

2018 OREGON TOURISM ENGAGEMENT SURVEY

CENTRAL OREGON

This report summarizes findings from a 2018 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. Findings are presented for respondents from Central Oregon with additional statewide results for context.

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SURVEY GOALS

The 2018 Oregon Tourism Engagement Survey was designed on behalf of Travel Oregon and regional tourism partners to elicit feedback from individuals and organizations linked to the tourism industry. The goal of the study was to obtain feedback and direction for Regional Destination Management Organizations (RDMOs). The survey built on a framework of past stakeholder surveys and was developed collaboratively by Driftline Consulting, Travel Oregon, and RDMOs.

METHODOLOGY

The survey was conducted online and was distributed in September and October 2018 via emails and an open URL to Travel Oregon databases with additional distribution from RDMOs. A total of 1,512 valid responses were collected. Results presented in this report are segmented by the region in which the respondent indicated they live or work. That is, this report aggregates responses from Central Oregon to provide relevant insights to the Central Oregon RDMO. Where applicable, regional results are compared to an average of Oregon's seven regions. In addition, questions were asked in a way (prioritization ratings) that enables comparisons across tactical opportunity categories. The terms respondent and stakeholder are used interchangeably.

SIGNIFICANCE

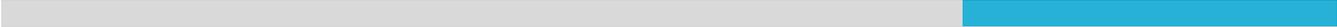
Because this survey was not conducted from a random sample it is not appropriate to perform typical statistical tests on the data. Therefore, confidence bands are not presented. The survey results should be viewed as an aggregation of relevant and thoughtful feedback from constituents. The applicability 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.

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KEY FINDINGS

- **High levels of engagement with the Oregon Tourism industry:** A greater percentage of Central Oregon respondents indicated that they agree or strongly agree with the statement, “I am engaged with the Oregon tourism industry” relative to the state-wide average. A smaller share, though still greater than the statewide average, indicated agreement with the statement, “I understand the Oregon tourism partnering structure.”
- **Satisfied with the Direction of Tourism in Central Oregon:** Respondents from Central Oregon indicated high overall satisfaction with the direction of tourism in their region, with 65% indicating they “agree” or “strongly agree” with the statement, “Overall I am satisfied with the direction the tourism industry is headed in my region” (page 4).
- **Concern about Overcrowding and Distribution of Tourism:** In open-ended comments about the overall health of the tourism industry in Central Oregon, increasing off-season visitation and sustainability were top themes. As in 2017, concerns about overuse and overcrowding were also prevalent. A related concern was that the tourism promotion is too focused on Bend and Sunriver and that work needs to be done to draw visitors out from areas which are highly trafficked to outlying parts of the region.
- **Above Average Familiarity with the RDMO:** Stakeholders in Central Oregon expressed that they were somewhat or very familiar by the RDMO in the past 12 months in percentages higher than elsewhere in the state.
- **Highest Priorities Are Identified in Destination Development:** Across all categories, only three tactics were identified as a “high priority” or a “very high priority” by over two thirds of respondents from Central Oregon, and all three are related to destination development: increase visitation to the region during off-peak seasons (planning and management), develop/improve infrastructure for visitors to experience outdoor recreation and nature-based tourism (product development), and educate community leaders and policymakers on the value of tourism and its viability as a long-term career. (pages 8 and 9).
- **Product Development and Air Service Revenue Bank Evaluated:** In the Central Oregon custom questions, stakeholders were asked to prioritize “investments in rural communities to support real-time visitor information for public land assets” and “preparations for commercial air service reduction and development via Revenue Guarantee Travel Bank.” As in 2017, there was higher prioritization for the investments in real-time visitor information (page 12).
- **Satisfaction with Direction of Tourism is High, though Directly Tracking Business from COVA Efforts is Relatively Low:** In the Central Oregon custom questions, stakeholders evaluated their satisfaction with COVA and their engagement with COVA. Matching findings from the beginning of the survey, 61% of respondents (vs. 67% in 2017) indicated they “agreed” or “strongly agreed” that they were satisfied with the direction of tourism in Central Oregon – while a slightly lower percentage, 52% (vs. 55% in 2017) “agreed or “strongly agreed” that they

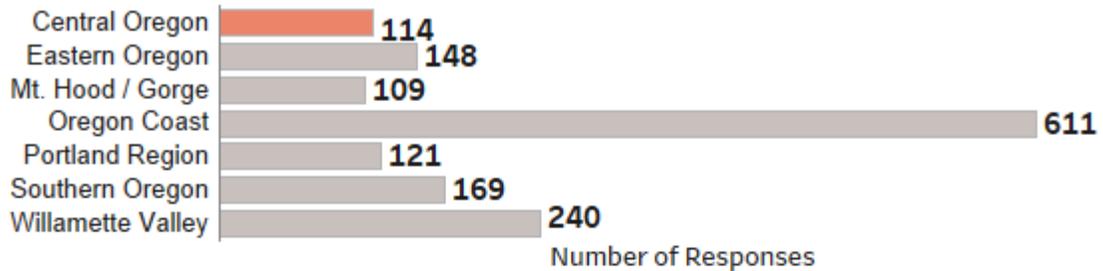


were satisfied with the past efforts of COVA. Interestingly, and despite relatively high levels of satisfaction, a majority (51% vs 55% in 2017) indicated that their entity had not directly tracked business as a result of COVA marketing efforts (page 13).

RESPONDENT PROFILE

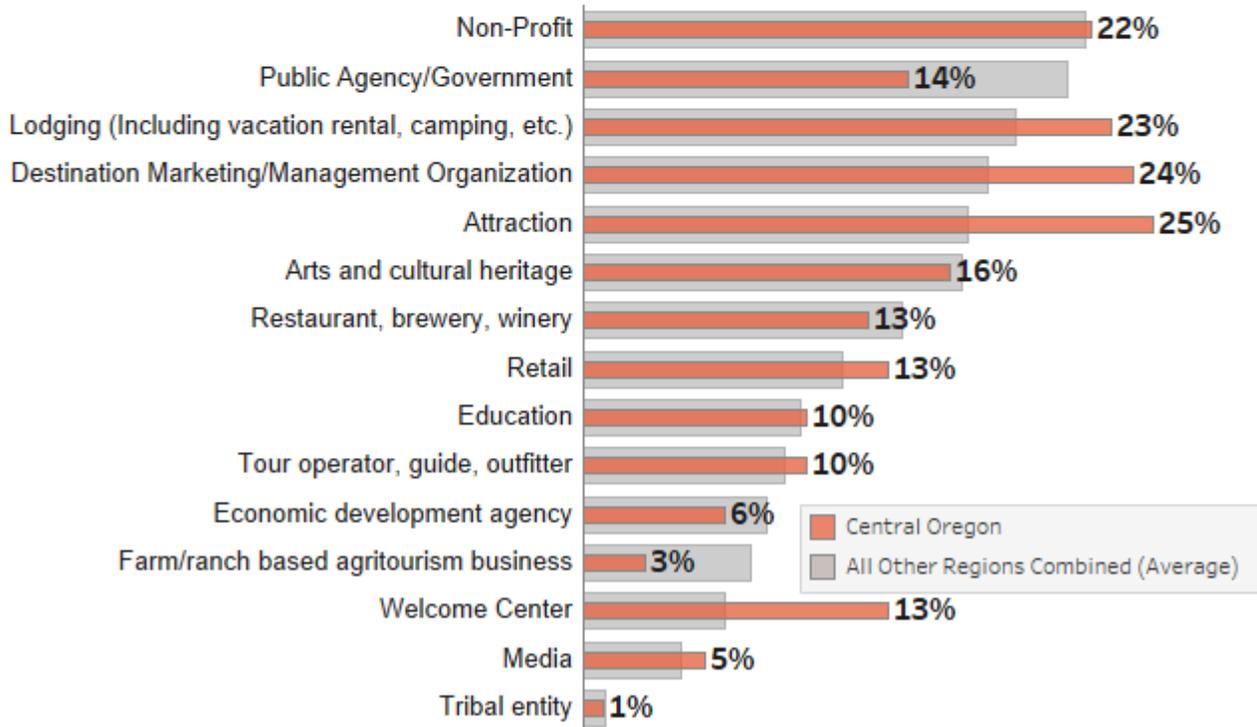
The figures below present the overall number of respondents as well as the industries in which respondents work. The question for Organization Type was a multiple response question, allowing respondents to select more than one industry or organization type. Thus, percentages will not sum to 100%. Relative to other regions, respondents from Central Oregon were more likely to be in “Attraction” (+8%) or “Welcome Center” (+7%), and less likely to be in “Public Agency/Government” (-7%) or a “Farm/ranch based agritourism business” (-5%). Additional details can be found in the figures below.

Number of Respondents



Organization Type

Q: Please indicate the sector of the tourism industry in which you work by checking all that apply:

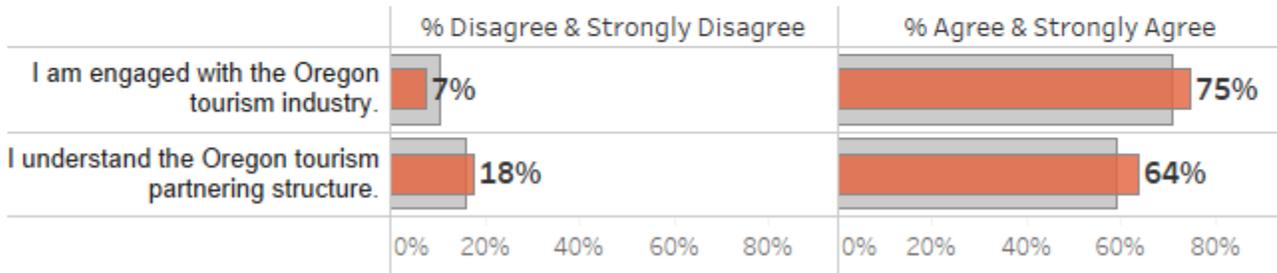


TOURISM INDUSTRY ENGAGEMENT AND OVERALL HEALTH

Respondents from Central Oregon indicate high levels of industry engagement. Relative to the rest of the state, respondents are more engaged with the industry (+4% agree or strongly agree) and better understand the partnering structure (+5% agree or strongly agree).

Industry Engagement

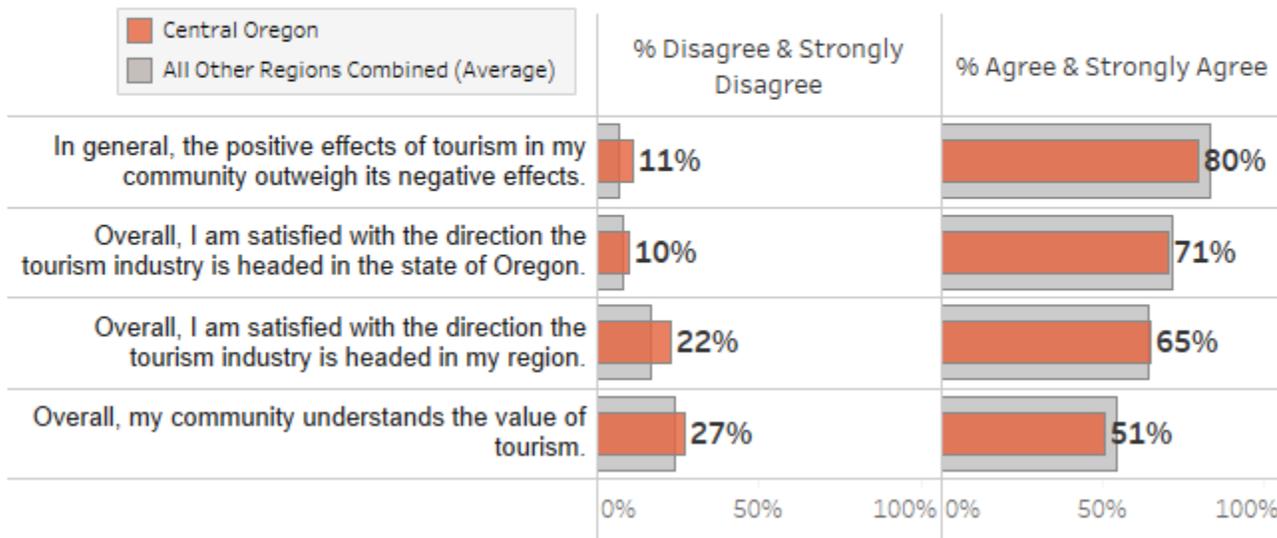
Q: Please indicate the level to which you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



On measures of overall industry health, respondents from Central Oregon indicate high levels of satisfaction. Relative to the rest of the state, however, they are slightly more pessimistic about the direction of tourism, with a higher percentage of respondents indicating “Disagree” or “Strongly Disagree” in each category. As in the rest of the state, respondents are most in agreement that the positive effects of tourism outweigh its negative effects, and they are least in agreement that their community understands the value of tourism.

Overall Health of the Tourism Industry

Q: Please indicate the level to which you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.

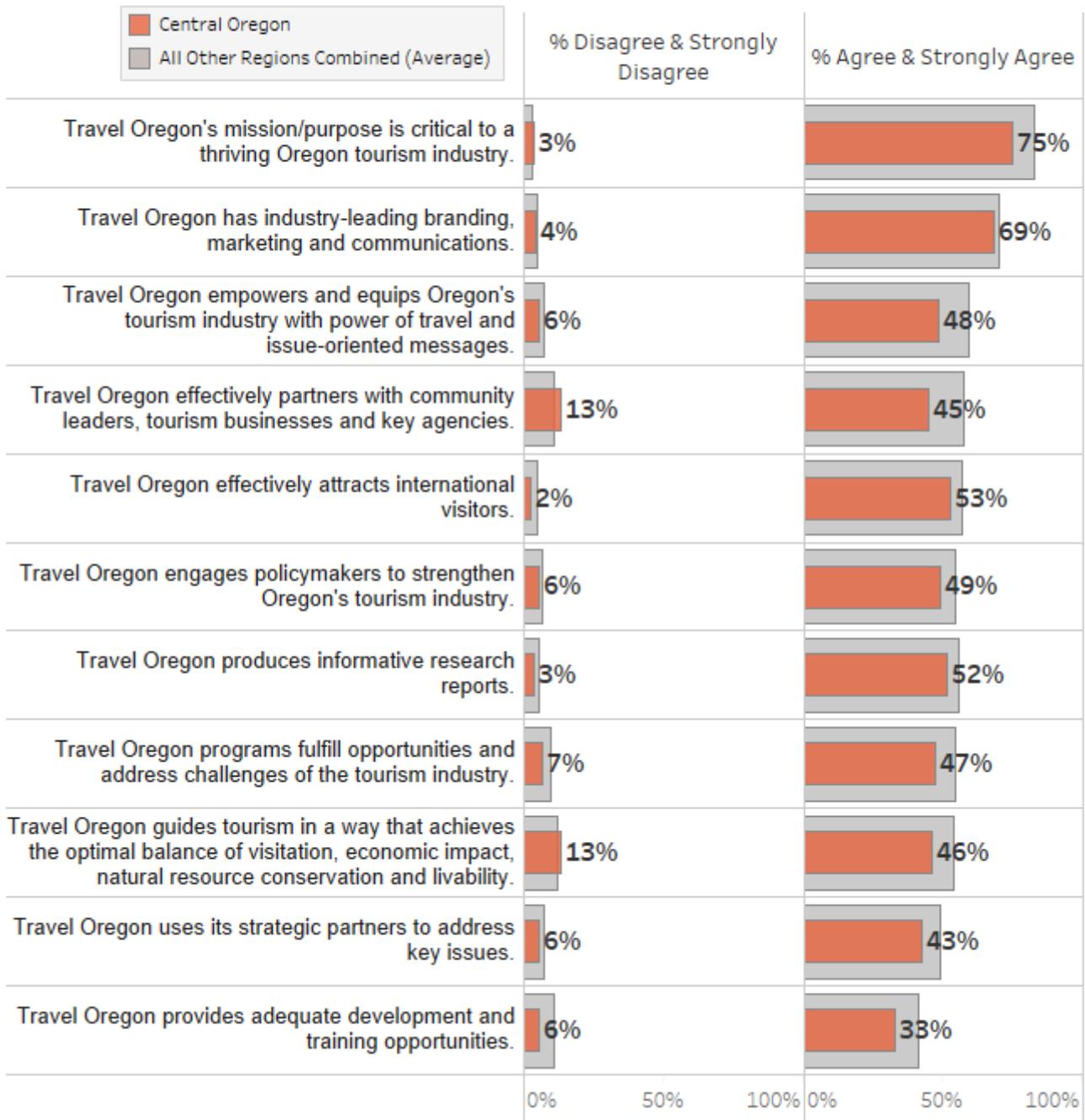


TRAVEL OREGON PERFORMANCE

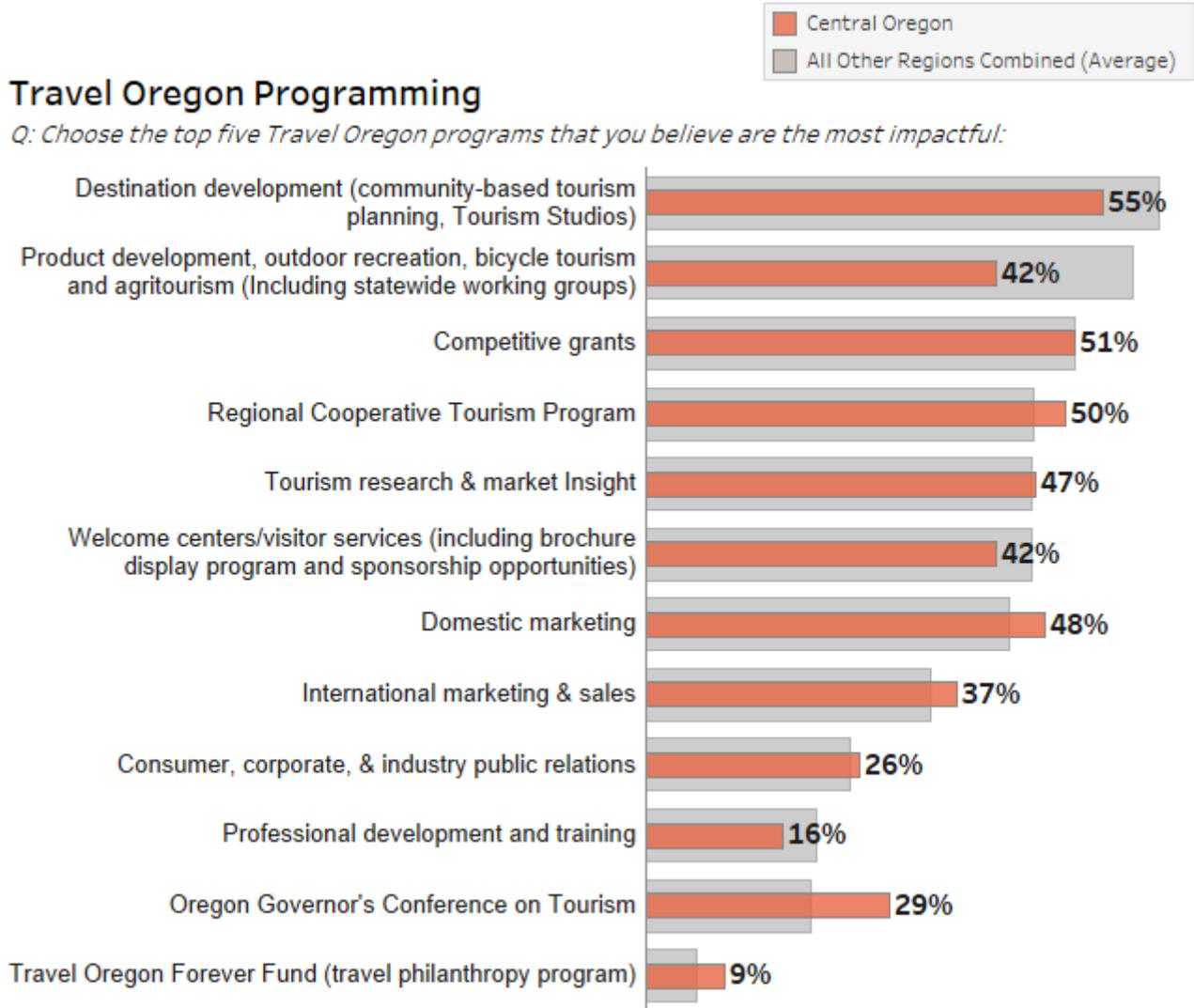
On measures of Travel Oregon performance, there is broad consensus that Travel Oregon's mission/purpose is critical to a thriving Oregon tourism industry, and that Travel Oregon has industry-leading branding, marketing and communications. There least amount of agreement about whether Travel Oregon provides adequate development and training opportunities. For each statement, respondents from Central Oregon were less likely to agree or strongly agree.

Travel Oregon Performance

Q: To what extent do you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



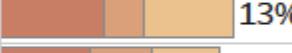
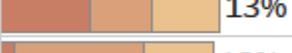
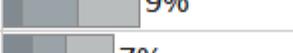
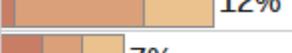
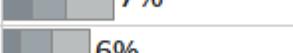
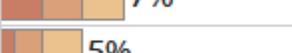
Overall, “Destination Development” was most cited among the top-five most impactful Travel Oregon programs, followed by “Product development, outdoor recreation, bicycle tourism and agritourism.” Respondents from Central Oregon were more likely to cite the “Oregon Governor’s Conference on Tourism” (+9%) and less likely to cite “Product development, outdoor recreation, bicycle tourism and agritourism” (-16%).



Looking ahead to 2019-2021 planning, 16% of Central Oregon respondents indicated Marketing and Promotion as a first, second, or third highest priority. The same percentage chose Destination Development & Management among their three highest priorities. The rank order of priorities for Central Oregon is the same as the statewide average.

Statewide Desired Tourism Priorities & Focus Areas

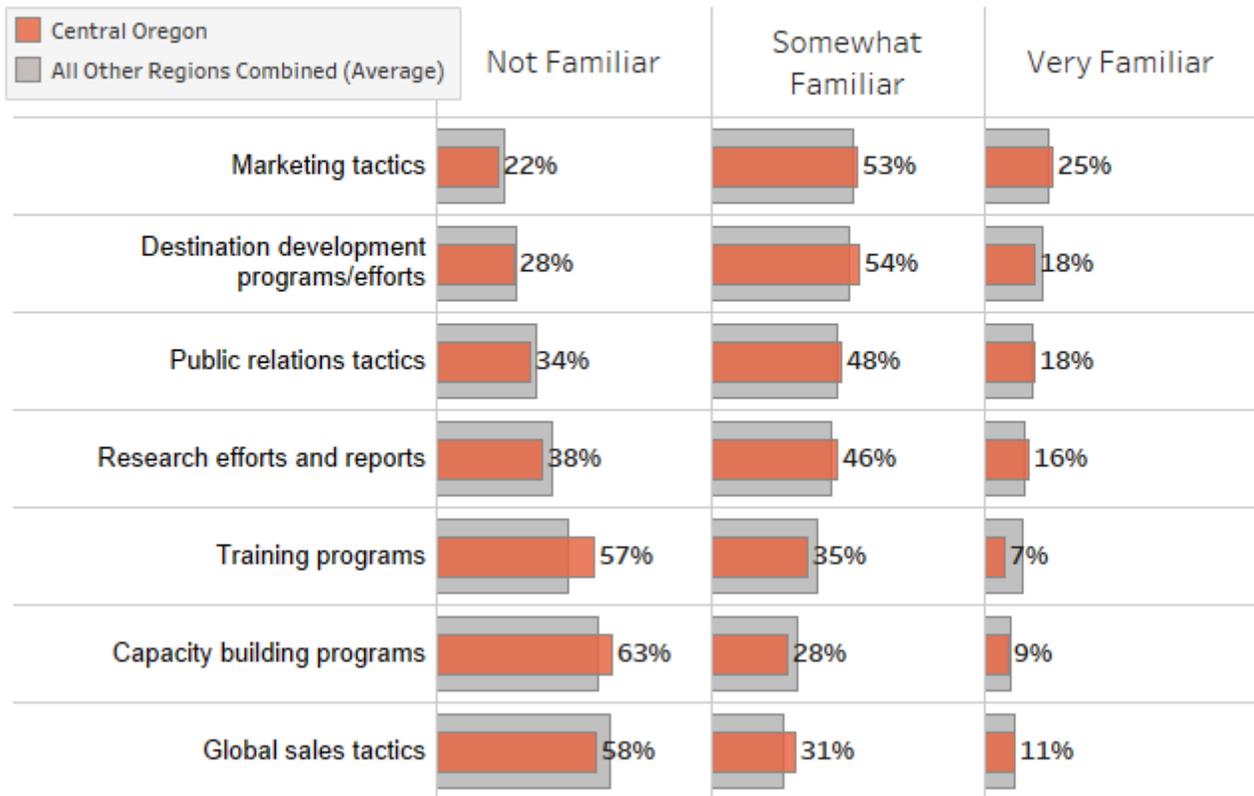
Q: Given limited resources, what three priority areas do you believe are most important for 2019-2021 tourism planning?

	All Other Regions Combined (First, Second, Third Priority)	Region (First, Second, Third Priority)
Marketing and Promotion	 19%	 16%
Destination Development & Management	 18%	 16%
Funding & Grants	 14%	 14%
Infrastructure & Transportation	 13%	 13%
Stakeholder Engagement & Collaboration	 12%	 13%
Tourism research & market Insight	 9%	 12%
Workforce & Training	 7%	 7%
Product Development	 6%	 5%
Other (describe below)	 2%	 3%

Respondents were asked to indicate their familiarity with regional initiatives engaged in by the RDMO over the past 12 months. Respondents, both overall and in Central Oregon, were most familiar with the marketing tactics of the RDMO. This result may be a reflection of the priorities of the RDMO or it may reflect the priorities of the constituents. Additionally, future investments in capacity building, global sales, and training programs are likely to need additional communication and outreach efforts in order to be better recognized and understood by stakeholders.

Familiarity with Initiatives

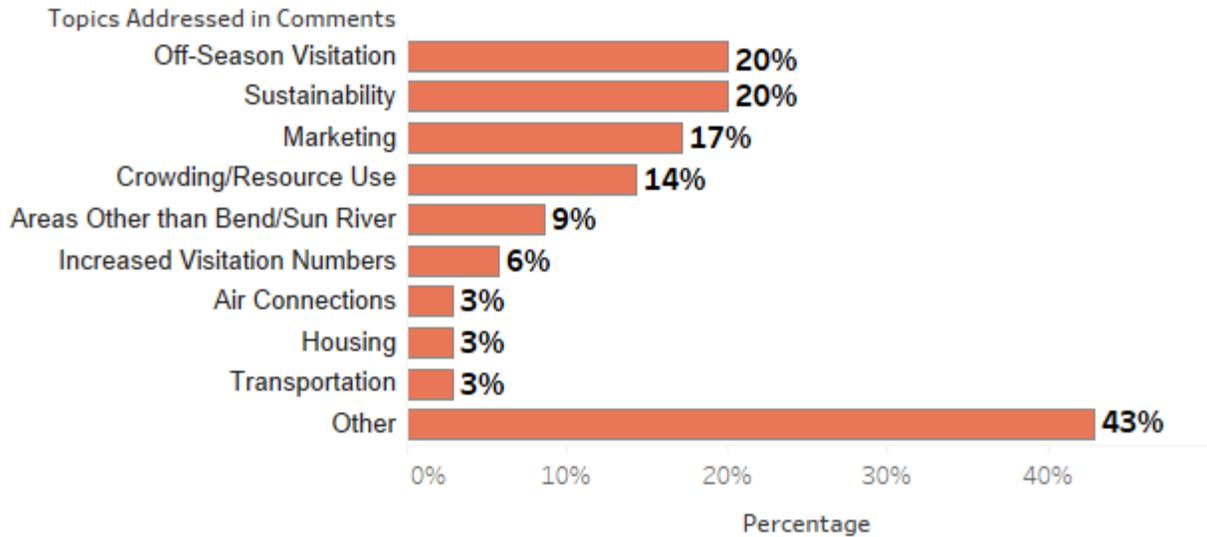
Q: Please indicate how familiar you are with the initiatives undertaken by your regional destination management organization in the following areas in the past 12 months:



Repondents were also asked to describe a specific outcome they would like their region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of the destination. The table below summarizes the comments (presented in their entirety in the appendix). Increasing off-season demand and encouraging more visitors to move from overburdened areas to lesser visited parts of the region was a desire commonly expressed by stakeholders. Sustainability was also a common theme.

Open-Ended Regional Goals: Comments Categorized for Analysis

Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.

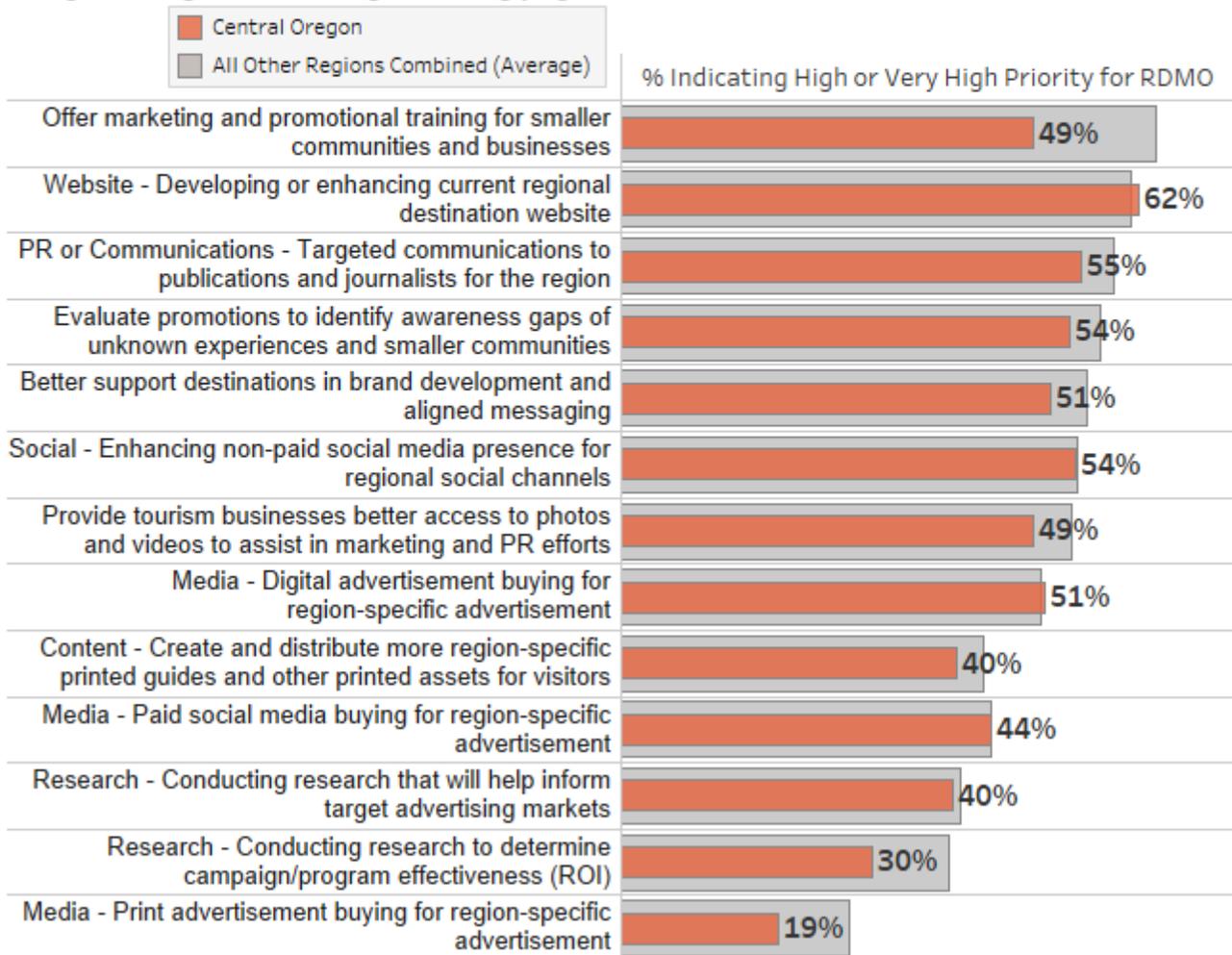


MARKETING

Respondents were asked to prioritize a variety of marketing tactics. Respondents could select from a scale of responses including the following: “not a priority,” “low priority,” “moderate priority,” “high priority,” and “very high priority.” The standout priority in Central Oregon is “Website – Developing or enhancing current regional destination website.” Relative to the rest of the state, respondents from Central Oregon were less likely indicate marketing and promotional training for smaller communities and businesses as a high priority.

Tactical Opportunities - Marketing

Q: Please indicate how you would prioritize the following tactical MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available not all items should be considered to be an extremely high priority and some may not even 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. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



As a follow-up to rating marketing tactics, respondents were asked to identify their top two marketing opportunities. Notably, developing or enhancing the current RDMO website fell to the fourth rank,

indicating that, although a high priority, respondents are less passionate about its importance. Both state-wide and in Central Oregon, offering marketing and promotional training for smaller communities and businesses was most cited among the top-two priorities.

Tactical Opportunities - Marketing

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

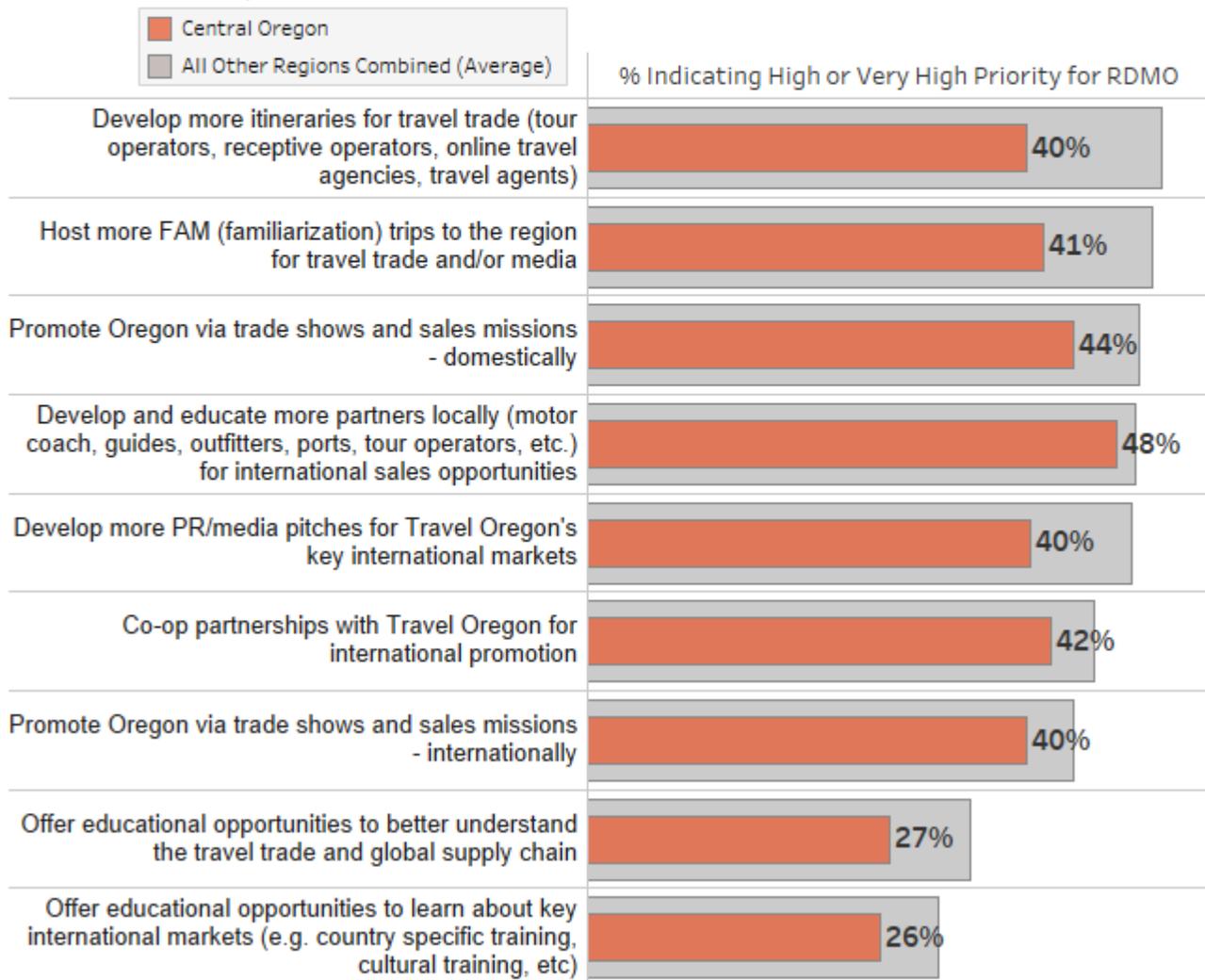
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Offer marketing and promotional training for smaller communities and businesses	16%	15%
Better support destinations in brand development and aligned messaging	11%	11%
Evaluate promotions to identify awareness gaps of unknown experiences and smaller communities	11%	12%
Website - Developing or enhancing current regional destination website	10%	11%
PR or Communications - Targeted communications to publications and journalists for the region	9%	10%
Content - Create and distribute more region-specific printed guides and other printed assets for visitors	9%	8%
Provide tourism businesses better access to photos and videos to assist in marketing and PR efforts	8%	7%
Social - Enhancing non-paid social media presence for regional social channels	6%	5%
Media - Digital Advertisement Buying for region-specific advertisement	6%	6%
Research - Conducting research that will help inform target advertising markets	5%	7%
Media - Paid Social Media Buying for region-specific advertisement	5%	3%
Research - Conducting research to determine campaign/program effectiveness (ROI).	4%	4%
Media - Print Advertisement Buying for region-specific advertisement	1%	1%

GLOBAL SALES, PROMOTIONS, PR, MEDIA, & MARKETING

Using the same prioritization scale, respondents were asked to prioritize global sales, promotions, PR, media, and marketing tactics. Respondents from Central Oregon rated, “Develop and educate more partners locals for international sales opportunities” as their highest priority. There is considerably less demand for developing more itineraries for travel trade in Central Oregon relative to the rest of the state.

Tactical Opportunities - Global Sales, Promotions, PR, Media, & Marketing

Q: Please indicate how you would prioritize the following tactical GLOBAL SALES, PROMOTIONS, PR, MEDIA, & MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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.



When asked to identify their top two global sales, promotions, PR, media, and marketing opportunities, the rank order of results was similar to the ratings and to the state-wide results. Sixteen percent of

respondents chose to develop and educate more partners locally for international sales opportunities among their top two highest priorities.

Tactical Opportunities - Global Sales, Promotions, PR, Media, & Marketing

Q: From the list above, please identify your top two opportunities for global promotions, sales, PR, media, & marketing:

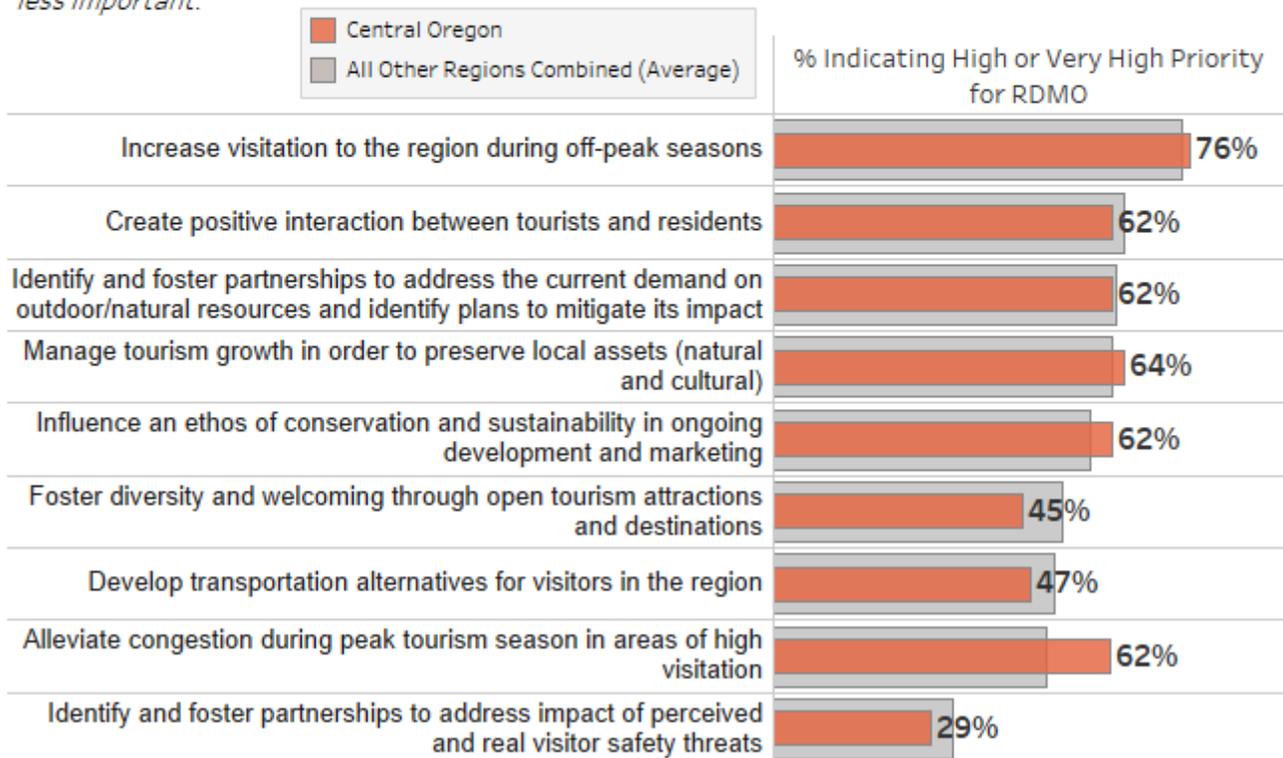
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Develop and educate more partners locally (motor coach, guides, outfitters, ports, tour operators, etc.) for international sales opportunities	16%	16%
Develop more itineraries for travel trade (tour operators, receptive operators, online travel agencies, travel agents)	14%	15%
Host more FAM (familiarization) trips to the region for travel trade and/or media	14%	13%
Promote Oregon via trade shows and sales missions - domestically	13%	15%
Co-op partnerships with Travel Oregon for international promotion	11%	8%
Develop more PR/media pitches for Travel Oregon's key international markets	10%	10%
Promote Oregon via trade shows and sales missions - internationally	7%	7%
Offer educational opportunities to better understand the travel trade and global supply chain	7%	6%
Offer educational opportunities to learn about key international markets (e.g. country specific training, cultural training, etc)	6%	9%

DESTINATION DEVELOPMENT

Stakeholders in Central Oregon were asked to prioritize destination development opportunities across three categories: Planning and Management, Product Development, and Training and Capacity Building. Across the three macro-categories (management, development, and capacity), there are three priorities which more than two-thirds of respondents identified as a “very high priority” or a “high priority.” These three are: increasing visitation to the region during off-peak seasons, developing/improving infrastructure for visitors to experience outdoor recreation and nature-based tourism, and educating community leaders and policymakers (local, county, state) on value of tourism and its viability as a long-term career.

Tactical Opportunities - Destination Development: 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 areas should be considered to be an extremely high priority and some may not even 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.



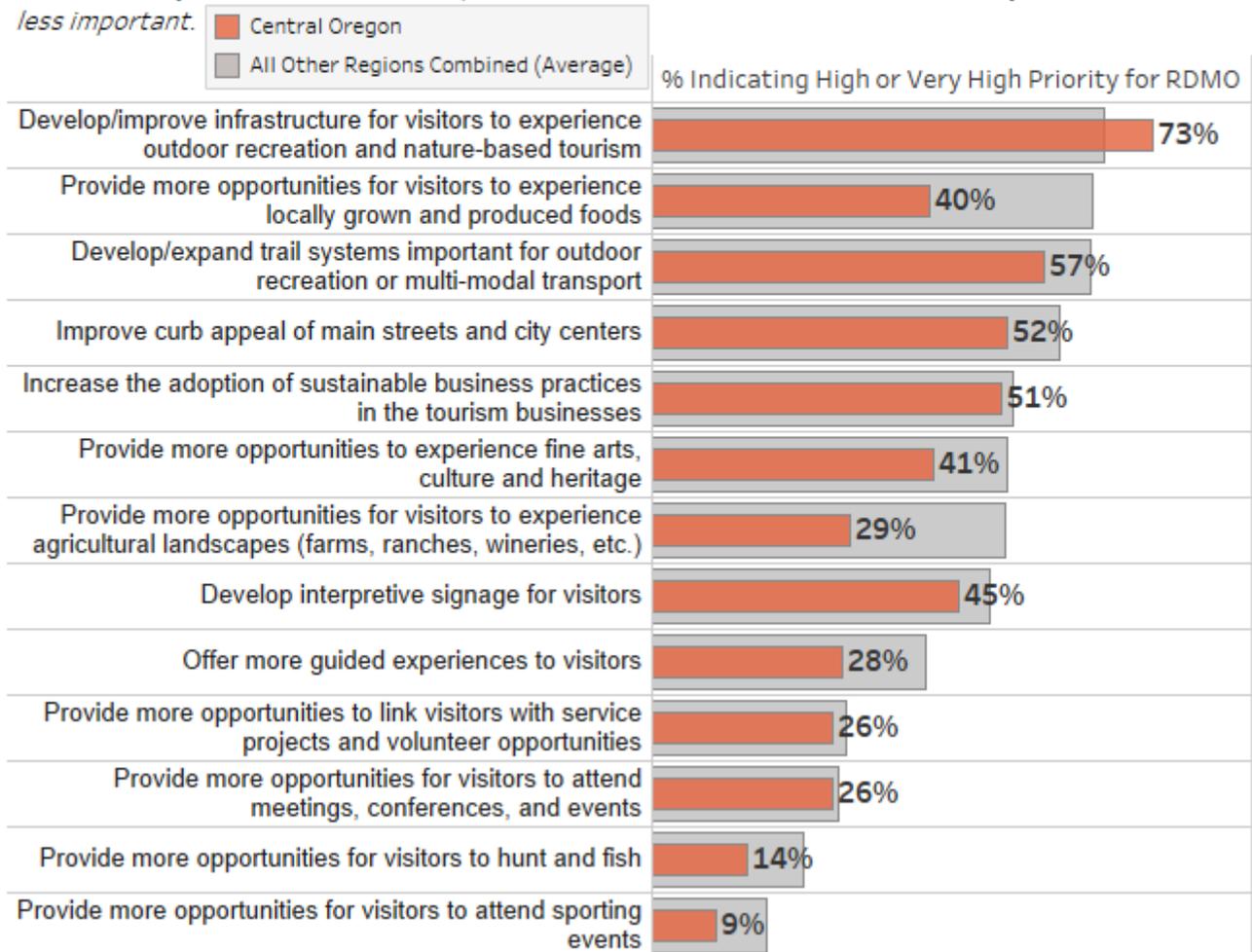
Tactical Opportunities - Destination Development: Planning and Management

Q: From the list above, please identify your top two planning and management opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Work with partners to help increase visitation to the region during off-peak seasons	21%	23%
Manage tourism growth in order to preserve local assets (natural and cultural)	14%	17%
Identify and foster partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact	12%	16%
Develop transportation alternatives for visitors in the region	11%	5%
Create positive interaction between tourists and residents	10%	8%
Influence an ethos of conservation and sustainability in ongoing development and marketing	10%	13%
Foster diversity and welcoming through open tourism attractions and destinations	9%	7%
Work with partners to help alleviate congestion during peak tourism season in areas of high visitation	8%	10%
Identify and foster partnerships to address impact of perceived and real visitor safety threats including homeless	5%	1%

Tactical Opportunities - Destination Development: Product Development

Q: Please indicate how you would prioritize the following tactical PRODUCT DEVELOPMENT OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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.



Tactical Opportunities - Destination Development: Product Development

Q: From the list above, please identify your top two product development opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Develop/improve infrastructure for visitors to experience outdoor recreation and nature-based tourism	18%	22%
Improve curb appeal of main streets and city centers	16%	12%
Develop/expand trail systems important for outdoor recreation or multi-modal transport	14%	14%
Increase the adoption of sustainable business practices in the tourism business	9%	15%
Provide more opportunities for visitors to experience locally grown and produced foods	8%	2%
Provide more opportunities to experience fine arts, culture and heritage	7%	9%
Develop interpretive signage for visitors	7%	9%
Provide more opportunities for visitors to experience agricultural landscapes	6%	2%
Offer more guided experiences to visitors	4%	2%
Evaluate and focus product development opportunities to include more conferences	3%	5%
Provide more opportunities to link visitors with service projects and volunteer opportunities	3%	4%
Evaluate and focus product development opportunities to include more fishing and hunting	2%	3%
Evaluate and focus product development opportunities to include more sporting events	1%	1%

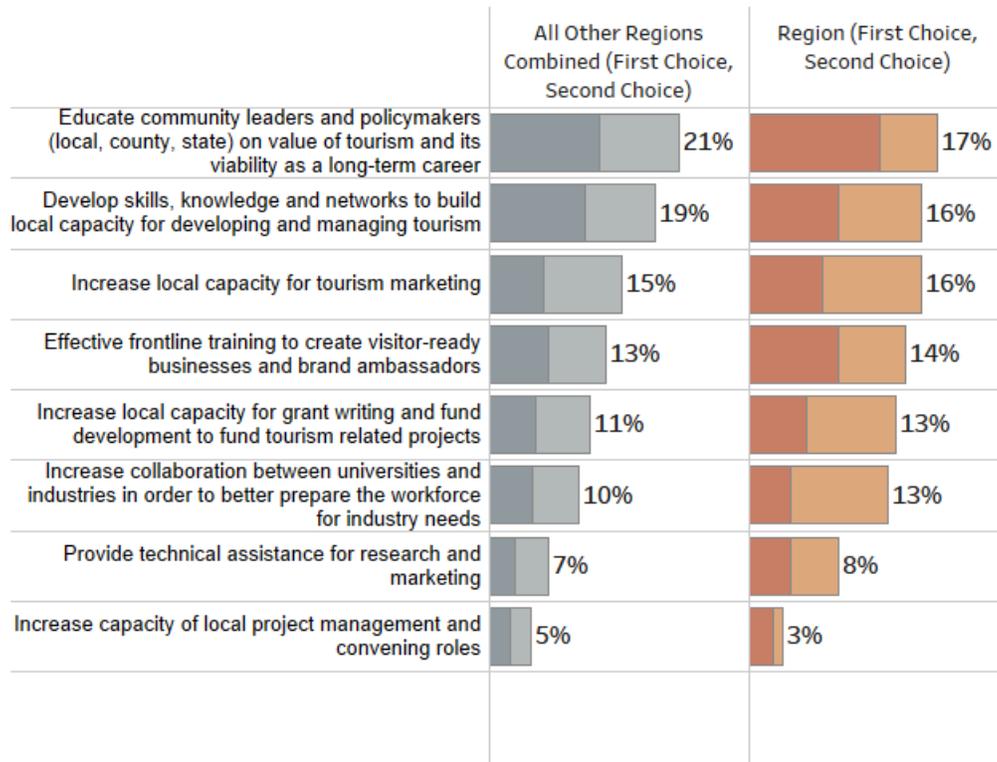
Tactical Opportunities - Destination Development: Training and Capacity Building

Q: Please indicate how you would prioritize the following tactical TRAINING and CAPACITY BUILDING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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.



Tactical Opportunities - Destination Development: Training and Capacity Building

Q: From the list above, please identify your top two training and capacity building opportunities:

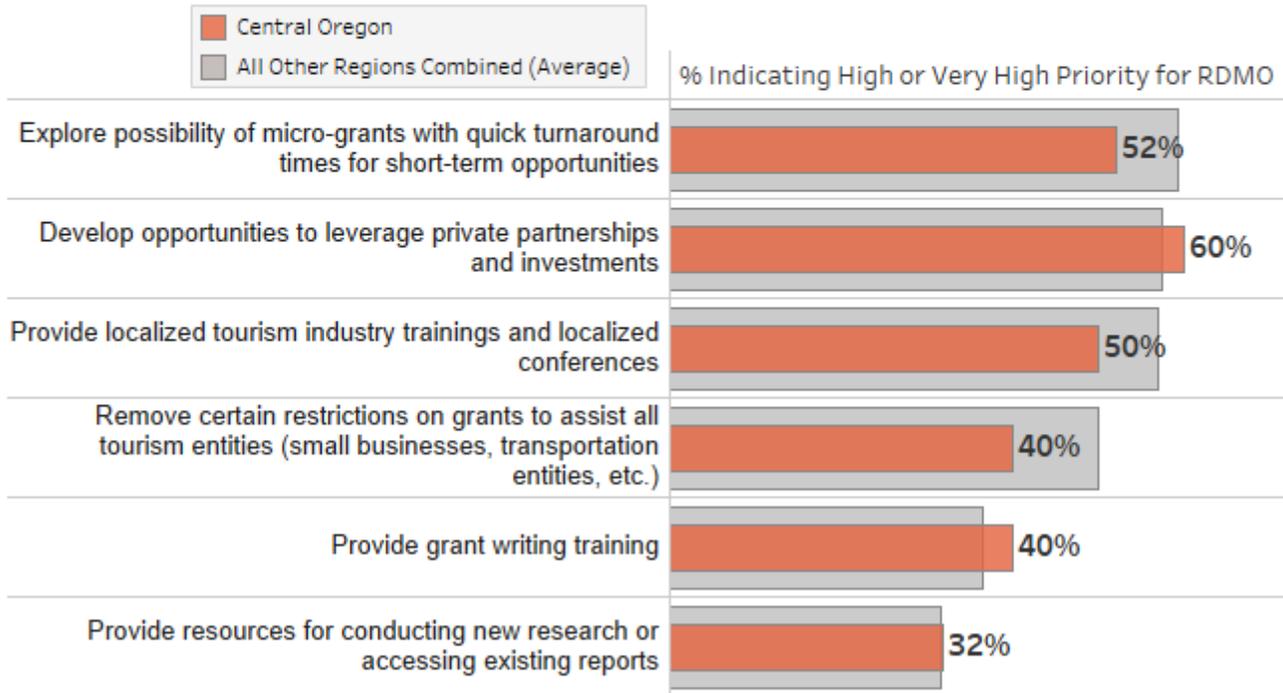


GLOBAL STRATEGIC PARTNERSHIPS

Stakeholders used the same rating system as in previous sections to prioritize specific global strategic partnership initiatives. Though no specific activities were a “very high priority” or a “high priority” by more than two-thirds of respondents (as in other sections), there are still clear initiatives which stakeholders have identified as relatively higher priorities. Exploring the possibility of micro-grants and developing opportunities to leverage private partnerships and investments were both rated as a “very high priority” or a “high priority” by more than half of Central Oregon stakeholders. Localized tourism industry training and conferences was also highly prioritized, both state-wide and in Central Oregon.

Tactical Opportunities - Global Strategic Partnerships

Q: Please indicate how you would prioritize the following tactical STRATEGIC PARTNERSHIP OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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.



When asked to identify their top two priorities, respondents showed clear preference for developing opportunities to leverage private partnerships and investments with a quarter of Central Oregon respondents saying it is among their top-two highest priorities, and 17% citing it as their top priority.

Tactical Opportunities - Global Strategic Partnerships

Q: From the list above, please identify your top two strategic partnership opportunities:

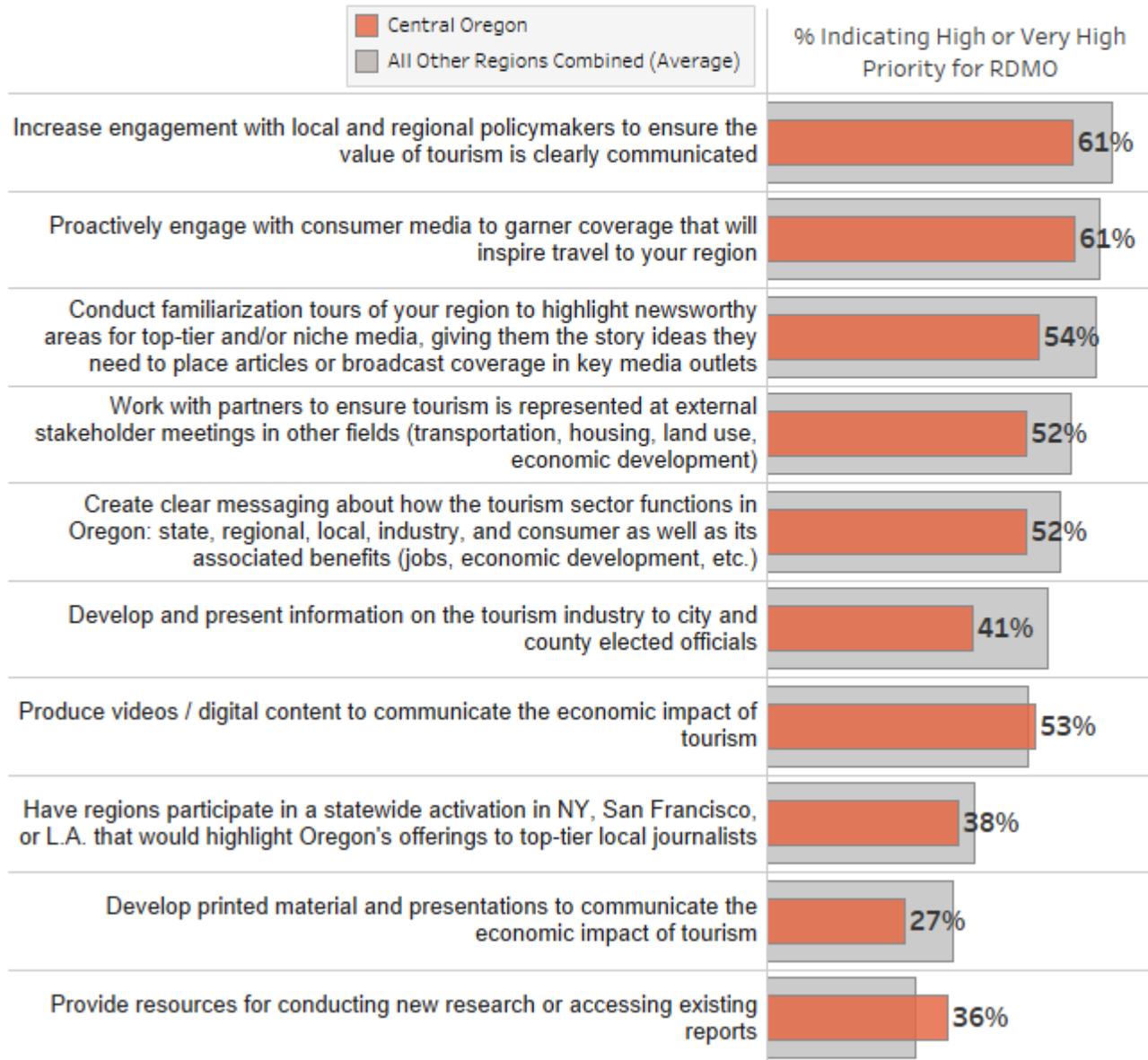
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Explore possibility of micro-grants with quick turnaround times for short-term opportunities	22%	19%
Develop opportunities to leverage private partnerships and investments	21%	25%
Provide localized tourism industry trainings and localized conferences	21%	18%
Remove certain restrictions on grants to assist all tourism entities (small businesses, transportation entities, etc.)	17%	15%
Provide grant writing training	10%	8%
Provide resources for conducting new research or accessing existing research	9%	13%

PUBLIC AFFAIRS AND COMMUNICATIONS

Using the same rating scale as in previous sections, Central Oregon stakeholders evaluated several tactics related to public affairs and communications. Both state-wide and in Central Oregon, respondents prioritized increasing engagement with local and regional policymakers to ensure the value of tourism is clearly communicated highest. That tactic was following closely by, “Proactively engage with consumer media to garner coverage that will inspire travel to your region.” Relative to the state-wide average, respondents differed most on developing and presenting information on the tourism industry to city and county elected officials (-15%).

Tactical Opportunities - Public Affairs and Communications

Q: Thinking from the perspective of tourism marketing and management, please indicate how you would prioritize the following tactical PUBLIC AFFAIRS AND COMMUNICATION OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available not all areas should be considered to be an extremely high priority and some may not even 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.



Tactical Opportunities - Public Affairs and Communications

Q: From the list above, please identify your top two public affairs and communications opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Conduct familiarization tours of your region to highlight newsworthy areas for top-tier and/or niche media	17%	11%
Proactively engage with consumer media to garner coverage that will inspire travel to your region	16%	14%
Increase engagement with local and regional policymakers to ensure the value of tourism is clearly communicated	14%	15%
Work with partners to ensure tourism is represented at external stakeholder meetings in other fields	11%	14%
Create clear messaging about how the tourism sector functions in Oregon	11%	13%
Develop and present information on the tourism industry to city and county elected officials	10%	9%
Produce videos / digital content to communicate the economic impact of tourism	7%	5%
Have regions participate in a statewide activation in NY, San Francisco, or L.A. that would highlight Oregon's offerings to top-tier local journalists	6%	9%
Conduct more research to capture the economic impact of tourism	4%	5%
Develop printed material and presentations to communicate the economic impact of tourism	4%	4%

CUSTOM REGIONAL 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.

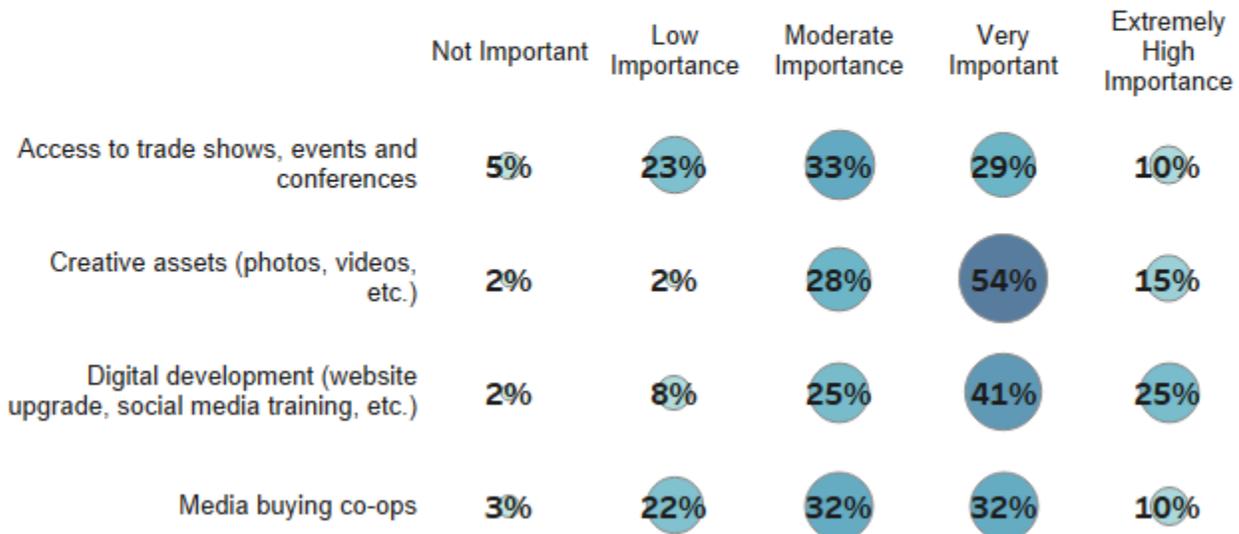
Central Oregon Destination Development Tactics: Prioritization

Q: Thinking from the perspective of the Central Oregon Regional Destination Management Organization, please indicate how you would prioritize the following Destination Development tactics to advance the economic impact of tourism and ensure the vitality and sustainability of your region over the next 3-5 years: These tactics should be considered in the context of the other tactics you have evaluated in this survey. The goal of your prioritization is to provide guidance to your regional destination management/marketing entity.



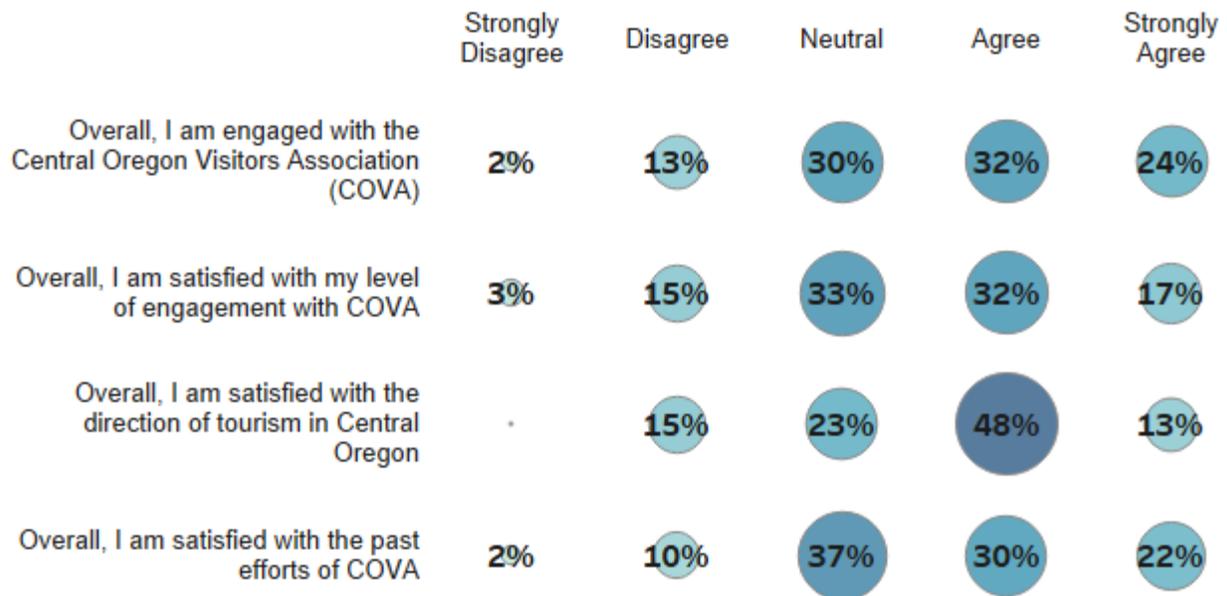
Central Oregon Marketing Tactics: Prioritization

Q: Thinking from the perspective of your business or organization, please indicate how important you believe each of the following Central Oregon Visitors Association marketing tactics are to increasing tourism's economic impact.



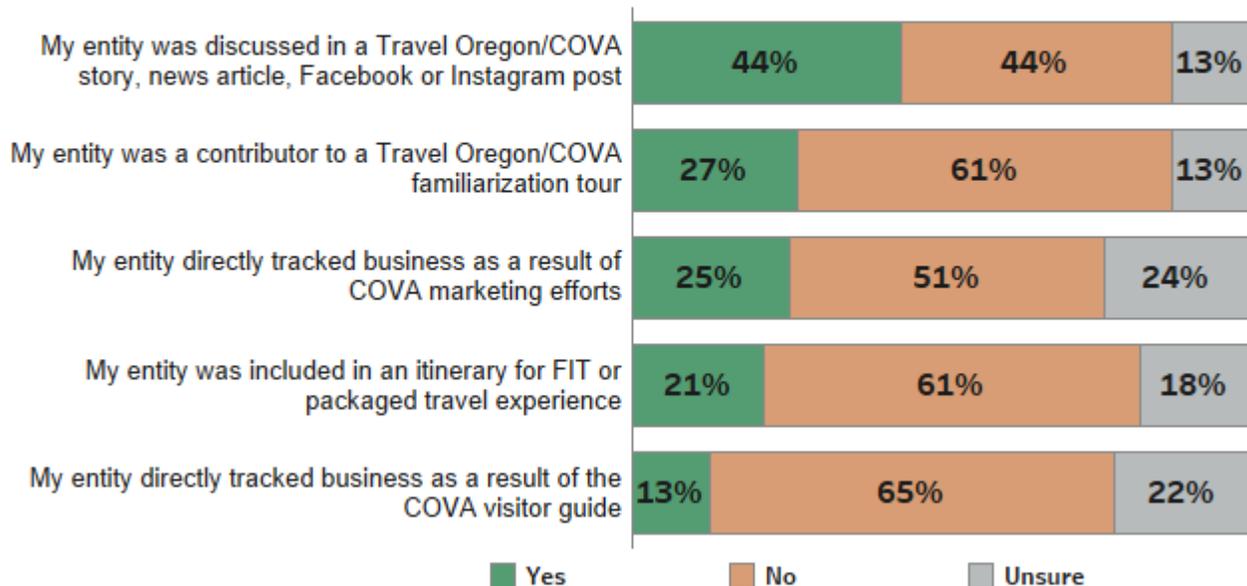
Central Oregon Overall Engagement

Q: Please indicate the level to which you agree or disagree with the following statements:



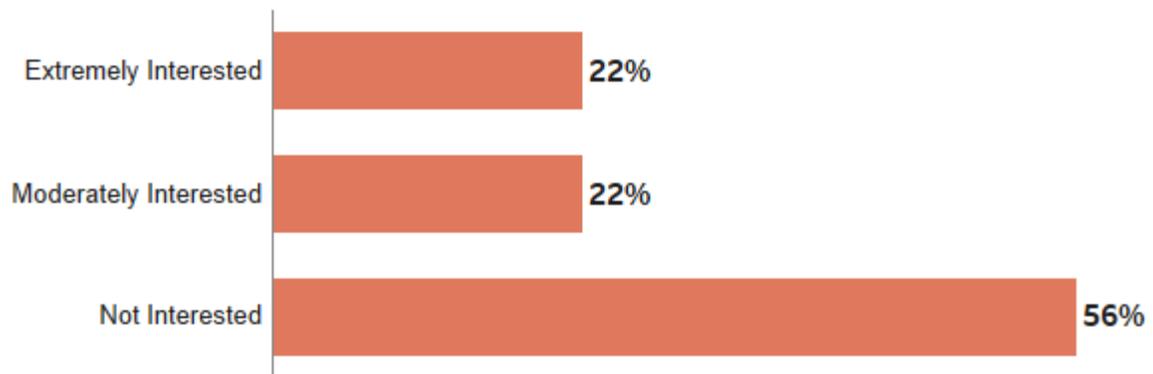
Central Oregon

Q: Central Oregon: Please indicate whether your business/attraction/event engaged with the Central Oregon Visitors Association (COVA) in the past year in the following areas:



Central Oregon

Q: From your business and/or organizational perspective, please indicate your level of interest in supporting Central Oregon regional forest lands by instituting a \$1 donation add on to each sale from your business towards stewardship of Central Oregon's Trails.



Appendix – Coded Open-Ended Responses

<p><i>Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.</i></p>	Off-Season Visitation	Sustainability	Crowding/Resource Use	Transportation	Marketing	Increased Visitation Numbers	Housing	Air Connections	Areas Other than Bend/Sun River	Other
Central Oregon	■	■	■	■	■	■	■	■	■	■
<ul style="list-style-type: none"> Protection of our nature resources and appreciation of tourism are the Hot Buttons in Central Oregon. We need to protect the experience for future generations. Essential we do not start treating tourists with contempt as we struggle through intense growing pains. 		■	■			■				
<ul style="list-style-type: none"> One of the primary reasons people come to visit Central Oregon is the natural beauty and outdoor opportunities. Preserving protecting these assets will allow us to continue to have a healthy relationship with tourism in the future. 		■								
<ul style="list-style-type: none"> I would like for our community to understand the importance of the tourism industry and how it supports local businesses and individuals. 										■
<ul style="list-style-type: none"> We've got to do a better job educating local officials how important tourism is to Central Oregon, but at the same time make sure some of our amazing natural assets aren't loved to death. That means some hard decisions like capping permits on popular trails or limiting access to certain areas. 			■			■				
<ul style="list-style-type: none"> Identify key segments that maximize utilization of our resources in a sustainable manner and give back to the community in an equitable model. 		■								
<ul style="list-style-type: none"> Through RCTP collaborative efforts, Central Oregon will have more daily direct flights in/out of RDM, increasing global accessibility for visitors inspired to come to experience Oregon's high desert for its affordability, abundant outdoor recreation, diverse arts & cultural scene, and tax-free shopping. Increased accessibility contributes to evening-out seasonality, and an increase of international visitors who are known to stay longer and visit the Pacific Northwest year-round. 	■							■		
<ul style="list-style-type: none"> Tourism will be less concentrated at the "premiere" attractions, and will be more spread out across second level attractions through more development and better marketing. 					■					
<ul style="list-style-type: none"> I would like to see Central Oregon refocus on drawing business from Oregon and areas that are an easy days drive. 										■
<ul style="list-style-type: none"> Greater growth in business during the off seasons and increase in ADR during throughout the year. 	■									
<ul style="list-style-type: none"> Increase state funding for nature-based tourism 										■
<ul style="list-style-type: none"> More support for winter sports and small, rural communities near winter destinations. 									■	
<ul style="list-style-type: none"> Educate local elected officials the importance of tourism o the local economy and private business, especially in shoulder seasons, when the natural flow of tourism decreases. 	■									
<ul style="list-style-type: none"> I Would like people in our small community to understand the economic benefit of tourism. I would also like to see Leave No Trace principals more widely advertised and visible . 		■								■
<ul style="list-style-type: none"> Do not change a thing! 										■
<ul style="list-style-type: none"> improve travel between Portland and Sisters, OR and Bend, OR so as to reduce traffic and to improve tourism during the off-season 	■			■						
<ul style="list-style-type: none"> Rename COVA to "Visit Sunriver" and return our local tax dollars to support new Redmond tourism initiatives. 										■
<ul style="list-style-type: none"> I think the 7 Wonders Campaign was excellent and should be brought back. In our region, helping the small businesses expand or improve their visibility for visiting guests. New product development support through the grant process. 					■					
<ul style="list-style-type: none"> Mty primary goal is to help promote Newberry Country, a newly designated area within Central Oregon, as it's own destination, with easily accessible assets and recreational choices. 					■					

<p><i>Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.</i></p>	Off-Season Visitation	Sustainability	Crowding/Resource Use	Transportation	Marketing	Increased Visitation Numbers	Housing	Air Connections	Areas Other than Bend/Sun River	Other
Central Oregon										
<ul style="list-style-type: none"> I would like our tourism community to better work with the gov agencies that manage our resource. The two opponents have opposite view points--we need more visitors and the gov agencies want fewer visitors. 										
<ul style="list-style-type: none"> to keep away from flash in the pan schemes. 										
<ul style="list-style-type: none"> Would like to seed an advancement beyond beer and bikes in Central Oregon. 										
<ul style="list-style-type: none"> Cut back on tourists honestly, our hotel prices are insane, trails and wilderness is being abused, we need to stop marketing and get a handle on our assets. Then come up with a strategy to bring in the right amount and type of visitor. 										
<ul style="list-style-type: none"> Off season tourism increase! More off season events. 'Visit like a local' to preserve our flora/fauna during the peak tourism. 										
<ul style="list-style-type: none"> Increased economic growth that increases the population, improves job opportunities, public schools and housing options. 										
<ul style="list-style-type: none"> I would like to see all local businesses engage with the tourists in a positive way to promote a better experience. I would love it if we could be known as a town that loves its tourists. 										
<ul style="list-style-type: none"> Want visitors from within driving distance first, as that's how most people choose to travel. So, marketing outside the state is important, and is your mission, but don't overlook marketing our hidden treasures (everywhere) within the state too. Thanks for all you do. 										
<ul style="list-style-type: none"> Less paperwork/paper publications. More creative suggestions so as not to overwhelm typical tourist destinations such as Smith Rock. Smaller destinations to support rural areas. 										
<ul style="list-style-type: none"> Focus on marketing winter, which is the season with the greatest opportunity for growth in the region. Figure out how to tell the story and who to market winter / ski vacations in Oregon for the broader domestic and international Markets 										
<ul style="list-style-type: none"> Increase overnight stays Oct though May. 										
<ul style="list-style-type: none"> The central Oregon region no longer has a need for promotion as assistance to tourism providers, but rather to begin to take care of the support facilities that make tourism and livability in our communities high. Tourists rarely pay their way for the support that make their destination locations viable experiences. 										
<ul style="list-style-type: none"> I would like to see good signage with branding logo on all materials. Would love to see more guided tours offered. 										
<ul style="list-style-type: none"> I live in Bend and while I certainly recognize the value of tourism I feel the time has come that we need to think more about how to keep Bend livable than how to increase tourism here. 										
<ul style="list-style-type: none"> Conduct messaging and training for businesses that benefit from public lands. Include research on the socio-economic value of public lands, the ecological importance of those natural resources, and ways for businesses to actively engage in maintaining the sustainability of those resources. 										
<ul style="list-style-type: none"> community buy in for importance of tourists industry 										
<ul style="list-style-type: none"> more education, outreach and partnerships with rural outlying communities 										

Appendix, Continued – Open-Ended Responses

Choose the top five Travel Oregon programs that you believe are the most impactful: Other (please specify)

Need more focus and strategy for arts and culture

Not familiar with any of them

Scenic Bikeway Program

Given limited resources, what three priority areas do you believe are most important for 2019-2021 tourism planning? If you selected "Other" as a priority, please describe:

Overbuilding, overreaching in certain markets. Less focus on bringing new hotel operators, new tour operators, etc to the market and a little more focus on allowing the ones there to thrive.

Research Impacts on growth and quality of life

Strengthening partnerships with Gov Agencies to improve the management of our natural resources that our visitors come to Oregon for. There is a large disconnect between said Gov Agencies and communities who rely on tourism. Communities and TO want more visitors and to improve the visitor experience; Agencies want fewer visitors due to continuing waning budgets and restructuring.

sustainability / livability planning

Sustainability / overtourism issues

We need to be pushing for a well balanced Forest Plan that helps address the impacts and frequency of wildfires that have been impacting the tourist experience and our quality of life.

We need to stop butchering our forests and market and develop them with outdoor recreation at the forefront to include OHV use.

Please indicate any other areas of marketing that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

developing social media platform and presence with drivers to push awareness

Rural Area marketing support in general and also for specific events that impact and increase local visits and revenue.

Winter, specifically ski related marketing efforts.

Please indicate any other areas of global sales and international travel trade and media that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

Global sales is not important to our region. It may be a better market in other parts of the state.

Good working relationship with USFS for signage.

International niche markets can be quite valuable to local tour operators. For example, a local motorcycle rental and tour operator can benefit greatly from information about international tourists who are motorcycle enthusiasts.

Native American reservation travels

Please indicate any other areas of planning, management, development, training, or capacity building that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

Analyzing markets on a YEAR ROUND basis, increasing traffic during shoulder seasons. Stop supporting over building of hotels!

Grant opportunities are sometimes difficult to access. Help with grant availability, comparison and completion would be very helpful.

Grants are great opportunities for charities or small businesses, but it is too TIME consuming to find them.

shoulder seasons need the most attention

Appendix, Continued – Open-Ended Responses

Staffing is the number 1 problem in our industry. There is a big emphasis on marketing our destination. If we can not operationally handle the demand (the case right now), than marketing efforts are in vain, and actually backfire. We need operational support light-years over the marketing support. Also, Research and data collection can only be done to a certain point as a small hotel. I would be very interested in any research that Travel Oregon could produce. Visit Bend is a very effective DMO pertaining to marketing and research for local partners. Our RDMO, Visit Central Oregon, seems to consistently miss the mark with marketing efforts and doesn't provide any research value.

Please indicate any other areas of industry services that you believe should be an extremely high priority in order to advance the economic impact of tourism:

Bike paths through out hey 97 and 31

Continued support of COVA as Central Oregon's RDMO. As a lodging (DiamondStone Guest Lodges) and tour (Motofantasy Rentals & Adventures) business, COVA has been an integral part of our Marketing since 1998 or longer.

Investing in arts and culture as an economic driver

It would be good to host a think tank for local officials to discuss and formulate solutions to how to fund local infrastructure improvements related to tourism use.

Marketing training for small businesses.

marketing training!

Please indicate any other areas of PUBLIC AFFAIRS AND COMMUNICATIONS that you believe should be an extremely high priority for in order to increase visitation in your area.

Cooperative video and marketing development to engage multiple tourism partners to show Central Oregon's, and Newberry Country's, recreational diversity.

Fam trips are a critical tool to develop extra-regional travel writing

Fashion shoots. Incentives for film production to shoot in our region.

Messaging and engagement with stakeholders about the funding needs for the stewardship of public lands that serve as the primary draw for tourism in the state.

Preservation & conservation of our outdoor resources are a big concern in Central Oregon. Programs such as Visit Bend's "Visit Like a Local" should be pursued by Travel Oregon.

Research about tourism impacts on Natural Resources and reports on success stories

Tourism economic benefit is often skewed. Accurate evaluation of tourism impacts on local communities needs to consider the full impact in municipal infrastructure and begin to pay for some of these impacts. For example: transportation, park, trails, and public safety all take a heavy hit due to tourism and currently the resident pays for the lions-share of these costs.

We would like to know more about your experiences with COVA marketing programs. In a few sentences, please describe a program you participated in and areas that had positive results or needed improvement.

As an educational institution that doesn't collect TRT and only houses people in July and August, our relationship with COVA is not "cookie-cutter." However, as an affordable option for summer lodging in Bend and an academic/workforce development resource, there are marketing and partnership opportunities out there. Time just needs to be dedicated to the exploration of those opportunities.

Co-op ad buy

COVA helped promote our charity music festival but I can't remember how. It's on their calendar.

COVA has not brought us any referral business (tracking on Google Analytics) or featured us in any marketing efforts. If they have featured us, they haven't communicated it to us or produced any revenue for us.

COVA's did a great Bend Brewfest video last year and the new digital magazine has a lot of potential. Overall, though, we get minimal traffic from the COVA website. We'd love to see that increase.

COVA's marketing is swayed to support Sunriver, we need to create a new DMO to service Redmond, Prineville, Madras region and stop sending those tax dollars to support COVA.

Appendix, Continued – Open-Ended Responses

I am new to Central Oregon, and thus have not engaged with COVA. I came from Eastern Oregon where I did have some contact with EOVA.

I would like to see COVA focus on all of Central Oregon and less on Sunriver. I would like to the PAC AM tournament return to multiple course in the area.

IAGTO conference was supported by our organization and was well attended, now we just need to see a return

I'm new to my position and working on growing the relationship with COVA. I see a lot or potential for partnership . I also see COVA markets Bend 90 percent of the time and would like to see more of the region marketed .

Increased visitors from the San Francisco efforts. Golf groups want to play golf packages.

My business is a nonprofit, COTA, and definitely promotion of mountain biking has resulted in more tourists riding our trails. It's great that we're a premier destination for mountain biking but it definitely increases the amount of resources we need to keep those trails in good shape.

Nature-based tourism has been left behind in the region and statewide, especially with the lack of support for the Oregon birding trails

Overall support and growth of Central Oregon and benefit from growing regional economy.

rts

Team meetings are very helpful.

We get referrals from COVA, primarily for Lodging, but also for Motofantasy and our Non-Profit, The Newberry Event Music & Arts Festival to Defeat MS, the 7th to be held July 26,27 & 28, 2019

We have always welcomed COVA visits and opportunities.

We were invited to participate in the Vancouver Consumer Show and had a very positive experience.

Comments - From your business and/or organizational perspective, please indicate your level of interest in supporting Central Oregon regional forest lands by instituting a \$1 donation add on to each sale from your business towards stewardship of Central Oregon's Trails.

Already Participate

As degree holders in Natural Resource Management, we are very interested in this subject,

Deschutes and Ochoco Forests are not in my area of Central Oregon

My organization IS the Deschutes National Forest

Not applicable; we are a nonprofit

Not relevant to our areas .

One business in Sisters is considering do this to support Sisters Trails Alliance.

Please include the Prineville BLM District in this DYF funding.

Retired Person

So happy to see this question included!!

sounds awkward / cumbersome.

We engage directly with DYF in other ways than the \$1 program.

We participate by encouraging donations with our annual member dues invoices.