

OREGON TOURISM STAKEHOLDER ENGAGEMENT SURVEY RESULTS

APR. 2016

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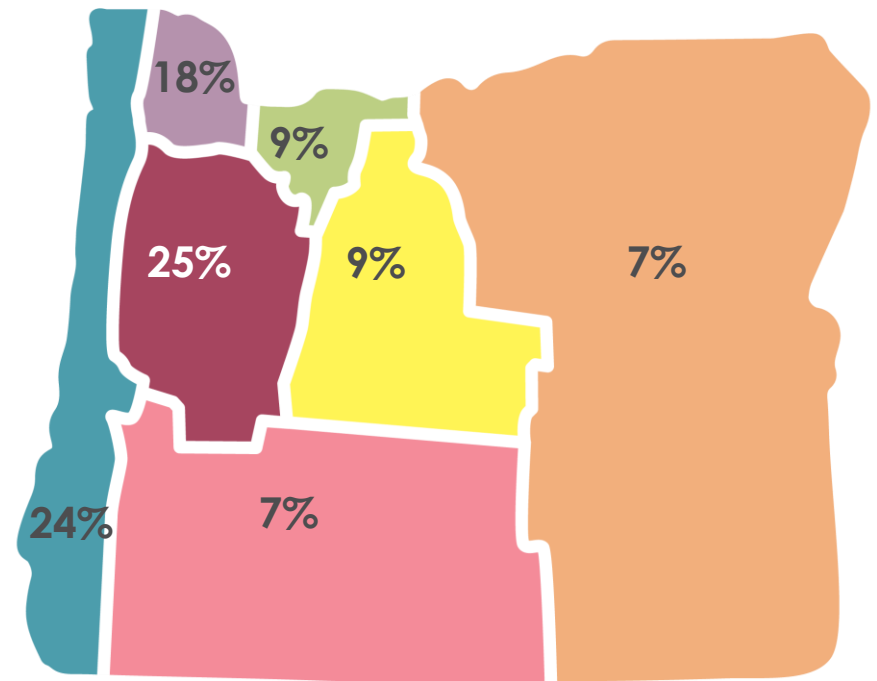
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STATEWIDE TOURISM ENGAGEMENT SURVEY RESULTS

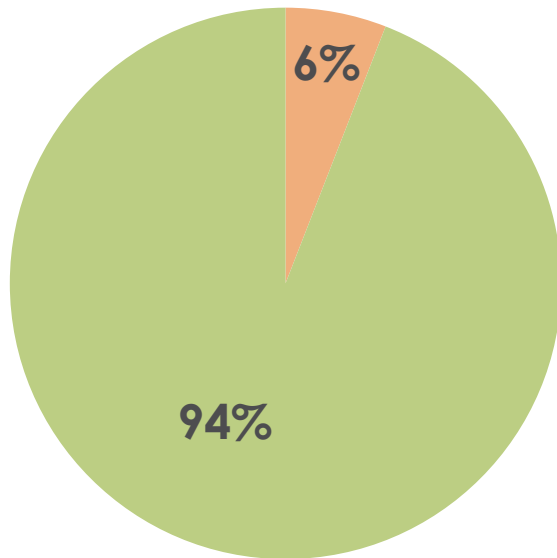
- 2016 Stakeholder Engagement survey: March 23-April 4
- 57% respondents represented small businesses/organization (1-10 people)
- 74% respondents were managers/executives or owners



219 Respondents by Geographic Location

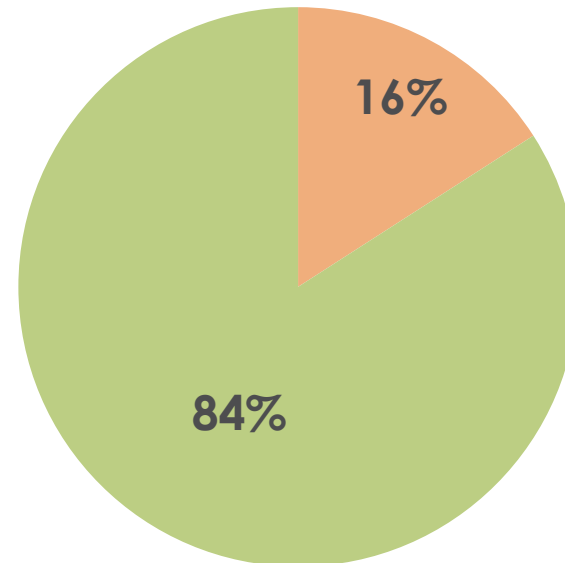
STATEWIDE AWARENESS AND OPINION OF NEW LEGISLATION

I am aware of the legislature's recent approval to increase the state lodging tax.



■ No ■ Yes

The legislature's recent approval to increase the state lodging tax is good for Oregon's tourism industry.



■ FALSE ■ TRUE

STATEWIDE OPINION OF NEW LEGISLATION

84%

The state lodging tax is **good** because...

Economic Driver

Increased Funding

Low Risk

Support Community/Business

Project/Grant

Development

Funds

More Productive Development

Increased Marketing

Social Driver

Resources Proven ROI

16%

The state lodging tax is **not good** because...

Inequitable Distribution

Requires Alignment

Unknown/Unseen ROI

Reduced Demand

Misrepresented Purpose

Creates Division

STAKEHOLDER OPINIONS OF TRAVEL OREGON

Answer Options	Average	Agree	Somewhat Agree	Neutral	Somewhat Disagree	Disagree
I understand Travel Oregon's primary mission/purpose.	4.59	69.7%	22.7%	5.4%	1.6%	0.5%
Travel Oregon's mission/purpose is critical to a thriving Oregon tourism industry.	4.62	73.0%	18.9%	5.9%	1.6%	0.5%
Travel Oregon does a good job of developing new tourism products/offerings.	4.38	53.5%	33.5%	10.8%	1.6%	0.5%
Travel Oregon does a good job empowering community and business leaders to make advancements in the tourism economy.	4.08	39.7%	35.9%	17.9%	5.4%	1.1%
Travel Oregon keeps me informed of their programs, activities and achievements for our industry.	4.29	54.6%	28.1%	11.4%	3.2%	2.7%
Travel Oregon raises the awareness of Oregon in domestic markets.	4.43	57.3%	31.4%	8.6%	2.2%	0.5%
Travel Oregon raises the awareness of Oregon in international markets.	4.24	53.3%	22.8%	20.1%	2.2%	1.6%
Travel Oregon is a leading voice for Oregon's statewide tourism industry.	4.57	71.6%	17.5%	7.7%	2.7%	0.5%
Travel Oregon coordinates and cooperates well with stakeholders in Oregon.	4.04	40.5%	34.6%	15.1%	8.1%	1.6%
Travel Oregon involves the travel and tourism industry in key decisions that affect it.	3.93	32.1%	38.6%	22.3%	4.9%	2.2%
Travel Oregon provides access to programs that are helpful to me and/or my business.	3.96	37.8%	34.1%	17.8%	7.0%	3.2%

STAKEHOLDER PROGRAM VALUE

How valuable do you perceive these programs to be for your business?



"Support for rural communities who struggle with funding and support for economies that incorporate tourism."

"I think the following would be helpful to my business but I haven't seen anything from Travel Oregon on them: public relations, destination/industry planning, professional development/training."

"The online information is very important."

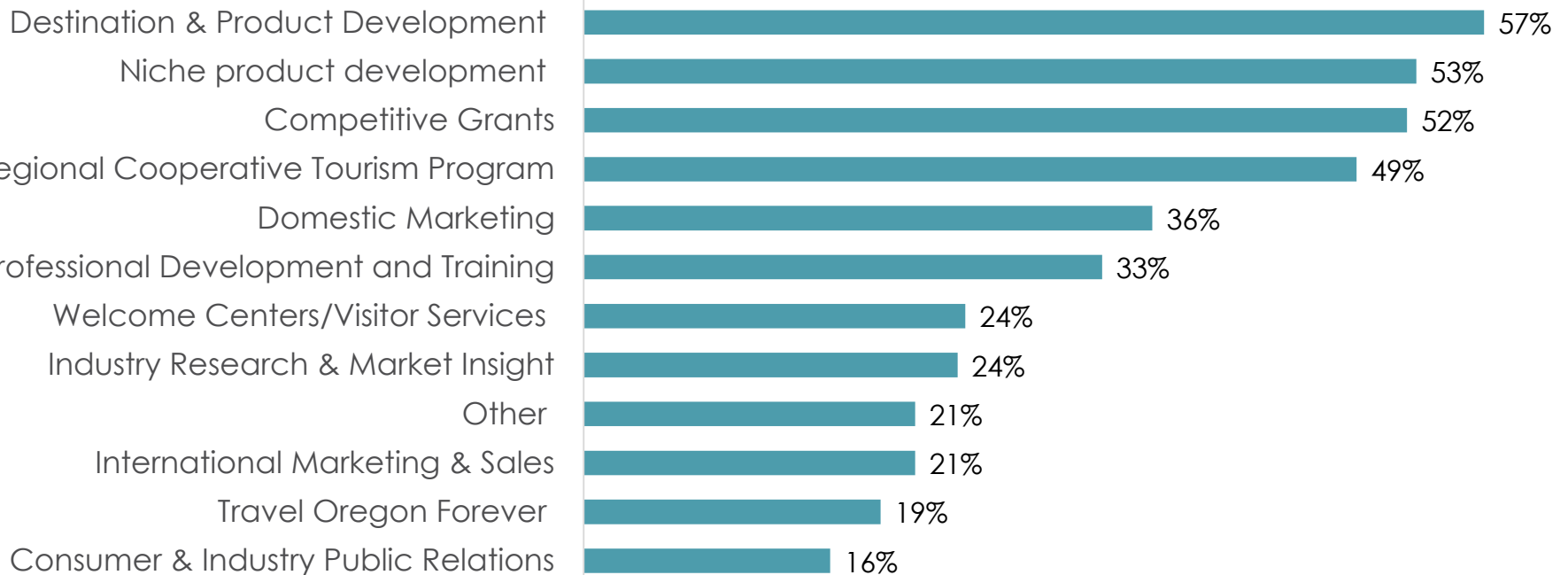
"Help with statewide significant project like Historic Highway State Trail."

"Supportive of Tribal tourism attractions and products."

"We are in the baby steps of creating an intentional tourism focus. We are appreciative of and hungry for all the resources and support available."

NEW FUNDING EMPHASIS

With new funding, I would like to see more emphasis on...



DO MORE

What is one thing you would like to see Travel Oregon do more of?

Engage/Educate Stakeholders

Cooperative Market Research

Small Business Destination Development Support

Build Corporation

Support Public Land Mgmt

Support Heritage/Multicultural Oregon

More Ads

Provide Grants

Support Rural DMO/Communities

"Help build the capacity for rural DMO efforts that are often poorly funded and lack the knowledge to effectively promote their locals and regions."

"Get out of the office and visit and get to know the ranchers and farmers and find out about their world."

"Running a 'for profit' DMO, I think Travel Oregon should be able to make grants to all DMOs (regardless if they are profit or nonprofit) if they can show they are helping to sell an area."

"Supportive of Tribal tourism attractions and products."

"Destination development for small businesses, helping businesses understand how to attract the tourists that Travel Oregon is working to bring to the state."

"With Outdoor Recreation as one of the pillars of Travel Oregon's marketing, many public land mgmt. agencies are struggling to maintain their outdoor rec. destinations to a high quality. I'd like to see TO consider supporting these agencies and their high-use recreation sites that are also tourism destinations."

"Connect with cultural heritage organizations and encourage (not just teach) them what to do."

DO LESS

What is one thing you would like to see Travel Oregon do less of?

Narrow Season Focus

Bicycle Tourism

Large Business Focus

Poor Fund Management

Programs

Status Quo Attractions

Narrow Regional Focus

Archaic Collateral

Inequitable Share of Funds

"Focusing on the same industries and activities; branch out to connect with other demographics. Give larger grants to establish businesses in our dying small towns."

"I would like the emphasis to be less on large businesses and more on small businesses."

"They need to look at their promotions and the time of year they will be promoting as in our area summer is full. We need winter promotions."

"Try to appear less beholden to a few stakeholders, which impacts your image among the locals including elected officials. Less top down assistance, more grassroots capacity building within EXISTING organizations. T.O. needs to ensure that ALL businesses benefit from your funds."

"International marketing. Simply because it doesn't affect my business and region as much as others."

"Do not emphasize just the top tourist attractions, lodging and locations. Showcase more of the smaller businesses and smaller regional attractions. We could be known as a state with 700 wonders sprinkled around the state with all kinds of secrets and surprises."

"Bicycle tourism. Continue to do it and be a leader, but it isn't enough of the travel market to justify so much investment and promotion of it. Hiking and wildlife watching are much more popular."

MOST VALUABLE

What does Travel Oregon offer that is most valuable to you and your business or organization?

Networking

Engagement/Education

Cooperative Marketing

Establishing Oregon
as a Destination

Marketing Support/Collateral

International Exposure

Grants

Community/Rural Tourism Support

"Being the voice and advocate for Oregon as a travel destination."

"Travel Oregon's RCMP program provides great benefit, especially to smaller destinations; however, a complete review and possible revision of the program and its funding may be necessary."

"Provides specific knowledge that helps explain the value of travel and tourism to locals and regions that don't understand or accept the economic importance to local economies."

"Assistance and training by traveling to small communities to work with local advocates and community leaders."

"The marketing support for our local assets through Travel Oregon's public web pages, the grants that provide us additional resources for marketing our local areas, and other marketing efforts that drive national and international tourist to destinations all over our state."

"Presentation and partnership of opportunities that are beyond our organization's capacity; helping to increase visibility and awareness of our region as a destination in multiple markets, both domestically and internationally."

"Community tourism planning (e.g. rural tourism studio, ongoing DMO support of community tourism efforts) efforts are amazing and have generated significant community support of the neighboring land management agencies."

#1 ISSUES

What is the #1 issue that the industry needs to address in order to take its next step forward?

Lack of Engagement with Local/Rural Communities

Conservation

Gov
Regulations

"Corporate partnership in sharing a stewardship message on public lands. Don't kill the goose laying the golden egg!"

"Better communications and "playing together" as a team with tourism partners throughout the state and regions. Some credibility and trust was lost during the past several months; it needs to be gained back."

"How do we ensure we don't love Oregon to death? I live in a popular part of the state do I feel the impacts of a steady flow of visitors / for better or worse. How to get people to visit less popular places while also being able to give back while they are there?"

"Cooperation. While Travel Oregon seems to work well on its own agenda, it doesn't feel like a cooperative and inclusive effort."

Lack of Rural Promotion

Brand Clarity
Over Crowding
Service Provider
Lack of Marketing Knowledge/Support

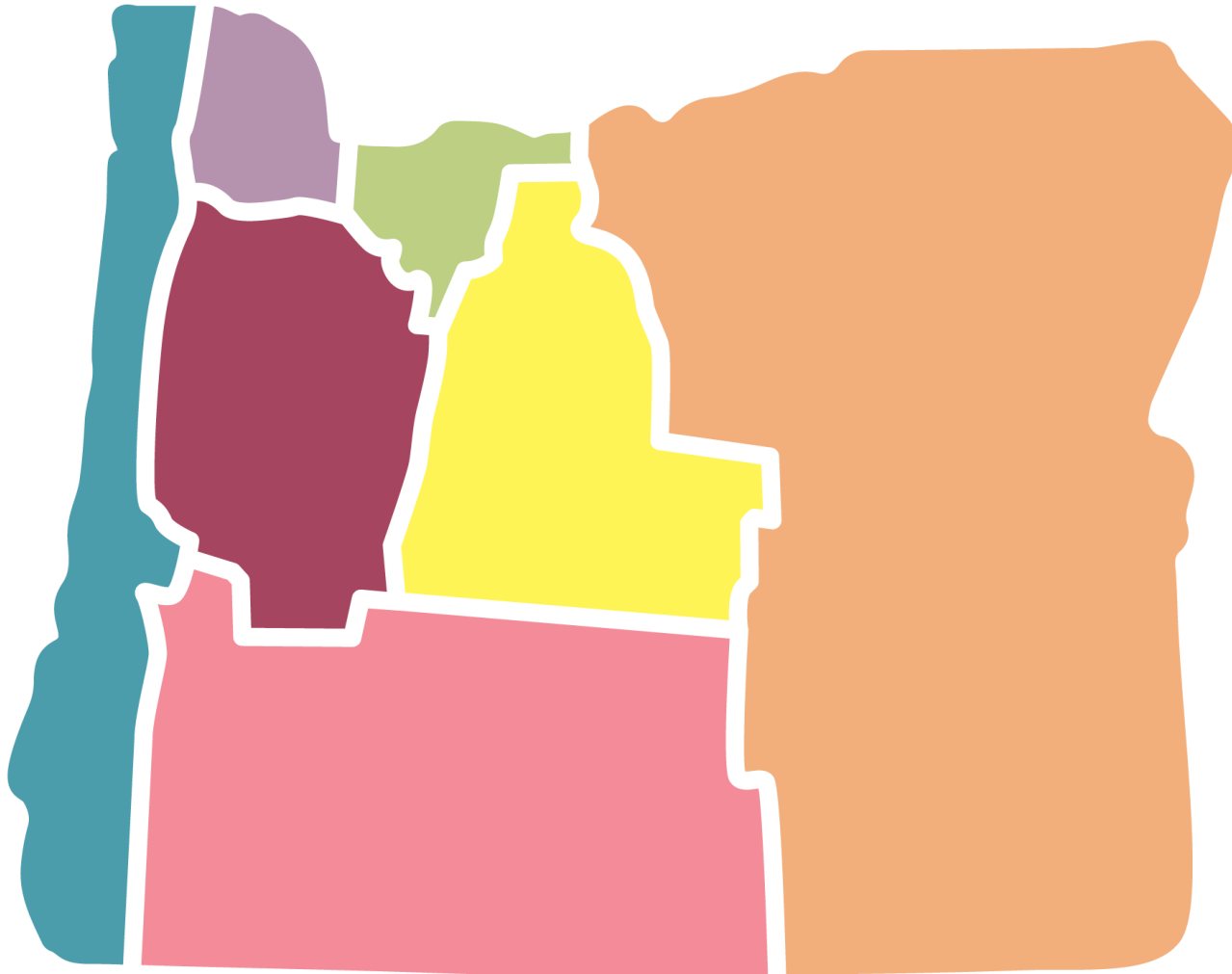
Collaboration/Communication

"Build bridges of understanding between locals and communities that clearly tie together the outbound marketing efforts of TO and larger DMOs to get more traffic to the state and regions and local efforts to attract those visitors to specific locations."

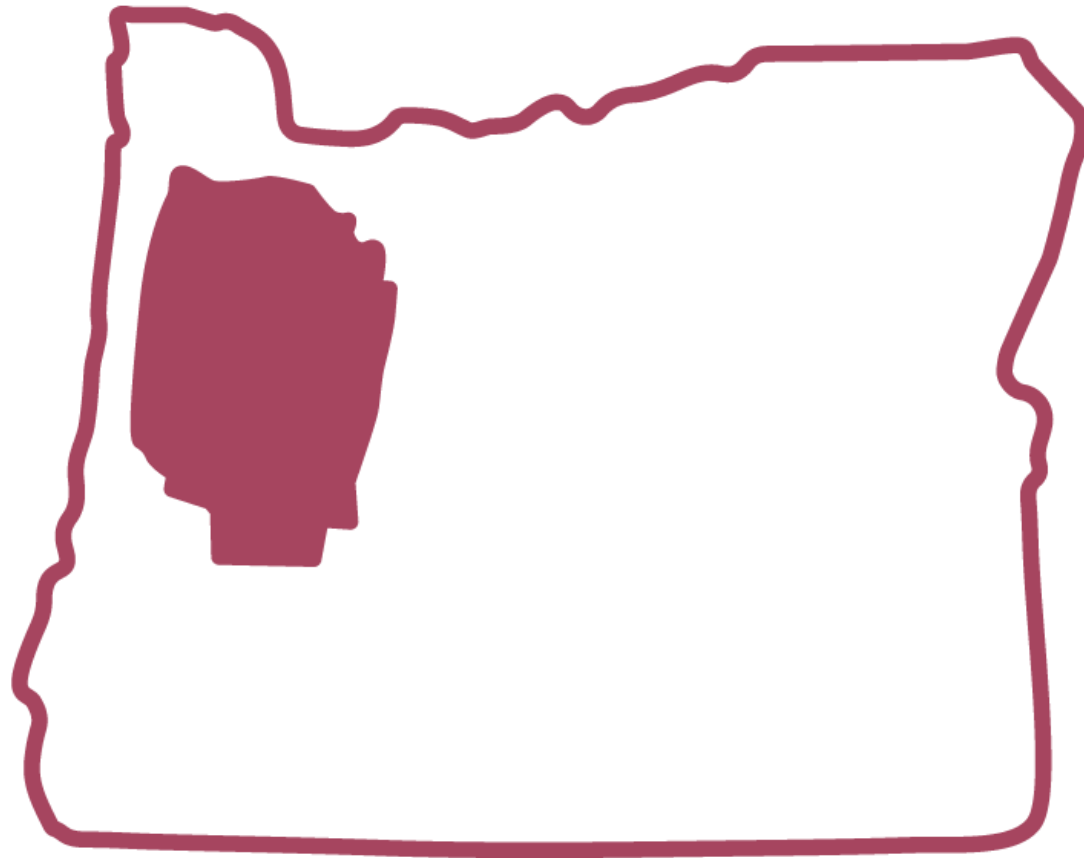
"Bridging the urban/rural divide. As a business owner in a small, rural, central Oregon town, we are constantly stand-outs in the tourism industry and our communities are trying to bridge this divide. Oregon is rural and rural Oregon wants the tourism commodity, but both sectors need to be able to play nicely together."

"Getting the OREGON brand more defined and doing what it takes to get the country/world to notice us."

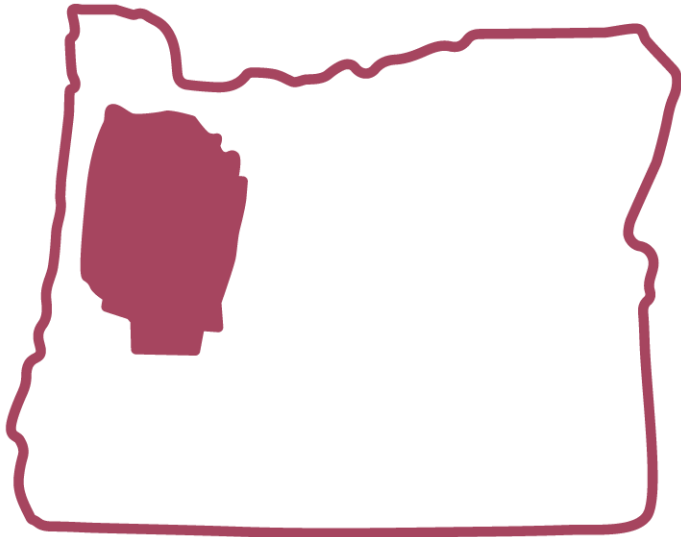
STAKEHOLDER ENGAGEMENT SURVEY RESULTS BY REGION



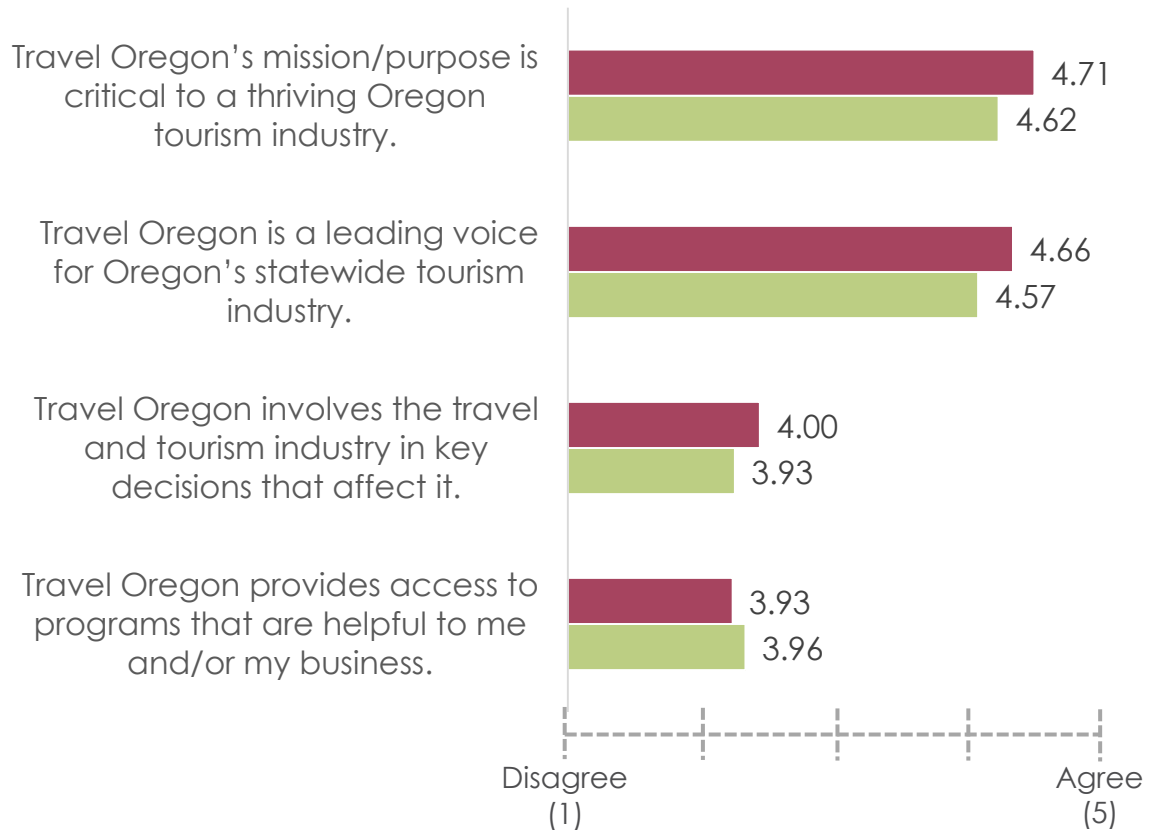
WILLAMETTE VALLEY



STAKEHOLDER OPINIONS OF TRAVEL OREGON

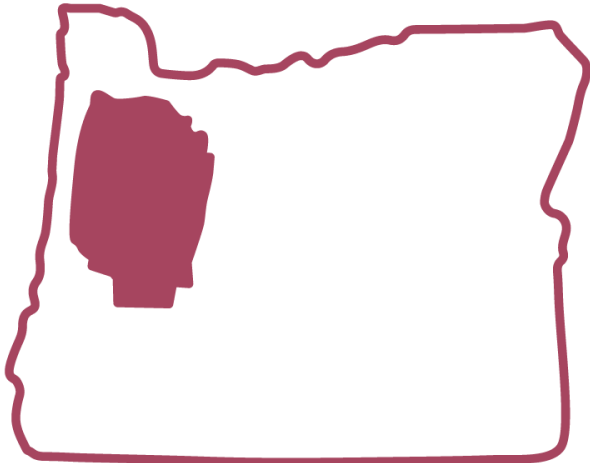


■ Willamette Valley ■ All Oregon

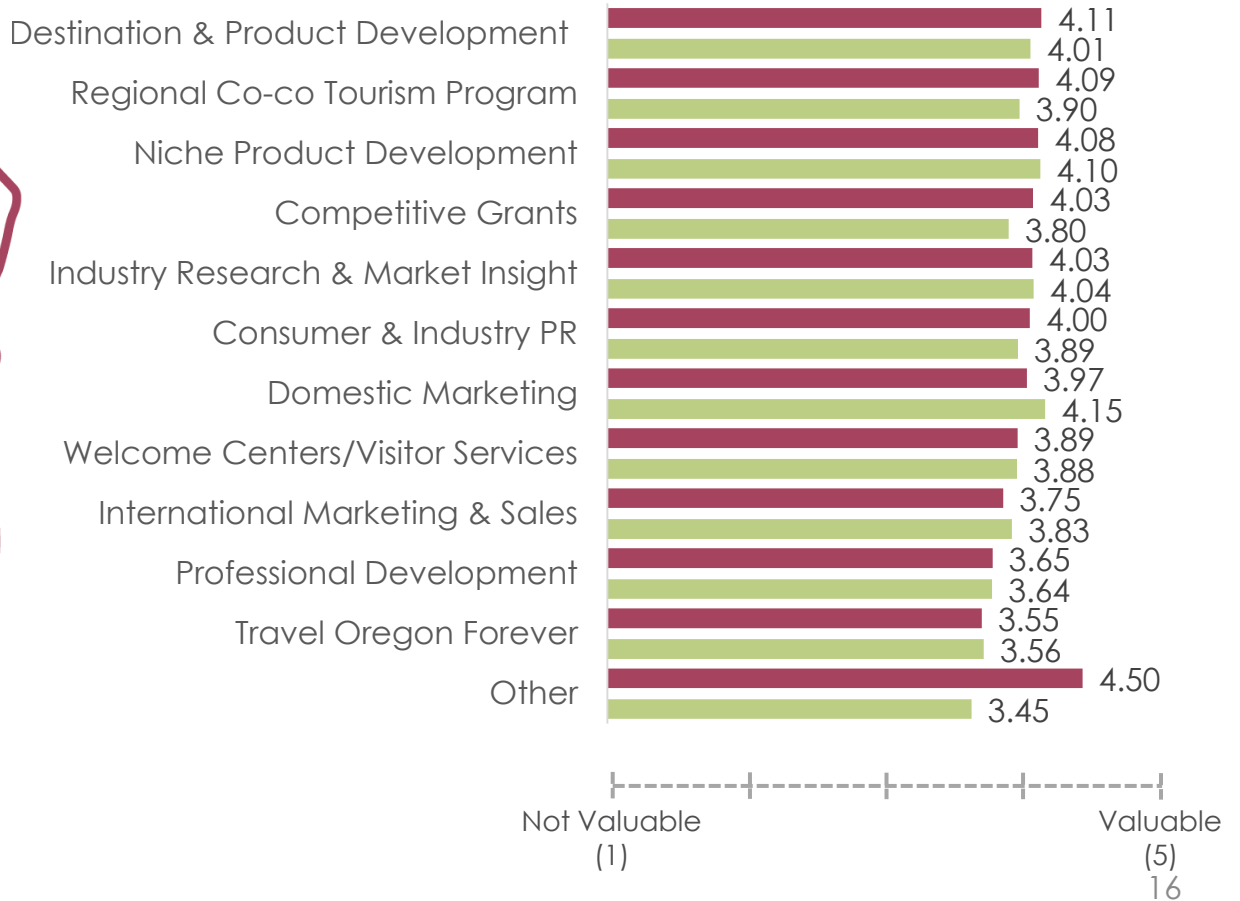


STAKEHOLDER OPINIONS ON THE VALUE OF TRAVEL OREGON PROGRAMS

How valuable do you perceive these programs to be for your business?

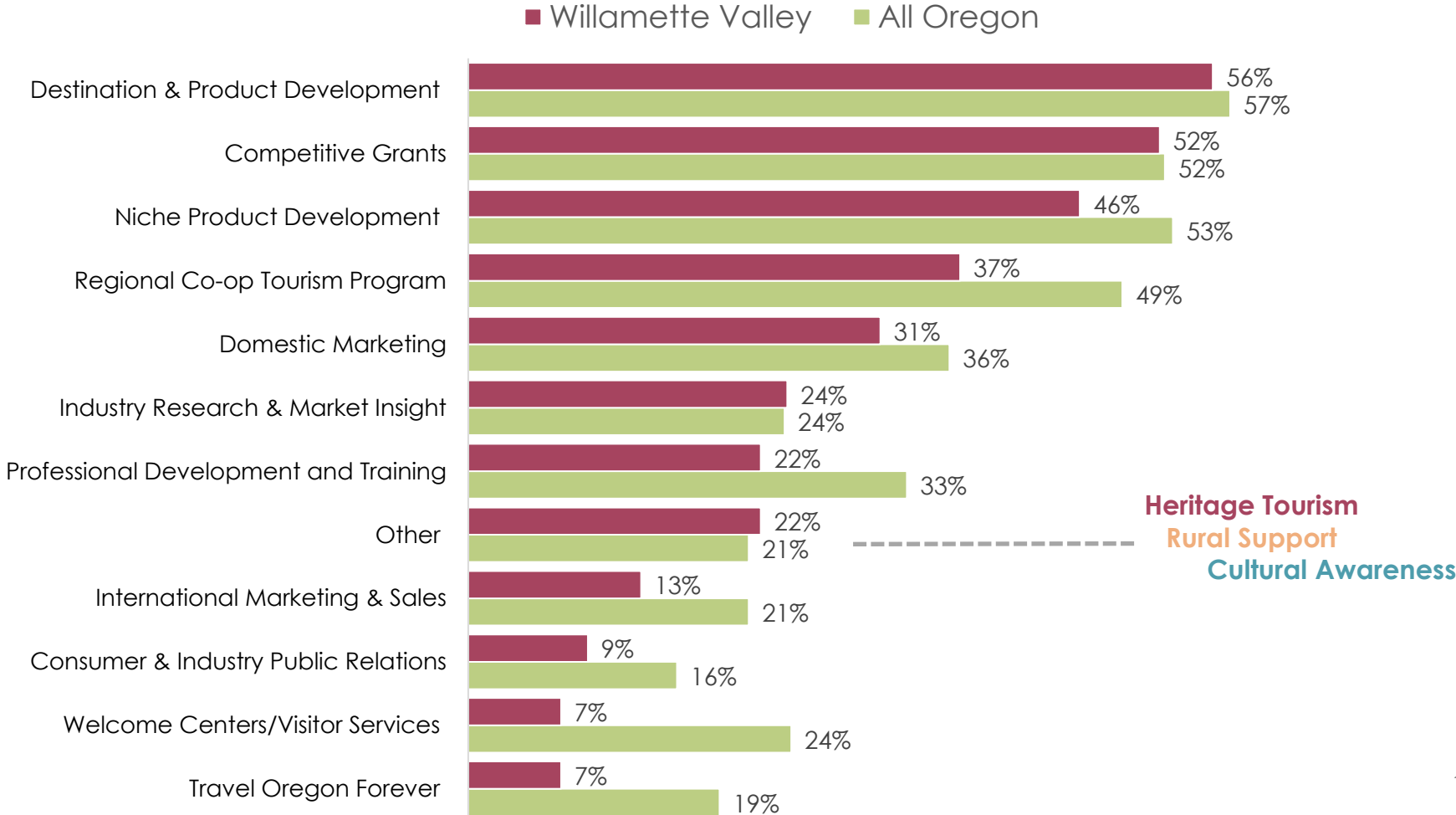


■ Willamette Valley ■ All Oregon



NEW FUNDING EMPHASIS

With new funding, I would like to see more emphasis on...



STAKEHOLDER OPEN ENDED RESPONSES

What is one thing you would like to see Travel Oregon do more of?

“Many small communities don't have the resources to market themselves effectively. It would be great to see more co-op type activities that give marketing opportunities to communities that wouldn't be likely to be able to put together on their own. ie, Leverage Travel Oregon's buying power and marketing expertise..”

“Grants. Everyone has ideas but it always takes some funding to pull it together. Make sure its a good, competitive process, but also make sure that some is getting outside of the major metro areas where it's really needed. Maybe you could run a grant program that supplies a staff person or consultant to a group of businesses or a small region that wants to create some new products.”

Please identify one thing you would like to see Travel Oregon do less of:

“Focusing on the same industries and activities: branch out to connect with other demographics. Give larger grants to establish businesses in our dying small towns.”

“Going to the same people in an industry for marketing, branch out and contact some of the lesser known and help them also .”

STAKEHOLDER OPEN ENDED RESPONSES

What do you believe Travel Oregon offers that is most valuable to you and your business or organization?

“Overall vision. Access to information. Ability to share our information with a broader market than we would otherwise reach.”

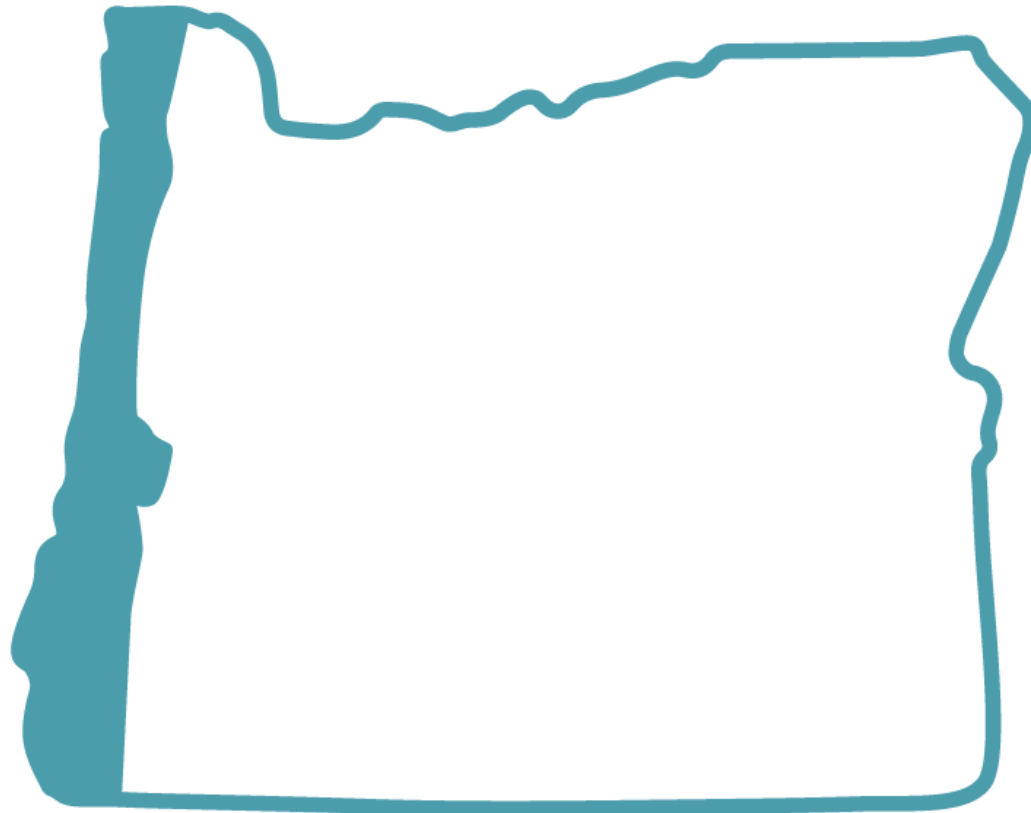
“I value most TO programs highly. Marketing and sales programs, research programs, product development expertise and grants. All of them.”

What is the #1 issue that the industry needs to address in order to take its next step forward?

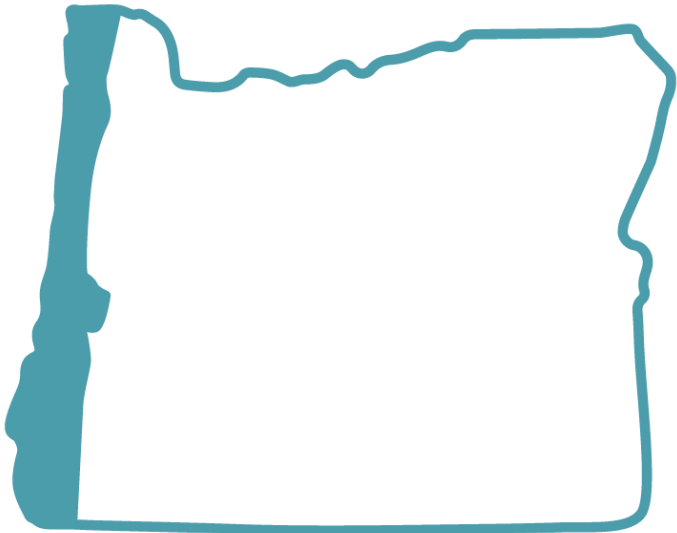
“Assisting rural communities with the expertise to market their assets.”

“Rural destination development - and the main issue there is manpower to do the work.”

OREGON COAST



STAKEHOLDER OPINIONS OF TRAVEL OREGON



■ Coastal Oregon ■ All Oregon

Travel Oregon's mission/purpose is critical to a thriving Oregon tourism industry.



Travel Oregon raises the awareness of Oregon in domestic markets.



Travel Oregon does a good job empowering community/business leaders to make advancements in the tourism economy

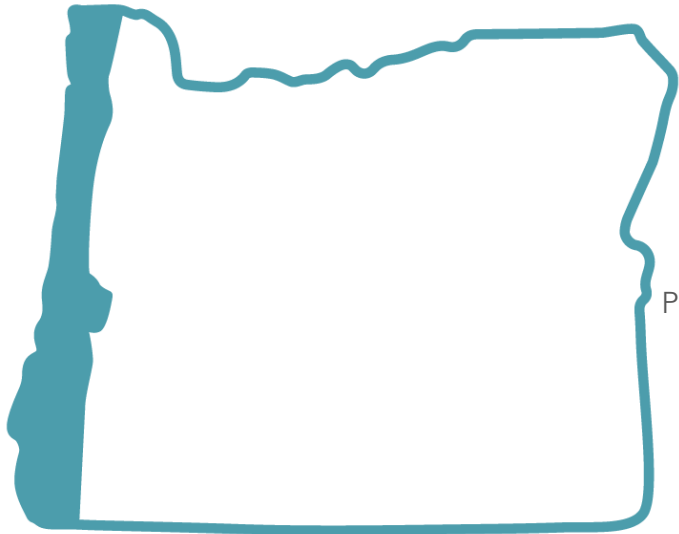


Travel Oregon provides access to programs that are helpful to me and/or my business.

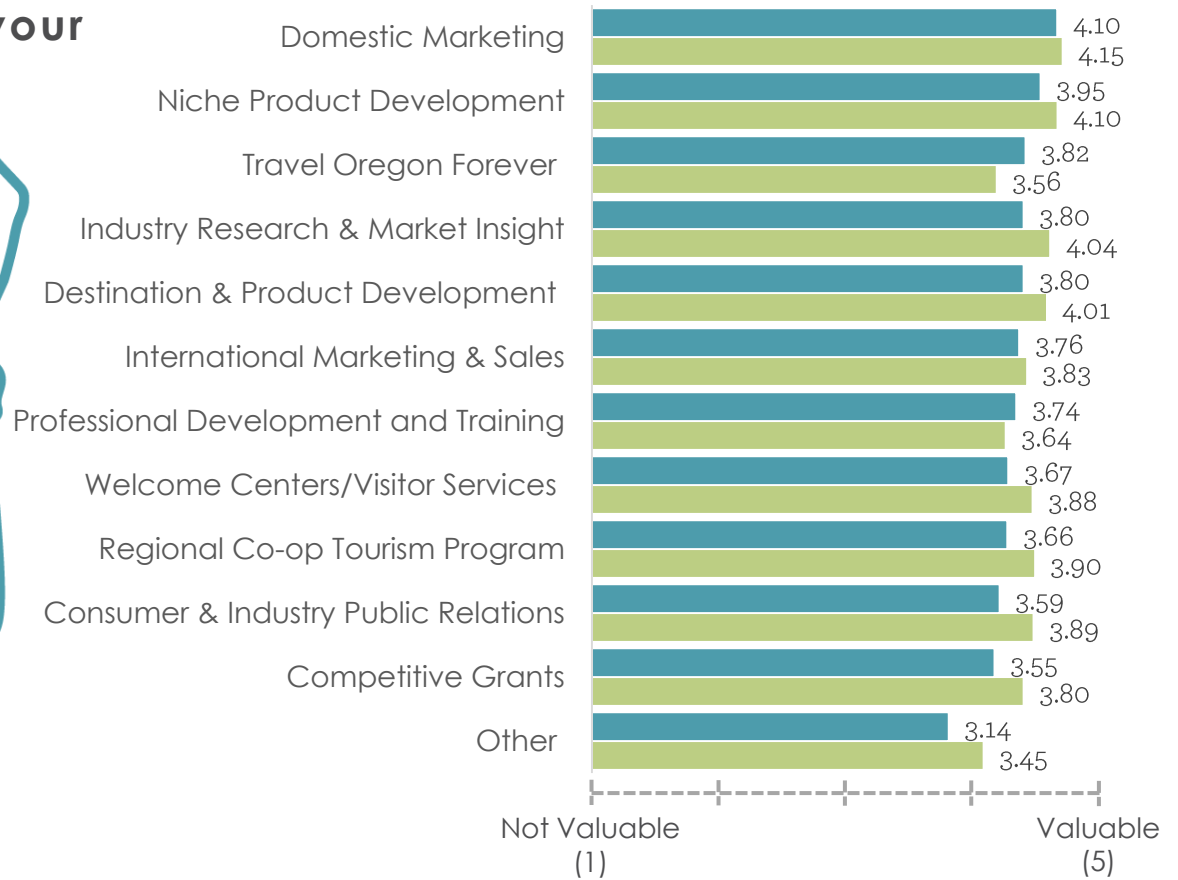


STAKEHOLDER OPINIONS ON THE VALUE OF TRAVEL OREGON PROGRAMS

How valuable do you perceive these programs to be for your business?



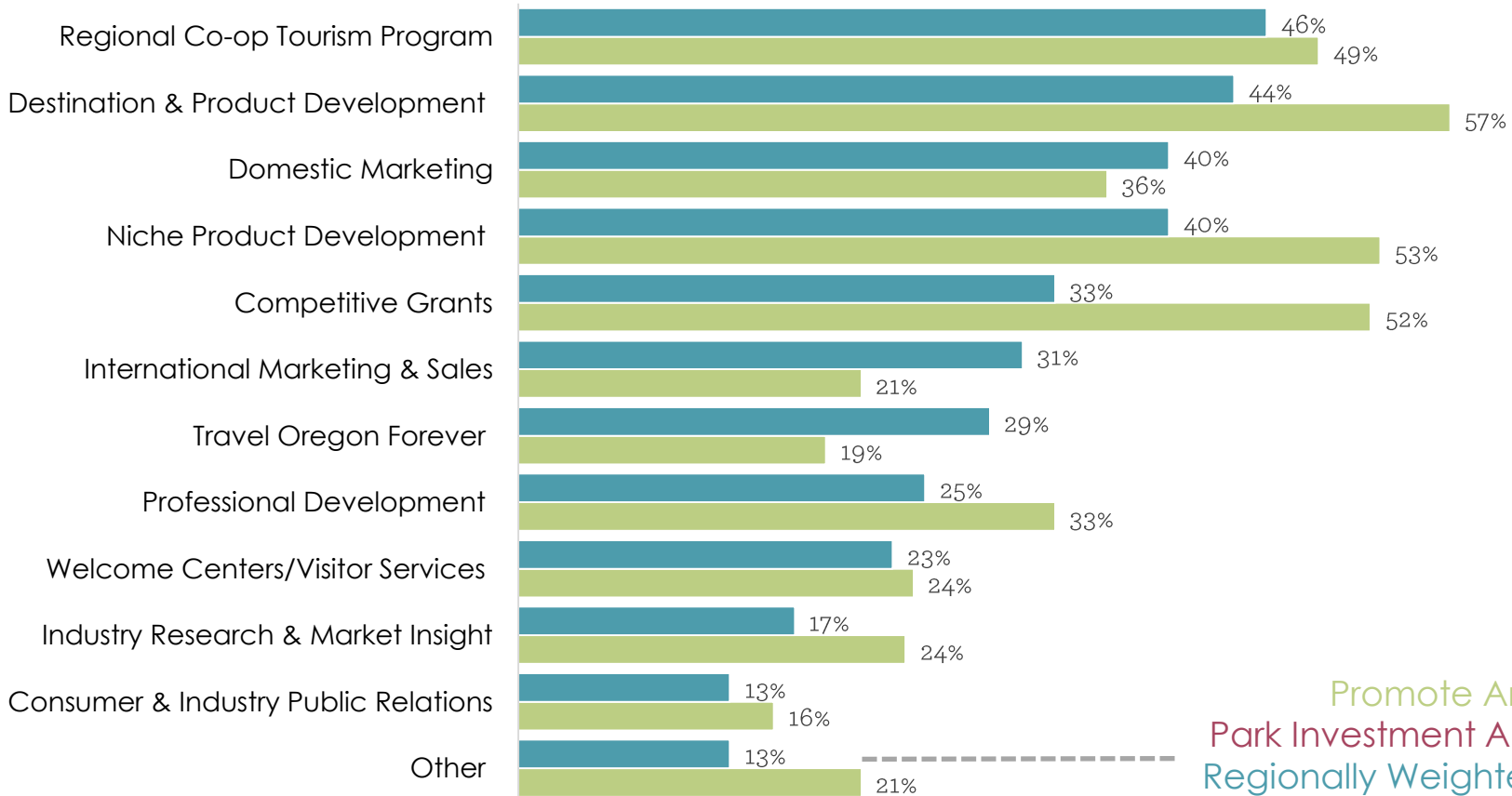
■ Coastal Oregon ■ All Oregon



NEW FUNDING EMPHASIS

With new funding, I would like to see more emphasis on...

■ Coastal Oregon ■ All Oregon



Promote Arts
 Park Investment Advocacy
 Regionally Weighted Grants

STAKEHOLDER OPEN ENDED RESPONSES

What is one thing you would like to see Travel Oregon do more of?

“Help build the capacity for rural DMO efforts that are often poorly funded and lack the knowledge to effectively promote their locals and regions.”

“Communicate to the industry in a timely manner allowing ample time for the industry to engage in thoughtful discussion before implementation.”

Please identify one thing you would like to see Travel Oregon do less of:

“I would like the emphasis to be less on large businesses and more on small businesses.”

“Less emphasis on where the tourists are already going and regions which already have substantial budgets to promote tourism.”

STAKEHOLDER OPEN ENDED RESPONSES

What do you believe Travel Oregon offers that is most valuable to you and your business or organization?

“Provides specific knowledge that helps explain the value of travel and tourism to locals and regions that don't understand or accept the economic importance to local economies.”

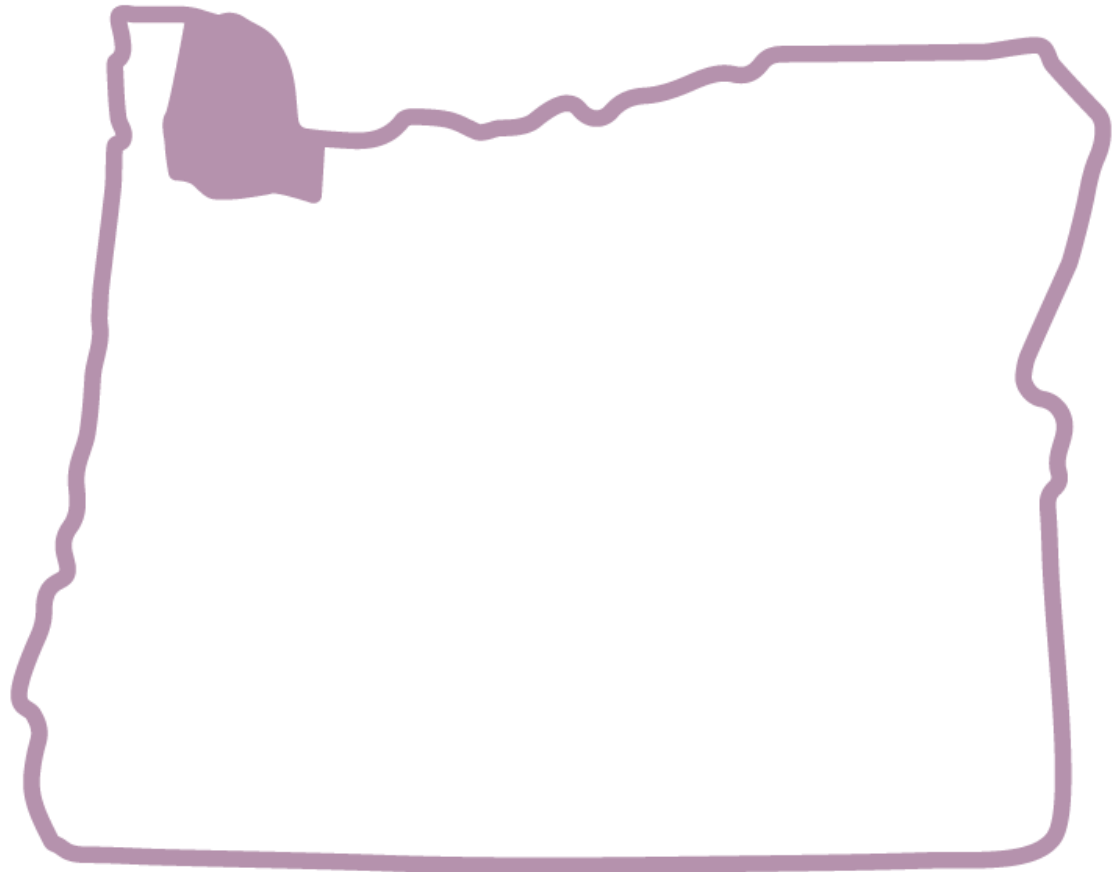
“Being an industry leader on all fronts. We have a lot of trust and respect in the guidance of Travel Oregon staff and that is a relief.”

What is the #1 issue that the industry needs to address in order to take its next step forward?

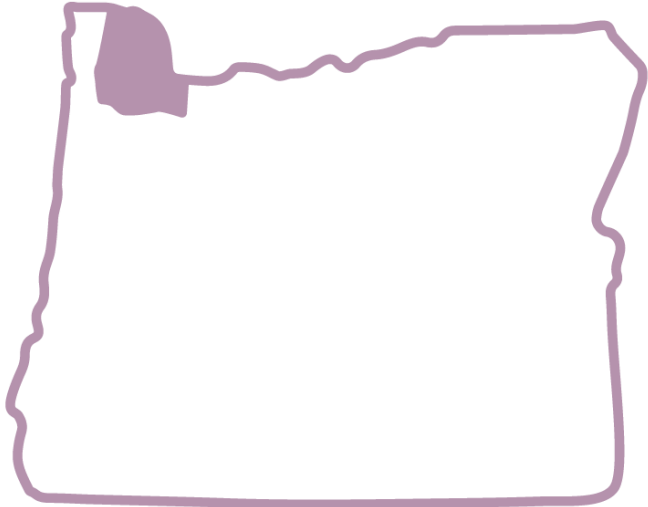
“Build bridges of understanding between locals and communities that clearly tie together the outbound marketing efforts of TO and larger DMOs to get more traffic to the state and regions and local efforts to attract those visitors to specific locations.”

Cooperation. While Travel Oregon seems to work well on its own agenda, it doesn't feel like a cooperative and inclusive effort. It often feels as if they dictate policy and marketing to the regions, sometimes without understanding what's best or those regions.”

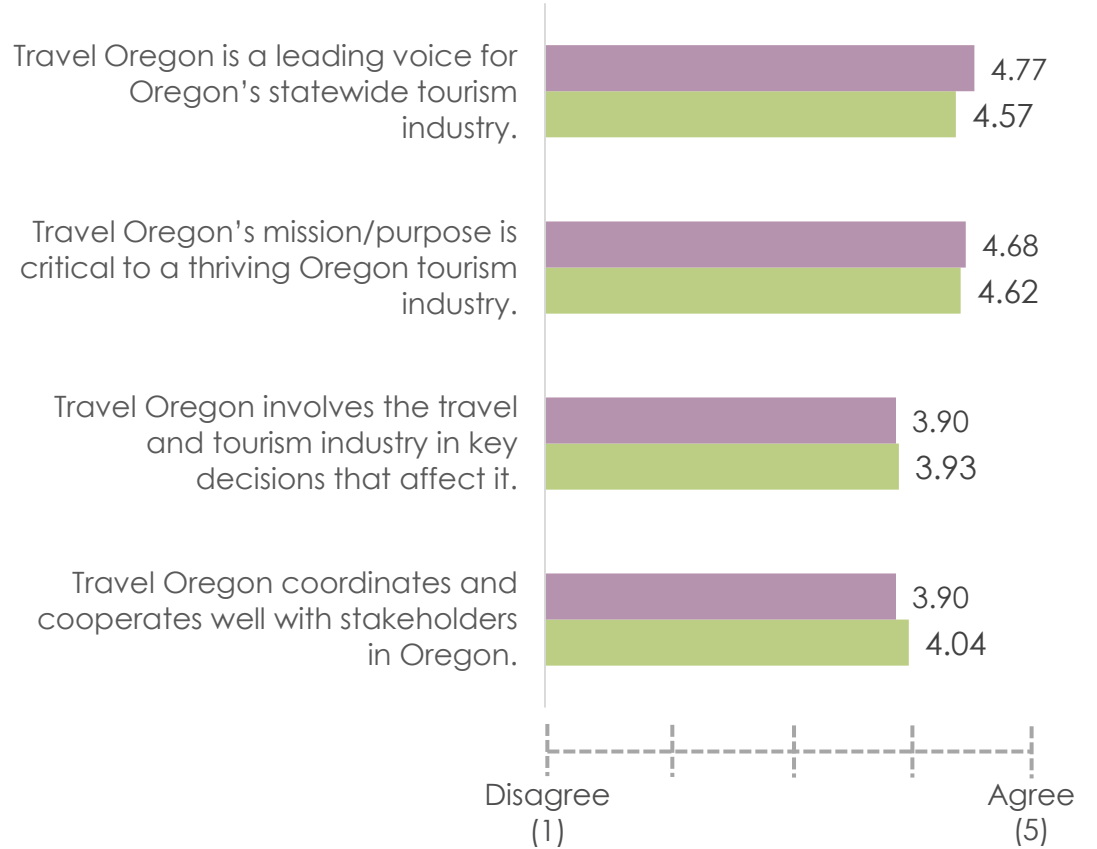
GREATER PORTLAND



STAKEHOLDER OPINIONS OF TRAVEL OREGON

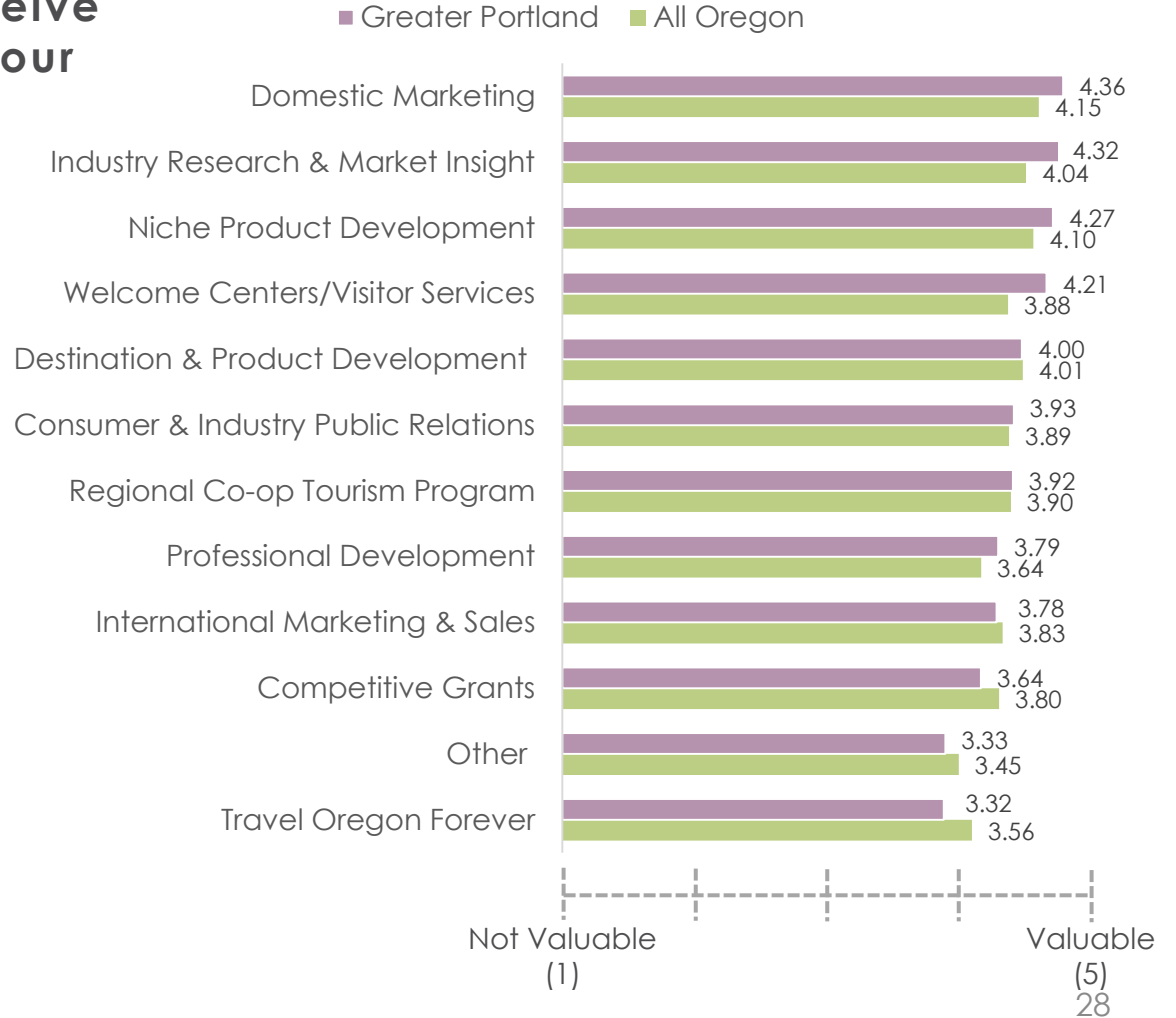
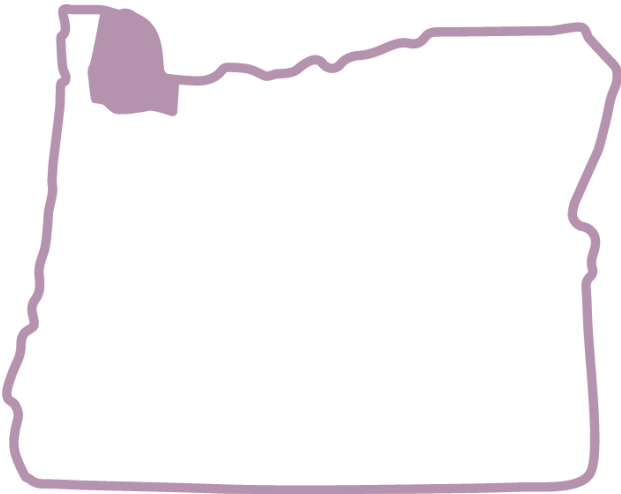


■ Greater Portland ■ All Oregon



STAKEHOLDER OPINIONS ON THE VALUE OF TRAVEL OREGON PROGRAMS

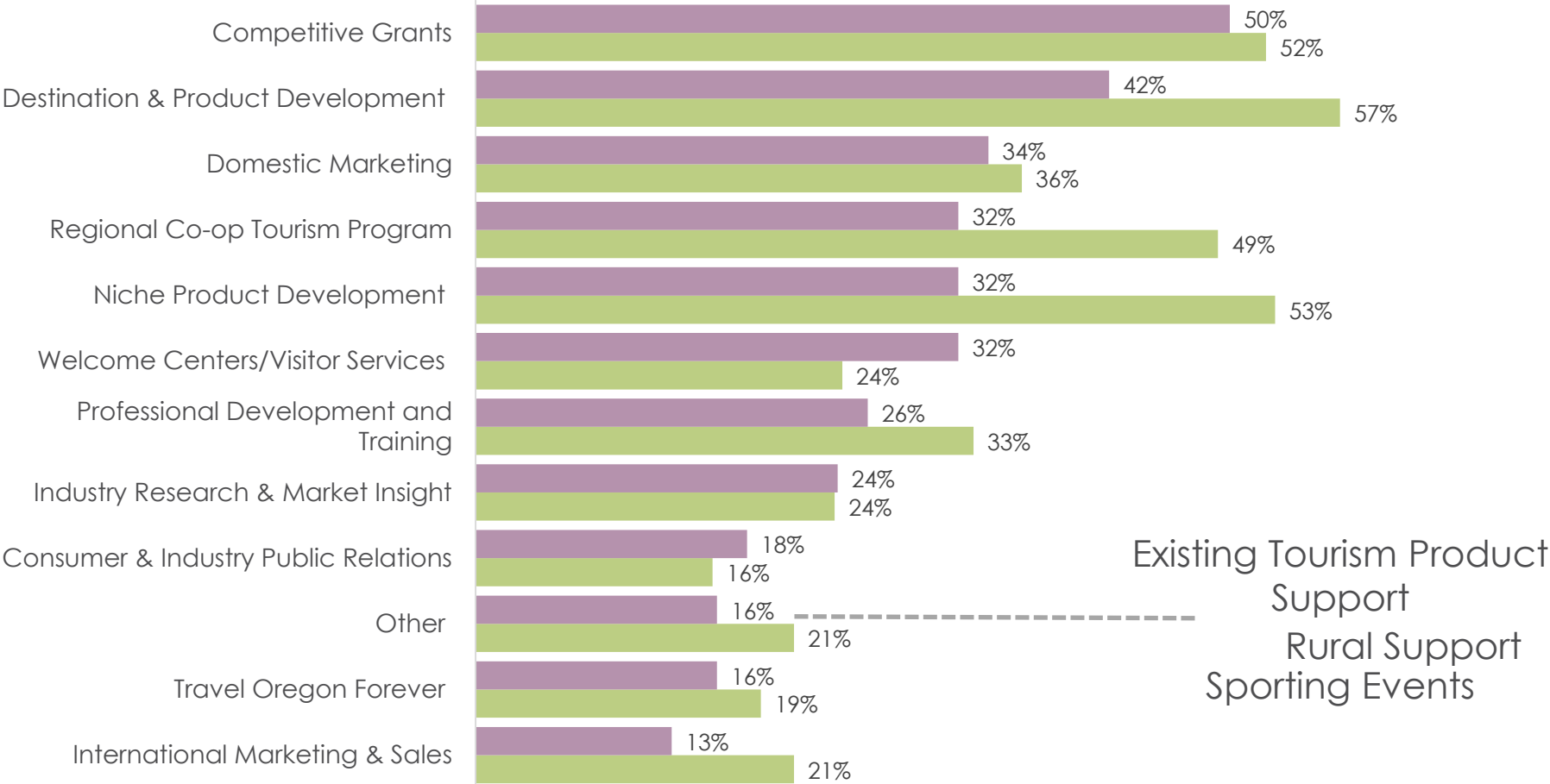
How valuable do you perceive these programs to be for your business?



NEW FUNDING EMPHASIS

With new funding, I would like to see more emphasis on...

■ Greater Portland ■ All Oregon



Existing Tourism Product Support
Rural Support
Sporting Events

STAKEHOLDER OPEN ENDED RESPONSES

What is one thing you would like to see Travel Oregon do more of?

“Development and maintenance of tourism product and infrastructure, especially in Portland, which is the gateway to the state for the vast majority of visitors.”

“Destination development for small businesses, helping businesses understand how to attract the tourists that Travel Oregon is working to bring to the state.”

Please identify one thing you would like to see Travel Oregon do less of:

“Do not have a narrow focus of regions to support tourism.”

“Focus is so heavy on outdoor adventure. Obviously this is an important niche, but not the only one. Need to balance better with promotion of opportunities for less active travelers.”

STAKEHOLDER OPEN ENDED RESPONSES

What do you believe Travel Oregon offers that is most valuable to you and your business or organization?

“Access to International markets.
Domestic public relations and
advertising to build awareness of the
State.”

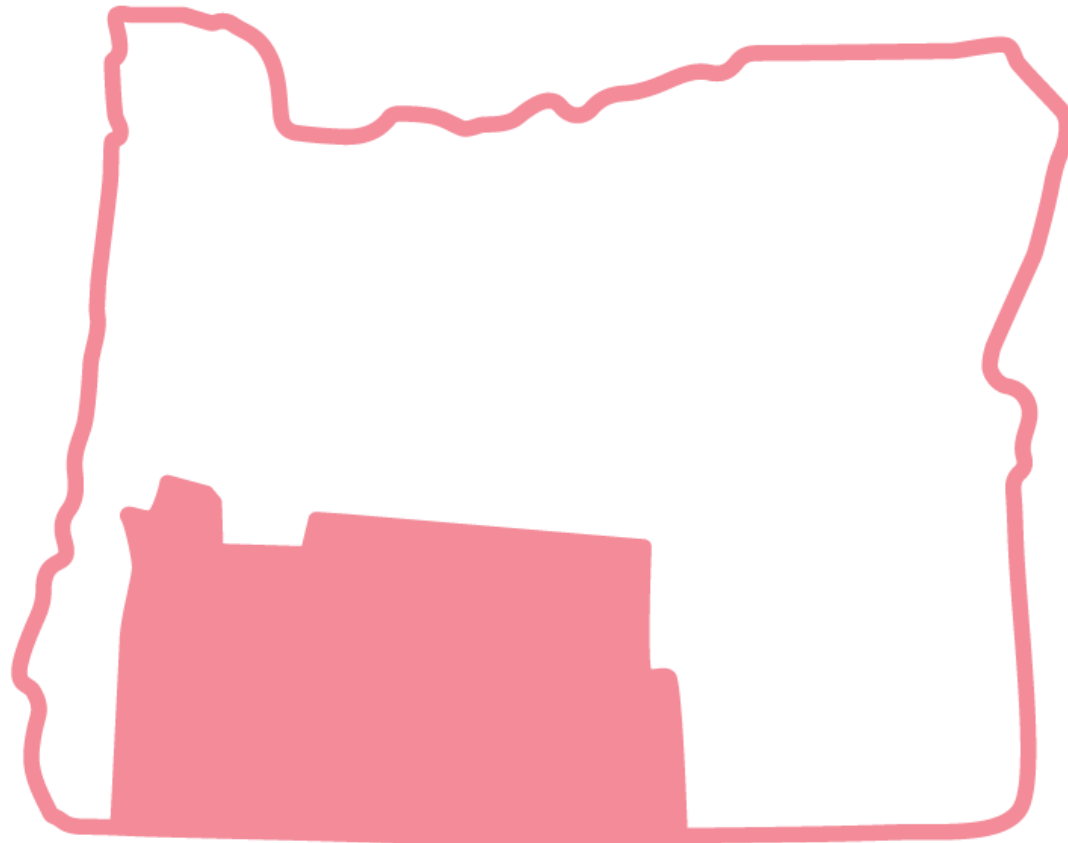
“Beautiful, fun, sharable images and
campaigns that invite people to explore
Oregon, even if they already live here.
That Travel Oregon inspires Oregonians
at least as much as it attracts non-
Oregonians... that's amazing.”

What is the #1 issue that the industry needs to address in order to take its next step forward?

“Caring for and not overlooking 'iconic'
tourism assets. Re-focus on the things
that have brought tourists here for
hundreds of years, not just what is shiny,
new, and trendy.”

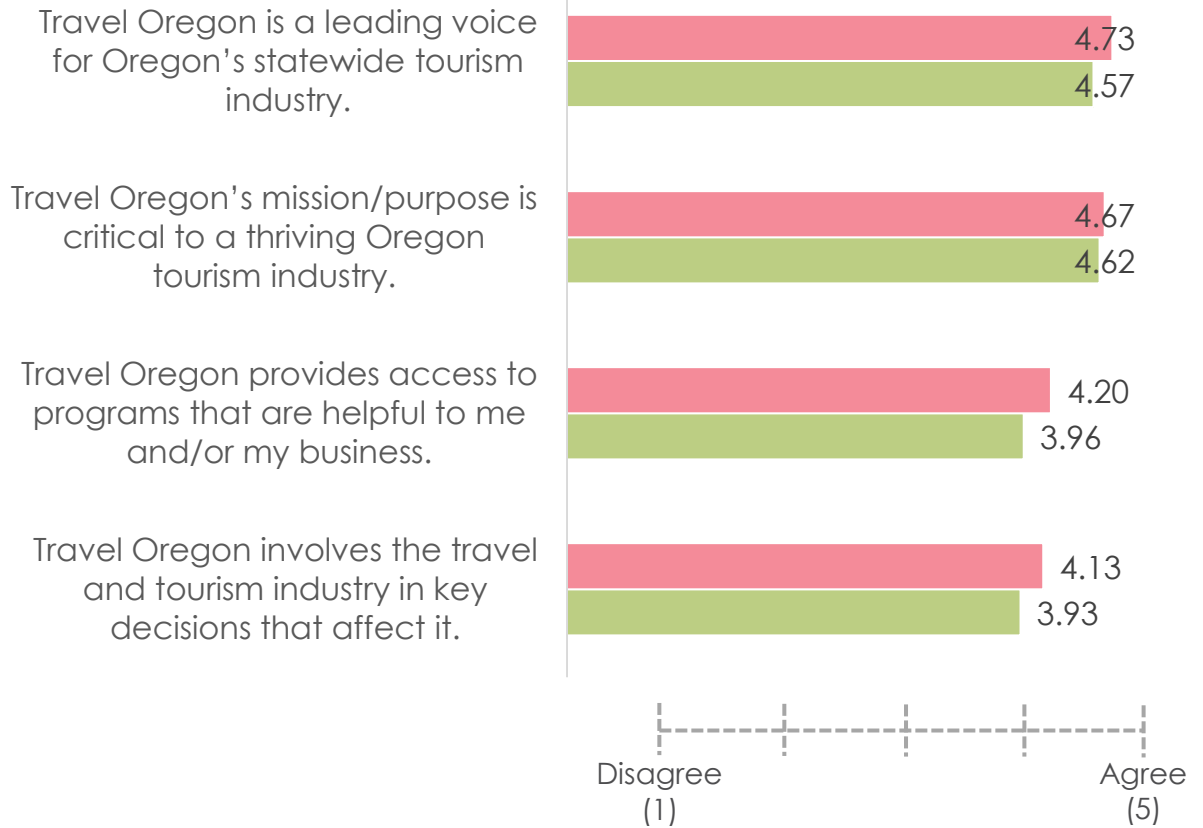
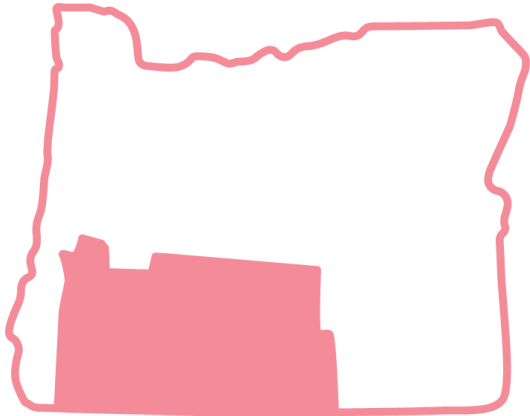
“Communication to and professional
development of small businesses that
are offering tourism related services and
retail.”

SOUTHERN OREGON



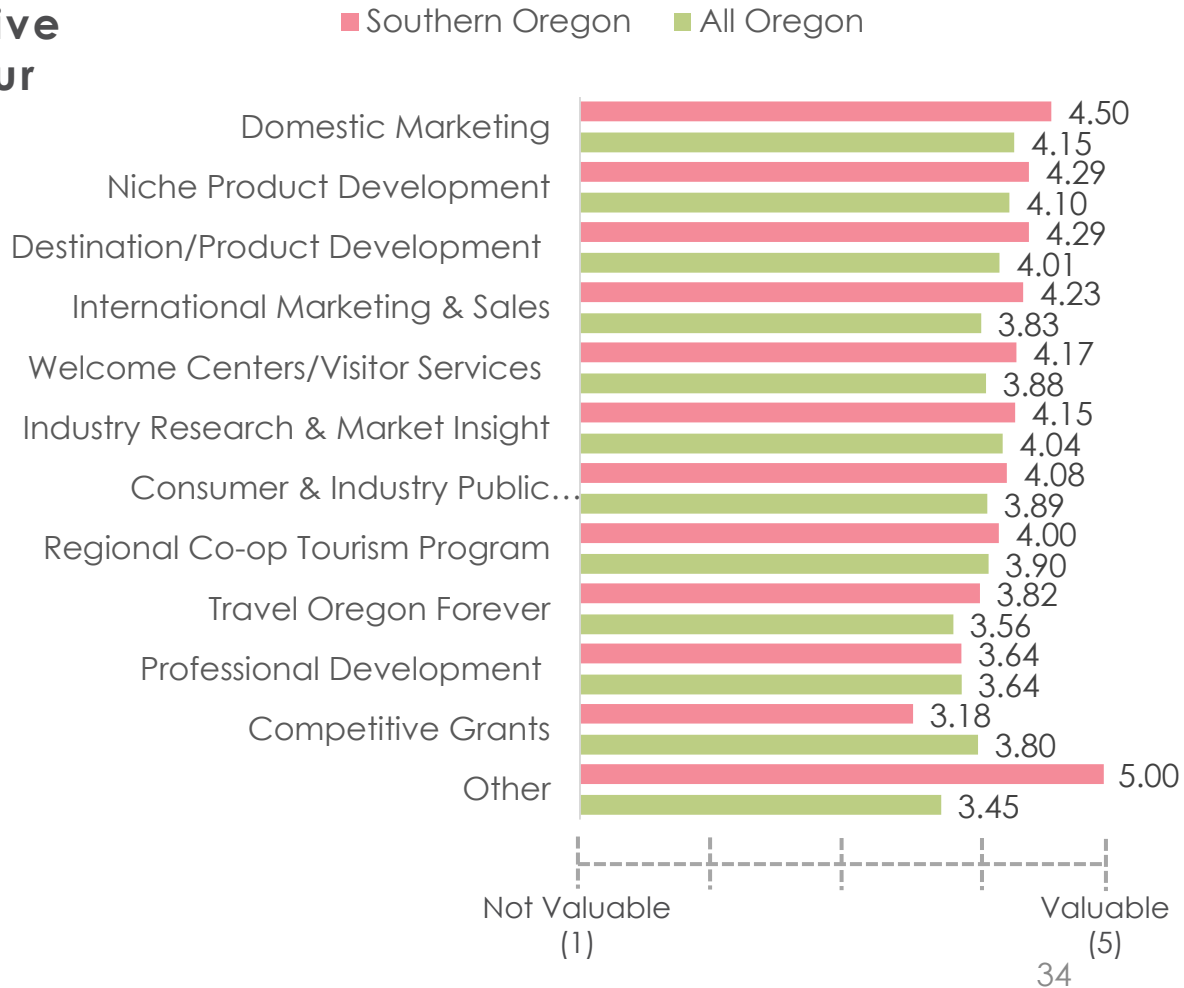
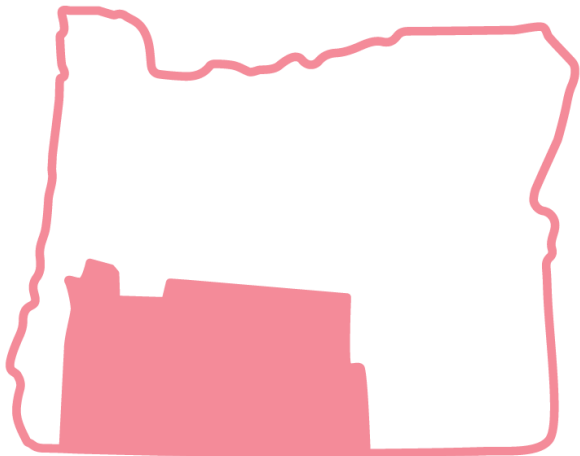
STAKEHOLDER OPINIONS OF TRAVEL OREGON

■ Southern Oregon ■ All Oregon



STAKEHOLDER OPINIONS ON THE VALUE OF TRAVEL OREGON PROGRAMS

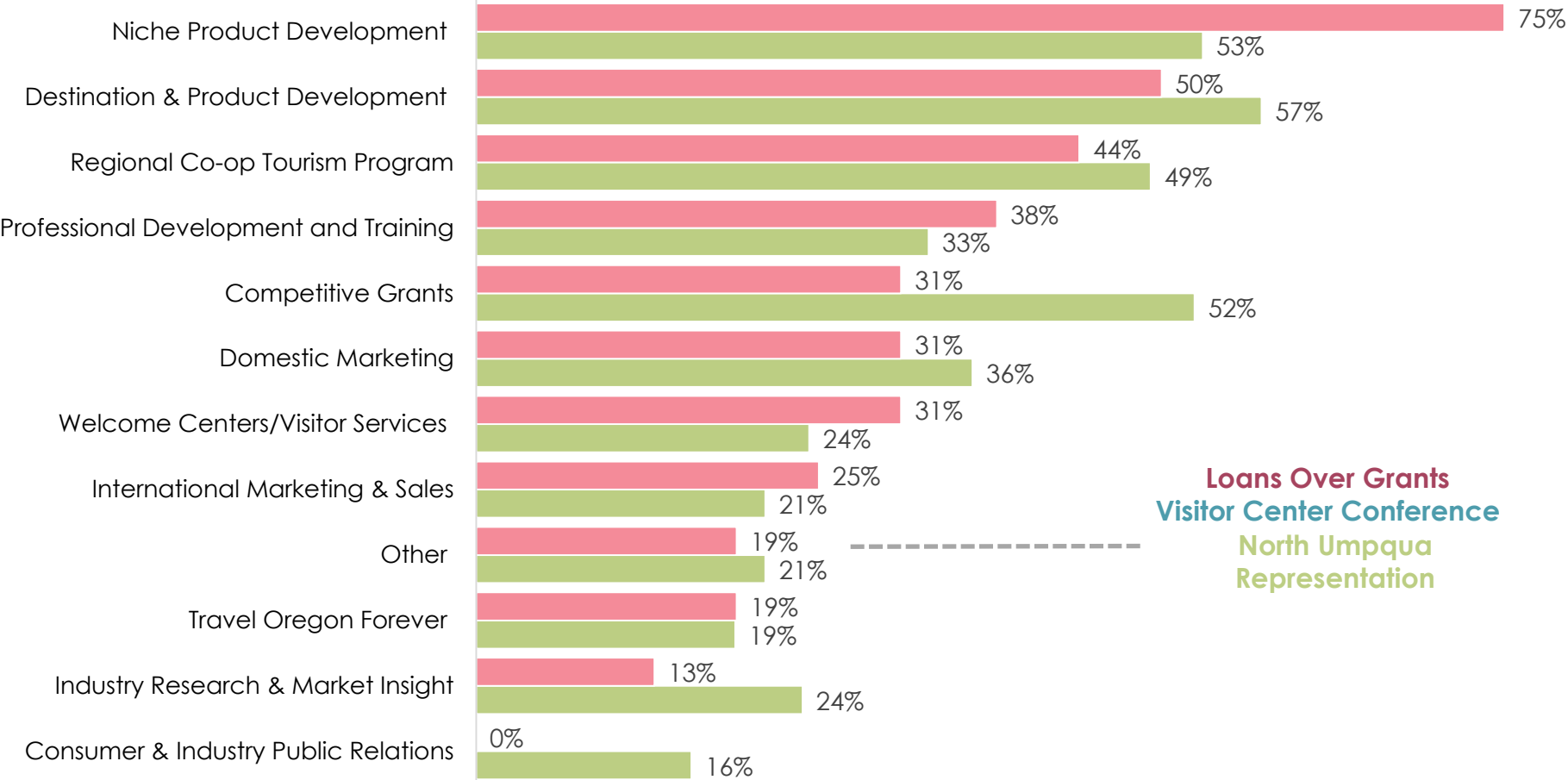
How valuable do you perceive these programs to be for your business?



NEW FUNDING EMPHASIS

With new funding, I would like to see more emphasis on...

■ Southern Oregon ■ All Oregon



Loans Over Grants
 Visitor Center Conference
 North Umpqua
 Representation

STAKEHOLDER OPEN ENDED RESPONSES

What is one thing you would like to see Travel Oregon do more of?

“Give plenty of support and direction but with more autonomy to the ODMOs and organizations and businesses served by Travel Oregon.”

“Work more closely and market more heavily the out of the way corners of the state.”

Please identify one thing you would like to see Travel Oregon do less of:

“STOP FOCUSING on just Northern Oregon. There is a LOT more to offer than just Portland, Salem and Eugene. Travelers come for our beauty, It happens in the Cascades, eastern, central and Southern Oregon TOO!!”

“Bring more workshops to all areas of the state and help those areas recognize their attributes and how to best highlight those attributes.”

STAKEHOLDER OPEN ENDED RESPONSES

What do you believe Travel Oregon offers that is most valuable to you and your business or organization?

“Regional marketing. Please remember we need more Travel Oregon presence here in Southern Oregon.”

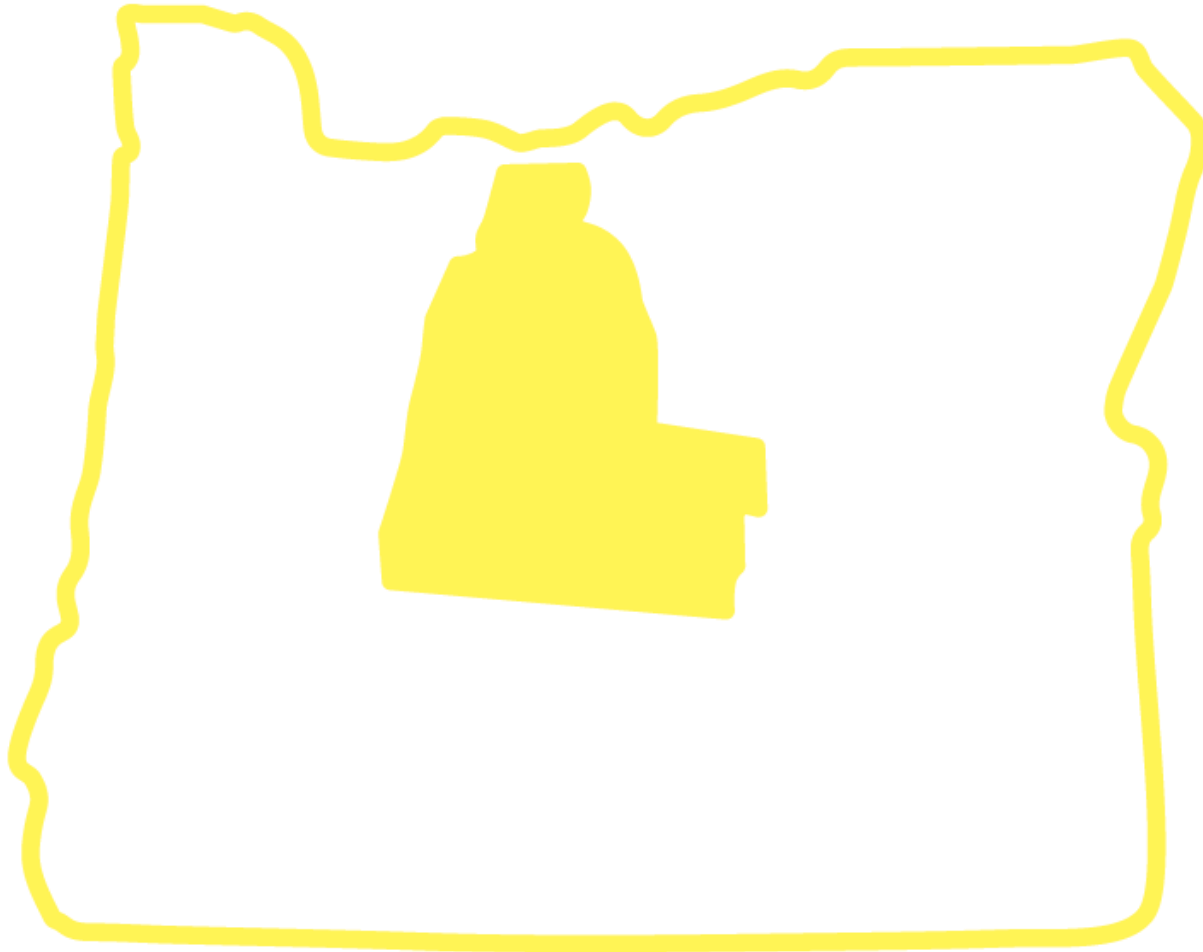
“A vision that includes the entire state and all of the communities in it, not just the individual businesses that are part of the industry.”

What is the #1 issue that the industry needs to address in order to take its next step forward?

“Recognize there are all sorts of visitors from all around the world who may be interested in visiting if they know what's available.”

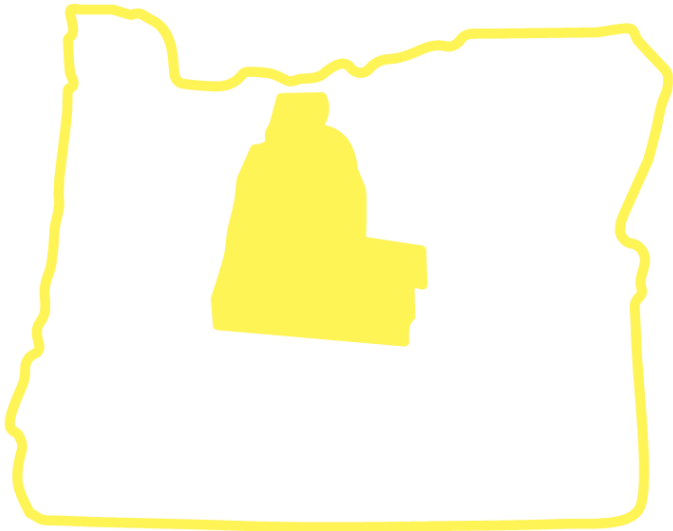
“Being sure that all areas of Oregon are assisted, especially the more economically strapped communities.”

CENTRAL OREGON



STAKEHOLDER OPINIONS OF TRAVEL OREGON

■ Central Oregon ■ All Oregon



Travel Oregon's mission/purpose is critical to a thriving Oregon tourism industry.



Travel Oregon does a good job of developing new tourism products/offering.



Travel Oregon keeps me informed of their programs, activities and achievements for our industry.



Travel Oregon involves the travel and tourism industry in key decisions that affect it.

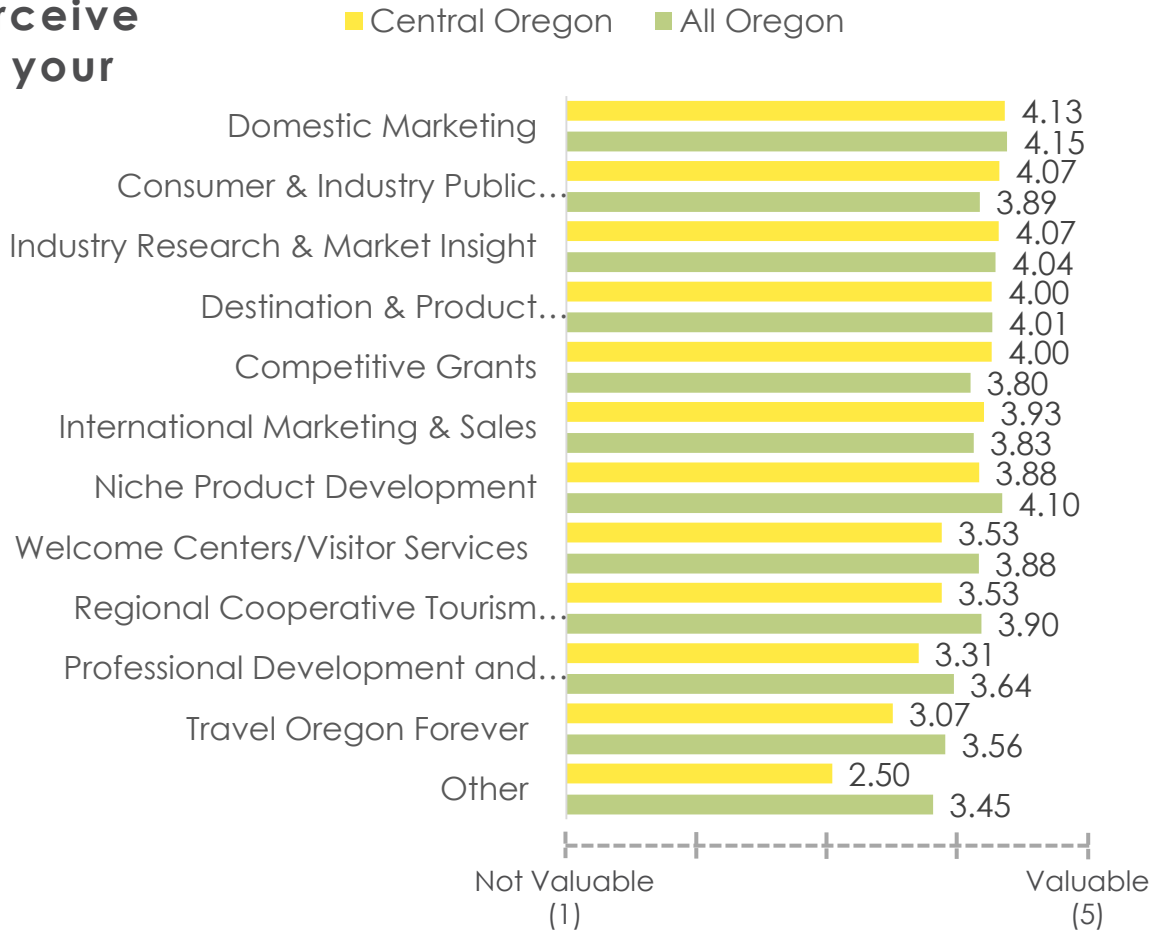
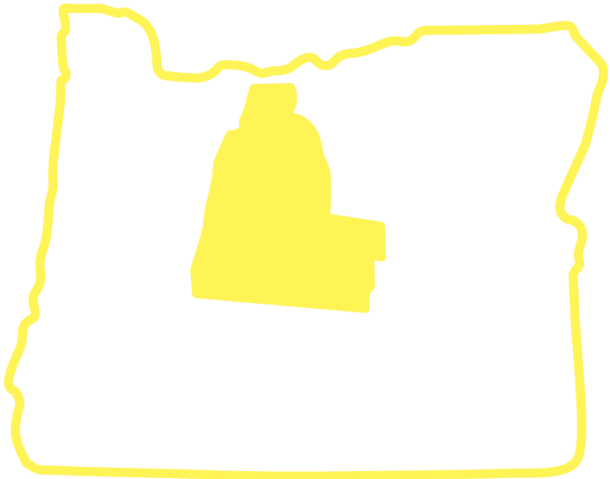


Disagree (1)

Agree (5)

STAKEHOLDER OPINIONS ON THE VALUE OF TRAVEL OREGON PROGRAMS

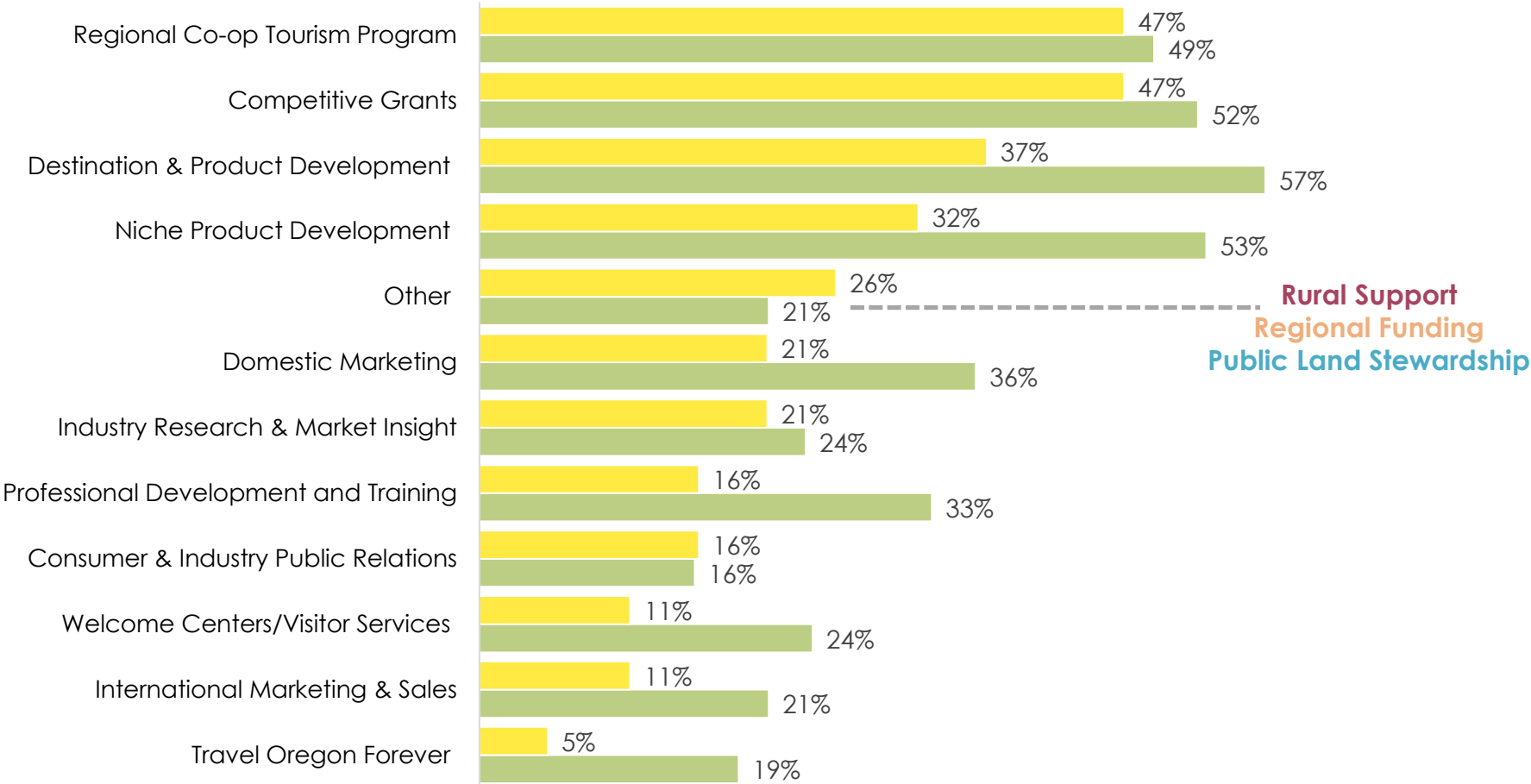
How valuable do you perceive these programs to be for your business?



NEW FUNDING EMPHASIS

With new funding, I would like to see more emphasis on...

■ Central Oregon ■ All Oregon



STAKEHOLDER OPEN ENDED RESPONSES

What is one thing you would like to see Travel Oregon do more of?

“I would like to see TO consider developing/increasing the offerings of capacity building support for rural communities. Many have great potential to develop their outdoor recreation based tourism. But many of the rural communities don't have the capacity to develop tourism in their areas.”

“Cooperative Market Research. We need more research that shows how travelers make decisions, how they buy and how they travel.”

Please identify one thing you would like to see Travel Oregon do less of:

“Creation of programs/campaigns that are challenging for the rural areas to participate due to not having the product and/or human capacity to engage.”

“Turning RDMO meetings into sales opportunities for regions to give their Travel Oregon funding right back. It's a waste of meeting time.”

STAKEHOLDER OPEN ENDED RESPONSES

What do you believe Travel Oregon offers that is most valuable to you and your business or organization?

“The marketing support for our local assets through Travel Oregon's public web pages, the grants that provide us additional resources for marketing our local areas, and other marketing efforts that drive national and international tourist to destinations all over our state.”

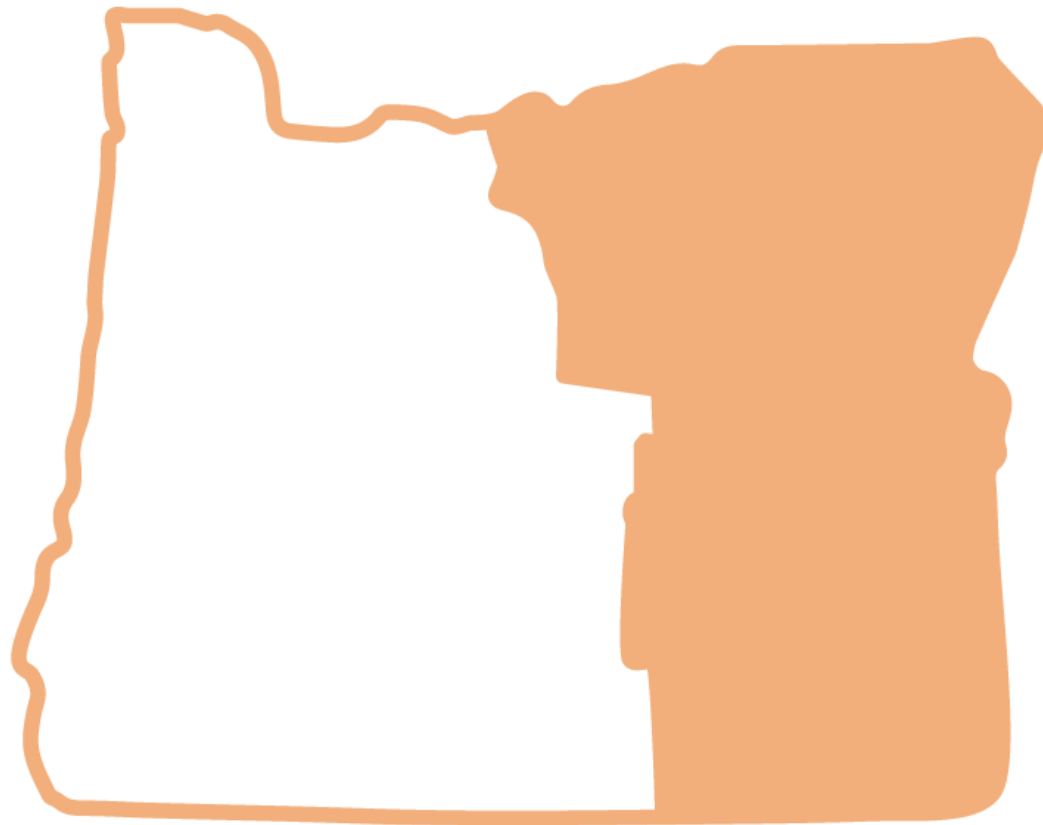
“Presentation and partnership (in-kind, sponsorship, co-sponsorship) of opportunities that are beyond our organization's capacity; helping to increase visibility and awareness of our region as a destination in multiple markets, both domestically and internationally.”

What is the #1 issue that the industry needs to address in order to take its next step forward?

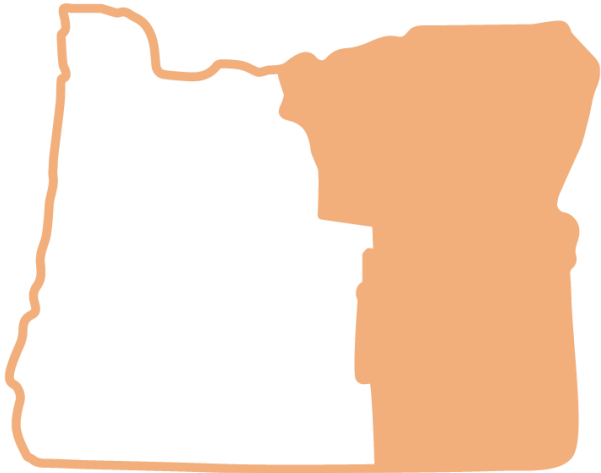
“Bridging the urban/rural divide. As a business owner in a small, rural, central Oregon town, we are constantly stand-outs in the tourism industry and our communities trying to bridge this divide. Oregon is rural and rural Oregon wants the tourism commodity, but both sectors need to be able to play nicely together.”

“Unity / shared vision. Travel Oregon was once the national leader and model for collaborative tourism development. That has deteriorated significantly in the past year as has industry trust, in direct correlation to the Regional Investment and Statewide lodging tax initiatives. Great intent, poor execution.”

EASTERN OREGON



STAKEHOLDER OPINIONS OF TRAVEL OREGON



■ Eastern Oregon ■ All Oregon

Travel Oregon is a leading voice for Oregon's statewide tourism industry.



Travel Oregon raises the awareness of Oregon in domestic markets.



Travel Oregon coordinates and cooperates well with stakeholders in Oregon.



Travel Oregon involves the travel and tourism industry in key decisions that affect it.

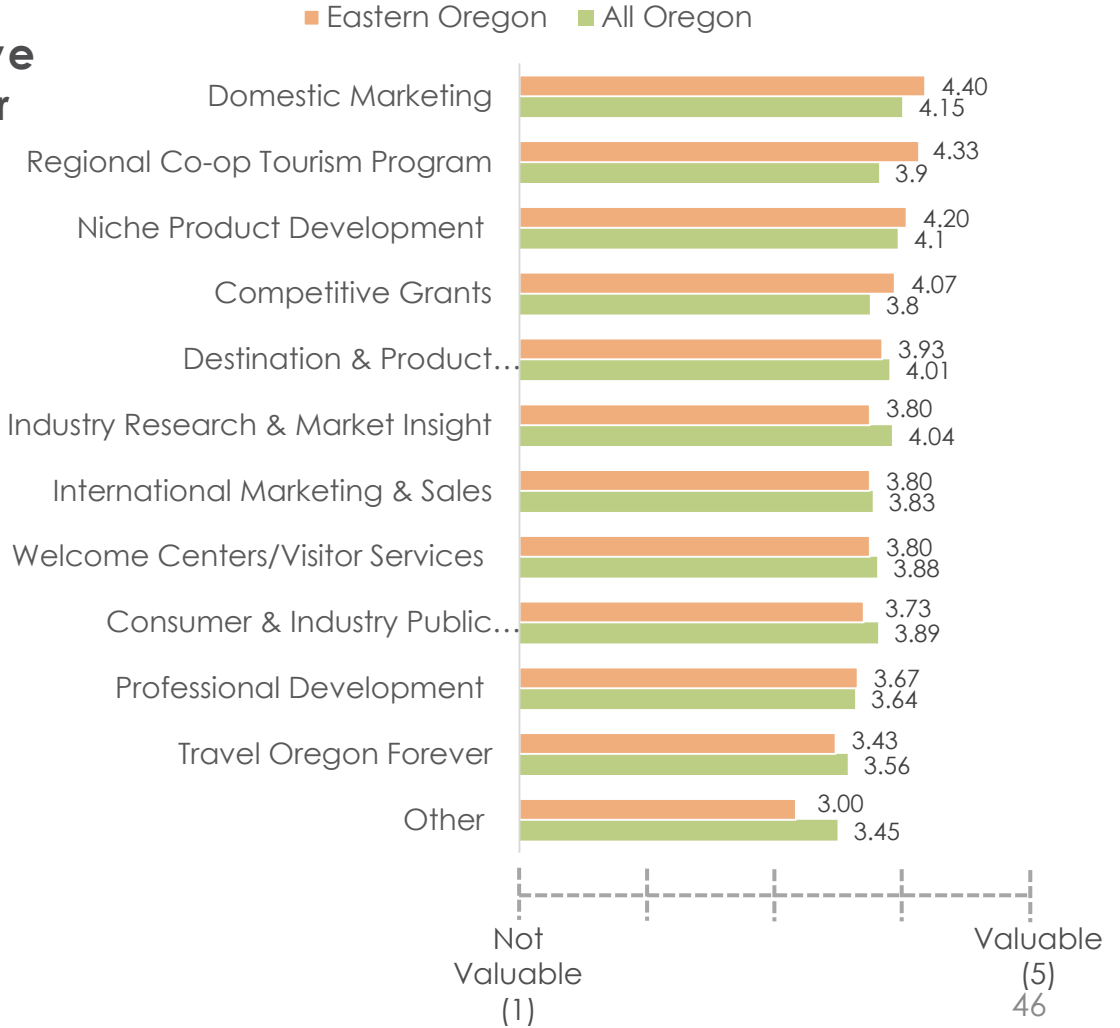
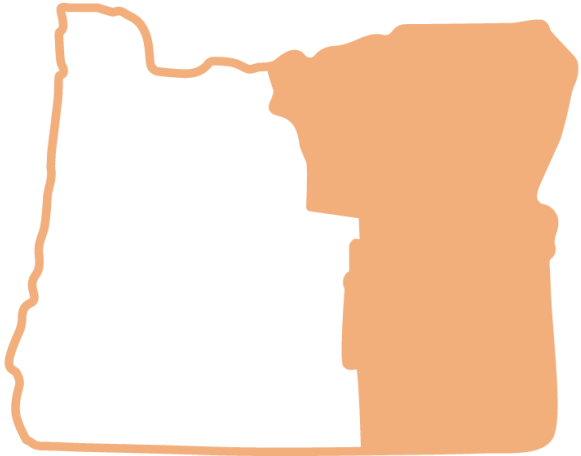


Disagree (1)

Agree (5)

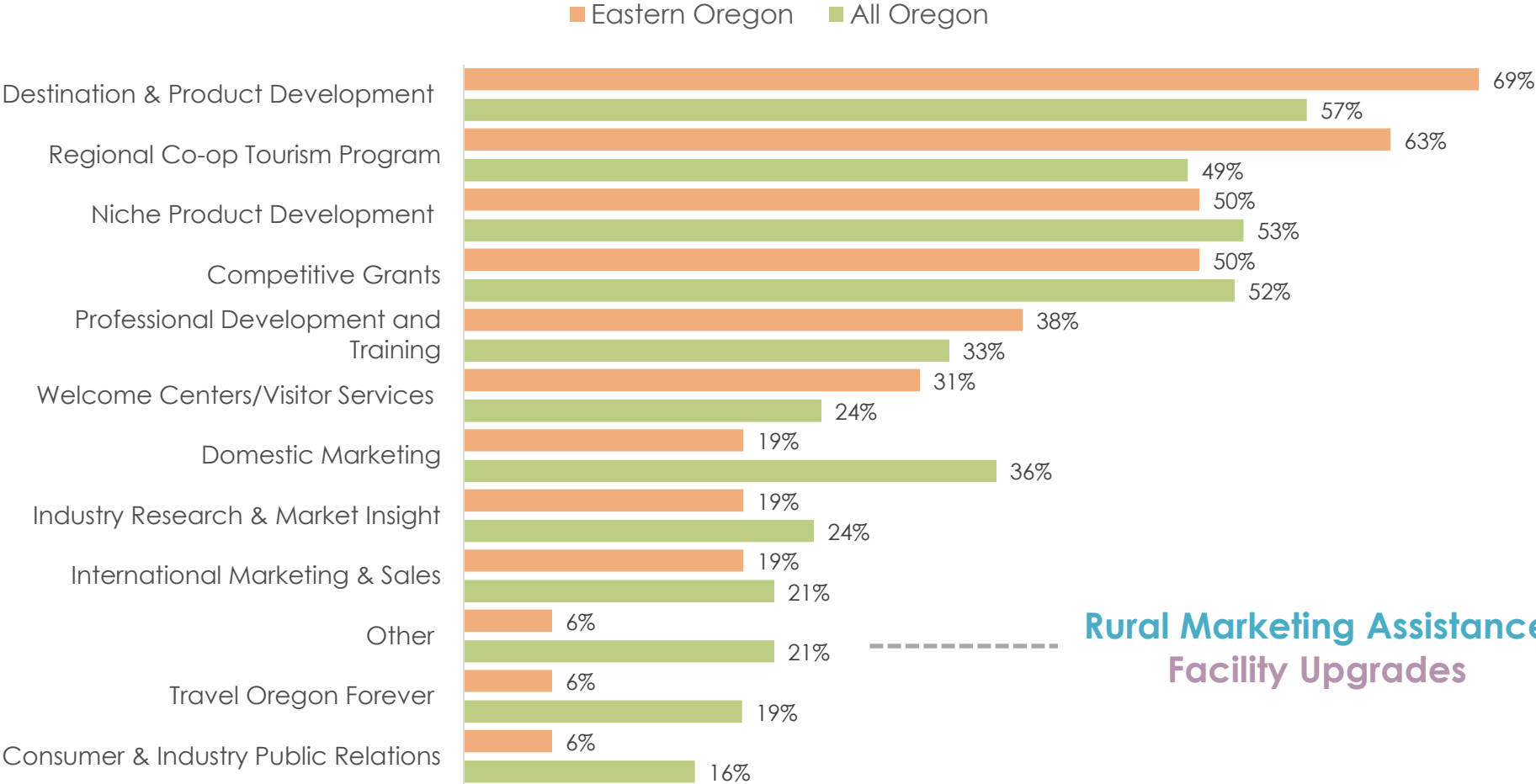
STAKEHOLDER OPINIONS ON THE VALUE OF TRAVEL OREGON PROGRAMS

How valuable do you perceive these programs to be for your business?



NEW FUNDING EMPHASIS

With new funding, I would like to see more emphasis on...



STAKEHOLDER OPEN ENDED RESPONSES

What is one thing you would like to see Travel Oregon do more of?

“Work more collaboratively with industry partners with an increase focus on input rather than feedback after the fact.”

“Continue the 7 wonder marketing and new successful marketing programs that put Oregon on the map. Our community has no tourism dollars for promoting. It would be nice to be able to promote this area. I would like funding for a brochure.”

Please identify one thing you would like to see Travel Oregon do less of:

“It is difficult to say since you never come our way.”

“Pay to play opportunities where the cost to buy in is cost prohibitive for any but the largest DMOs. These kinds of coop opportunities do little more than confirm just how out of touch TO is with non Portland Metro Oregon.”

STAKEHOLDER OPEN ENDED RESPONSES

What do you believe Travel Oregon offers that is most valuable to you and your business or organization?

“The Regional Partnerships program and the recent reallocation of regional funds. Representation at the RDMO level is sometimes the only engagement with Travel Oregon for many of our smaller industry partners.”

“Travel Oregon offers our community a place to find information in print form about Oregon that they can't find anywhere else other than on the web. We love running the welcome center here in Umatilla and hope to continue this partnership for many years to come.”

What is the #1 issue that the industry needs to address in order to take its next step forward?

“Address saturation points, local pulse on tourism promotion, reallocating resources to areas that have underutilization of their region tourism assets.”

“It's important that the whole state be engaged and supported, not just those regions with the most lodging properties.”

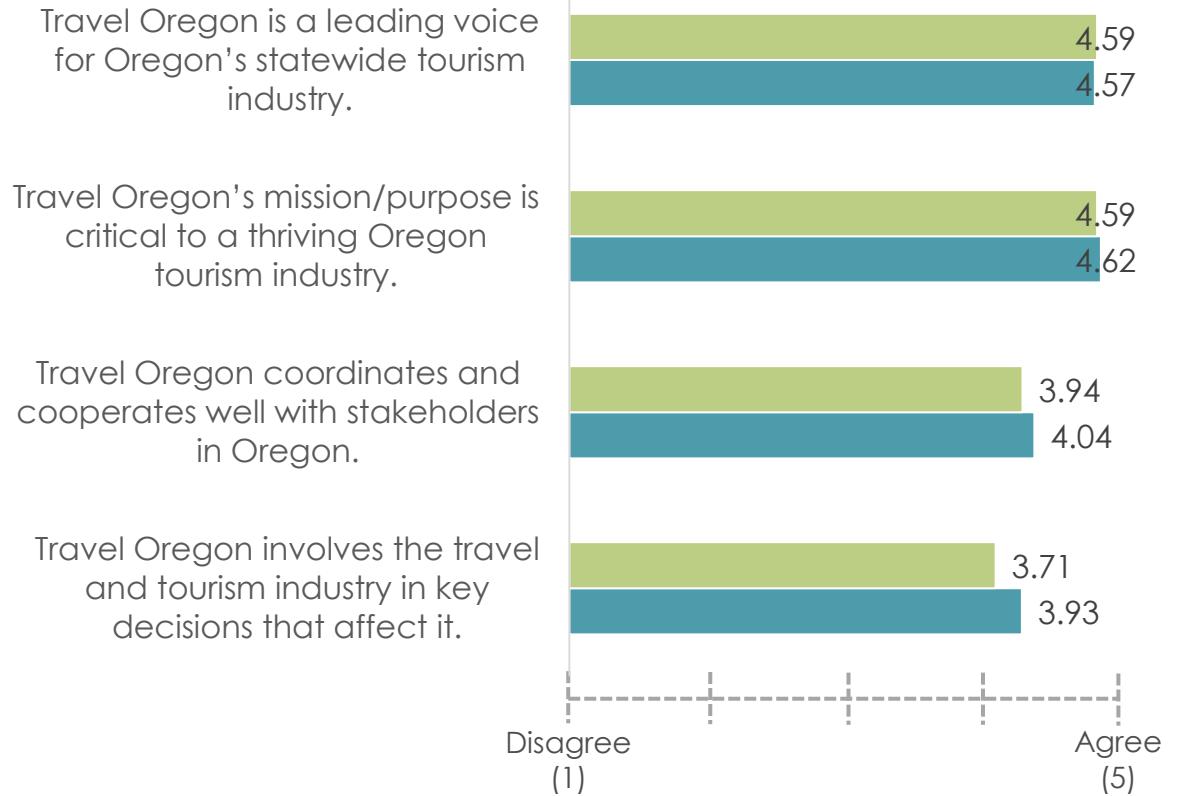
MT. HOOD/GORGE



STAKEHOLDER OPINIONS OF TRAVEL OREGON



■ Mt. Hood/Gorge ■ All Oregon

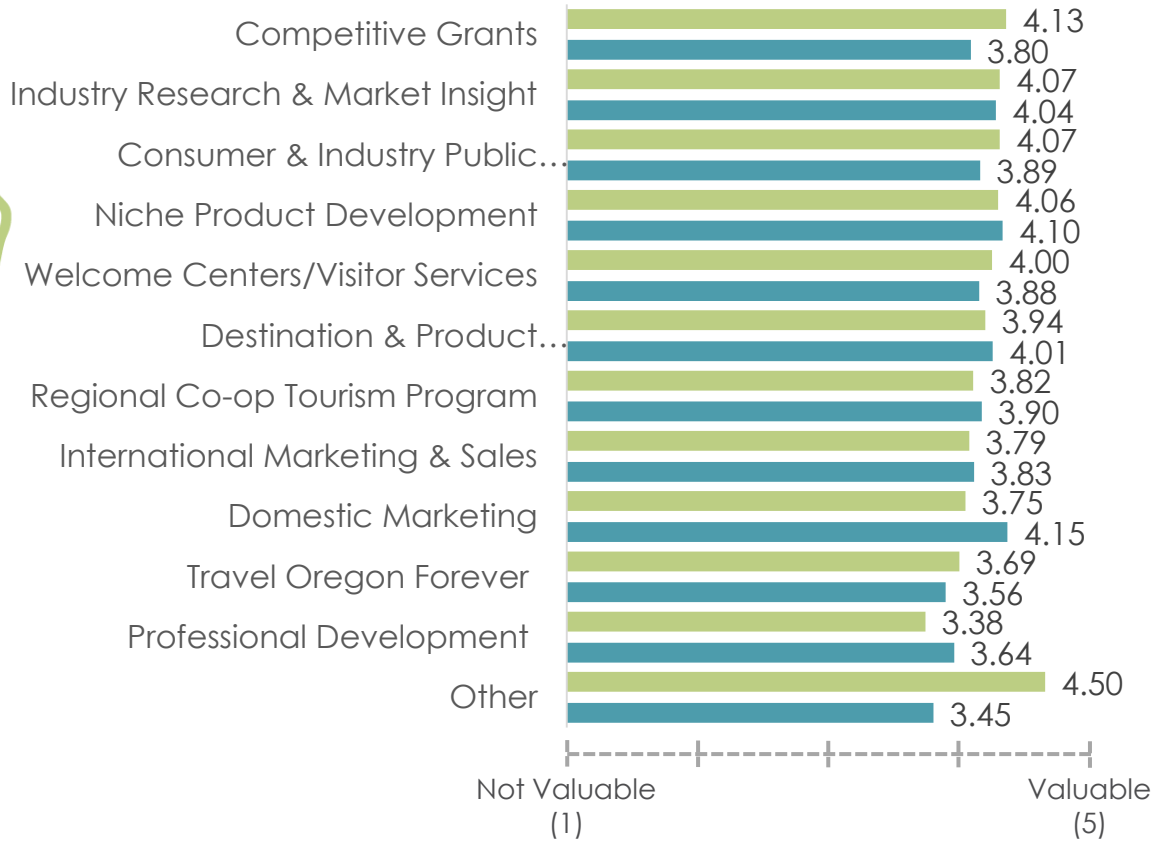


STAKEHOLDER OPINIONS ON THE VALUE OF TRAVEL OREGON PROGRAMS

How valuable do you perceive these programs to be for your business?

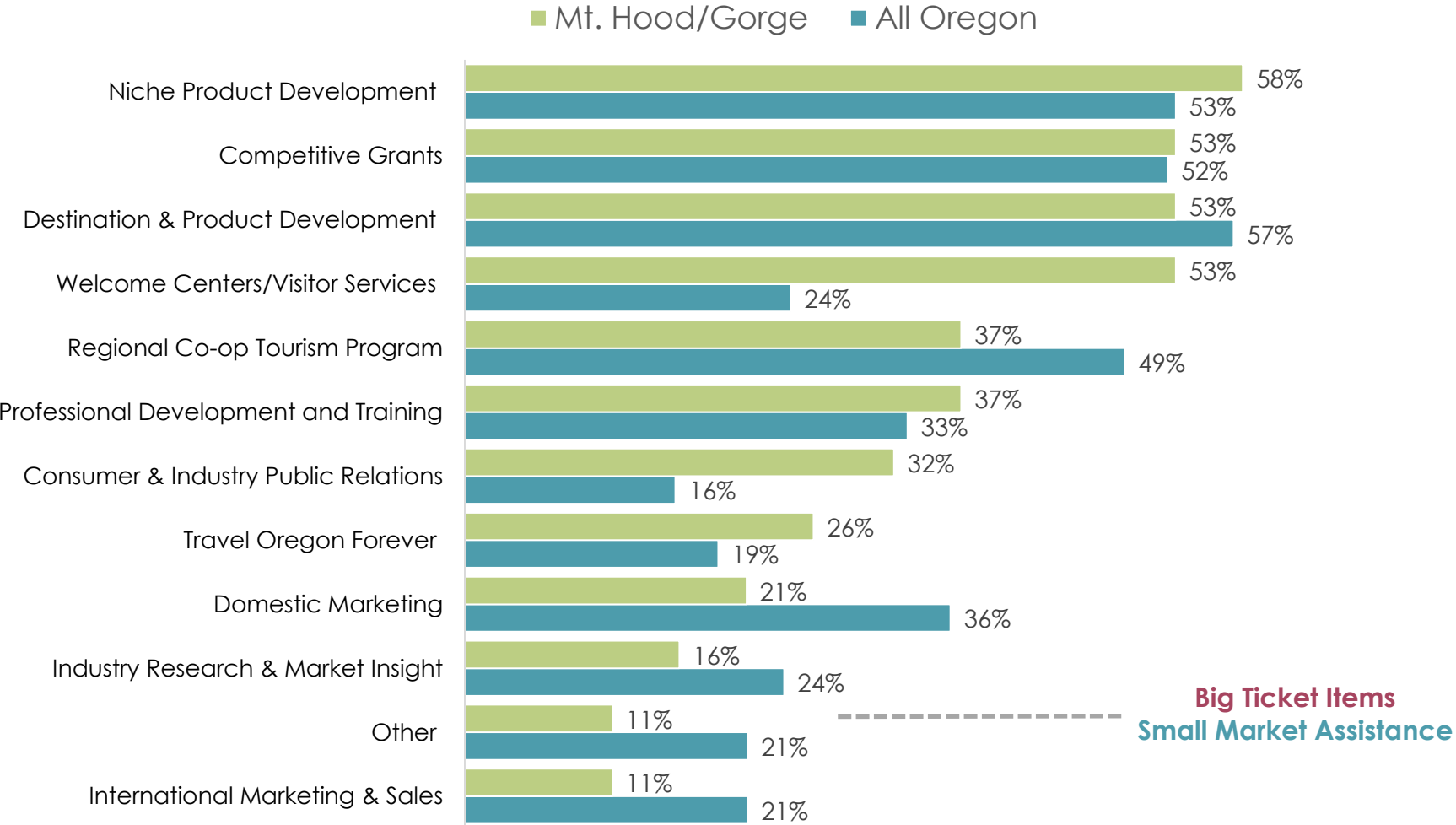


■ Mt. Hood/Gorge ■ All Oregon



NEW FUNDING EMPHASIS

With new funding, I would like to see more emphasis on...



STAKEHOLDER OPEN ENDED RESPONSES

What is one thing you would like to see Travel Oregon do more of?

“Hands-on programs like the Tourism Studio, currently running. For many small businesses this is a unique professional learning opportunity and a great networking opportunity. Other: continue promoting Oregon internationally.”

“Help communities find creative ways to leverage tourism dollars to improve the very resources that attract people to Oregon. I think Forever Oregon is not very well known and there's a lot of opportunity to expand the reach and impact of that program.”

Please identify one thing you would like to see Travel Oregon do less of:

“Do not emphasize just the top tourist attractions, lodging and locations. Showcase more of the smaller businesses and smaller regional attractions. We could be known as a state with 700 wonders sprinkled around the state with all kinds of secrets and surprises.”

“Use the term Oregon Wine Country and only talk about Willamette wines. It is one of the biggest battles wineries in the rest of the state have to fight. We are in the Gorge, but there are wineries in Southern Oregon and other locations too. The Columbia Gorge Winegrowers Association received a grant from you to create trips like you have on your website, but do you have them on your website? NO.”

STAKEHOLDER OPEN ENDED RESPONSES

What do you believe Travel Oregon offers that is most valuable to you and your business or organization?

“Helping small communities in the Gorge to develop better facilities to encourage overnight stays. In the long run, it would be great to be able to host national and international tourists and provide multi-day packages for hikers and bicyclists (accommodations, food and beverage, shuttle service, baggage forwarding).”

“Very valuable to have TO organize fam tours, be the machine for international marketing and some of the big domestic marketing. The marketing campaigns have been very successful and very Oregon. Keep up the great work in that respect. Also really appreciate the destination and niche development. Funding the RDMO at a higher level this year so that some additional work could get done.”

What is the #1 issue that the industry needs to address in order to take its next step forward?

“Caring for and not overlooking 'iconic' tourism assets. Re-focus on the things that have brought tourists here for hundreds of years, not just what is shiny, new, and trendy.”

“My region has highlighted transportation issues (congestion and parking) as the big challenge to tackle. Vehicle traffic affects safety, livability, and one of our main industries - agri-tourism.”

THANK YOU