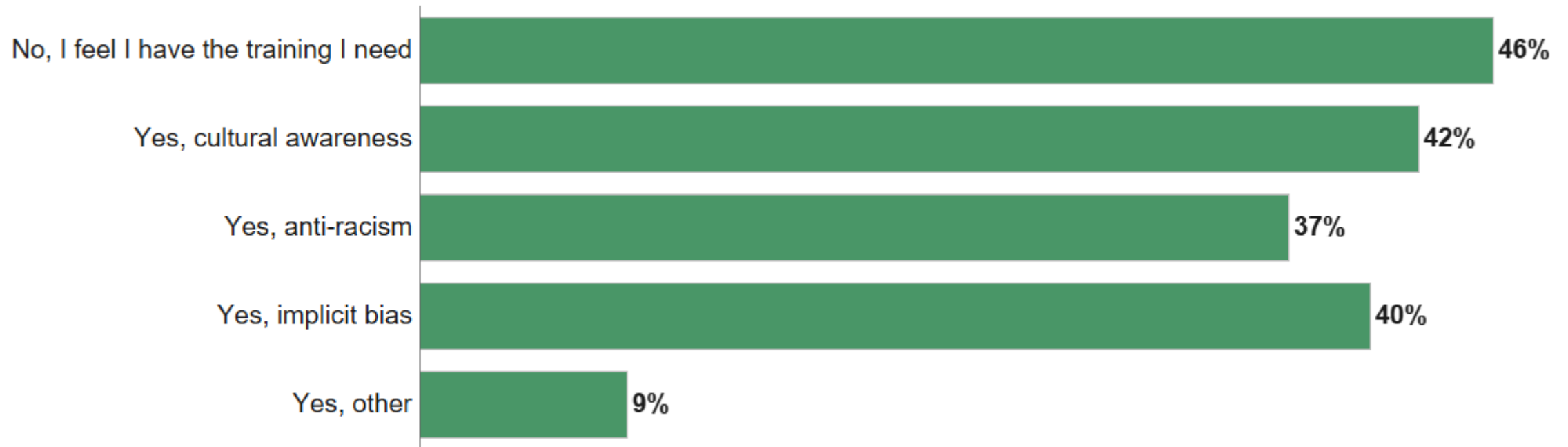
Source: 2020 Oregon Tourism Industry Stakeholder Survey

CREATING COMMUNITY WHERE ALL FEEL WELCOME

Respondents were asked, "In a few words, what, if anything, needs to change for your community to feel like a destination where ALL who travel can enjoy their journey and feel welcome?" Three primary themes emerged:

- **Nothing needs to change/my community is already welcoming.**
  - These respondents often provided examples of ways in which their community is welcoming. A very small minority suggested their community should not be so welcoming.
- **More training and education.**
  - Increase awareness of issues, both past and present, through more training and educational opportunities for all, and especially people in leadership positions.
- **More diverse representation in marketing materials and workforce.**
  - More promotional materials featuring BIPOC and LGBTQ+ individuals. Greater diversity in the travel and tourism workforce at all levels.

Example responses of these three most-prominent themes are provided on the following slide. In addition, smaller shares of respondents cited the need for improving safety in their communities, removing overt displays of racism, and making travel and outdoor recreation opportunities more accessible, particularly among youth from lower socio-economic backgrounds. Safety-related concerns were more common among Portland Region respondents, and primarily cited safety-related concerns due to homelessness, the police, and protesters. Some respondents said they either did not know how to make their community more welcoming, or, as a majority in their community, were not in a position to answer.

CREATING COMMUNITY WHERE ALL FEEL WELCOME

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

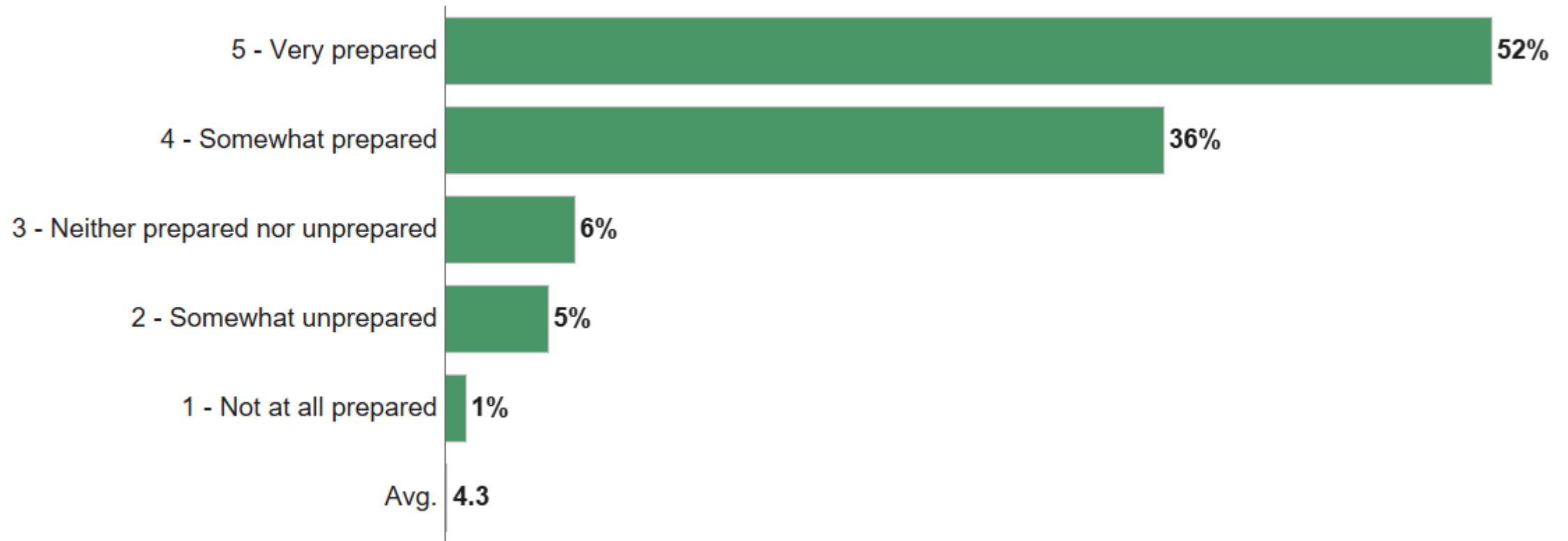| Theme:	Example Responses:	
My community is already welcoming	All of our businesses do a terrific job of making diverse visitors feel welcome-- must be that rural hospitality ethic!	Our community doesn't need to change, just like communities of other cultures don't need to change. We just need to be accepting of each other and treat each other equally as human beings. If you begin to blatantly focus on these issues through travel Oregon, you will lose a lot of interest in rural areas. It's not that people don't care about cultural equality, it's that it's not really an issue where we live. People feel welcome in our community.
More training and education	Our community is very homogenous and relatively isolated, so I think educating the community is very important. Perhaps schools have a role in teaching more acceptance of those that look or sound different than "us".	I think folks in public facing jobs need education - of Oregon's history of Black exclusion, the breadth of modern native culture, how to consider from other perspectives. Also people need a guideline and goal to strive towards - leadership with a description of the level of inclusivity that is expected in tourism.
More diverse representation in marketing and positions of leadership	EDI trained park staff, more access and incentives for BIPOC hires within the tourism and outdoor recreation industry	More welcoming marketing for ALL; more diversity in government and tourism hires.
	Visitors need to see themselves reflected in the promotional materials and business mix of a community. Oregon needs to figure out how to balance its dependence on visitors and the often antagonistic view of outsiders shared by a vocal minority	

PREPAREDNESS TO INTERACT WITH DIVERSE POPULATIONS

Q: How prepared do you feel to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds?
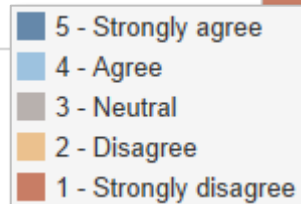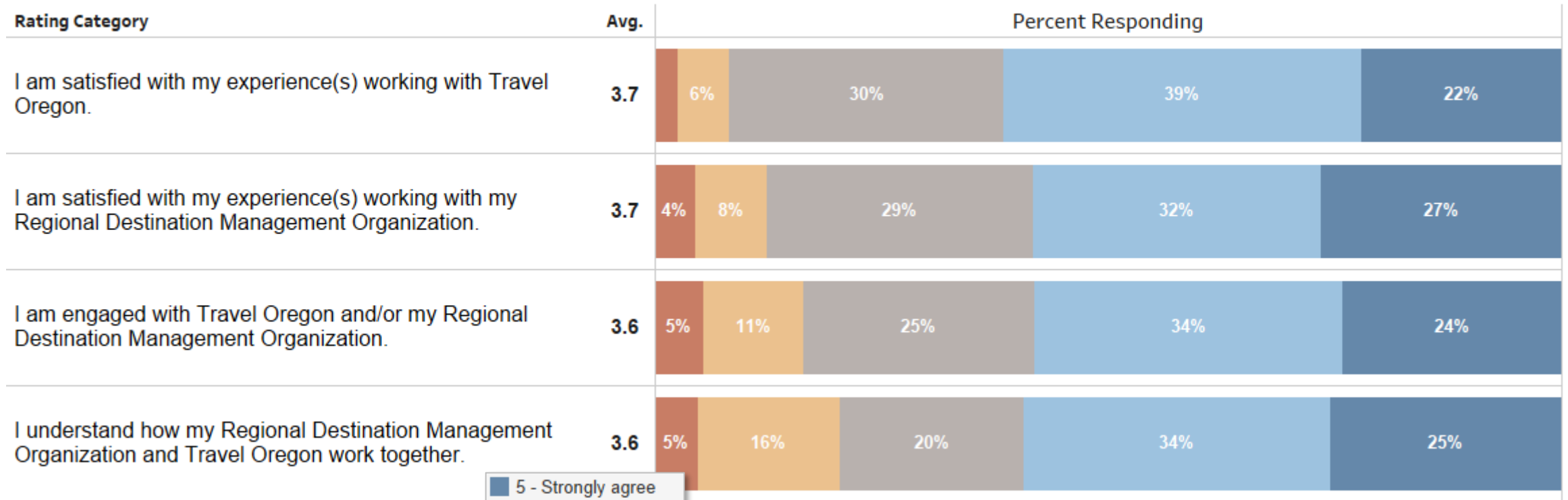
5 - Very prepared	52%
4 - Somewhat prepared	36%
3 - Neither prepared nor unprepared	6%
2 - Somewhat unprepared	5%
1 - Not at all prepared	1%
Avg.	4.3

Source: 2020 Oregon Tourism Industry Stakeholder Survey

INDUSTRY ENGAGEMENT & COMMUNICATIONS

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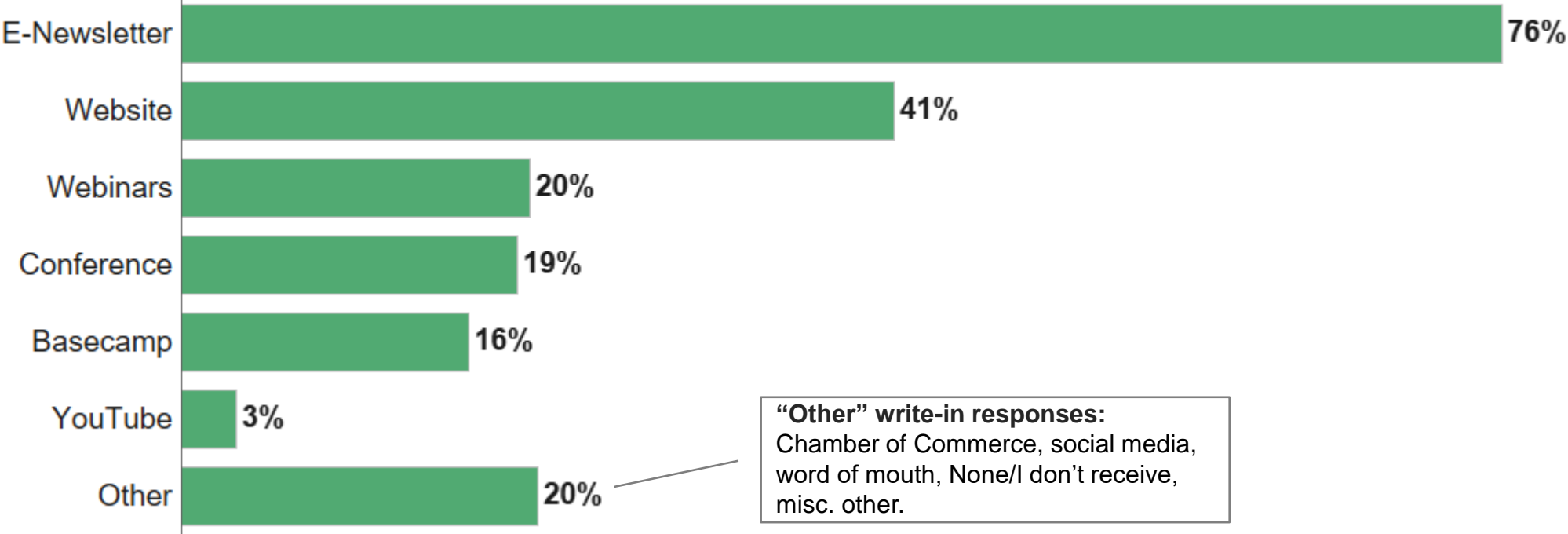
Q: Please indicate the level to which you agree or disagree with the following statements: (1 = Strongly disagree, 5 = Strongly agree)

Rating Category	Avg.	Percent Responding				
I am satisfied with my experience(s) working with Travel Oregon.	3.7		6%	30%	39%	22%
I am satisfied with my experience(s) working with my Regional Destination Management Organization.	3.7	4%	8%	29%	32%	27%
I am engaged with Travel Oregon and/or my Regional Destination Management Organization.	3.6	5%	11%	25%	34%	24%
I understand how my Regional Destination Management Organization and Travel Oregon work together.	3.6	5%	16%	20%	34%	25%

Legend:
- 5 - Strongly agree
- 4 - Agree
- 3 - Neutral
- 2 - Disagree
- 1 - Strongly disagree

Source: 2020 Oregon Tourism Industry Stakeholder Survey

INDUSTRY ENGAGEMENT

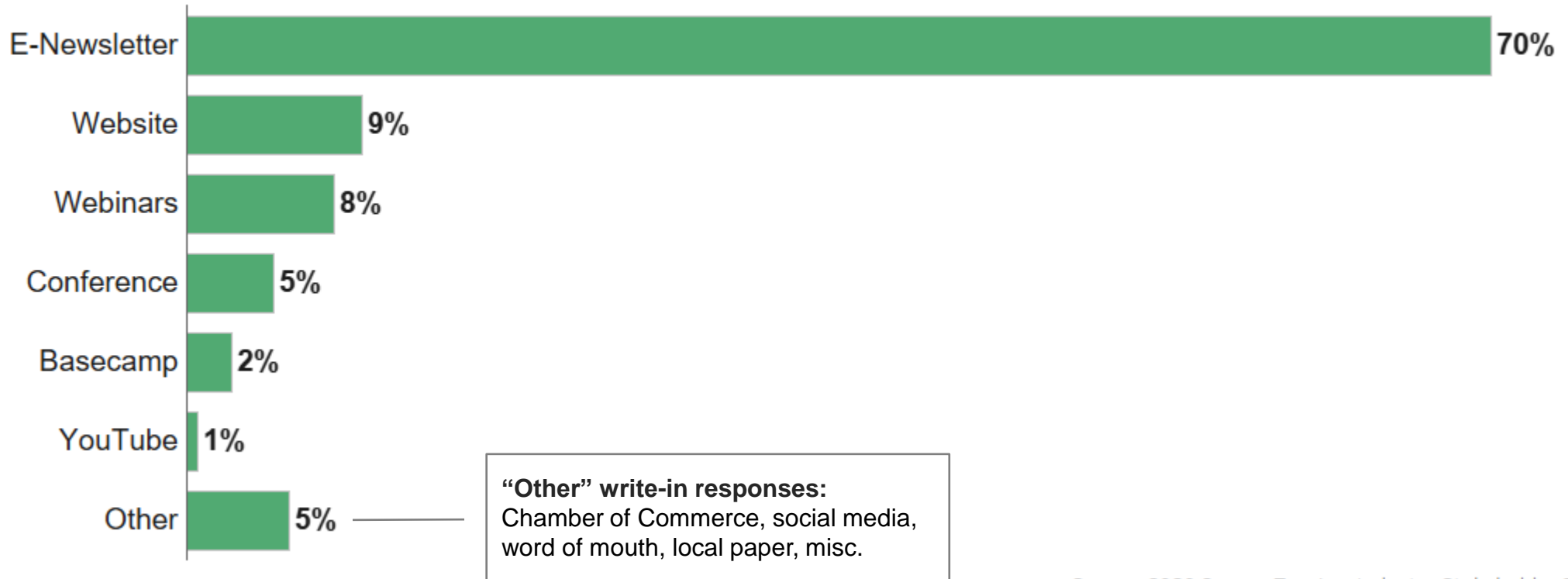Q: What is the best way for you to receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization?

E-Newsletter — 70%
Website — 9%
Webinars — 8%
Conference — 5%
Basecamp — 2%
YouTube — 1%
Other — 5%

"Other" write-in responses:
Chamber of Commerce, social media, word of mouth, local paper, misc.

Source: 2020 Oregon Tourism Industry Stakeholder Survey