2020 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY

PORTLAND REGION

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 Portland with additional statewide results provided for context.

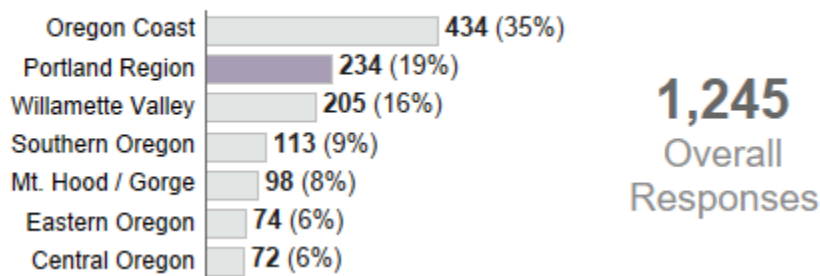# 2020 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY

PORTLAND REGION

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 234 responses from the Portland Region 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 the Portland Region compared to the statewide survey results (referred to as the "overall" in figures).

Number of Respondents

Region		
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%)

1,245 Overall Responses

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

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KEY FINDINGS

BUSINESS HEALTH

- Fifty-four percent of Portland Region respondents reported their business/organization has laid off, terminated, or otherwise let go of employees in 2020, with the most layoffs occurring four to six months ago. About 22% anticipate layoffs/terminations at their business/organization within the next six months, while 30% are unsure if layoffs will occur within the next 6 months.
- Over two thirds (67%) of Portland Region respondents characterize the impacts of COVID-19 on their organization/business's revenue or funding as having a significant negative impact. By comparison, 16% describe the wildfires as having a significant negative impact.

RESILIENCY, RECOVERY AND REOPENING

- Forty percent of Portland Region 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 lack of visitation due to decrease in travel demand.
- By a large margin, "help advocating for effective policies and funding to support tourism businesses/organizations" is the resource that will best support Portland Region businesses/organizations recover. "Support developing and bolstering visitor experiences that are COVID-appropriate and that enhance local livability" will best support Portland Region communities.

PLANNING AND MANAGEMENT

- From a list of ten areas that would aid in recovery from COVID-19, wildfires, and related economic conditions, Portland Region 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

- Fifty-eight percent of Portland Region respondents think the tourism industry should play a role in advancing social and racial justice, a more than the 54% of respondents statewide. Nineteen percent do not think the industry should play a role, while 24% are unsure.
- Sixty-eight percent report having received training related to cultural awareness, anti-racism, implicit bias, or some other diversity, equity, and inclusivity related training. Fifty-four percent would be interested in participating in diversity, equity, and/or inclusivity related training. Nine in ten Portland respondents feel somewhat or very prepared to interact with visitors/clients/coworkers of diverse ethnic/racial/cultural backgrounds.
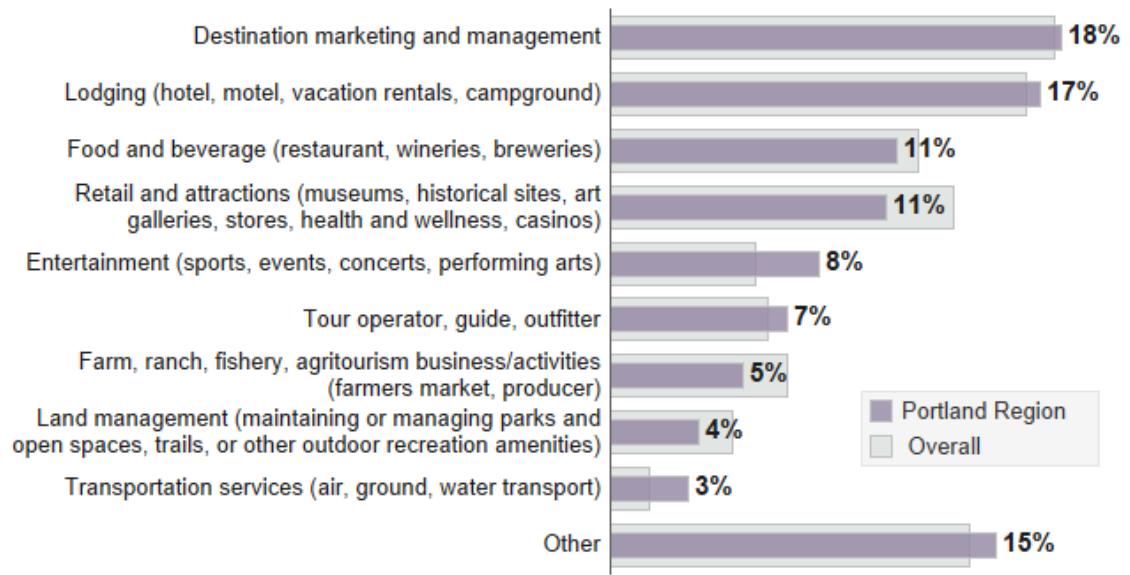
RESPONDENT PROFILE

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 (12%). "Other" write-in responses, comprising 14% of the overall responses, were diverse and reflect the broad reach of the survey. By sector, responses among Portland Region respondents were similar to statewide responses, although they accounted for a greater share of respondents from the entertainment sector (sports, events, concerts, performing arts, etc.).

Over half of respondents, both statewide and in Portland, represent for profit businesses while roughly a quarter represent non-profit organizations.
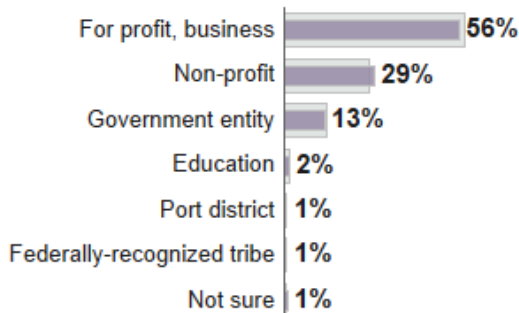
Sixty-two percent of all respondents are employed full-time in the tourism industry, 18% are employed part-time, and the remaining 10% are retired, not currently employed, or prefer not to say. The distribution of results by employment status in Portland generally align with the statewide overall results.

Industry Sector, Entity Type and Employment Status

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

Sector	Portland Region
Destination marketing and management	18%
Lodging (hotel, motel, vacation rentals, campground)	17%
Food and beverage (restaurant, wineries, breweries)	11%
Retail and attractions (museums, historical sites, art galleries, stores, health and wellness, casinos)	11%
Entertainment (sports, events, concerts, performing arts)	8%
Tour operator, guide, outfitter	7%
Farm, ranch, fishery, agritourism business/activities (farmers market, producer)	5%
Land management (maintaining or managing parks and open spaces, trails, or other outdoor recreation amenities)	4%
Transportation services (air, ground, water transport)	3%
Other	15%

Legend: Portland Region / Overall

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

Entity type	%
For profit, business	56%
Non-profit	29%
Government entity	13%
Education	2%
Port district	1%
Federally-recognized tribe	1%
Not sure	1%

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

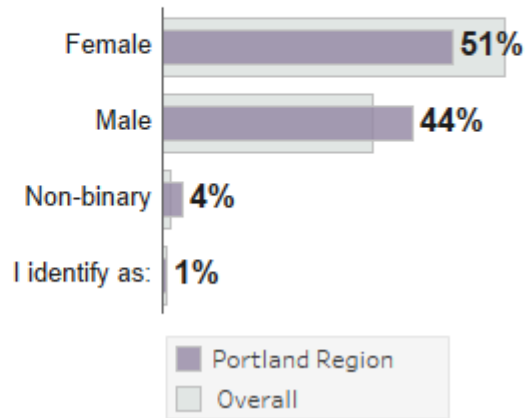| Employment status	%
Employed full-time	60%
Employed part-time	20%
Retired	7%
Not currently employed (and looking for employment)	5%
Prefer not to say	8%

The average age of respondents is 54 years (vs. 53 in the Portland Region), with roughly half of respondents aged 55 or older, and half 55 or younger. Statewide, 61% of respondents identify as female and 37% identify as male. Among Portland Region respondents, there were slightly more males (44%).

Age and Gender

Q: Respondent age:

25 - 34	10%
35 - 44	18%
45 - 54	25%
55 - 64	25%
65 or older	21%

| | Portland Region | Overall |
| Avg. | 53.2 | 53.8 |

Q: What is your gender?

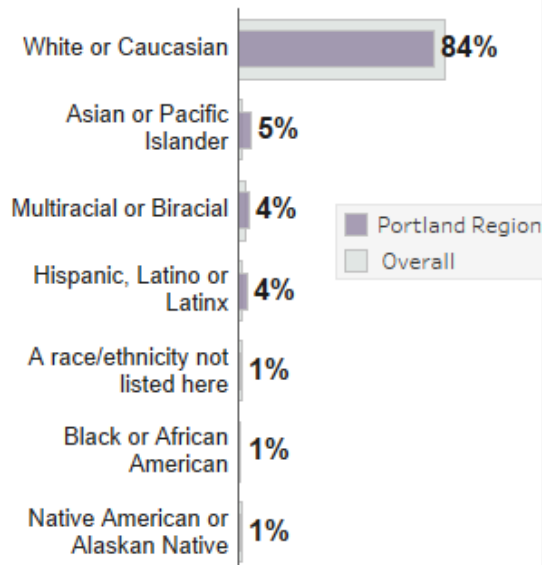| Female | 51% |
Male	44%
Non-binary	4%
I identify as:	1%

- Portland Region
- Overall
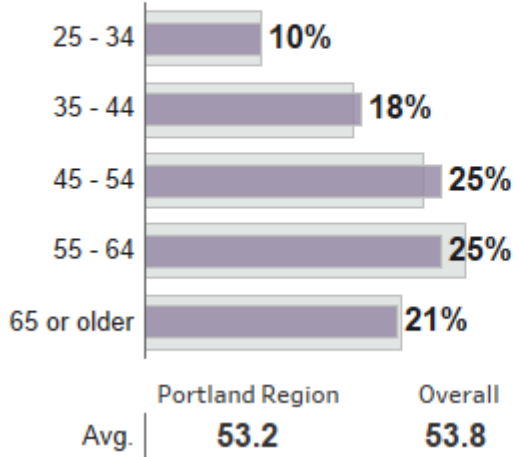
Statewide, nearly nine in ten respondents describe themselves as white or Caucasian. Portland is slightly more diverse with 16% of respondents describing themselves as non-white/Caucasion.
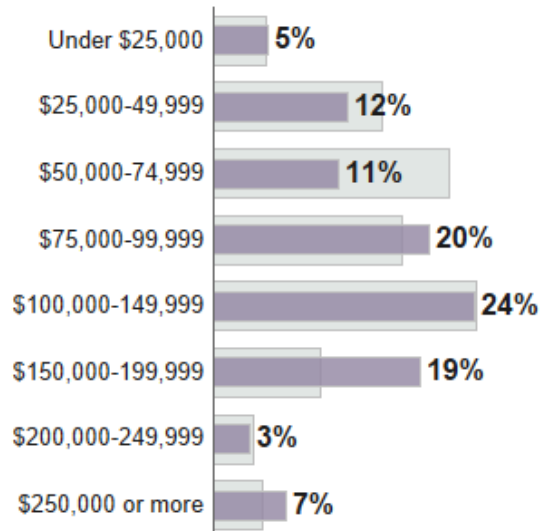
Forty-one percent of all tourism industry stakeholders in Oregon have annual household incomes of less than $75,000. Portland had a greater share of respondents earning $150,000 or more relative to the statewide results.

Race and Household Income

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

White or Caucasian	84%
Asian or Pacific Islander	5%
Multiracial or Biracial	4%
Hispanic, Latino or Latinx	4%
A race/ethnicity not listed here	1%
Black or African American	1%
Native American or Alaskan Native	1%

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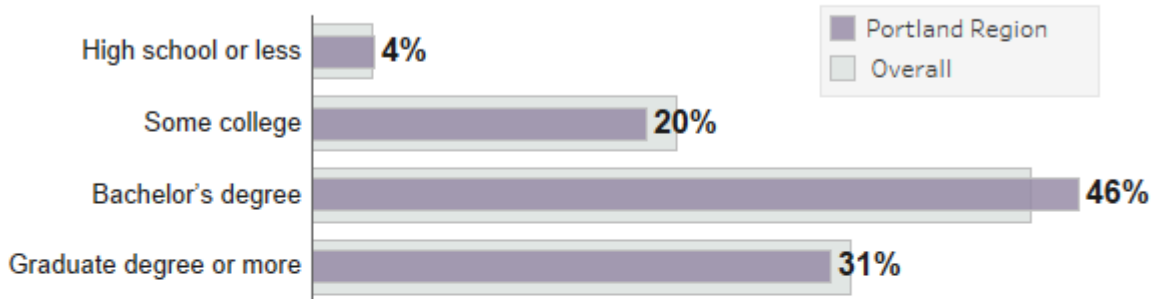
Q: Which of these categories best describes the total gross annual income of your household (before taxes)?

Under $25,000	5%
$25,000-49,999	12%
$50,000-74,999	11%
$75,000-99,999	20%
$100,000-149,999	24%
$150,000-199,999	19%
$200,000-249,999	3%
$250,000 or more	7%

Overall, three quarters of respondents have a Bachelor's degree or higher level of education, while a quarter did not attain their Bachelor's degree. Six percent of overall respondents report a disability, with "walking" most frequently identified.

Education Level and Presence of Disabilities

Q: What is your highest level of education?

	Portland Region	Overall

- High school or less — 4%
- Some college — 20%
- Bachelor's degree — 46%
- Graduate degree or more — 31%

Q: Do you have a disability?

- Yes — 4%
- No — 96%

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

- Walking — 58%
- Hearing — 26%
- Learning — 19%
- Sight — 16%
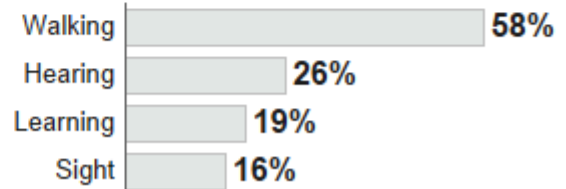
Overall only due to insufficient regional sample size.

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. 54% in the Portland Region) work for organizations or businesses that have laid off, terminated, or otherwise let go of employees in 2020. 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 indicated layoffs within their organization, the median number of employees let go was 5.0 (vs. 9 in Portland Region), which represented a median of 50% of employees within the organization (vs. 54 in Portland Region).

Layoffs and Terminations

Portland Region **Overall**

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

Yes	54%
No	46%

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

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

1 - 5	42%
6 - 20	26%
20 - 50	13%
51 - 100	8%
101 - 200	7%
200 or more	4%
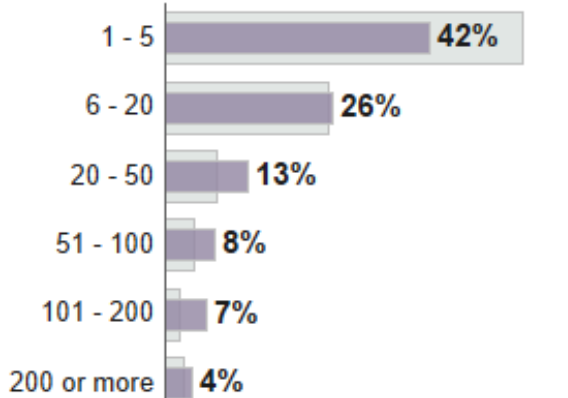
	Portland Region	Overall
Average	52.1	30.4
Median	9.0	5.0

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

Less than 10%	9%
11 - 25%	19%
26 - 50%	20%
50 - 75%	22%
76 - 100%	29%
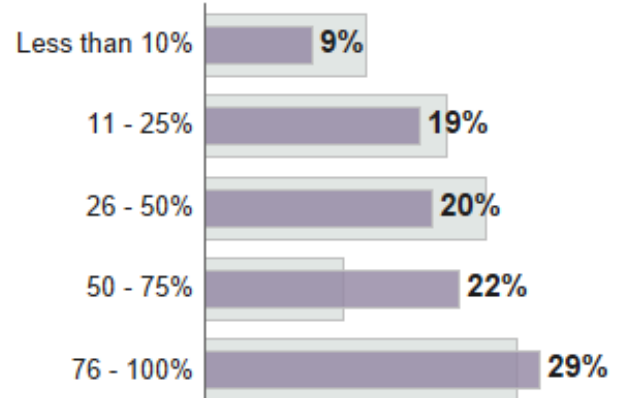
	Portland Region	Overall
Average	54.4%	49.7%
Median	54.0%	50.0%

The survey asked about anticipated future layoffs, and the timing of layoffs both past and future. Statewide, 14% of respondents anticipate layoffs within their business/organization within the next six months, 54% do not anticipate layoffs, and a third, 33%, are unsure. Respondents in the Portland Region are more likely to anticipate layoffs (22%). The greatest share of layoffs occurred early during the pandemic, four or more months ago.

Layoffs and Terminations

■ Portland Region   ☐ Overall

Q: Within the next 6 months, do you anticipate laying off, terminating, or otherwise letting go of employees?
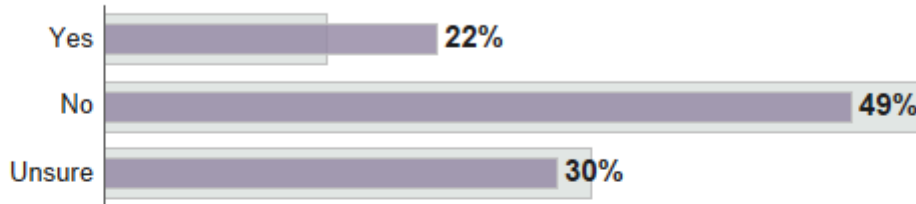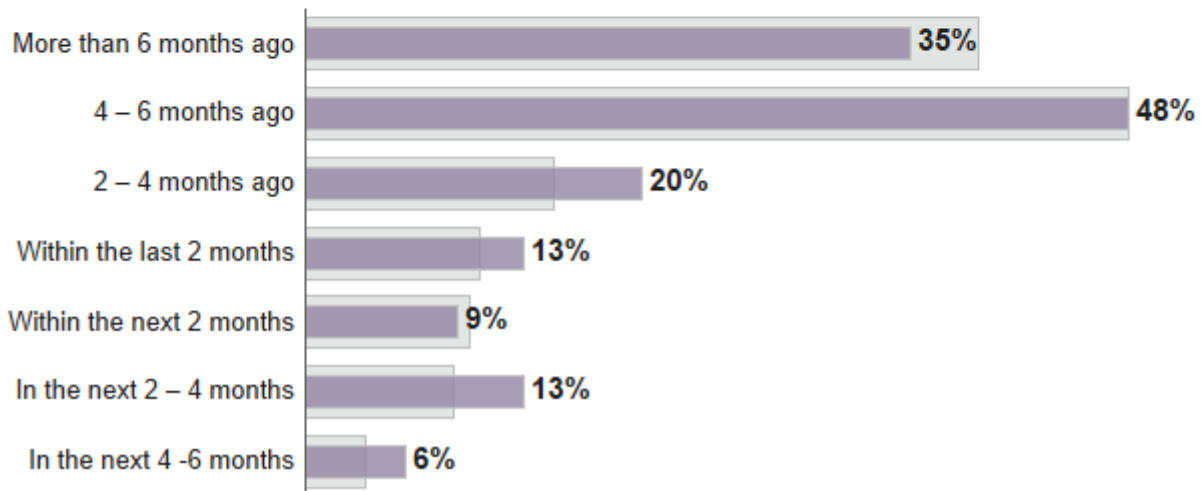
Yes	22%
No	49%
Unsure	30%

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

More than 6 months ago	35%
4 – 6 months ago	48%
2 – 4 months ago	20%
Within the last 2 months	13%
Within the next 2 months	9%
In the next 2 – 4 months	13%
In the next 4 -6 months	6%

Statewide, 12% of respondents reported that COVID-19 has had little to no impact or a positive impact on their business or 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, Portland Region respondents are much more likely to report significant negative impacts due to COVID-19, and a greater share describe those impacts as worsening. Portland respondents were less likely to report negative impacts due to wildfires.

COVID-19 and Wildfire Impacts

■ Portland Region   □ Overall

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

COVID-19

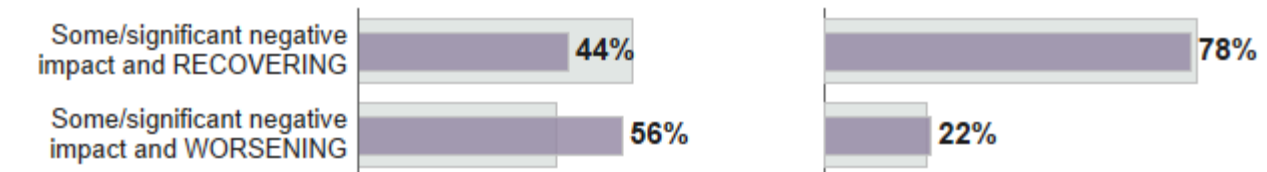|	
Positive impact	2%
Little to no impact	6%
Some negative impact	24%
Significant negative impact	67%

Wildfires

Positive impact	8%
Little to no impact	42%
Some negative impact	34%
Significant negative impact	16%

[If impacted negatively]

COVID-19

Some/significant negative impact and RECOVERING	44%
Some/significant negative impact and WORSENING	56%

Wildfires

Some/significant negative impact and RECOVERING	78%
Some/significant negative impact and WORSENING	22%

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).

Funding Sources

■ Portland Region   □ Overall

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	22%
Economic Injury Disaster Loan (EIDL)	11%
My business/organization applied for funds, but did not receive any	4%
Travel Oregon Emergency Grant	4%
FEMA individual assistance	1%
None of the above	38%
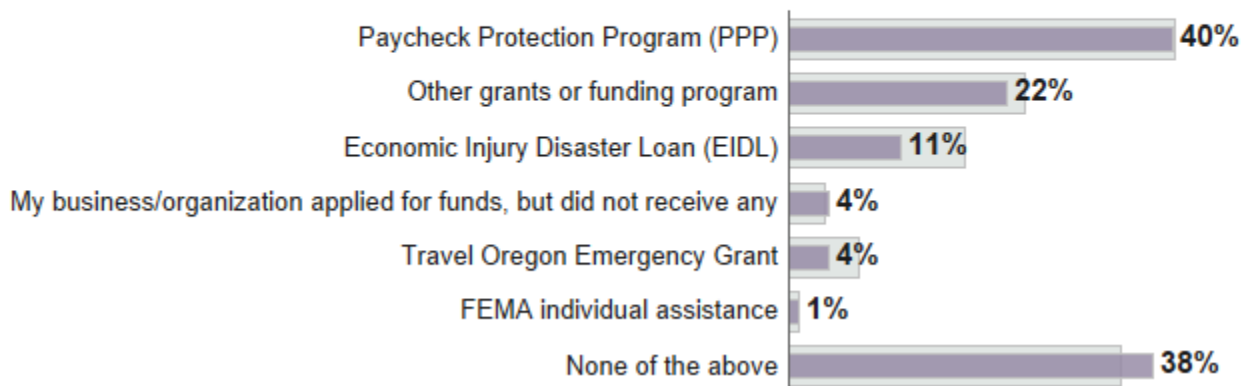
RESILIENCY, RECOVERY AND REOPENING

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 the Portland Region express relatively less concern about welcoming visitors, with 61% 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?

Sample	Avg.	Percent Responding:		
		Not concerned (1 & 2)	Neutral (3)	Concerned (4 & 5)
Portland Region	2.2	40% 21% **61%**	**21%**	**19%**
Overall	2.4	37% 18% **55%**	**21%**	15% **24%**

- 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
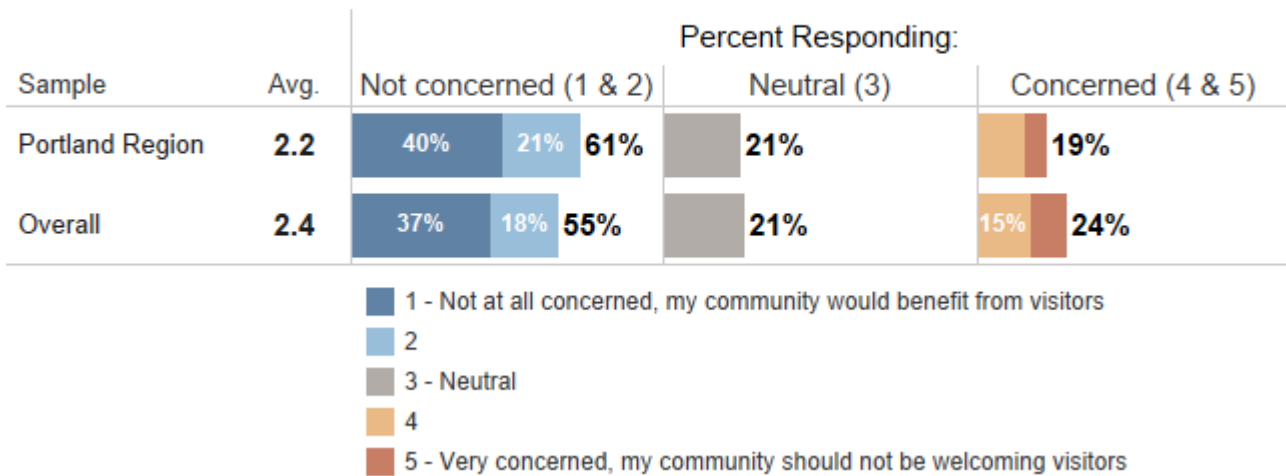
A follow-up open-ended question asked respondents: "Why do you feel that way?" The survey resulted in 526 total comments from respondents that were not concerned with promoting their community (answered 1 or 2), and 241 total comments from respondents that expressed concern (answered 4 or 5). Among those 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 Portland Region respondents by response follows. A full list of open-ended comments from Portland respondents is provided in the appendix.

CONCERNED with promotion (4 & 5): "Why do you feel that way"

As much as I want to see people visiting here, I still feel we have to be careful about what we ask for. It is important for all of our businesses to feel safe and help to keep everyone healthy.

Covid diagnoses are on the rise...setting new daily records in Oregon. Some evidence that the virus has mutated and has more scary issues...cytokine storm for example, seems to be more prevalent this time

around. No...people should not be travelling...especially to small communities without a lot of medical resources.

No control over what visitors maybe bringing to my community which includes COVID-19. Containment is a good effective method to control.

Oregon as a whole should not be promoting visitation at this time due to the ongoing pandemic. We should be focusing on health safety messaging for local commerce and trips.

Portland is in a state of upheaval and we need to recognize that our problems are getting worse. When I hear that a friend walked in downtown Portland to her job, in the Pearl, and walked with her hand on her knife that she had to carry, to feel safe... I feel like we have a problem.

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

As long as visitors follow the social distancing, mask, and good hygiene best practices along with the guidelines posted by our businesses and restaurants, we would welcome visitors.

I am proud of the work that is being done in our area to respond appropriately to the threats of COVID and implement public health & safety measures in response. I believe that with these measures in place, and restrictions on the number of people who gather in a space etc that we can safely welcome visitors back to our community, and that we would benefit greatly from a return of travel & overnight guests.

Oregon is a great destination to visit - Portland is dealing with a terrible homeless tent camping issue and visiting downtown Portland is not pleasant - so many restaurants and businesses closed - and the streets LINED with tents - we still NEED tourism but trying to promote Portland without a PLAN that the city will begin dealing with the homeless is almost futile!

Our downtown has struggled during COViD, but even more so because of streetscape construction during the same time period that stretched 4 months longer because of COVID. We still have another month before it is done. We need people to come back to our downtown and patronize the businesses.

Safety protocols can be in place to safely reopen. Our governor's restrictions are so risk averse to the virus that a subsequent and I fear worse economic crisis will result causing wage compression, unemployment and foreclosures that will last for years. We need to find ways to balance public health with the survival of our community members who need employment.

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 the Portland Region were much more likely to be concerned with heightened political and racial tensions relative to the statewide results. Categories in the figure below are sorted in descending order by the average rating of Portland Region respondents.
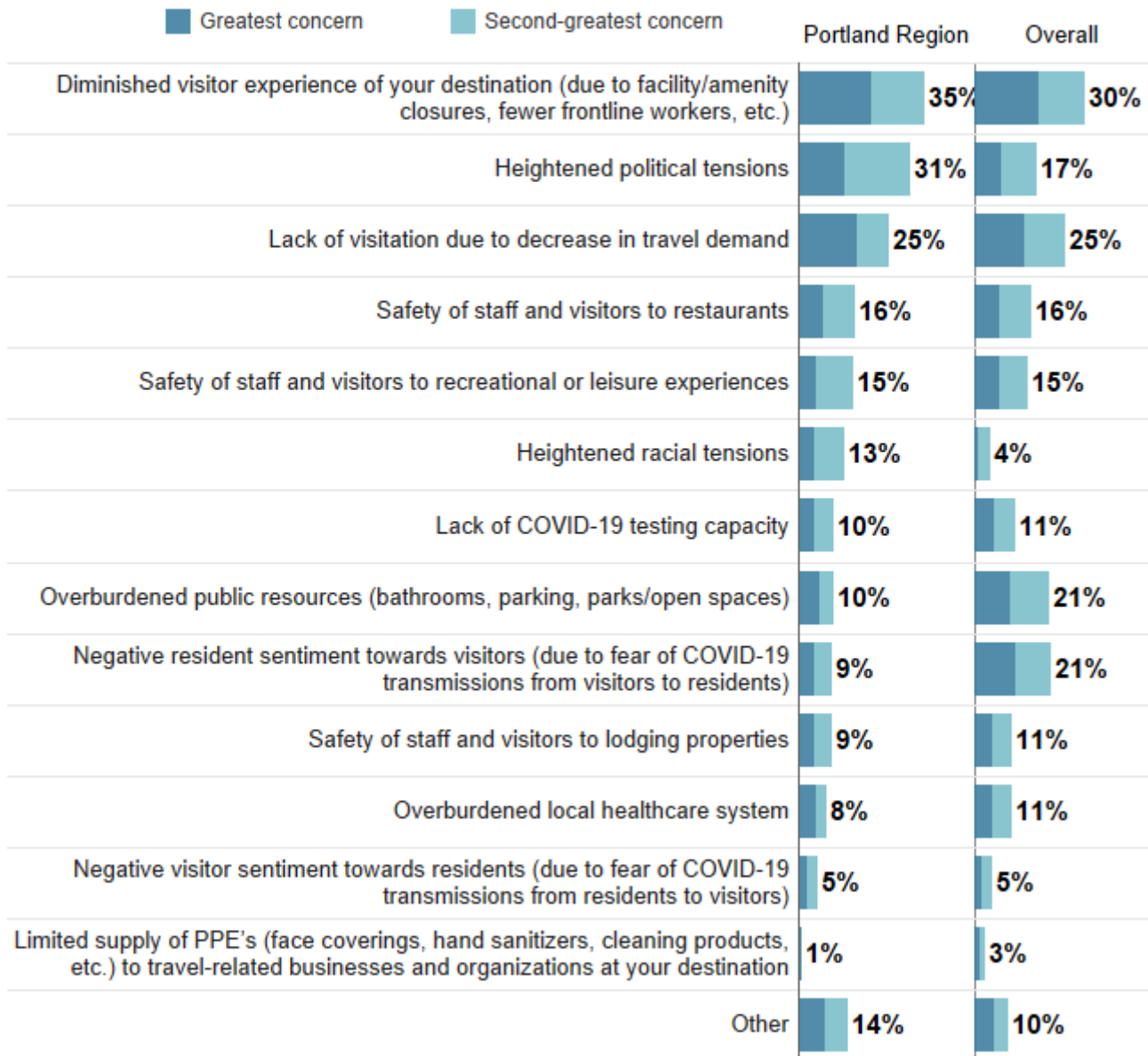
Q: As you think about welcoming visitors to your community, how concerned are you about the following? (1 = Not at all concerned, 5 - Extremely concerned)

	Portland Region	Overall	Average Rating 1 - 5
Lack of visitation due to decrease in travel demand			3.7
Diminished visitor experience of your destination (due to facility/amenity closures, fewer frontline workers, etc.)			3.4
Heightened political tensions			3.4
Safety of staff and visitors to restaurants			3.3
Safety of staff and visitors to recreational or leisure experiences			3.1
Safety of staff and visitors to lodging properties			3.0
Lack of COVID-19 testing capacity			3.0
Heightened racial tensions			3.0
Overburdened public resources (bathrooms, parking, parks/open spaces)			2.9
Negative resident sentiment towards visitors (due to fear of COVID-19 transmissions from visitors to residents)			2.6
Overburdened local healthcare system			2.5
Negative visitor sentiment towards residents (due to fear of COVID-19 transmissions from residents to visitors)			2.3
Limited supply of PPE's (face coverings, hand sanitizers, cleaning products, etc.) to travel-related businesses and organizations			2.2

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 concern, with a quarter or more of respondents identifying them among their greatest concerns. While diminished visitor experience was also the top concern among Portland Region respondents, heightened political

tensions ranked second in terms of concerns. Over-burdened public resources and negative resident sentiment towards visitors, which were ranked of high concern statewide, was of relatively less concern to Portland Region respondents. Concerns are sorted in descending order by the percent in the Portland Region responding greatest/second-greatest concern.
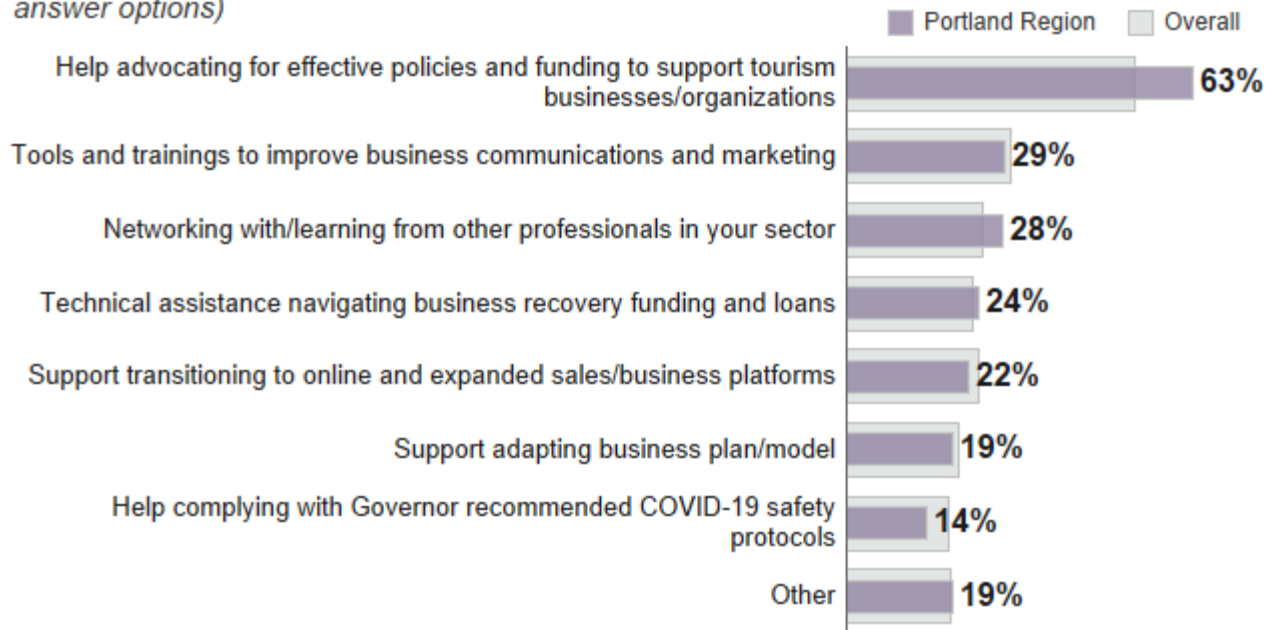
Q: From the list above, please identify your top two concerns related to welcoming visitors to your community.

Concern	■ Greatest concern ■ Second-greatest concern	Portland Region	Overall
Diminished visitor experience of your destination (due to facility/amenity closures, fewer frontline workers, etc.)		35%	30%
Heightened political tensions		31%	17%
Lack of visitation due to decrease in travel demand		25%	25%
Safety of staff and visitors to restaurants		16%	16%
Safety of staff and visitors to recreational or leisure experiences		15%	15%
Heightened racial tensions		13%	4%
Lack of COVID-19 testing capacity		10%	11%
Overburdened public resources (bathrooms, parking, parks/open spaces)		10%	21%
Negative resident sentiment towards visitors (due to fear of COVID-19 transmissions from visitors to residents)		9%	21%
Safety of staff and visitors to lodging properties		9%	11%
Overburdened local healthcare system		8%	11%
Negative visitor sentiment towards residents (due to fear of COVID-19 transmissions from residents to visitors)		5%	5%
Limited supply of PPE's (face coverings, hand sanitizers, cleaning products, etc.) to travel-related businesses and organizations at your destination		1%	3%
Other		14%	10%

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. Portland Region respondents were even more likely to identify advocating for effective policies and funding to support tourism businesses/organizations. They also placed greater emphasis on networking with/learning from other professionals in your sector.
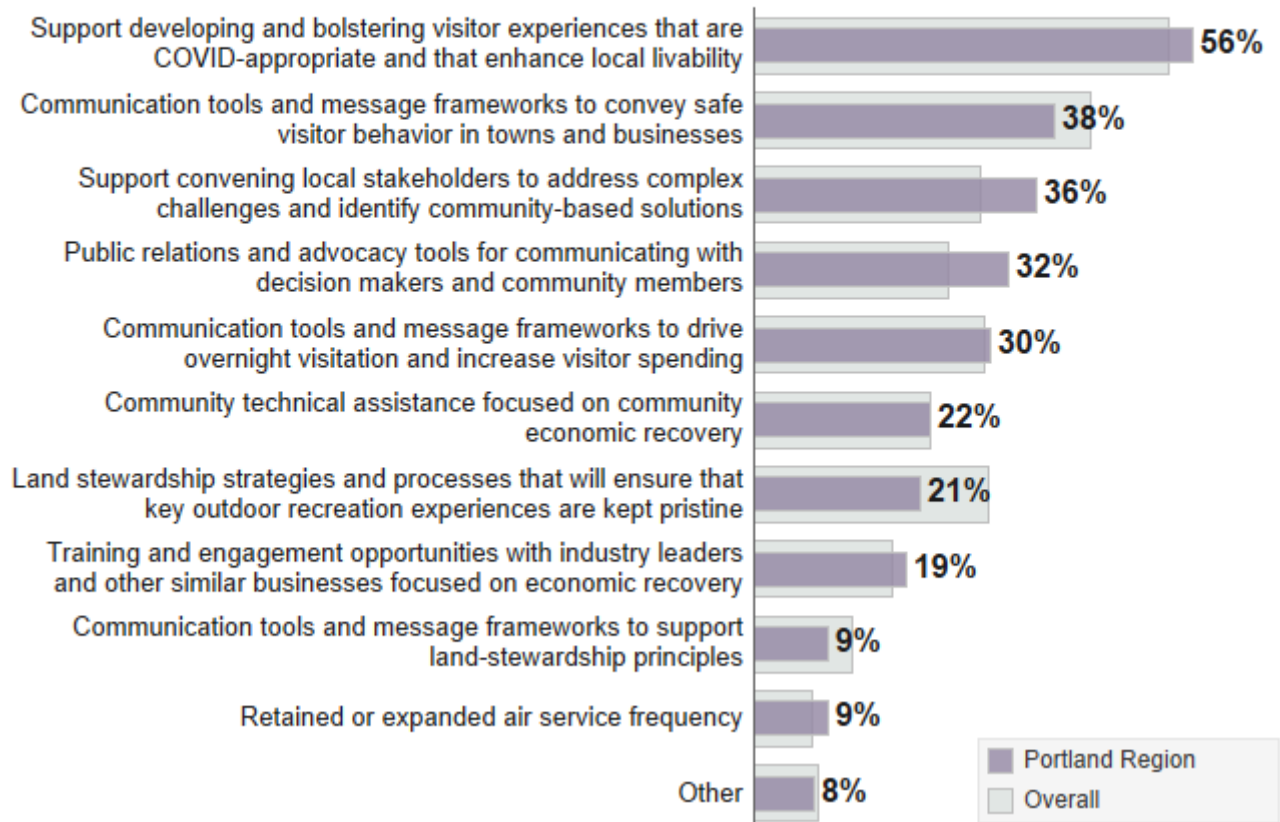
Buisness/Organization Assistance

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

Legend: ■ Portland Region ☐ Overall

Resource/Program	Portland Region
Help advocating for effective policies and funding to support tourism businesses/organizations	63%
Tools and trainings to improve business communications and marketing	29%
Networking with/learning from other professionals in your sector	28%
Technical assistance navigating business recovery funding and loans	24%
Support transitioning to online and expanded sales/business platforms	22%
Support adapting business plan/model	19%
Help complying with Governor recommended COVID-19 safety protocols	14%
Other	19%

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 Portland Region respondents was similar to the statewide results; however, they were more likely to identify public relations and advocacy tools for communicating with decision makers and community members as the "best" resources.

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)

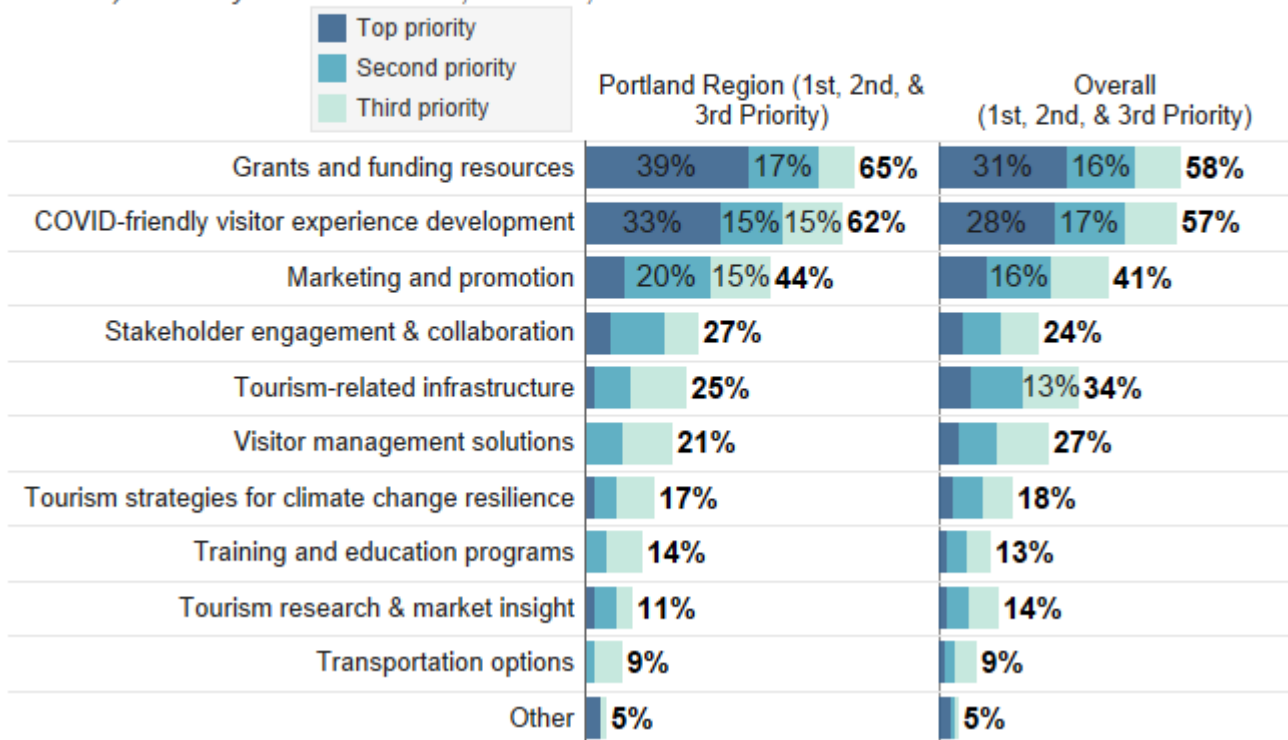|	
Support developing and bolstering visitor experiences that are COVID-appropriate and that enhance local livability	56%
Communication tools and message frameworks to convey safe visitor behavior in towns and businesses	38%
Support convening local stakeholders to address complex challenges and identify community-based solutions	36%
Public relations and advocacy tools for communicating with decision makers and community members	32%
Communication tools and message frameworks to drive overnight visitation and increase visitor spending	30%
Community technical assistance focused on community economic recovery	22%
Land stewardship strategies and processes that will ensure that key outdoor recreation experiences are kept pristine	21%
Training and engagement opportunities with industry leaders and other similar businesses focused on economic recovery	19%
Communication tools and message frameworks to support land-stewardship principles	9%
Retained or expanded air service frequency	9%
Other	8%

Legend: ■ Portland Region ☐ Overall

PLANNING AND MANAGEMENT

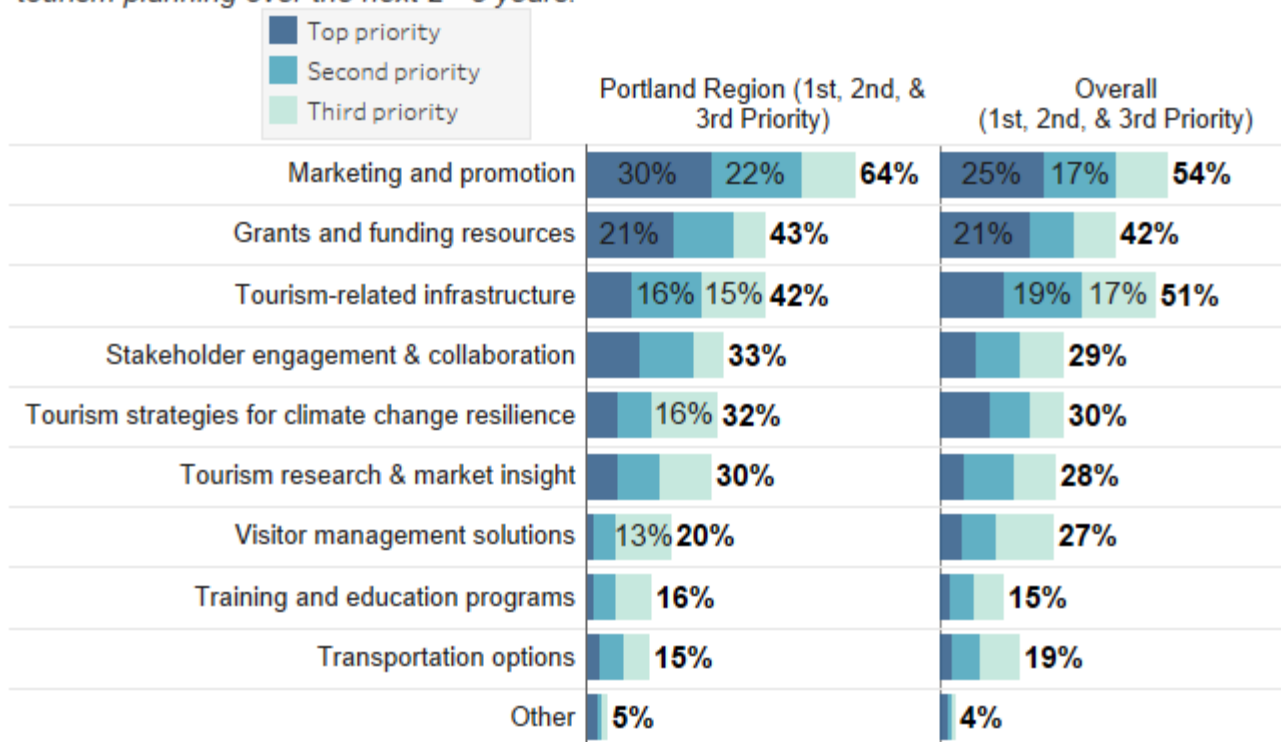Respondents were asked to identify the three areas that should be emphasized for immediate (6-12 month) recovery from COVID-19, wildfires, and related economic conditions. They were then asked to prioritize the same focus areas for longer-term tourism planning over the next 2-5 years. In the short-term, 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 three highest priorities. COVID-friendly visitor experience development was a the second –most-identified priority (57% among their top three), by a small margin.

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:

	Top priority / Second priority / Third priority	Portland Region (1st, 2nd, & 3rd Priority)	Overall (1st, 2nd, & 3rd Priority)
Grants and funding resources		39% 17% 65%	31% 16% 58%
COVID-friendly visitor experience development		33% 15% 15% 62%	28% 17% 57%
Marketing and promotion		20% 15% 44%	16% 41%
Stakeholder engagement & collaboration		27%	24%
Tourism-related infrastructure		25%	13% 34%
Visitor management solutions		21%	27%
Tourism strategies for climate change resilience		17%	18%
Training and education programs		14%	13%
Tourism research & market insight		11%	14%
Transportation options		9%	9%
Other		5%	5%

Over the long term, grants and funding resources fell to the third-highest priority behind marketing and promotion and tourism-related infrastructure. In the Portland Region, marketing and promotion is the most important long-term priority by a large margin with nearly 60% of respondents identifying it among their three highest priorities.
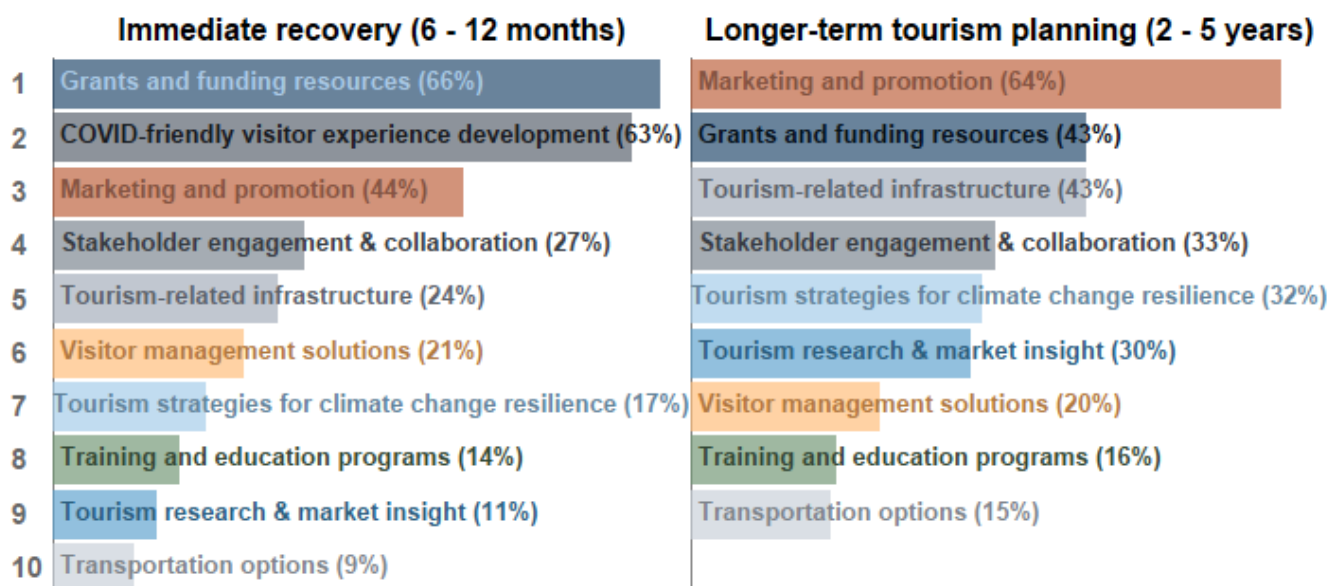
Longer-Term Tourism Priorities & Focus Areas

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

Legend:
- Top priority
- Second priority
- Third priority

	Portland Region (1st, 2nd, & 3rd Priority)	Overall (1st, 2nd, & 3rd Priority)
Marketing and promotion	30% 22% 64%	25% 17% 54%
Grants and funding resources	21% 43%	21% 42%
Tourism-related infrastructure	16% 15% 42%	19% 17% 51%
Stakeholder engagement & collaboration	33%	29%
Tourism strategies for climate change resilience	16% 32%	30%
Tourism research & market insight	30%	28%
Visitor management solutions	13% 20%	27%
Training and education programs	16%	15%
Transportation options	15%	19%
Other	5%	4%

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

Short vs. Long-Term Priorities: *Portland Region

	Immediate recovery (6 - 12 months)	Longer-term tourism planning (2 - 5 years)
1	Grants and funding resources (66%)	Marketing and promotion (64%)
2	COVID-friendly visitor experience development (63%)	Grants and funding resources (43%)
3	Marketing and promotion (44%)	Tourism-related infrastructure (43%)
4	Stakeholder engagement & collaboration (27%)	Stakeholder engagement & collaboration (33%)
5	Tourism-related infrastructure (24%)	Tourism strategies for climate change resilience (32%)
6	Visitor management solutions (21%)	Tourism research & market insight (30%)
7	Tourism strategies for climate change resilience (17%)	Visitor management solutions (20%)
8	Training and education programs (14%)	Training and education programs (16%)
9	Tourism research & market insight (11%)	Transportation options (15%)
10	Transportation options (9%)	

Respondents were asked to rate on a 1-5 scale (with 1 being "not a priority" and 5 being "high priority") various tactical planning and management opportunities. Among all respondents statewide, "identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery," and "managing tourism impacts in order to preserve local assets (natural and cultural) and livability" were the two highest priority tactics, while "increasing visitation to less-visited destinations" was a low priority. There were six tactics that received ratings of 3.7-3.8, indicating a broad range of competing priorities. In the Portland Region, "identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery" was rated the top priority.

Planning and Management

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

	Portland Region	Overall	Average Rating
Identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery			4.2
Managing tourism impacts in order to preserve local assets (natural and cultural) and livability			3.8
Building a diverse, equitable, and inclusive tourism economy			3.8
Educating community leaders and policymakers (local, county, state, tribal) on the value of tourism and its viability as a long-term career			3.8
Identifying and fostering partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact			3.7
Creating positive interaction between visitors and residents			3.7
Increasing the adoption of sustainable business practices in tourism			3.6
Dispersing visitation across seasons (from peak tourism season to shoulder seasons) in areas of high visitation			3.4
Increasing visitation to less-visited destinations.			3.1

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%). Building a diverse, equitable, and inclusive tourism economy was of greater importance to Portland Region respondents relative to the statewide results.

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

	Portland Region (1st & 2nd Priority)			Overall (1st & 2nd Priority)		
	Top priority	Second priority		Top priority	Second priority	
Identifying and fostering partnerships to address economic resiliency and reopening and implement solutions to drive recovery	21%	18%	**38%**	16%	13%	**29%**
Building a diverse, equitable, and inclusive tourism economy	21%	15%	**36%**	16%	11%	**27%**
Educating community leaders and policymakers (local, county, state, tribal) on value of tourism and its viability as a long-term career	19%	9%	**28%**	13%	10%	**24%**
Managing tourism impacts in order to preserve local assets (natural and cultural) and livability	12%	10%	**22%**	16%	15%	**31%**
Creating positive interaction between visitors and residents	8%	10%	**18%**	8%	12%	**21%**
Increasing visitation to less-visited destinations		11%	**15%**		7%	**12%**
Dispersing visitation across seasons (from peak tourism season to shoulder seasons) in areas of high visitation		12%	**15%**	12%	13%	**25%**
Identifying and fostering partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact		7%	**14%**	7%	10%	**17%**
Increasing the adoption of sustainable business practices in tourism		7%	**14%**		8%	**14%**

DIVERSITY, EQUITY AND INCLUSION

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

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. Younger respondents, those under 34 years of age, were more likely to respond "yes" (80%) than older respondents. Further, support for the industry playing a role tends to increase with education level (41% among those with high school or less and 62% among those with a graduate degree or more).

Respondents from the Portland Region were more likely to feel the industry should play a role in advancing social and racial justice (58% responding "yes").

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

Legend: ■ Portland Region ☐ Overall

- Yes — **58%**
- No — **19%**
- Unsure — **24%**
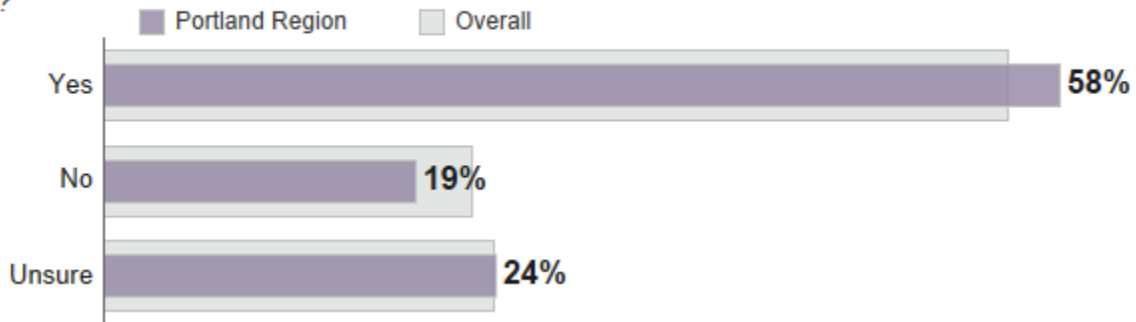
Respondents that indicated that the Oregon tourism industry should play a role in advancing social and racial justice were asked: "How do you see Oregon's tourism industry playing a role in advancing social and racial justice?" Those that replied "no" or "unsure" were asked: "Do you have any comments 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 Portland Region respondents follows:

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

Acknowledging people who were part of the historic significance. As Oregon racial laws preventing non-whites from owning land, those who contributed to the tourist attractions we all enjoy need to be acknowledged.

Address the state's racist past with a commitment for all in the travel and tourism sector to advance racial equity through a provided framework to prevent further violence and anti-Black racism.

Be a leader in this space. Help fix the reputation that has significantly deteriorated in Portland and regain the trust and respect of visitors to the NW.

By being inclusive and provide open outreach. Everyone has the right to enjoy all we have offer. Travel and events are an important compliment to an otherwise busy life. Tourism brings people and families together. We are an important part of the community puzzle. We need to reach out to all in our marketing strategies.

By creating welcoming spaces and by ensuring opportunities for traditionally underrepresented communities to gain employment and career advancement across the industry.

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

I believe that persons in the Oregon tourism industry should PRACTICE social and racial justice, but I don't believe that should be the focus of the industry. The focus of the industry should be to improve tourism infrastructure and facilities, and to promote them to EVERYONE.

I feel that there should be positive messages put out showing that Oregon is inclusive and welcoming to all people. I don't think that Tourism needs to be leading the work on social and racial justice, there are other groups/agencies doing that. My own daughter is biracial and loves living in Oregon. I have friends from all different races and sexual identifications that enjoy visiting Oregon and don't feel any hesitation in visiting the area. If anything, they see it as being more inclusive than other areas of the country.

Yes. But any response I give is contrary to the current dogma and group think so it is best to only venture this far with any comments. Just be reminded that nobody wants to be lectured to. Look at the TV ratings for the NBA, NHL, and MLB; they all adopted woke social justice lecturing and they payed for it (ratings in the tank). Stay out of the whole social justice fad.

Both statewide and in the Portland Region, 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, and 5% in the Portland Region 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?

Sample	Avg.	Percent Responding:		
		Not prepared (1 & 2)	3	Prepared (4 & 5)
Portland Region	4.3	5%	4%	41% 50% **91%**
Overall	4.3	6%	6%	36% 52% **87%**

- 1 - Not at all prepared
- 2 - Somewhat unprepared
- 3 - Neither prepared nor unprepared
- 4 - Somewhat prepared
- 5 - Very prepared
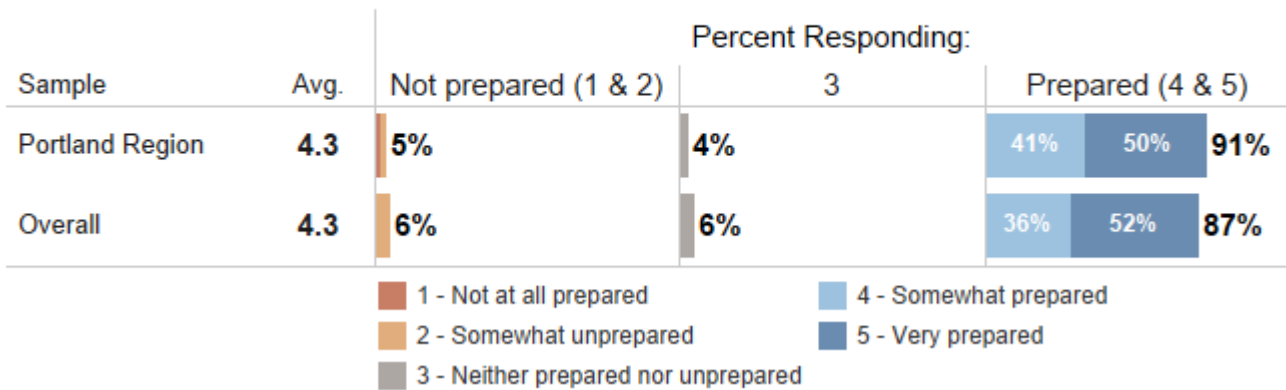
Statewide, three in five respondents indicated that they have participated in training related to cultural awareness, anti-racism, implicit bias, or other diversity, equity, and inclusivity training. Slightly more than half of all respondents (54%) would be interested in participating in such a training. Rates of participation in trainings were higher among Portland Region respondents, and interest in future trainings was slightly lower among Portland Region respondents.

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

Legend: ■ Portland Region □ Overall

Category	Portland Region
No, I have not received any cultural awareness, anti-racism, or implicit bias training	32%
Yes, cultural awareness	50%
Yes, anti-racism	47%
Yes, implicit bias	47%
Yes, other diversity, equity & inclusivity related training	22%
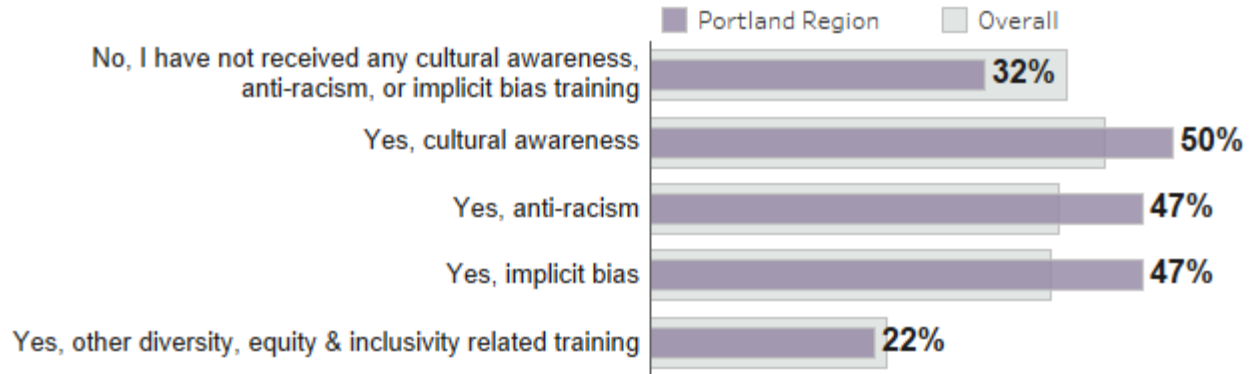
Q: Would you be interested in participating in trainings related to any of the following? (Check all that apply)

Category	Portland Region
No, I feel I have the training I need	46%
Yes, cultural awareness	42%
Yes, anti-racism	38%
Yes, implicit bias	39%
Yes, other	10%
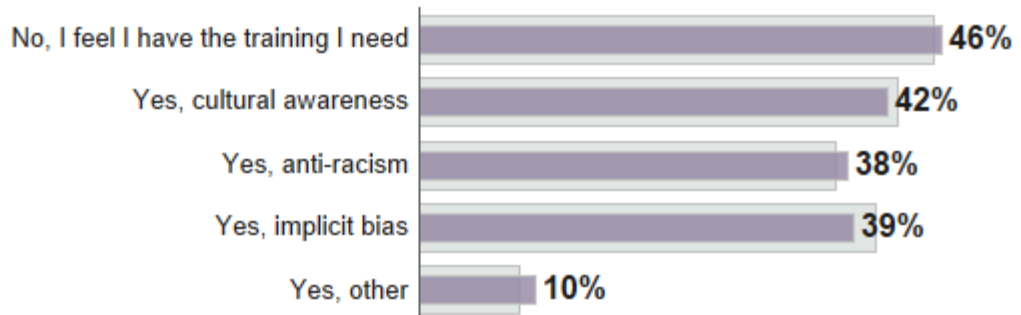
INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Statewide, respondents indicate high levels of satisfaction working with Travel Oregon and their RDMO, and high levels of engagement and understanding of how their RMDO 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. Among all four statements, Portland Region respondents on average indicated higher levels of agreement, 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)

Average Rating

Legend: ■ Portland Region　□ Overall

Statement	Rating
I am satisfied with my experience(s) working with my Regional Destination Management Organization.	3.9
I am satisfied with my experience(s) working with Travel Oregon.	3.9
I am engaged with Travel Oregon and/or my Regional Destination Management Organization.	3.7
I understand how my Regional Destination Management Organization and Travel Oregon work together.	3.7

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, and this source is particularly important among respondents from Portland Region.

Communications

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

	Portland Region
E-Newsletter	80%
Website	45%
Webinars	24%
Conference	17%
Basecamp	9%
YouTube	6%
Other	13%

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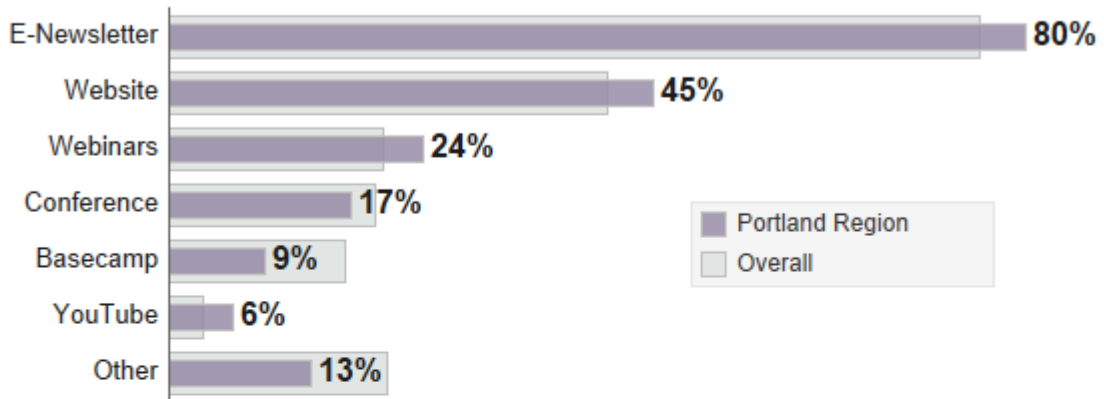
Q: What is the best way for you to receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization?

	Portland Region
E-Newsletter	73%
Webinars	9%
Website	8%
Conference	5%
Basecamp	1%
YouTube	1%
Other	4%

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 Portland Region respondents. The values of the bar chart and size of words represent the percent of Portland Region respondents that used a particular word. Commonly used words, including "Oregon" and region names, have been omitted.

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

PORTLAND REGION QUESTIONS

Each region had the opportunity to ask a series of custom questions of specific interest to their stakeholders, challenges, and opportunities. Findings from these custom questions are presented below. Custom questions that contained open-ended comments appear in the open-ended comment appendix.

Q: Please indicate the top two domestic source markets for your organization (excluding Oregon):
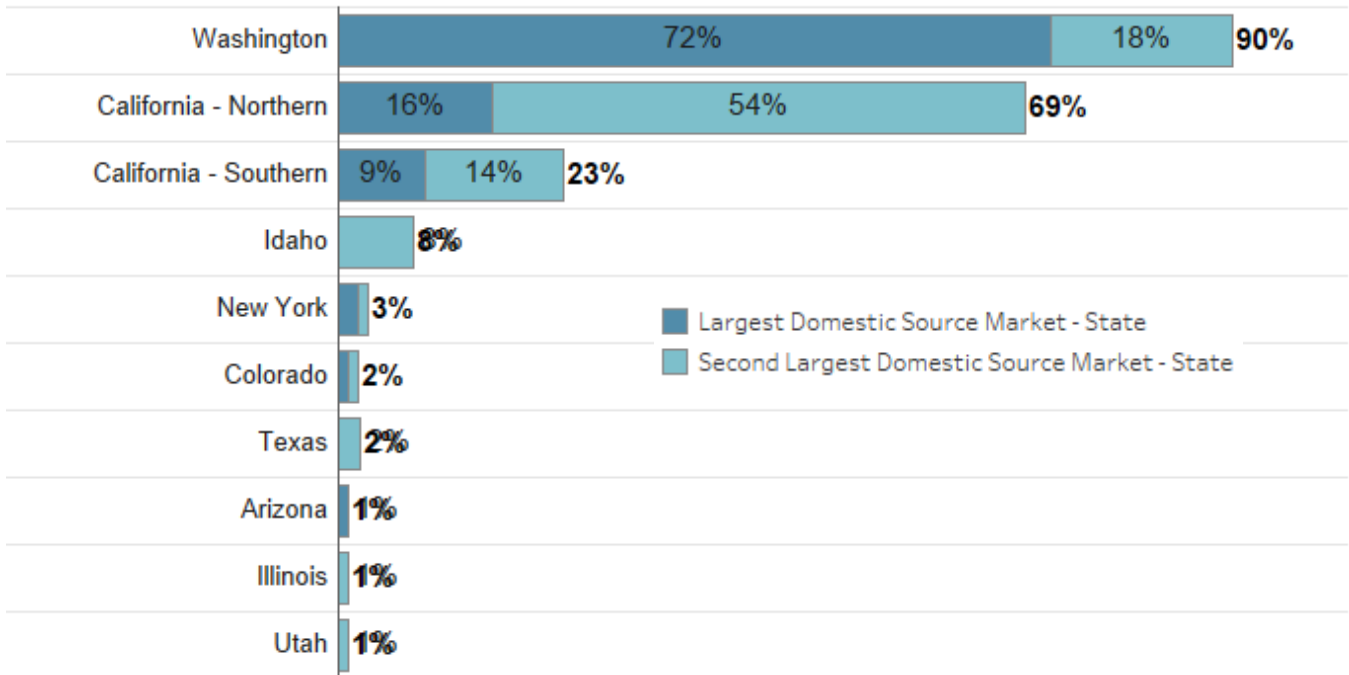
Rating Category	Avg.	Percent Responding:		
		1 & 2	3	4 & 5
Meetings and conventions: importance to the tourism industry in the Portland Region	4.1	6%	20%	33% 41% 74%
Meetings and conventions: importance to the tourism industry in the City of Portland	4.0	8%	18%	36% 37% 73%
Sports: importance to the tourism industry in the Portland Region	3.6	15%	32%	25% 29% 54%
Sports: importance to the tourism industry in the City of Portland	3.6	14%	31%	29% 26% 55%
Importance to your organization of downtown Portland as an economic and tourism driver for the region	3.6	14% 23%	17%	29% 32% 60%
Meetings and conventions: importance to your organization	3.6	17% 24%	18%	27% 30% 58%
Sports: importance to your organization	3.0	17% 24% 40%	24%	17% 19% 36%

Legend:
- 5 - Extremely important
- Very
- 3 - Moderate
- Low
- 1 - Not important
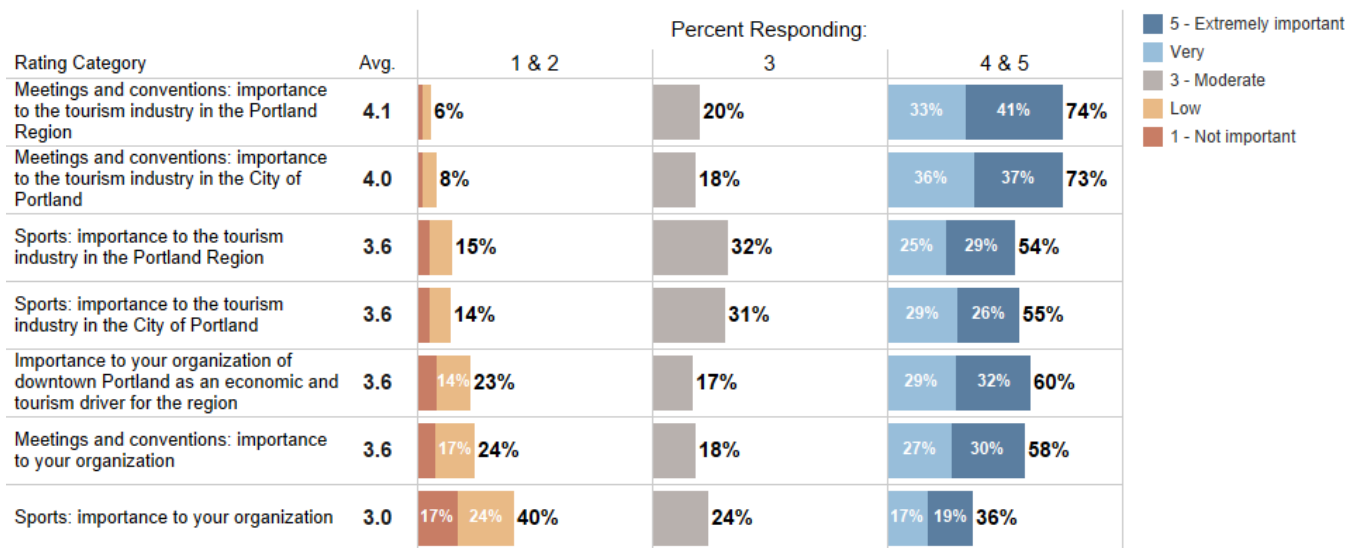
OPEN-ENDED COMMENTS

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 Portland Region respondents:

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

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

As much as I want all of this to be behind us, this is NOT the time to be having visitors to our city and continuing to increase chances of exposure.

Businesses changed policy on meetings and travel to eliminate exposure to their employees. Even though airlines, hotels, and restaurants are treating safety as a top priority, that will not change these companies new policy to eliminate travel and meeting needs, which is a direct negative impact on hotels.

Confidence in state resources and positive steps taken to promote safe travel and in case of emergency adequate resources available to control situation

COVID has presented a challenging dichotomy between visitors and local residents. Visitors, almost without exception, come to our community, wear their masks, maintain distancing protocols and respect all safety regulations. Our local residents by contrast, are far more likely to object to wearing face masks and have less regard for distancing and other safety measures.

COVID really impacted travel this Spring, but it has been recovering. However, the nightly protests getting Portland into the national / global news has been very damaging to our city with respect to travel. We've had multiple guests call us to ask if it's safe in Portland and many other that have cancelled and mentioned the will not be visiting our city anymore. To be honest, I think that has been more damaging to our tourism industry overall. Especially to Downtown businesses. It's so sad how much destruction there has been in our Downtown.

Even pre-COVID we have concerns that travel is contributing to climate change (as manifested by recent wildfires) and must become more sustainable.

Homelessness and public drug usage if my biggest concern for the visitor experience. Other cities and states have better sidewalk experiences and it is only a matter of time until this decreases the attractiveness and willingness for leisure and business travelers to come to Portland. Many international travelers place a high level of importance on safety. We need to re-instill confidence.

I believe heightened political tensions are creating a negative perception of Oregon as a travel destination - for Portland in particular.

I want to get back to work and show our positive side as well as the beauty of the State

I work in both the Gorge and Downtown Portland area. Many people I talked to this summer, that were traveling, were not coming into Portland. They were intentionally not visiting because of our nationwide coverage of the protests.

It is just a Scary time right now. People are scared to go out and be around to many people. We need more outdoor restaurants and activities. We have seen a HUGE DECREASE for Halloweentown ! mostly because of the price they are charging but I am sure a lot of it is because of Covid also

It would definitely help to get our "Recreational" areas back and running and our borders opened...

lack of alignment and consistent messaging from local/state authorities/politics is a big hurdle

Locals in 97038 accept laxity in masking and social distancing as a political statement, which puts both visitors and the community at risk. I would not recommend visitors engaging freely in this community because I don't see an overall respect for the safety of others. We have protocols in place to protect staff and visitors at our museum, but are open by appointment only. I never want to deal with a volatile situation of keeping open hours and people showing up without masks and demanding entrance to our facilities.

Our community according to Health Department is still not encouraging non-essential travel or leisure travel

over 100 days of bad press in national news has devastated our image. We have been a foodie destination with fabulous arts, wineries and recreation. Not sure how to fix that among the Covid pandemic

Portland's demand drivers (our arts, culture, food and drink scene) are all closed or barely hanging on. They are our biggest demand drivers. Why are people visiting PDX if not for those things. It is going to take a monumental marketing effort to bring that demand back and our RDMOs simply are not going to have the money. It is going to be a long and slow return.

The biggest issue we face right now Is the public perception of safety and cleanliness. The Portland brand is in free fall and the City looks like hell. It is embarrassing to tour people through our City right now.

The media has heightened the situation in Portland to make it look like the protests and riots are happening everywhere in the city however they are happening in small pockets of the city.

We do not have enough parking in our downtown core. The city has identified this as an improvement area for future planning. We also need more retail businesses but the rents are so high, it's not feasible to sustain them. Our downtown is mostly restaurants, wellness centers/medical, and offices. Our park along the Willamette needs lockers to allow recreational visitors to store thier items and visit downtown, we are currently creating wayfinding signage to install at the boat launches showing the nearby amenities for these travelers. We need updated Historic Walking Tour Brochures which is a draw for visitors. Historic designation signage on I205 directing people to our Historic District would be helpful. Having a Visitors Center downtown would be a huge advantage to welcome people.

What you don't list is the homeless population and the filth that comes with them. Portland, at least, is not very welcoming, from a visual perspective. Boarded stores, tents, garbage, panhandlers. This is not who we are. It is a tough situation: we want people in airplanes, in hotels, in restaurants etc. but with the rise in COVID numbers, we don't want people to bring the virus with them. Restaurants - who has warm sheltered outside spaces? Due to limited space in restaurants, another tough balance - accommodate locals and visitors safely.

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

Advocate for analysis of the various reopen guidance by sector/business. There are current inconsistencies and opportunity to reimagine hospitality and tourism with retail guidance and dining guidance.

Because of all the challenges just listed, there is a better chance of getting all stakeholders to the table to collaborate in successful recovery, along with more resources to work with.

downtown NEEDS Help! the CITY MUST help deal with improving the livability and safety of downtown

Due to the pandemic I have been collecting pandemic unemployment and working when possible. Please continue your support for PPP loans & pandemic unemployment until this is over.

Everyone is tapped out trying to make ends meet—hard to find time to attend webinars, workshops etc.

For the life of me the wildfires should not be a problem. We need to actively manage our forests, like we used to. Make forest management a priority as we can not survive losing more valuable tourism months due to mis-managment of our forests. As for Covid...we need to have downtown ready to welcome tourists back. Clean it up and get help for our tourism dependent businesses.

Funding, Our City has a major lack of parking in our business district which is leading to loss of customers - our city has no plans for additional parking.

I just think that marketing our destination as a safe place to travel to is most important right now. The general sentiment is that Portland is not safe, and I wonder since our airport is in Portland if that is also affecting the greater Oregon travel as well

I think safe planning and funds to support our community are the top things we should be concerned with.

Included grants and funding resources as a priority because some tourism-related businesses may have to close permanently if they aren't able to get additional support to bridge the gap. Businesses like restaurants are a vital piece of the tourism package, and the more pieces that become "missing" (close permanently), the less functional our destination is for visitors. (Restaurants are used as an example, but there are many others)

It is far too soon to be talking about recovery, we are just now entering the worst phase yet of this ongoing crisis. You are asking the wrong questions in this survey.

Maybe spend the next 6-12 months cleaning up the city so that once it is safe for visitors to travel again, Portland will be a city that people want to visit.

Most small tourist businesses are hit hard. A bunch of grants capped at 20k each would do more for diversity and small business than a few larger grants would do.

One of Columbia County's biggest issue is Marketing and Promotions. I have been involved in many functions through Tourism and the Biggest issue was always Marketing and Promotions. Our County needs more productive grants and now more Covid Friendly Visitor experiences.

Oregon needs to rebuild our reputation as a safe place to come. Our business receives comments from visitors daily from both in and out of state that they do not feel safe coming to Portland due to nightly riots and the homeless situation.

Our first priority is to rally volunteers to help clean our site and air out our buildings, as they smell strongly of smoke, and the outsides of the buildings are dirty with ash.

Stop the violence and destruction in our city.

Technical assistance to help businesses update their google my business page, websites, etc. would be very good.   Since our recovery also includes our streetscape that has gone on since January, creating a video of our town showing our "new" downtown, all of our parks and scenic waterways would be a huge boost. Additional funding for our Main Street organization to allow for more hours to help advocate for the businesses would be helpful.

The best strategy for COVID-19 recovery is the adherence to reasonable precautions like masking and maintaining distance and frequently washing hands or gloving up. As far as the wild fires go there are many issues here. Arson is a concern and there has clearly been arson. Poor forest management is an element. I also know that the fire management practices are of question

The idea that we should be prioritizing efforts around "recovery" as it is related to COVID-19 is an inherently flawed principle. Until there is a widely available vaccine and we have a concrete timetable on easing OHA/Governor's Office restrictions related to the pandemic we are not in a place to activate recovery. We are by the very nature of the situation in a "stabilization" mode. I think it is unwise of Travel Oregon to promote the idea of "recovery" as it relates to the pandemic until that point.

The most immediate need is grants and funding to cover economic impacts. Moving to tourism-related infrastructure is important is tolling along this section of I-205 will impact local businesses and tourism. On tourism strategies for Climate Change Resilience, West Linn has a lot of parks and open spaces outlined by two rivers. This a good fit with those strategies.

The tri county area has stated they believe the governors restrictions are nearly impossible to achieve. That is crippling to the largest concentration of people, hospitality jobs and more in Oregon. There Hass to be something better than what we're doing. Until Washington Multnomah and Clackamas County's can open up I don't think the rest really matters.

We are developing a two way approach to 2021 depending upon the Covid situation in early 2021.

We are focusing on day use guests, and smaller group size with social distance in our offerings

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, and fast.

We need to see an increase in travel demand to Portland. People are simply not coming right now. So coming up with a comprehensive marketing plan as a market is essential. We also need better leadership in Portland, as they have completely failed the leadership test in 2020. They have no plans and no ideas.

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

As the long-term planning involves Waterfront Master Planning in West Linn, plans are moving on the Oregon City side with both cities connected to Willamette Falls. This is a significant tourism area which need the ability of travelers to connect to it. There have been plans to reopen the locks and talks of a tram to move people along or across the river.

Be prepared for the unexpected. As times improve we need to rebuild the opportunities to enjoy what a great State we have. Put 2020 behind us and go forward.

Climate change is going to have a huge impact on our state...reduction in skiing, more fires, etc. We need to get off fossil fuels, and we need people to stop flying everywhere. We don't need "resiliance" planning as in "hey ski resorts, build some mountain bike trails!" we need to focus on slowing/stopping/reversing it.

Focus on building low income housing and get control of our streets back. Tourism will never recover without making Portland safe.

For decades or more there has been talk about how unfriendly Oregon is for minorities to visit, to work in, or to live in. This has been heightened this year. This fear of Oregon for minorities impacts both domestic and international travel. We need to have Oregon open to everyone. This will require cooperation from mayors, governors, and the feds. Sadly sometimes it viewed as Oregon versus the world in our policies and we don't show we cooperate outside of our state. That Hass to stop because it's become politicized and making it unattractive to come to this beautiful state

Given drought conditions, it has been observed that popular reservoirs in southern and central Oregon are not available to boaters as long in the summer as in years past. Meaning, ramps and other amenities are unable to be used because of low/unsafe water levels. Other lakes/reservoirs deal with toxic algae blooms and have to restrict public access. This could have an impact on the surrounding communities that welcome recreational boaters/anglers to their region and the money spent locally. This may be an area to explore in connection to tourism strategies for climate change resilience.

Grants and loan programs availability and access for all businesses small and large to sustain and grow

Having tourism that will allow travelers an experience when they are visiting people and places that will contribute to a better future environment somehow, someway.

I think as a destination marketing organization marketing and promotion should always be the 1st priority, and helping the recovery of our infrastructure which includes training and education for the members of the tourism business community are very important for us to grow back to pre-COVID tourism levels

I would like to see Travel Oregon engage in planning and collaboration alongside stakeholders to develop world-class recreation infrastructure systems around Oregon. In this concept, systems not only include the recreation built environment (trail, river, mountain (skiing)), but related services as well. This means, lodging properties, huts, guides and outfitters, restaurants, stewardship organizations, etc.

It's difficult to look beyond the immediate 1-2 month future at present to know how things are going to shape out over the next 5 years.

Long-term planning will have to retain a focus on COVID-appropriate activities and experiences for visitors. Any new strategies must necessarily also incorporate climate resilience. Grants and funding resources will be needed for the long-term to facilitate recovery.

Stakeholder engagement must always be a top priority - both short term and long term.

The leaders in the promotional area of tourism need to get together and plan for this coming winter, spring, and then summer this next year.

There is much to develop in our return to the norm due to the bad press on the riots and protests -- Get them to STOP Now! Our Covid is good and working but who knows how long it will last and we need to be vigilant

Training and educational programs for all businesses to get the same exposure as the large lodging properties and big conglomerate hotel and hospitality businesses

Waterway infrastructure for many small businesses to utilize the river is the best covid and climate change tourist option.

We need a holistic strategy that provides funding for publicly-owned venues as well as a communications and advocacy strategy for Governor Kate Brown to assess reopening phase guidance that doesn't cause the worst economic crisis in our history.

We need to balance dealing with this Pandemic, the protests safety, cleaning up our streets and sidewalks of the homeless camps and global warming. It is a lot but we can't ignore one problem just cause we are juggling issues so we need to be able to multitask as a community.

We need to continue to establish ourselves as aware of social inequities and commit to addressing them in our businesses and communities. Doing the right thing is the best form of marketing.   And while I do not think tourism strategies for climate change resilience is going to make any difference AT ALL in the big picture, we do need our state and federal leaders to address climate change from an economic angle. We don't need to change our ways to protect forest critters (although we should), we need to change our ways to not have annual fires wreak economic destruction.

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

Breaking down the urban/rural divide, especially how it relates to race and class.

Cultural Awareness

Cultural competency, how to be an ally, systems of oppression

Eliminating racist groups from our community

Engaging the Hispanic community in the Tualatin Valley as winery customers given their taste for wine and their essential role in both

Front line staff/implicit bias training.

Funding for translation services, of general funding for DEI work that can be sued by regional orgs.

General awareness of finding our own implicit biases.

How communities can embrace and foster more inclusion of BIPOC artists, programming, etc.

How to have difficult conversations with clients, stakeholders, and other business owners about race. I'm shocked at the amount of outfitters/guiding companies that seem to blatantly disregard issues around race, equity, and inclusion. How to be actively anti-racist as an organization - what does that look like from inside-out? How does an organization embody this value in everything from policy manuals to program delivery? Hiring? Mission and vision statements? It's one thing to say it, it's another to BE it.

Learning more about the best practices to welcome all visitors.

Making people feel safe and welcome regardless of color, gender or economics.

Overall, bring people together to talk with each other - Landmark Education offers an incredible program called Landmark Forum that has been used across the world to bring people together (Israel, Southafrica)

small business issues, visitor issues, anything specific in the mix is helpful to us as a small group

Tip sheets

To address public policy that the state of Oregon was built on, and how do we shift state policies to more anti-racist policies. This will need to be addressed in the tourism industry as well on who we invite, how we invite and who we want to come visit our state but also for the folks who decide to stay after their visit. The state is set up with very stark differences from the coast, to the valley to central and eastern Oregon.

Tourism, outdoor recreation, financial access, safety in rural communities

Trainings that focus on how racism and implicit bias impacts every single one of us, and how racism is not always overt and aggressive. Education about how we are racist even when we think we're not. Education about privilege and systemically racist power structures in our society.

Treatment towards different persons employed with us. Helping with mental and physical health issues. More sick time for mental health too, not just physical.

Understanding white priv. How to support, engage more diversity in leadership in business, government, etc.

We need a program that helps small businesses address these issues internally. A tool kit for organizations that want to take steps to be more just, equitable and diverse. We currently do not have a common vocabulary around these topics to even discuss them as an industry. The goal should be to develop a network of businesses who are putting in the work on these issues that can provide peer to peer support for each other and businesses looking to take the first step.

What BIPOC-owned businesses do we have locally and how do we support them?

When Stakeholder, City, Economic Development, Chambers, Businesses all work together.

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?

#1 concern is safety. Travelers do not feel safe coming to Oregon. Protestors, police brutality, Covid uncertainty all make guests feel unsafe. #2 guests need reason to come here. With businesses, parks, etc closed we have people coming to visit families and protest.

a greater recognition of the value of grassroots sports, for all ages, to the culture and the community at large.

a return to civility, where people actually have empathy and care about each other, regardless of what their color, sexual orientation, or politician's button they are wearing.

A welcoming attitude to the river as a resource to cut land congestion and multiple open and easy access docks for the public and small tourist businesses to connect.

Acknowledge our racist past as a state, and communicate clearly the concrete ways in which we are working to dismantle that. Defund and restructure the PPB, eradicate institutionally racist law-enforcement power structures. Community development funding should prioritize historically underserved communities of color.

Assign housing and services for homeless people will help to keep the streets clean. Investing into retention and or recovery for business left in downtown Portland.

Better infrastructure such as better internet delivery, cell phone coverage, as well as good signage and maps for surrounding area not right in town. We mostly have our natural environment and bike paths for people to come and enjoy. We do have several restaurants but only 1 hotel and 1 Bed & Breakfast. It would be nice to have things like bicycle and kayak rentals.

Chill the people involved with property destruction, rednecks and police .

Clean up downtown and make it safe for everyone.

Community Education

Community members need to be more open to having tourists in our community

Continued training and reinforcement of multiculturalism as a norm, not a progressive fad. This will take time and persistence.

Cultural diversity art and culture displays in community

Cultural shift in our community to reduce "us-them" dynamics and elevating diverse voices from within our community

Demilitarize the police and development more community engagement.

EDI trained park staff, more access and incentives for BIPOC hires within the tourism and outdoor recreation industry

Elevate community pride that respects preservation of past, present and future.

End the protests/riots

First we need to change the bad reputation the city currently has.

For Portland, our tourism industry has gotten a lot of bad press for being on the wrong side of racially biased situations. We need to show publicly our commitment, as an INDUSTRY, to make sure that it NEVER happens again. I also think we need changes to how our police are held accountable. The police's behavior over the past 4 months doesn't inspire much confidence that they will keep ANYONE safe when visiting Portland.

general acceptance of implicit bias and systemic racism. And systems of inclusion

Get rid of the Covid-19 pandemic so we can move forward in our business's

Greater diversity in the travel and tourism workforce at all levels.

Have more cultural celebrations. Have more at our farmers markets. Recipes, food products like herbs, peppers, .

Homelessness camps near businesses deter travelers from wanting to stay at hotels.   Riots and vandalism downtown have made companies stop sending their business travelers to the area.

Honestly, in Portland, the issue is sometimes that the folks doing the traveling have racist views. I see this all the time at the farmers market in the way that tourists treat our BIPOC vendors. Help with state-wide explicit marketing re: racism isnt welcome here would possibly help. Especially knowing so much about the demographics of who is able to travel (predominantly white folks) partaking in activities that are often staffed by folks of color (restaurants, hotels, farm labor, etc.)

I am not in a position to evaluate how our community is perceived from the outside in.

I don't think this is possible in my lifetime. I cannot guarantee the safety of non-white people in the communities where our org operates.

I feel that the Pacific NW in general is already a place where people of varying races and ethnicities feel comfortable. I assume we could have some improvements, but in general, I believe we do a pretty good job on this front.

I think Portland (where we are located) does a pretty good job of this, however I do think in some smaller rural towns in Oregon it's a different vibe. I do think that the protests have made people feel uneasy and more separated though and would love our community to communicate more and work together to make things better for everyone. What a mess we have right now.

If local leadership (mayors, police departments, and other public entities) do not support these efforts or participate in addressing systems of oppression, it will continue to be challenging.

It needs to be safe, clean, and welcoming.

It needs to feel safe. Between the virus, the protests and the homeless, going anywhere downtown feels like a punishment, and not like a tourist destination. If I as a local wouldn't go there anymore, why would a tourist?

It's not a local or regional issue, it's a national issue and the outcome of the upcoming election will decide if we are able to start rebuilding bridges or slip deeper into division.

More access to parking and a more open mindset to the individuals in the community that think out of towner's are bad

our destination is a multi cultural community but once out of the urban areas it is apparent the rural areas of oregon are in need of multi cultural awareness.

People need to change their lousy behavior toward people who are 'different'. The hardest change of all.

Smaller towns need to be able to embrace visitors from all races, religions, LGBTQ and backgrounds. Some visitors to these smaller communities may not feel welcome.

Solve COVID! Stop right wing and police violence. Stop left wing vandalism.

stop mandating racial separation in our thinking and look at all people as just people.

Stop the protesters in Portland. As long as we have these violent protesters, people will not come here.

Stopping protests before or as soon they turn violent

The only issue I see with some regularity pertains to a handful of individuals with housing and/or mental health concerns.

There needs to be more businesses owned by BIPOC and visible in my community.

This has to be addressed at all levels and not just in words or PR campaigns, there has to be real work with folks from Black communities and communities of color to help shape what this looks like moving forward.

Treat people how you want to be treated. If everyone would follow this wisdom there would be no problems but all I can see are people who attack trump supporters and conservative people.

We have a largely white population in a rural community. Still we held a peaceful BLM rally which is encouraging and creates atmosphere of inclusivity. However, we must admit we also have an element of supporters of the right, some who do not welcome tourism and still cling to the hope of industries long gone return.

We have had a well publicized racial incident with our police force. This is an ongoing matter and there are groups working within the city and community addressing it. It remains to be seen if there will be any residual fallout from this event.

We need to find a way to help the homeless in the city of Portland, so that all people feel more safe visiting this city. I understand that this question is in relation to how we can make our city and state more inclusive, but the fact remains that nobody will want to visit if mass tents remain. I also think that providing a focus on all businesses from all areas: ethnic/racial and cultural backgrounds is necessary in our city and draws people here. Portland has done a great job of this, but the question I would pose is, what has the rest of the state done to highlight it's diversity and can it improve in this area?

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

City government needs to understand that commerce is what keeps the area alive. Businesses are the cornerstones of a city. Letting a few out of state people disrupt the safety and business activity in our city is a disgrace. Respect for business partners is paramount to our Future success.

Conventions that bring large numbers of people long distances are inherently unsustainable even after COVID health risks have passed

Elsewhere in country, people perceive, whether true or not, that Portland is not safe due to the protests. Until we change the reality on the ground and/or perception, tourist related business will continue to suffer.

From both TO and our RDMO, it would be helpful to have more transparency in the short and long term plans. Even if the current plan is "We don't know." The recovery is going to be hard and slow. But we need to position ourselves to be able to best align and support TO and RDMO endeavors moving forward. If the plan is that TO/RDMO aren't going to do any marketing encouraging travel now until the spring, organizations can plan their budgets to align with that timeline.

From observation in reading materials provided by Travel Oregon, in the water recreation topic area much of the focus seems to be on kayak and paddling sports which I am curious as to the reason. Motorized boaters and anglers are a major group of visitors/travelers and I don't hear much conversation about this audience. Currently, they provide the majority of funds for boating infrastructure, access to many of Oregon's waterways, as well as the enforcement/safety component. Are there plans to consider the interests, needs, or partnerships with this audience? Will you address that in future communications?

I wish small City Management would support the value of main street beautifications, being clean, understanding art and history are things important to visitors and locals.

I would like to hear a conversation on the relevance of sport in the cultural/economic impact of Oregon.

Just remember the value of cultural tourism of all kinds

Lets get Portland and Oregon cleaned up and lets get businesses open so we then we can concentrate on promoting tourism.

Oregon is a Amazing State with so much to offer! We need to get more Marketing and Promotions out there to show America what we have to offer

Oregon is still a wonderful state! the natural beauty is spectacular. the homeless issues are terrible. downtown does not feel safe. i have lived in Oregon my entire life and am considering moving because of the homeless and racial tensions occurring in downtown.

The appearance along the freeways in Portland leading to Highway 30 which is the entrance to Columbia County is very detrimental to tourism. The rioting and property damage that has been allowed to continue for the past six months is extremely harmful to tourism throughout Oregon. When I'm speaking to potential visitors I have to emphasize that we are NOT Portland! Even then it is sometimes difficult to convince them. Portland needs to quit blaming others, and get its house in order for the sake of the entire state.

We really need to focus on climate change, once Covid is resolved. Things like pro sports, with the huge amount of flying and driving, not to mention non-recyclable waste from game concessions needs to be revisited and made more sustainable.