



2024 OREGON TOURISM INDUSTRY PARTNER SURVEY

SUMMARY OF RESULTS | WILLAMETTE VALLEY

March 2025



OVERVIEW

This report summarizes findings from a 2024 survey of tourism industry partners in Oregon. The survey sought feedback from partners to provide guidance and perspective on priorities for future investments from regional destination management organizations. This report summarizes findings from respondents in Willamette Valley, with additional statewide results provided for context.

OBJECTIVES

The 2024 Oregon Tourism Industry Survey was designed on behalf of the Oregon Tourism Commission, dba Travel Oregon, and the state's seven official regional destination management organizations (RDMOs) to elicit feedback from individuals and organizations linked to the tourism industry.

As Travel Oregon embarks on its 10-year strategic vision for tourism in the state, the results of the survey will help inform strategic direction for Travel Oregon and its regional partners to fulfill the strategic vision. The survey will also assist funding and programmatic decisions in marketing, grants, tourism-related infrastructure, visitor management, and more.

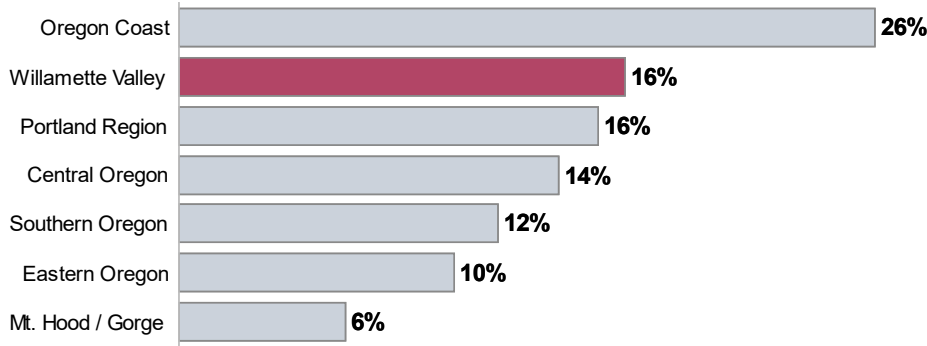
The survey built on a framework of past partner surveys conducted in 2018, 2020, and 2023. The survey was developed collaboratively by Travel Oregon, the seven RDMOs, and RRC Associates.

DATA COLLECTION

This study consisted of a digital survey that was fielded to Oregon tourism industry employees from September 12–October 14, 2024. The 2024 study is the fifth edition of the Industry Partner Survey, formerly known as the Stakeholder Survey. This year, the survey distribution methods included the Travel Oregon Industry Newsletter, partner and staff outreach, industry conferences, and social media.

The survey resulted in a total of 224 valid responses from Willamette Valley (up from 166 responses in 2023) and more than 1,300 responses statewide. 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, and figures show results from Willamette Valley compared to the statewide survey results.

Number of Respondents



224
Willamette Valley
Responses

1,363
Overall Responses

Source: RRC

LIMITATIONS

The survey results should be viewed as an aggregation of relevant and thoughtful feedback from partners. The applicability of findings to real-life circumstances may depend on whether the feedback is from a broad enough (or representative) swath of partners and whether individual RDMOs believe they have engaged with enough partners to have a good gauge of the partners' priorities. An assessment of the industries represented, and the statewide response numbers, suggest a diverse and sufficient sample was collected from all regions, adding confidence to the applicability of results. Because the survey was not conducted from a random sample, statistical tests have not been performed 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 partner population that were not addressed in this report.

The survey also resulted in an extensive number of open-ended responses. All open-ended responses may be accessed in the online dashboard.

Access the online dashboard by going to: bit.ly/2024TOPartnersurvey

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KEY FINDINGS

TOURISM STRATEGIES

DESTINATION DEVELOPMENT

- **Satisfaction Levels:** 60% of Willamette Valley respondents are satisfied with the direction of tourism development, slightly lower than the statewide average of 62%.
- **Focus Areas:** Key focus areas for improving the resident and visitor experience include public infrastructure (33%), outdoor recreation (26%), and destination marketing and promotion (23%).
- **Perceived Strengths:** Respondents highlight food and beverage (52%) outdoor recreation opportunities (51%), and agritourism (25%) as the region's strongest tourism assets.

PLANNING PRIORITIES

- **Top 3 Priorities for the Next 2–5 Years:**
 1. Grant and funding opportunities (39%)
 2. Tourism-related infrastructure (32%)
 3. Enhancing tourism perceptions for residents and workforce (29%)
- **Shift from 2023:** Marketing and promotion, which was a top priority in 2023 (60%), has dropped to 24% this year, showing a shift toward funding opportunities and infrastructure.

ADVOCACY

- **Collaboration and Engagement:** Willamette Valley respondents feel confident collaborating with diverse groups to support tourism (4.5 out of 5).
- **Legislative Engagement:** Engagement with policymakers is low (3.2 out of 5), suggesting a need for stronger advocacy efforts.
- **Tourism Perception:** Respondents see the value tourism brings to their community (4.8 out of 5), however see room for improvement in access to data and information to better understand this value.

VISITATION AND SEASONALITY

- **Overcrowding in Summer:** in 2023, only 8% of Willamette Valley respondents felt that there were too many visitors in summer compared to 27% in 2024, although this is still lower than the statewide average (39%).
- **Winter Visitation Concerns:** 82% of respondents feel that they could use more visitation in the winter—higher than the statewide average (75%).
- **Potential for Redistributing Visitors:** Visitor dispersal strategies could help balance tourism demand throughout the year.

STRENGTHS AND CHALLENGES

- **Housing and Workforce Challenges:**
 - 62% cite a lack of affordable housing as a high-risk challenge compared to 74% statewide, a challenge regionally and statewide that has continued to rise in risk.
 - 55% report workforce housing shortages compared to 67% statewide. Similar to affordable housing, this issue has continued to rise in risk regionally and statewide.
 - Overall, Willamette Valley respondents find the listed risks to be of less severity than statewide results.
- **Workforce Recruitment Issues:**
 - 57% report inconsistent work hours and lack of qualified applicants (49%) as key barriers.

RESOURCES AND PROGRAMS

- **Most Needed Resources:**
 - Grant and funding opportunities (77%)—higher than the state average (72%).
 - Resources to build tourism-related infrastructure (61%).
 - Training and tools for marketing and communication (57%).
- **Lowest Priority Resources:**
 - Support adapting business plans/models (16%) and transitioning to online sales (13%) are less pressing concerns.

Prioritizing funding opportunities and infrastructure development will be key to sustaining tourism growth in the Willamette Valley, as these have emerged as top planning priorities over marketing and promotion. Addressing seasonal visitation imbalances, improving workforce recruitment, and strengthening advocacy efforts—particularly in legislative engagement—will further enhance tourism's benefits for residents and businesses.

RESPONDENT PROFILE

The survey received broad participation by the tourism industry sector. Statewide, destination marketing and/or management accounted for 15% of total respondents, followed by lodging (14%) and food and beverage (10%). Food and beverage accounted for the largest sector of respondents from Willamette Valley at 17% which is above the statewide results (10%) but less than 2023 Willamette Valley results (22%). Destination marketing or/and management and lodging were the next selected sectors. Fewer respondents (-5.6 pts) work in land management than the overall stateside results.



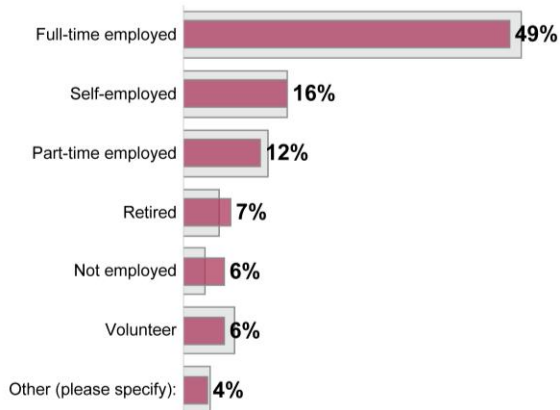
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

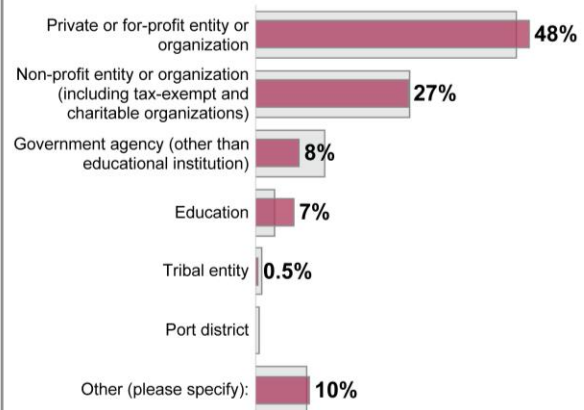
The top employment statuses for the region were full-time employed (49%), self-employed (16%), and part-time employed (12%). Compared to the statewide responses, the Willamette Valley region had a higher proportion of unemployed respondents. About half of Willamette Valley respondents (48%), similar to the statewide results, work for a private or for-profit organization. Those who responded in the "other" category for entity type highlighted business owners, independent contractors, and board members in some of the open-ended comments.

Entity Type & Employment Status

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



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



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

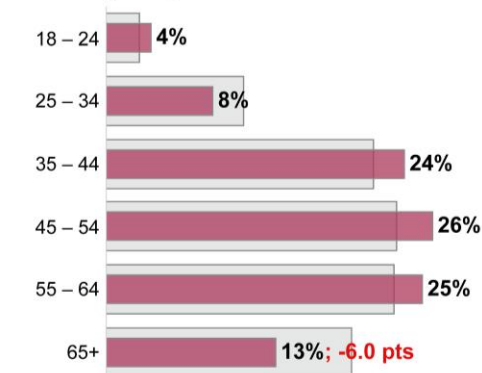
Source: RRC

In Willamette Valley, more respondents fell in the 35-64 age range than statewide respondents while less were over the age of 65. In the statewide results, the largest share of respondents were in the 45-64 range.

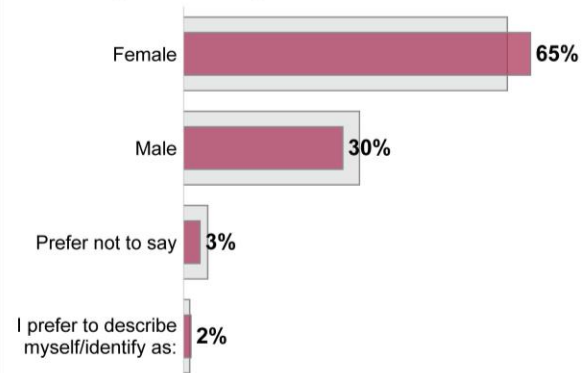
Willamette Valley respondents were slightly more likely to identify as female (65%) and less likely to identify as male (30%) than statewide results.

Age & Gender

Q: What is your age?



Q: What is your identified gender?



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

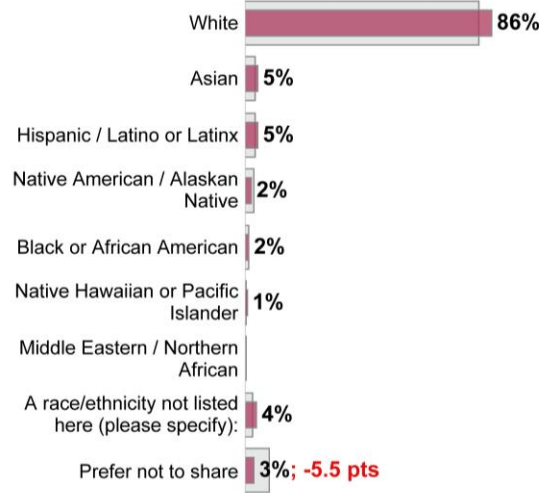
Source: RRC

For race and ethnicity, 86% of Willamette Valley respondents identify as white. The overall race/ethnic background of Willamette Valley respondents closely aligns with the statewide demographics.

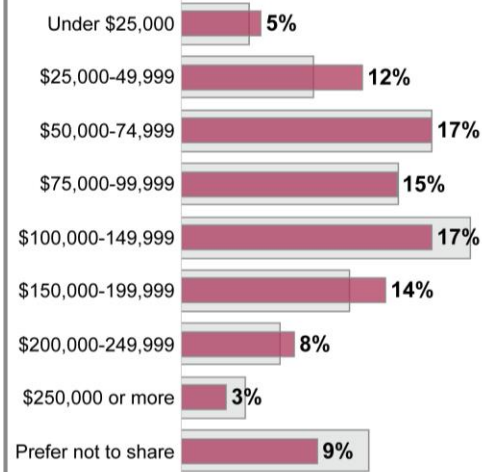
Fifty-seven percent of survey respondents statewide indicated that they had annual household incomes of \$75,000 or more. Overall, Willamette Valley results are similar to statewide with a slightly higher share of respondents who fell into the \$25,000-49,999 income range.

Race & Household Income

Q: Which of the following best describes you?



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



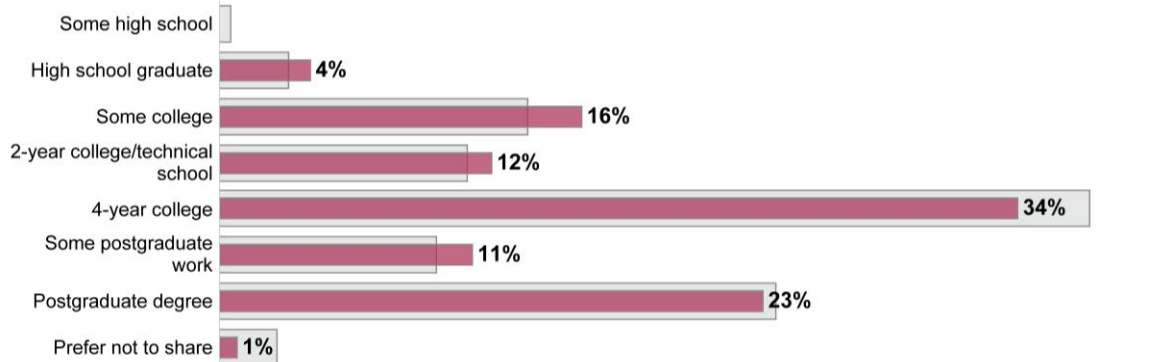
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Willamette Valley respondents were only somewhat different compared to the sample in terms of the level of education achieved. A larger percentage of Willamette Valley respondents completed some postgraduate work (11%) and some college (16%) compared to the statewide results (9% and 13%, respectively).

Education

Q: Which option best describes your education?



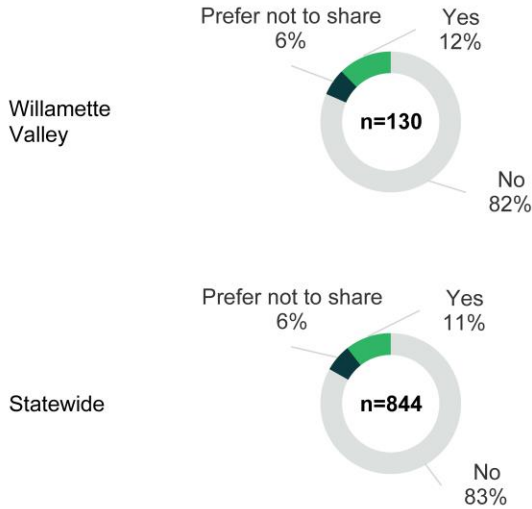
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

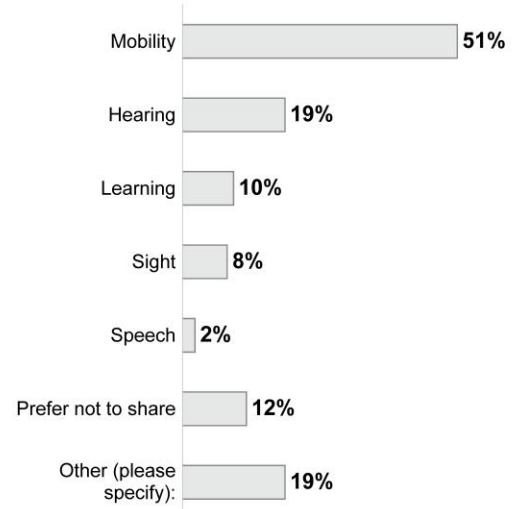
Twelve percent of Willamette Valley respondents reported having a disability, compared to 11% of respondents statewide. Statewide, mobility represented the most common disability among those who identified with one at 51%. Other disabilities listed include mental health (including anxiety/depression, ADHD, and PTSD), autoimmune disease, and neurodivergence.

Presence of Disabilities

Q: *Do you have a disability?*



Q: *Which of the following best describes these disabilities?*



*Only displaying statewide sample due to insufficient sample size within regions.

Source: RRC

TOURISM STRATEGIES

As Travel Oregon continues their work on the 10-year strategic vision for tourism adopted in June 2022, these survey findings will play a crucial role in shaping strategic priorities for Travel Oregon and its regional partners. These insights will be a vital source of information in guiding Travel Oregon and RDMOs in funding and program decisions across key areas including marketing, grants, tourism-related infrastructure, and visitor management, ensuring alignment with the broader vision for sustainable tourism development in the state.

Respondents were asked to characterize their satisfaction with the general direction of tourism development in Oregon.

The following definition was provided to survey respondents:

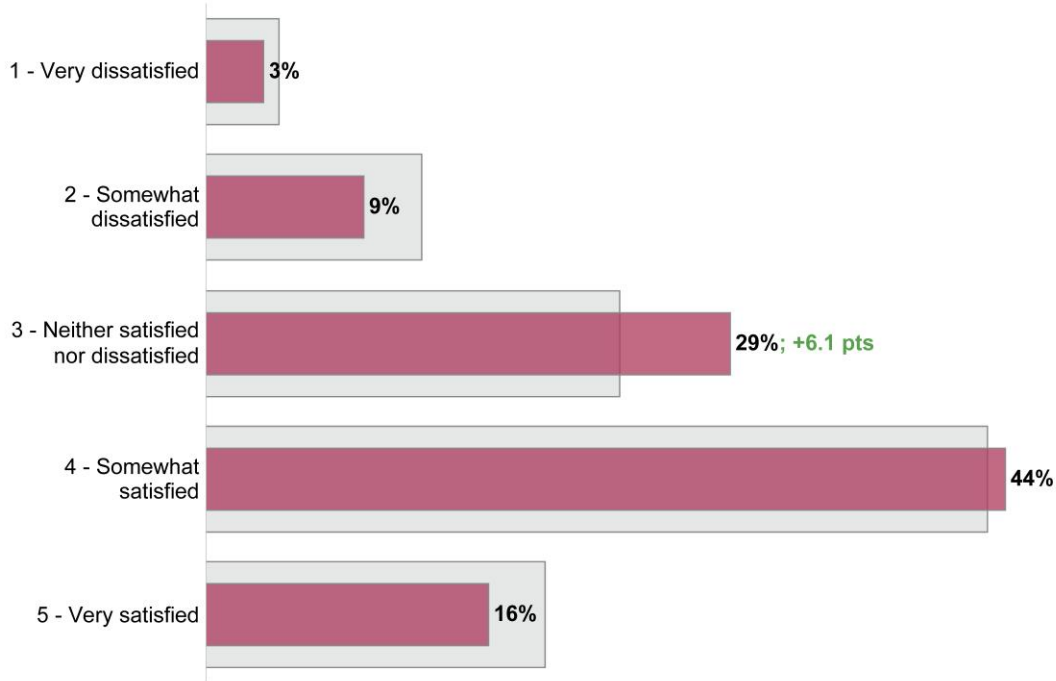
"Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets."

Statewide, 62% of respondents were satisfied with the direction of tourism development in Oregon (selected 4 or 5 on a five-point scale), while 16% were unsatisfied (selected 1 or 2). Twenty-three percent were neutral (selected 3, neither unsatisfied nor satisfied). In Willamette Valley, 60% were satisfied, 12% were unsatisfied, and 29% were neither unsatisfied nor satisfied. The average among respondents in Willamette Valley was the same as the statewide average in 2024 (3.6) as well as in 2023 (3.4).

Satisfaction with Tourism Development in Oregon

■ Willamette Valley
 ■ Statewide

Q: Please rate your satisfaction with the direction of destination development in Oregon:



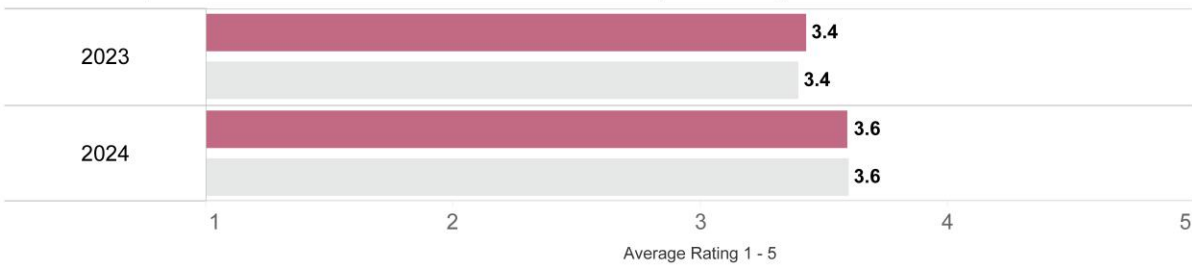
Note: "Destination Development" refers to overall tourism development in Oregon. The following definition was provided to survey respondents: "Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets."
 Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Satisfaction with Tourism Development in Oregon

■ Willamette Valley
 ■ Statewide

Q: Please rate your satisfaction with the direction of destination development in Oregon:



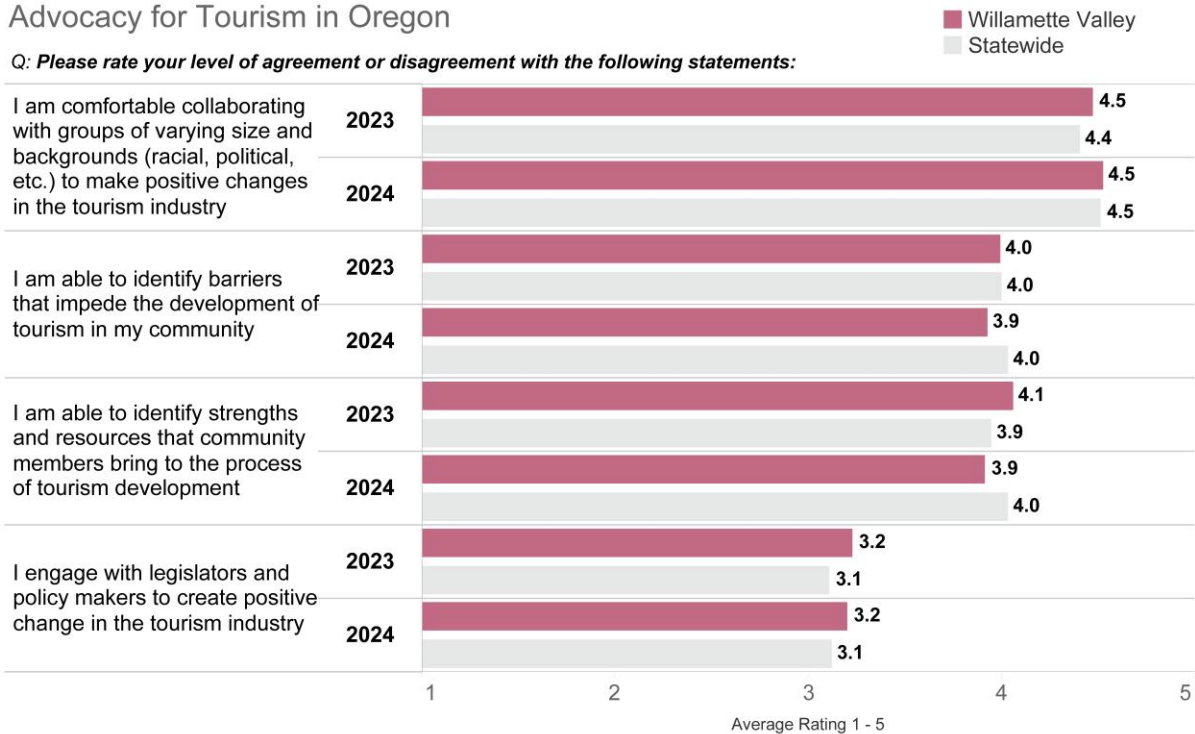
Note: "Destination Development" refers to overall tourism development in Oregon. The following definition was provided to survey respondents: "Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets."
 Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Respondents were asked to rate their agreement with four statements that measured their advocacy for tourism. The statement with the greatest support among the statewide sample and respondents in Willamette Valley was, "I am comfortable collaborating with groups of varying size and backgrounds (racial, political, etc.) to make positive changes in the tourism industry," with an average rating of 4.5 on a five-point scale for both samples. Respondents, both statewide and in Willamette Valley, agreed least with the statement, "I engage with legislators and policy makers to create positive change in the tourism industry".

Advocacy for Tourism in Oregon

Q: Please rate your level of agreement or disagreement with the following statements:

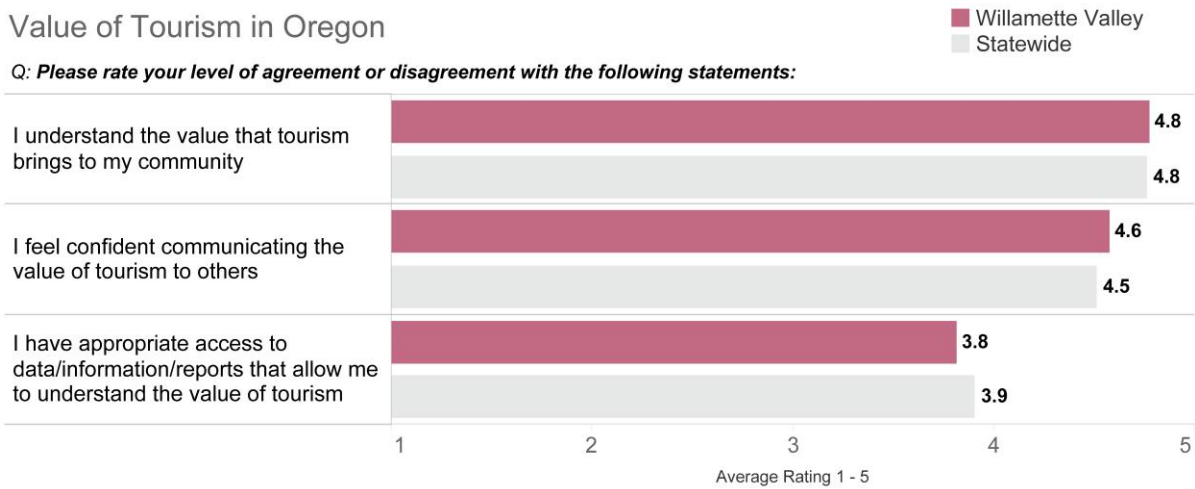


Source: RRC

Respondents were also asked to rate their level of agreement with three statements that measured perceived value of tourism. Average rating of the value of tourism differed only slightly between the statewide sample and Willamette Valley. Both rated all three statements highly, with "I have appropriate access to data/information/reports that allow me to understand the value of tourism" the lowest rated at 3.9 statewide and at 3.8 for Willamette Valley. The highest rated statement reflects an understanding that tourism benefits Oregon as a whole, at a 4.8 on a five-point scale: "I understand the value that tourism brings to my community" was rated equally high in both samples.

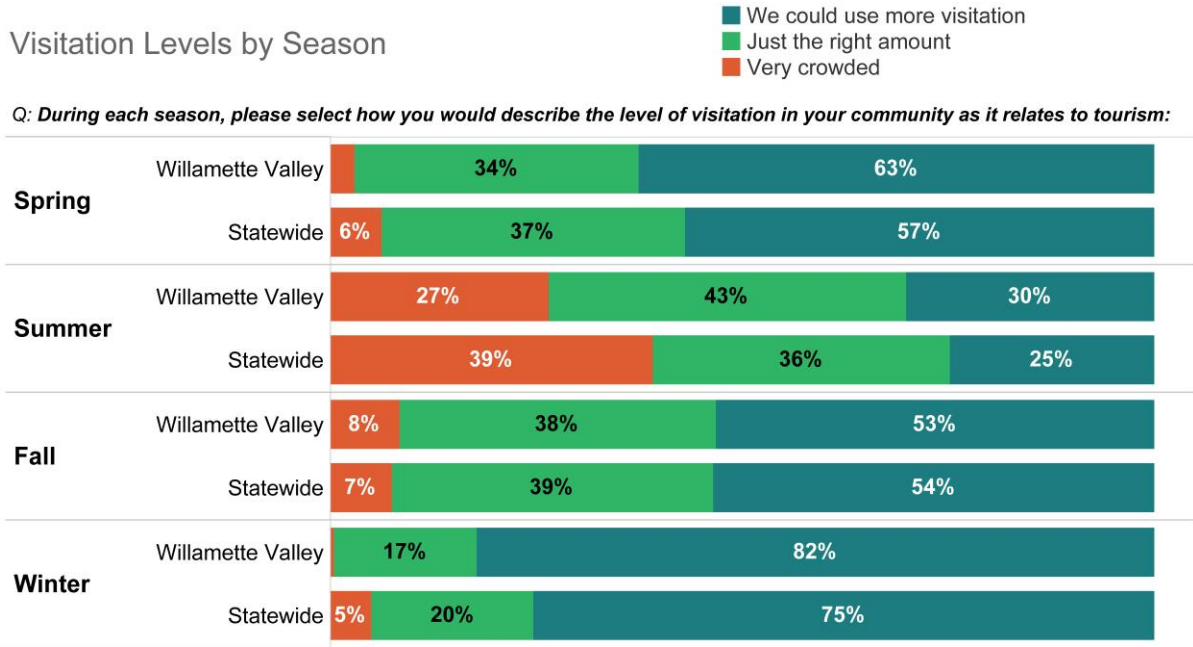
Value of Tourism in Oregon

Q: Please rate your level of agreement or disagreement with the following statements:



Source: RRC

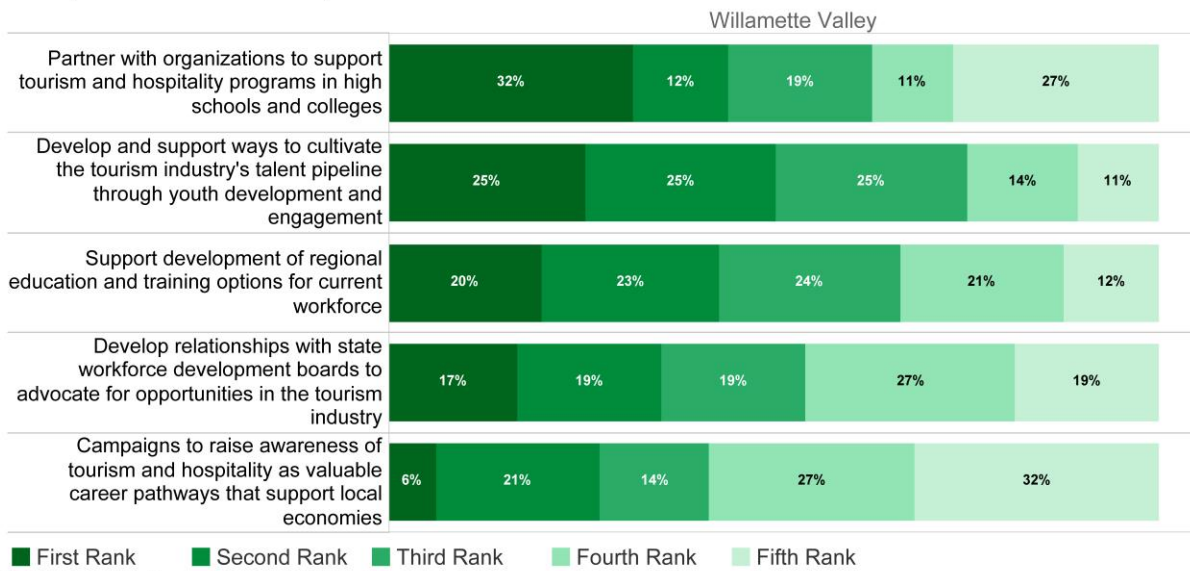
Respondents were asked to characterize the number of visitors their community receives during each of the four seasons. Statewide, 6% of respondents said there were too many visitors in the spring, followed by 39% in summer, 7% in fall, and 5% in winter. Willamette Valley respondents were more likely to say that they could use more visitation in every season apart from Fall. Willamette Valley respondents stated at a much higher rate this year, that their community was “very crowded” in the summer (27%), compared to last year at only 8% which stated the same.



Respondents were asked to rank, from highest to lowest priority, various educational and career opportunities designed to help develop, attract, and retain industry workforce. Willamette Valley respondents placed "Partner with organizations to support tourism and hospitality programs in high schools and colleges" as their top priority, with 32% ranking it first among the five options. The next top-ranked priority for Willamette Valley was "Develop and support ways to cultivate the tourism industry's talent pipeline through youth development and engagement" at 25%.

Educational and Career Opportunities (Regional)

Q: Please rank (from highest priority to lowest priority) the following educational and career opportunities designed to help develop, attract and retain industry workforce.



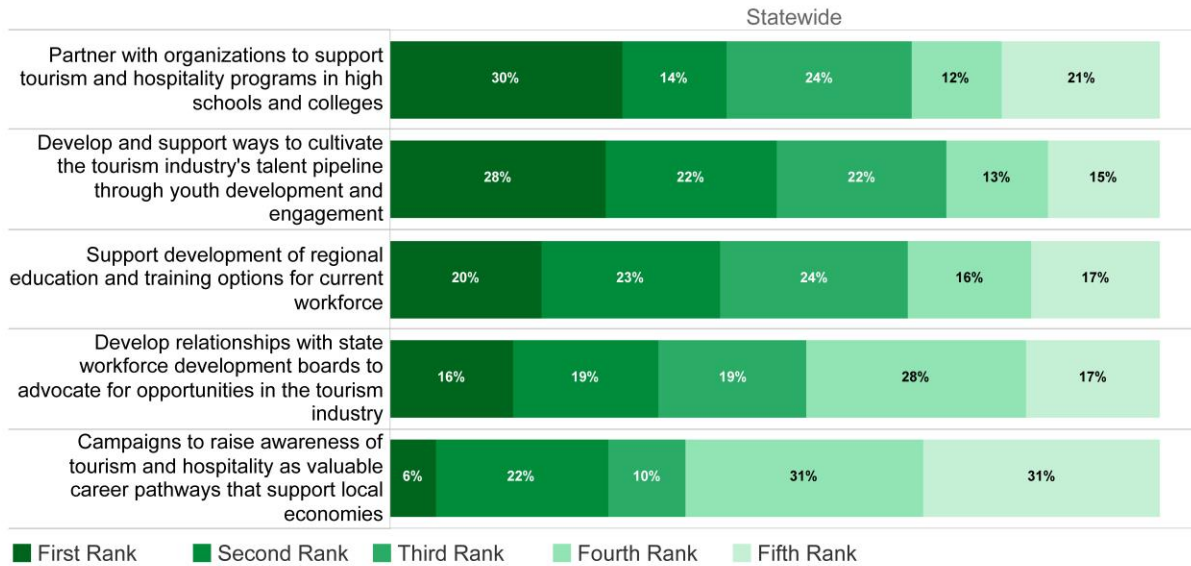
Note: Responses sorted in descending order by "First Rank".

Source: RRC

The statewide sample ranked "Partner with organizations to support tourism and hospitality programs in high schools and colleges" and "Develop and support ways to cultivate the tourism industry's talent pipeline through youth development and engagement" as their first-ranked priorities at 30% and 28%, respectively.

Educational and Career Opportunities (Statewide)

Q: Please rank (from highest priority to lowest priority) the following educational and career opportunities designed to help develop, attract and retain industry workforce.



Note: Responses sorted in descending order by "First Rank".

Source: RRC

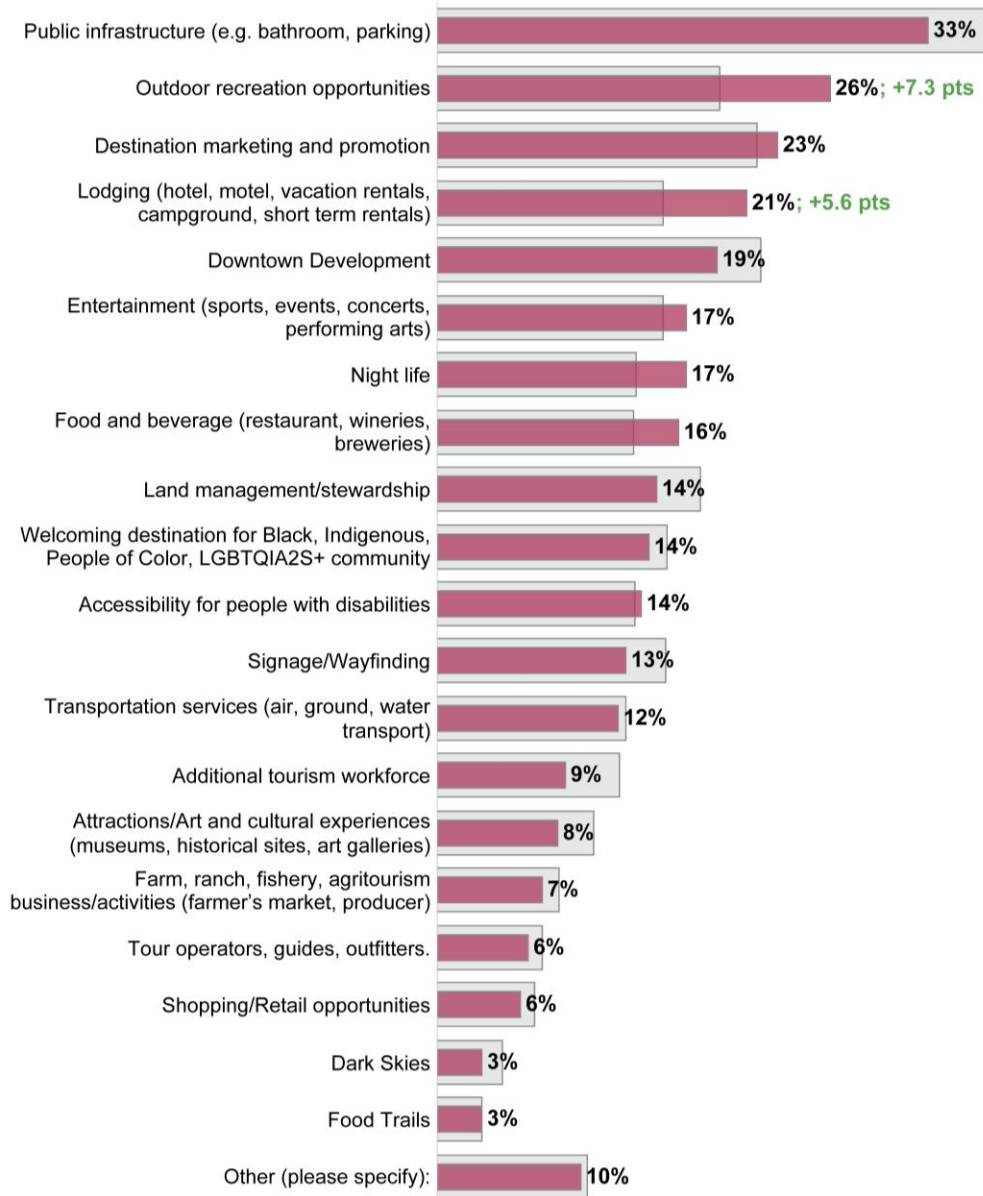
AREAS OF FOCUS

The top areas that the statewide sample said their community needs to focus on to improve the resident and visitor experience were public infrastructure (37%), destination marketing and promotion (21%), downtown development (21%), and outdoor recreation opportunities (19%). In comparison, Willamette Valley respondents identified public infrastructure (33%), outdoor recreation opportunities (26%) and destination marketing and promotion (23%) as having greater importance.

Areas of Focus

■ Willamette Valley
 □ Statewide

Q: Please identify three areas that your community needs to focus on to improve the resident and visitor experience. (Select up to three)



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

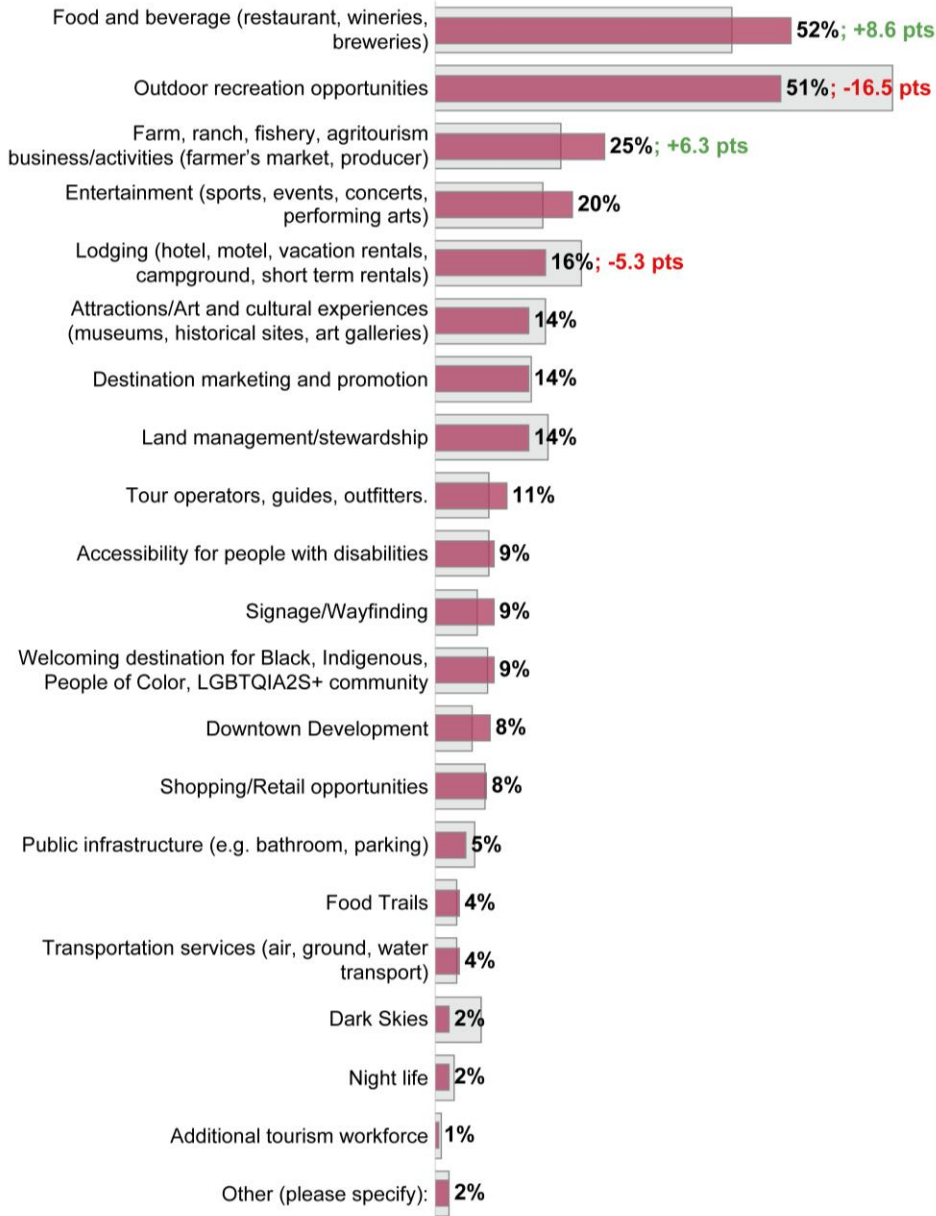
Source: RRC

Using the same set of answer options as those immediately above, the following figure portrays areas that respondents felt are strengths in their community. The top three areas that respondents from Willamette Valley consider as strengths in their community are food and beverage (52%), outdoor recreation opportunities (51%), and agritourism (25%). In comparison to the statewide responses, respondents in the Willamette Valley region were less likely to identify outdoor recreation opportunities and lodging as strengths but more likely to identify food and beverage and agritourism as strengths.

Community Strengths

■ Willamette Valley
□ Statewide

Q: Please identify three areas that are a strength for your community. (Select up to three)



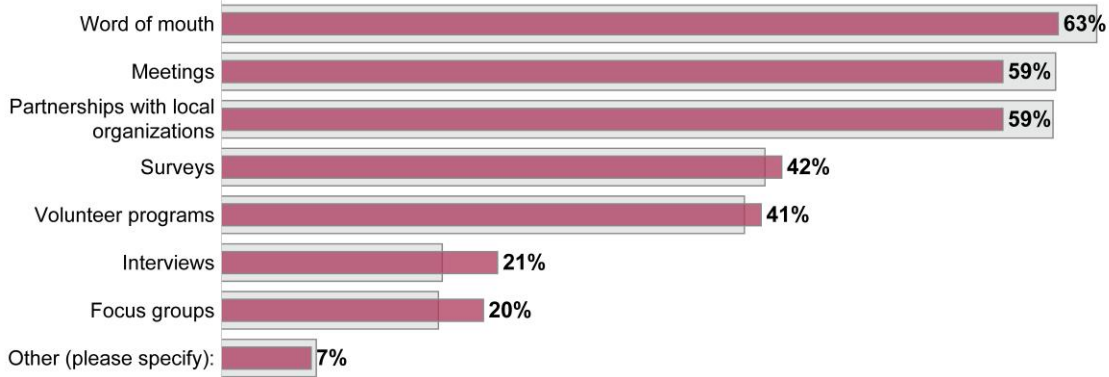
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

When communicating and engaging with the local community, Willamette Valley is largely consistent with the statewide sample, using word of mouth (63%), meetings (59%), and partnering with local organizations (59%) to reach out to the community. In comparison to the statewide responses, respondents in the Willamette Valley region were less likely to use interviews and focus groups when engaging the local community.

Local Community Engagement

Q: *What methods have you used to engage with your local communities in the past 12 months?*



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

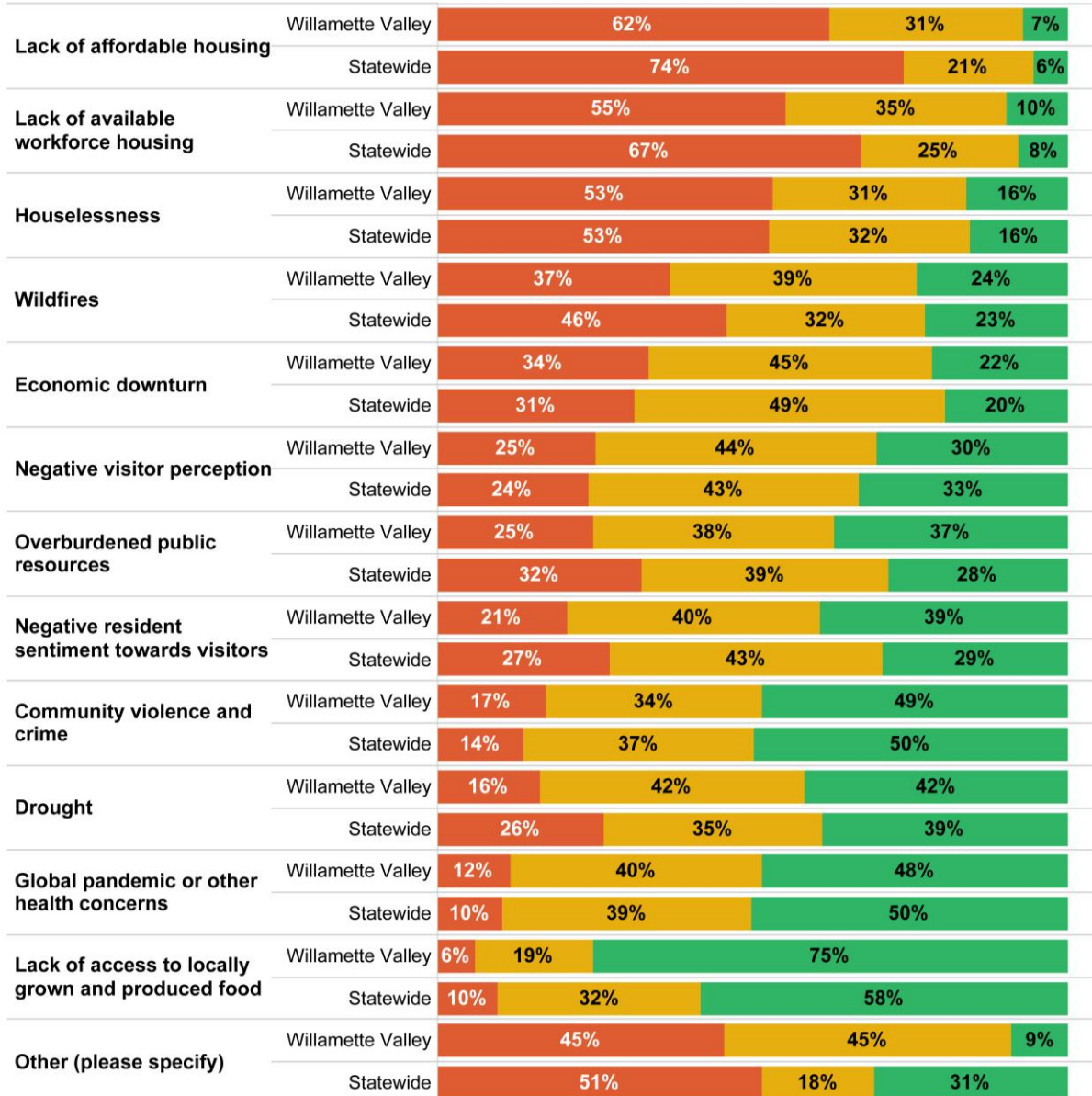
Source: RRC

The survey asked respondents to rate the challenges the community currently faces, and the level of risk associated with each challenge. The top three challenges statewide were identified by respondents as a lack of affordable housing (74%; "high risk"), a lack of available workforce housing (67%), and houselessness (53%). Much of the response from Willamette Valley identified similar challenges, although to a less degree.

Risks to Tourism in Your Community

Response
■ Low risk
■ Medium risk
■ High risk

Q: Which of the following challenges does your community currently face?



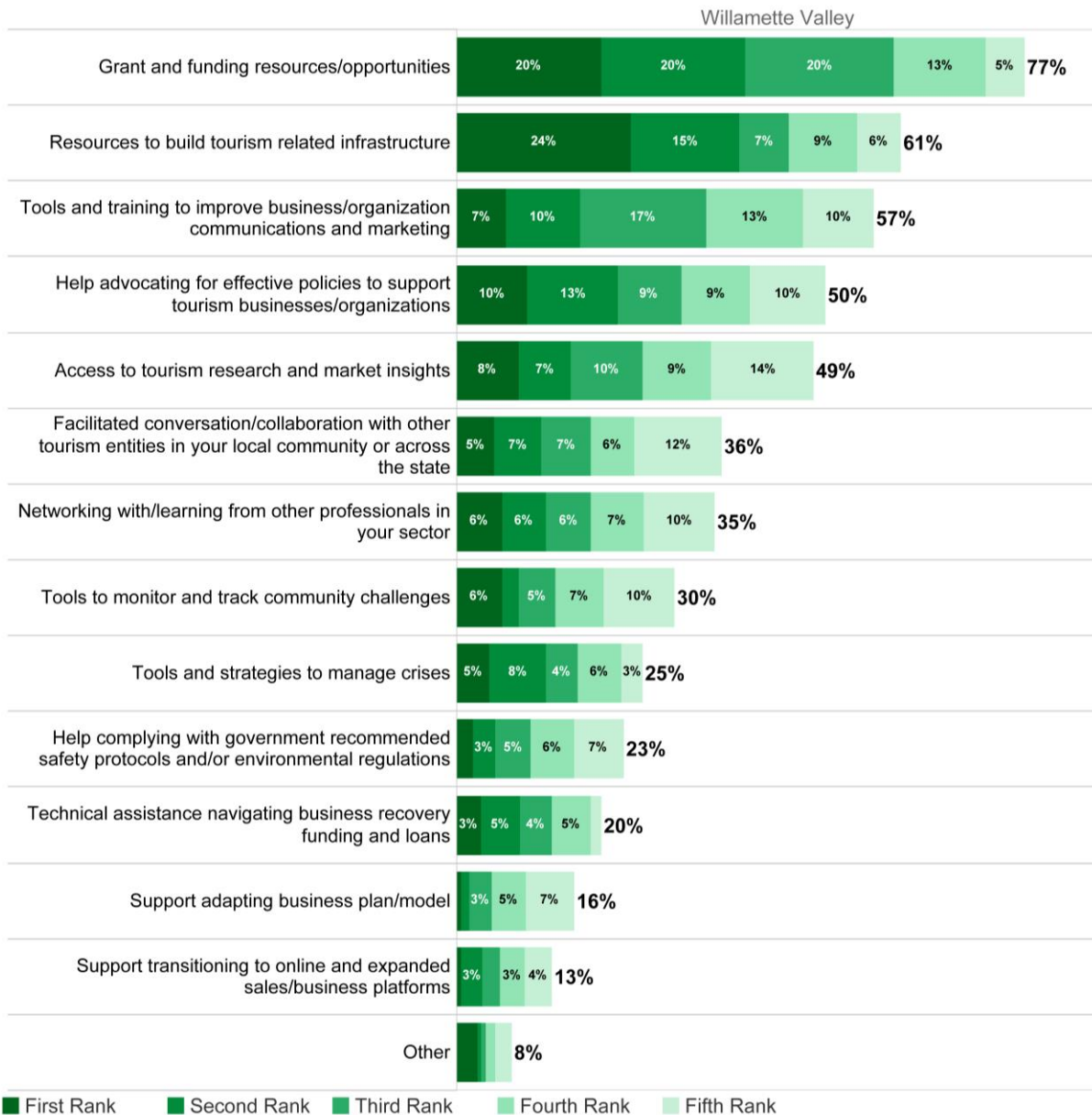
Note: Categories sorted in descending order by the percent of regional respondents selecting "High risk".

Source: RRC

The highest rated strategy statewide and in Willamette Valley was grant and funding resources/opportunities (72% and 77%, respectively, identified this among their top five resources or programs). Resources to build tourism related infrastructure (61%) and tools and training to improve business communications and marketing (57%) were among the next highest rated for Willamette Valley. The resources or programs that were identified as the lowest priority for Willamette Valley were support transitioning to online and expanded sales/business platforms (13%) and support adapting business plans (16%).

Resources & Programs (Regional)

Q: Which of the following resources or programs would best assist your business/organization or community in the face of the challenges identified above?



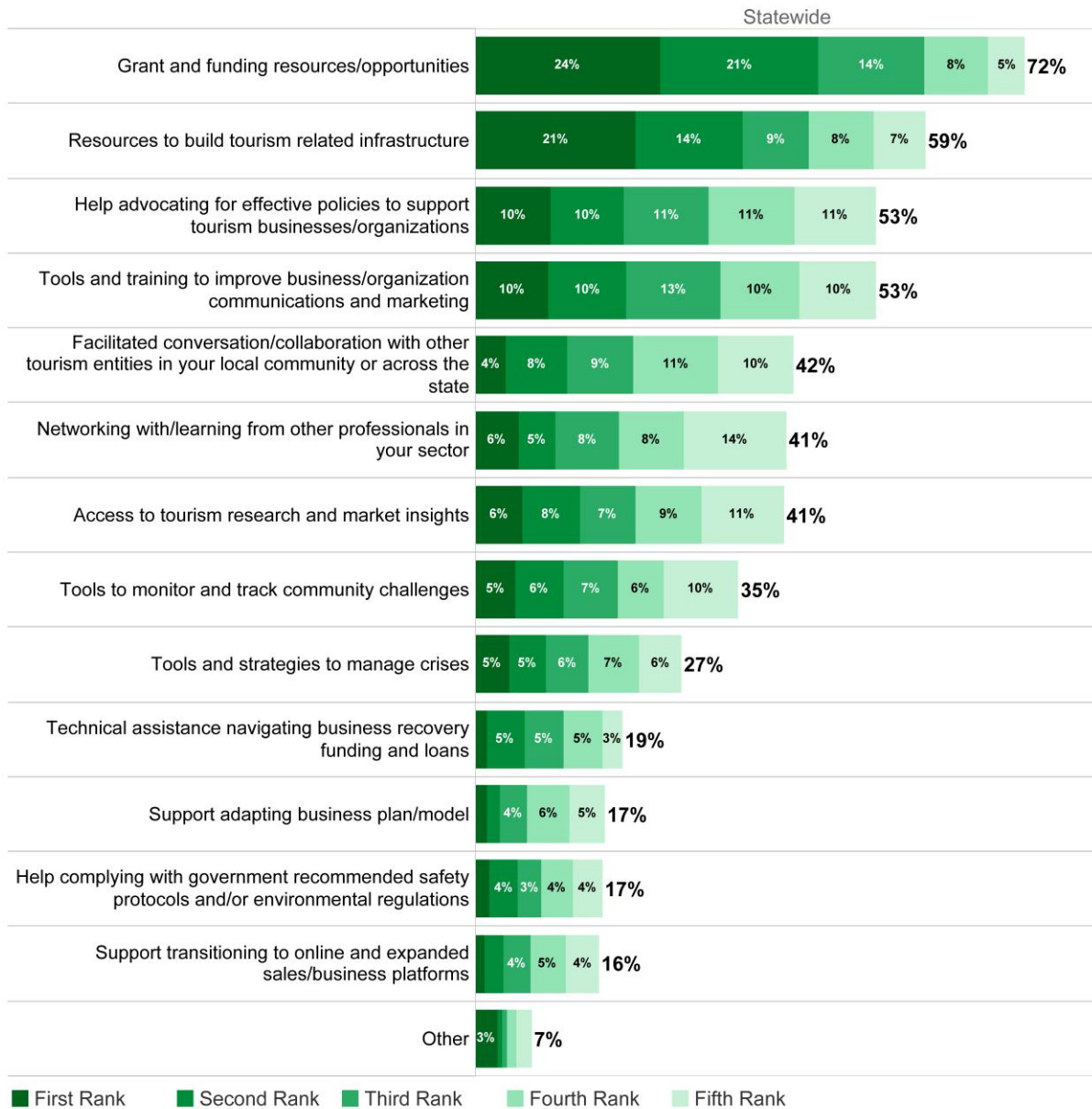
Note: Responses were recorded for the top five resources or programs respondents identified, with the sum of these five choices noted on the far right.

Source: RRC

Across the statewide sample, grant and funding resources/opportunities was the highest rated, with 72% of respondents identifying this among their top five resources or programs. Following were resources to build tourism-related infrastructure (59%), help advocating for effective policies to support tourism businesses/organizations (53%), and tools and training to improve business/organizations' communications and marketing (53%).

Resources & Programs (Statewide)

Q: Which of the following resources or programs would best assist your business/organization or community in the face of the challenges identified above?



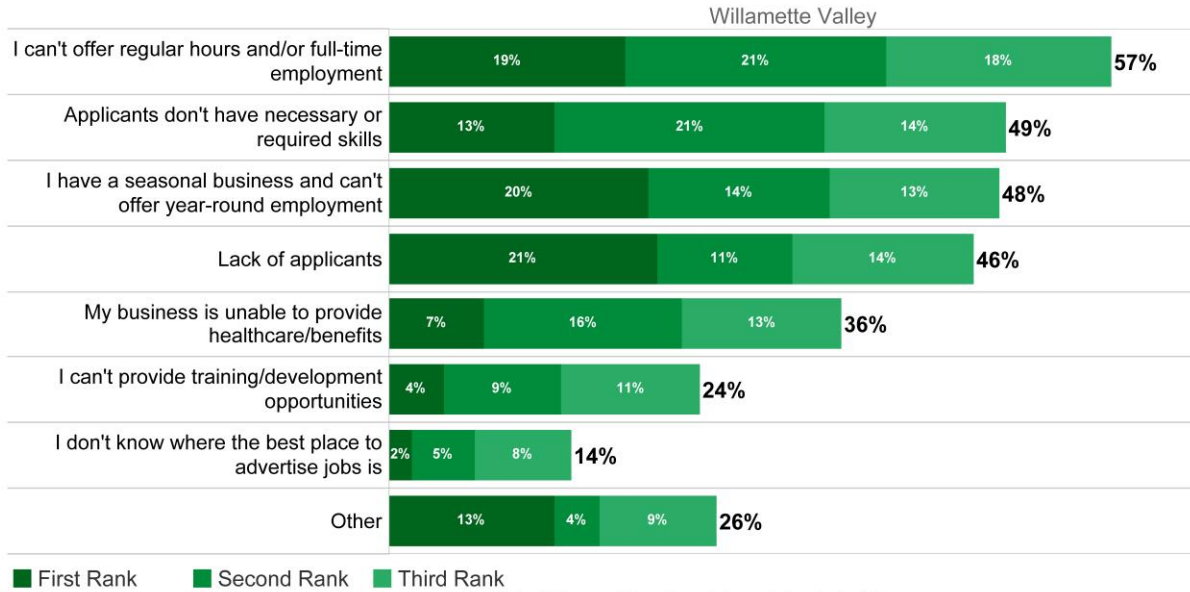
Note: Responses were recorded for the top five resources or programs respondents identified, with the sum of these five choices noted on the far right.

Source: RRC

Respondents were asked to identify the three greatest challenges they faced in attracting and/or retaining tourism workforce in the area. More than half of Willamette Valley respondents ranked “I can’t offer regular hours and/or full-time employment” (57%) among their top three challenges in the area. The lowest rated challenge by Willamette Valley was “I don’t know where the best place to advertise jobs is” at 14%. Examples of challenges related to workforce housing mentioned in the “other” category primarily include affordable/lack of housing and lack of ability to pay competitive salaries.

Tourism Workforce Challenges (Regional)

Q: *What are the three greatest challenges you currently face in attracting (and/or) retaining tourism workforce?*



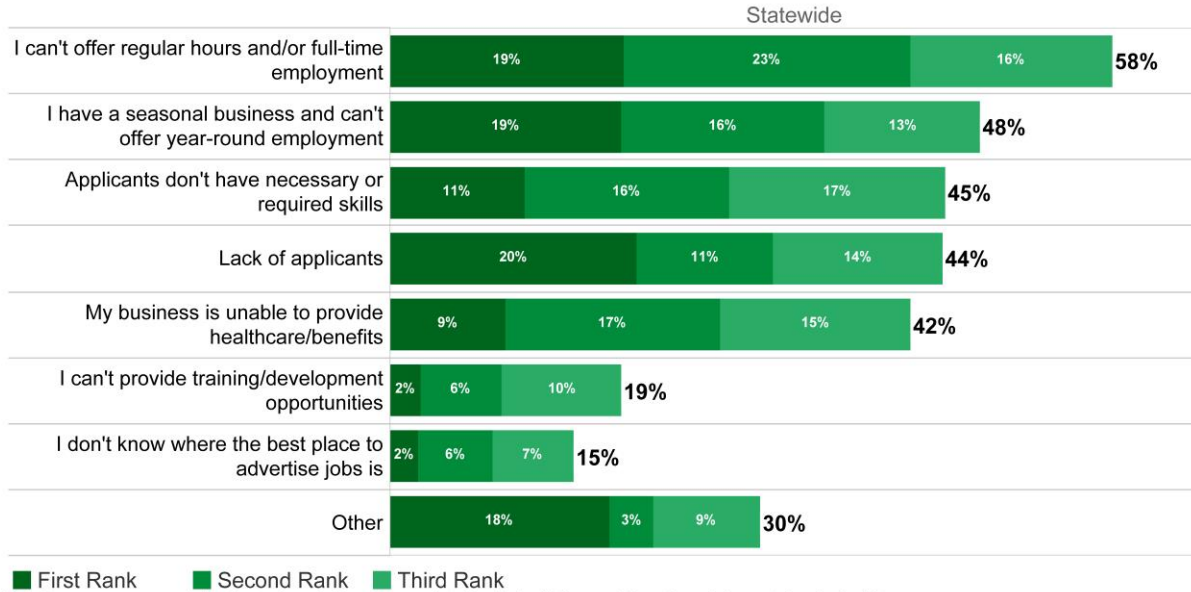
Note: Responses were recorded for the top three challenges respondents identified, with the sum of these three choices noted on the far right.

Source: RRC

The statewide sample was similar to regional findings, with the greatest share of respondents ranking “I can’t offer regular hours and/or full-time employment” (58%) and “I have a seasonal business and can’t offer year-round employment” (48%) among their greatest challenges. Similarly, “I don’t know where the best place to advertise jobs is” (15%) was seen as relatively minimal in terms of tourism workforce challenges.

Tourism Workforce Challenges (Statewide)

Q: *What are the three greatest challenges you currently face in attracting (and/or) retaining tourism workforce?*



Note: Responses were recorded for the top three challenges respondents identified, with the sum of these three choices noted on the far right.

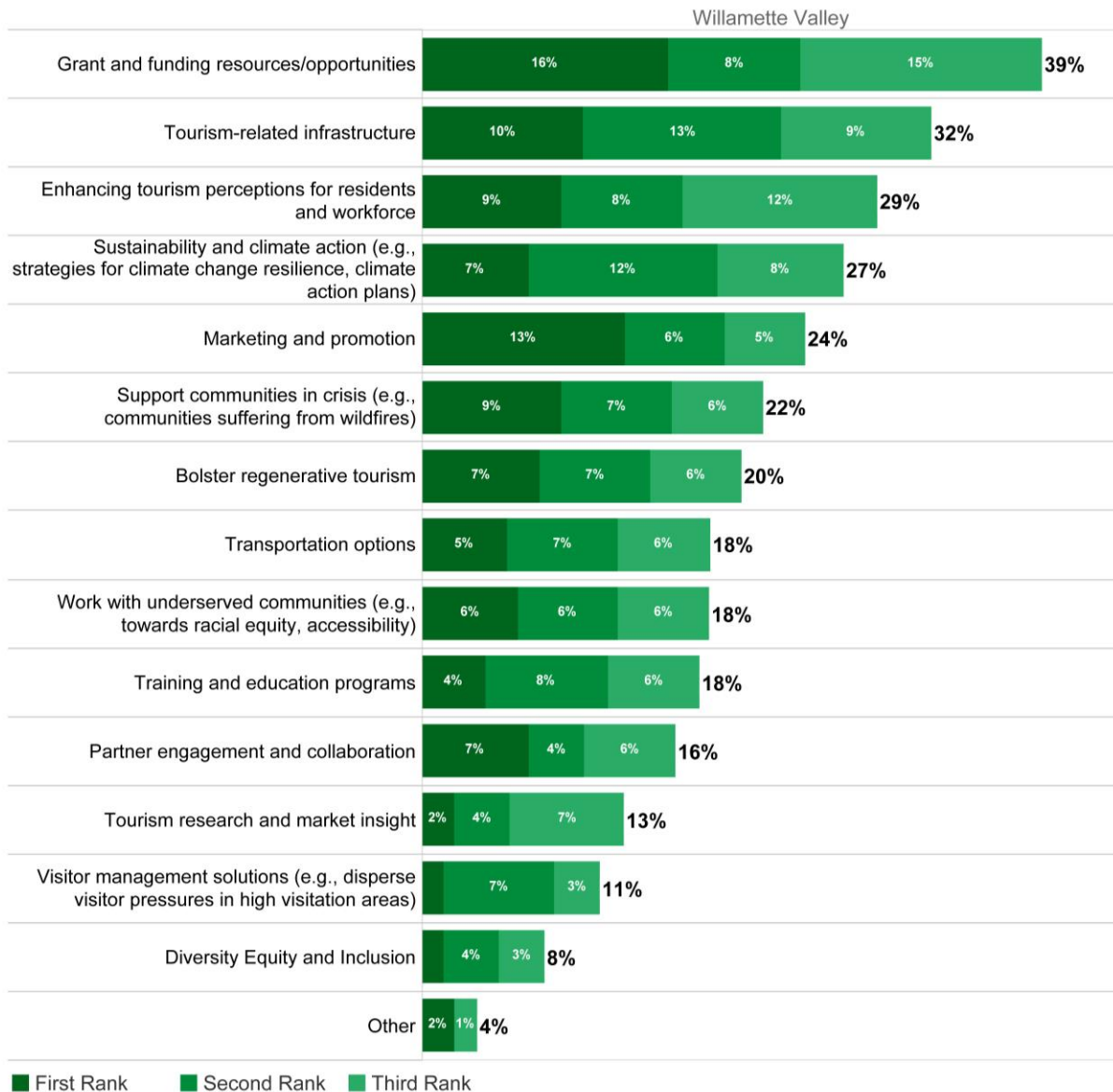
Source: RRC

As in prior iterations of the Oregon Tourism Industry Partner Survey, respondents were asked to identify the three areas that should be emphasized for tourism planning over the next 2-5 years.

Willamette Valley respondents identified grant and funding resources as the top priority, with 39% of respondents identifying it among their top three priorities. Tourism-related infrastructure was the second most identified priority (32%), followed by enhancing tourism perceptions for residents and workforce (29%). Compared to 2023, marketing and promotion fell from 60% to 24%, the most drastic change.

Long-Term Tourism Planning (Regional)

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years. (Rank top three priorities within this list)



Note: Responses were recorded for the top three plans respondents identified, with the sum of these three choices noted on the far right.

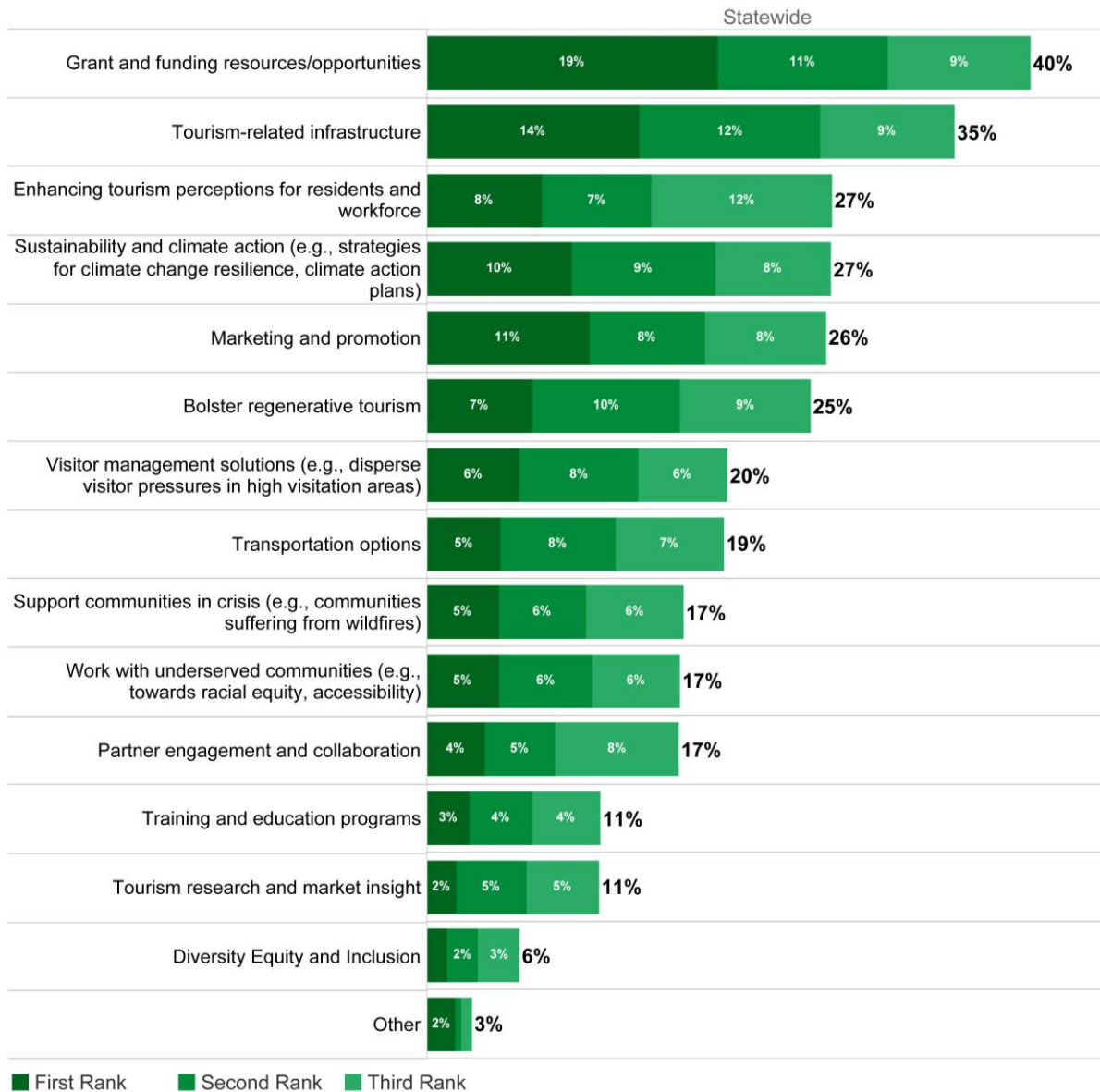
Source: RRC

The top priorities identified in the statewide sample were grant and funding resources/opportunities (40%), tourism-related infrastructure (35%), and sustainability and climate action (27%).

Relative to 2023, many of the same areas of focus were among the top priorities for respondents, with the exception of marketing and promotion, which was cited as a priority for 45% of the respondents in 2023 (down to 26% this year). Tourism-related infrastructure also dropped from 53% to 35% in 2024 but remains a top priority.

Long-Term Tourism Planning (Statewide)

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years. (Rank top three priorities within this list)



Note: Responses were recorded for the top three plans respondents identified, with the sum of these three choices noted on the far right.

Source: RRC

REPRESENTATION OF AND COMMUNICATION WITH UNDERSERVED COMMUNITIES

Historically and currently underserved and under-resourced communities, including Oregonians who identify as:

- Native American, members of Oregon's nine federally recognized tribes, American Indian, Alaska Natives
- Black, African, African American
- Latina, Latino, Latinx, Hispanic
- Asian
- Pacific Islander (including Compact of Free Association Citizens)
- Immigrants, Refugees, Asylum-Seekers, Deferred Status Holders, Temporary Protected Status
- Undocumented, Deferred Action for Childhood Arrivals (DACA), "Dreamers", Non-Immigrant Visa Holders
- Linguistically diverse, English language learners (ELL)
- Economically Disadvantaged
- People with disabilities
- LGBTQIA2S+
- Farmworkers, Migrant Seasonal Workers

Definition provided by State of Oregon

(https://www.oregon.gov/das/Docs/DEI_Action_Plan_2021.pdf)

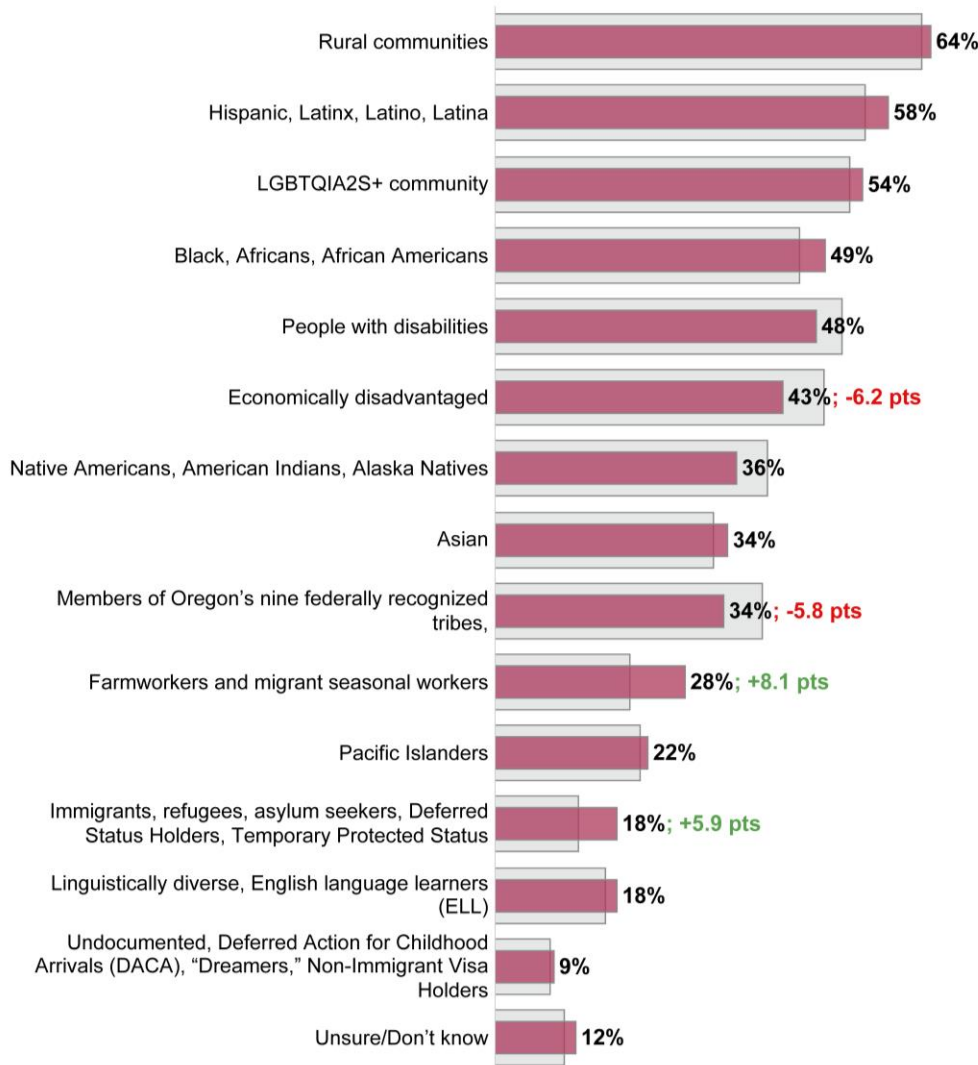
Of those underserved and under-resourced communities, Willamette Valley respondents self-reported having the most engagement with rural communities (64%); Hispanic, Latinx, Latino, Latina (58%); LGBTQIA2S+ (54%); and Black, African, African American (49%).

Compared to the statewide sample, Willamette Valley respondents are more likely to engage with farmworkers and migrant seasonal workers (28%) and immigrants, refugees, asylum seekers, Deferred Status Holders, and those with Temporary Protected Status (18%). However, they are less likely to engage with people who are economically disadvantaged or members of Oregon’s nine federally recognized tribes than the statewide sample.

Engaging with Underserved Communities

■ Willamette Valley
□ Statewide

Q: Which of the following underserved communities have you engaged with in the past two years?



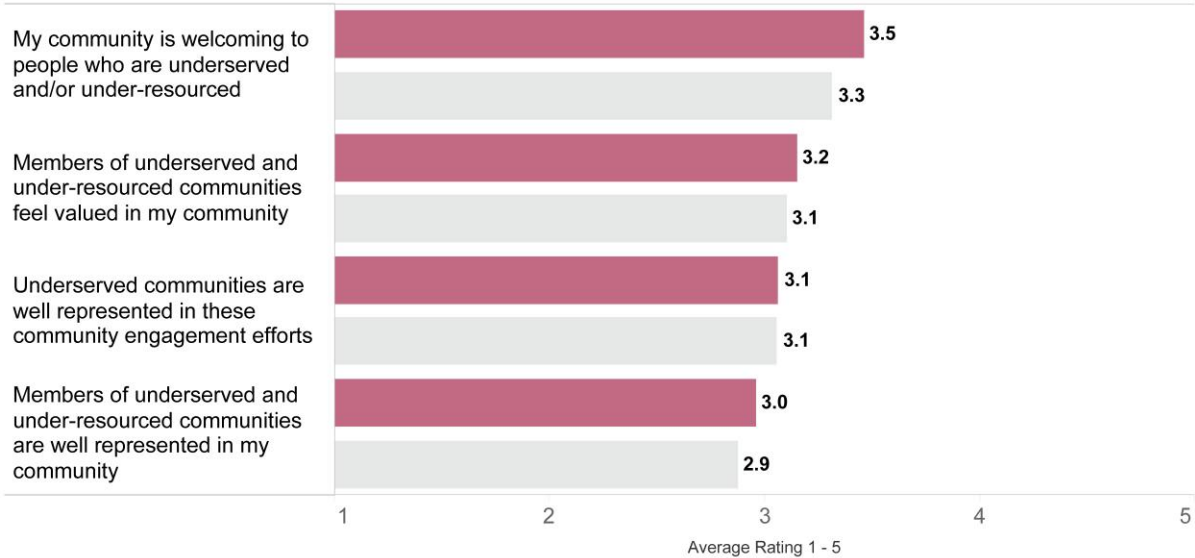
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Respondents were asked to rate their agreement with four statements that measured their representation of underserved communities in the area. There was little shift observed in the average ratings between Willamette Valley and the statewide sample. The highest rated statement for both samples was "My community is welcoming to people who are underserved and/or under-resourced," at 3.3 on a five-point scale for the statewide sample and 3.5 for Willamette Valley respondents. The lowest rated for both samples was the statement "Members of underserved and under-resourced communities are well represented in my community," at an average rating of 3.0 and 2.9 for Willamette Valley and the statewide sample, respectively.

Representation of Underserved Communities

Q: Please rate your level of agreement or disagreement with the following statements:

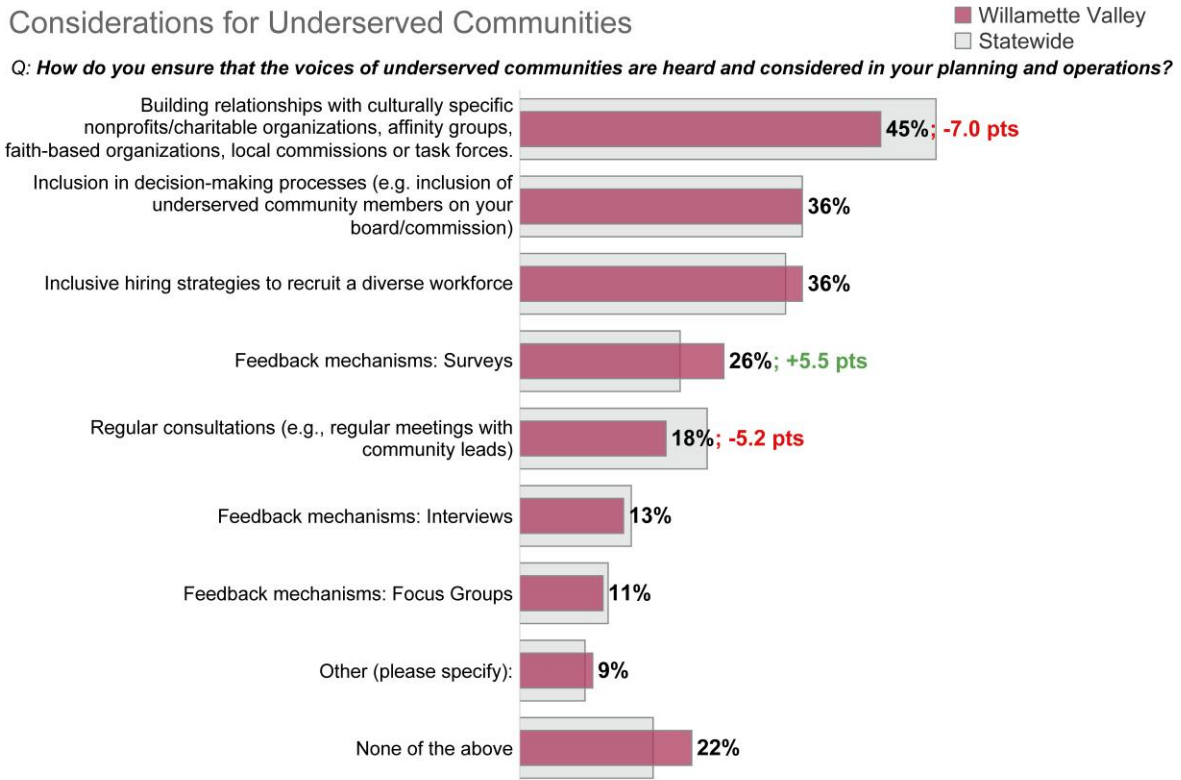


Source: RRC

When asked what considerations respondents make to ensure that the voices of underserved and under-resourced communities are heard, nearly half (45%) of Willamette Valley respondents cited building relationships with culturally specific nonprofits/charitable organizations, affinity groups, faith-based organizations, local commissions or task forces. Just over one-third of Willamette Valley respondents also included these communities in the decision-making process (36%) and used inclusive hiring strategies to recruit a diverse workforce (36%).

Compared to the statewide sample, Willamette Valley respondents report building relationships with culturally specific groups and utilizing regular consultations slightly less frequently. However, Willamette Valley respondents make use of surveys more frequently.

Considerations for Underserved Communities

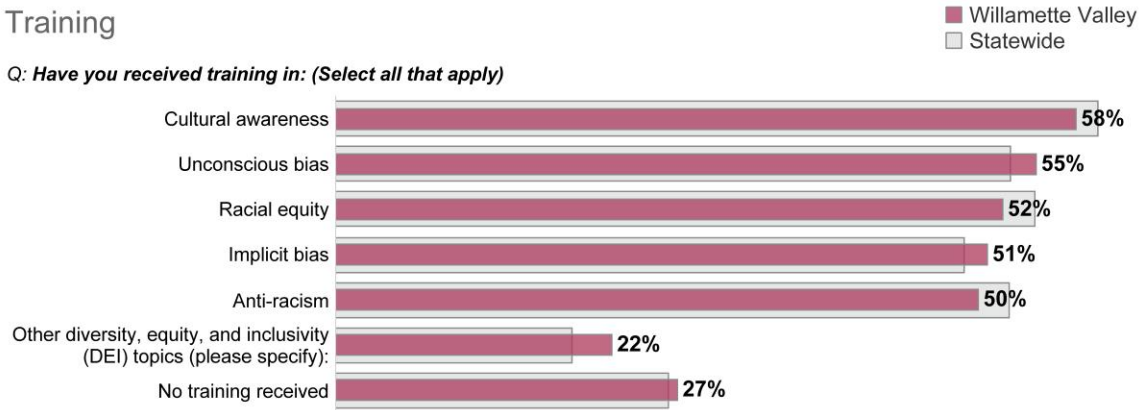


Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

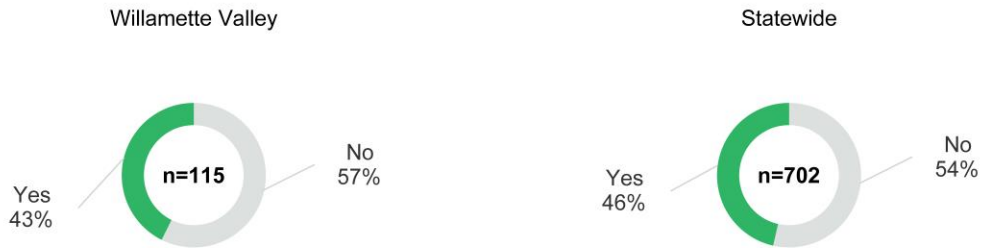
A majority of Willamette Valley respondents reported having training in cultural awareness (58%), unconscious bias (55%) racial equity (52%), implicit bias (51%), and anti-racism (50%), with most of these trainings not provided by their current employer.

Training



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Q: Was this training provided by your current employer?



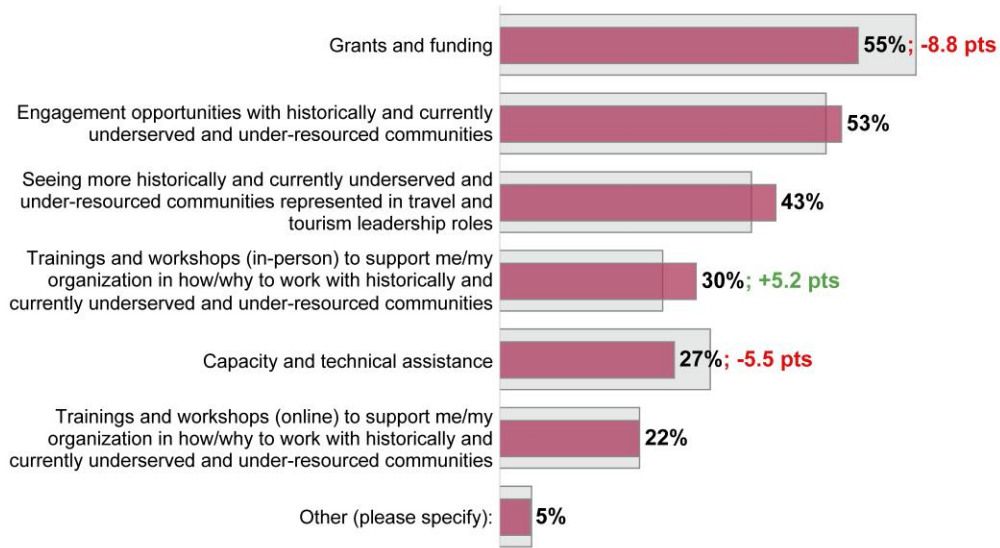
Source: RRC

When asked what type of resources would be most helpful in developing tourism-related facilities and products for underserved and under-resourced people, Willamette Valley respondents cited grants and funding (55%) and engagement opportunities with historically and currently underserved and under-resourced communities (53%). However, Willamette Valley respondents would find grants and funding and capacity and technical assistance less helpful than the statewide sample and instead have a greater preference for trainings and workshops to support their organization in how/why to work with historically and currently underserved and under-resourced communities.

Development of Tourism Resources

■ Willamette Valley
 □ Statewide

Q: Which of the following would be most helpful in developing tourism related facilities and products for underserved and under-resourced people in your community?



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

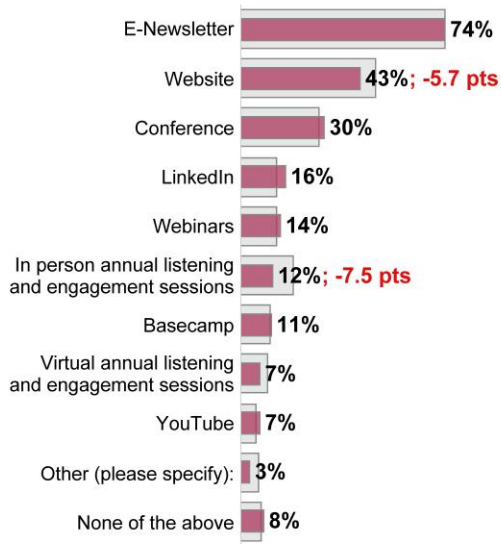
INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Seventy-four percent of Willamette Valley respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter, followed by their website (43%). By a large margin, e-newsletters (monthly or quarterly) are considered the best way for respondents to receive information.

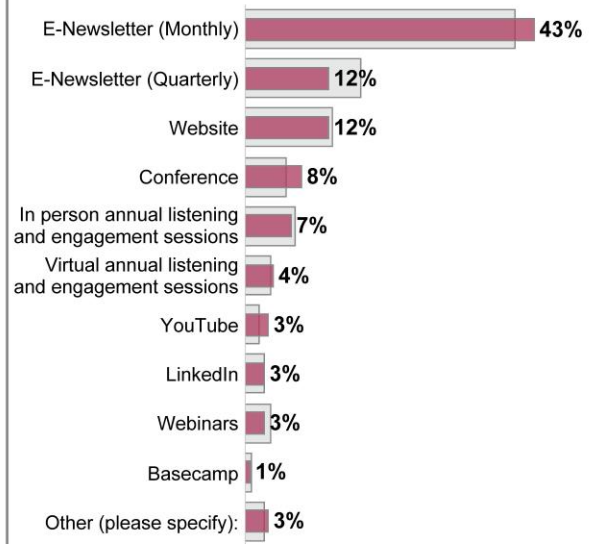
Tourism Communication Methods

■ Willamette Valley
□ Statewide

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



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



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

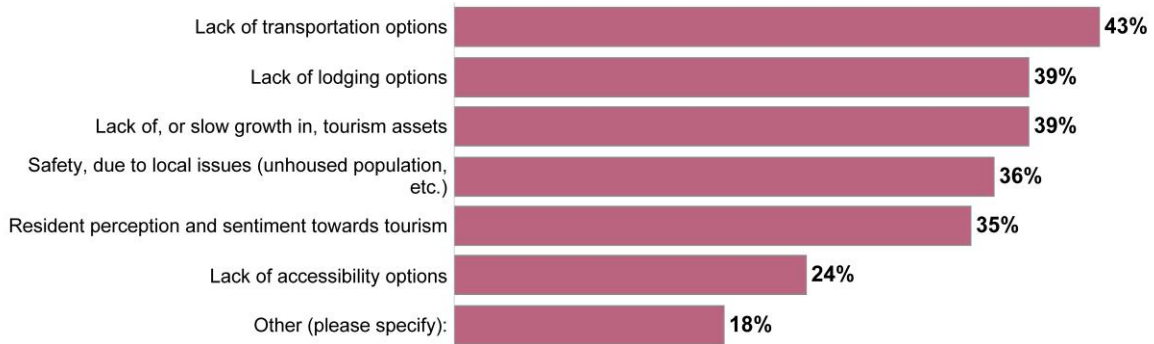
Source: RRC

WILLAMETTE VALLEY QUESTIONS

Each Regional Destination Management Organization (RDMO) had the opportunity to ask a series of custom questions of specific interest to their partners. The findings from these custom questions are presented below. Responses to regional questions that were open-ended are presented in the Open-Ended Response appendix.

Willamette Valley - Greatest Challenges

Q: *When thinking about the ability to welcome visitors to your destination, what are some of the greatest challenges your local community is facing?*



Source: RRC

Willamette Valley - Engagement with Travel Oregon Opportunities

Q: How engaged are you now in the following opportunities offered by Travel Oregon, your regional DMO, and your local DMO?

Rating Category	Avg.	n=	1 - Not at all engaged	2 - Slightly engaged	3 - Somewhat engaged	4 - Moderately engaged	5 - Extremely engaged	X - Not familiar with local/regiona..
Destination development toolkits and technical assistance	2.7	125	34%	16%	24%	7%	7%	12%
DMO networking events	2.8	123	38%	15%	10%	11%	13%	13%
Industry research	3.2	123	17%	21%	18%	16%	20%	7%
Local DMO/Regional educational opportunities and trainings	3.0	124	23%	21%	19%	13%	13%	10%
Travel Oregon engagements and webinars	2.9	125	22%	24%	20%	18%	9%	7%
Willamette Valley Visitor's Association industry website	3.0	127	22%	19%	21%	18%	12%	8%
Willamette Valley Visitor's Association menu of investments opportunities	2.5	123	38%	20%	15%	14%	3%	10%

Source: RRC

OPEN-ENDED RESPONSES

The survey resulted in an extensive number of open-ended responses. In addition to open-ended questions asked of all respondents, each region was given the opportunity to ask customized questions to respondents from their region. Responses to the following Willamette Valley questions follow:

- *Describe how your business or organization engages or could engage in sustainable or regenerative travel.*
- *When thinking about the ability to welcome visitors to your destination, what are some of the greatest challenges your local community is facing? Other (please specify)*

Note that responses are presented 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 other open-ended responses are viewable in a spreadsheet format or in an online dashboard format with accompanying word clouds and bar charts.

Describe how your business or organization engages or could engage in sustainable or regenerative travel.

.

advising those offering experiences and/or communications on how to incorporate language and best practices

As a regenerative vineyard, we educate visitors about soil building and biodiversity. If that education helps inspire visitors to encourage biodiversity in their own home regions, we've made a difference.

By investing in restoring native landscapes and habitats, protecting old growth forest, and eliminating clear cut style logging.

Certified Biodynamic Farming and Practices; Certified B Corp business.

Clean up City Day - like a beach clean up day!

Coordinating voluntourism opportunities for visiting conferences/groups with local partners.

Currently, we don't do anything but it would be nice to see our lodging associations get involved in something like this.

Currently: Fair wages, reduce vehicles on road, support wineries that employ regenerative practices, partner and promote local businesses. Future: ecoFriendly vehicles, minimize waste, etc.

Educate on leaving no Trace and even improving the land you visit. Use tourism to boost uo small communities that are passed through on way to adventures.

engaged on board

Eugene Science Center is off the beaten path, with minimal wayfinding support from the City of Eugene. We independently attempt to communicate how to visit ESC via bus or bike, and we actively promote sustainable practices.
Exploring and supporting voluntourism opportunities, responsible recreation, and environmental conservation efforts.
Feature on website
Fishing guides often pick up trash while guiding, leaving it better than you found it.
Host picnics by the river, partner with bike tours
Host river events that include education on Tribal stewardship and/or offer activism opportunities
Huh?
i have an outfitting business
I am a contractor; I connect lots of opportunities together from disparate groups. There are a lot of people doing similar work, and a lot of growth could be made if resources were combined.
I can write about it- that's what I do
It is included as options in our services.
Leave it better than we found it.
Local businesses don't even know what this is...and don't have time to figure it out.
make visitors aware of regenerative travel through social media
Making events have a sustainability focus
Maybe only to add more events such as Earth Day where school groups, etc, can actually get into the dirt with Garden staff to clean, restore, or remodel certain gardens.
mindful of what we bring to the space. if it is celebration to limit the waste generation at the event
More trash receptacles that are changed more frequently, better recycling education
My business displays and educated me the community and customers in River clean up. My business creates and promotes River clean up, party with the community for free events to educate the community on River clean up. And display River clean up, as I pick up trash on guided tours on the river in front of customer and educate them at the same time.
My business operates globally, but being based in eugene the travel barrier is a large factor. Travel and regenerative travel is difficult as a destination opportunity given the proximity to an airport that folks outside the region can access without making multiple (affordable) flight connections. Portland is just too far for a regenerative trip to tmeugene, given all of the closer opportunities to PDX
My business practices leave no trace and takes people out in nature to discover its beauty.
Not an option at this time

Not sure
Number one issue is land use. We need sensible agri-tourism to maximize high-yield visitor spend through overnight stays. If we are unable to attract locals to the career pathway then we also need workforce housing....good luck trying to get both in the current anti-growth political environment of Oregon.
Offer trainings and assistance to community organizations already working in this space.
Onsite catering with pack in pack out policies. Always leaving spaces better than when we arrived and engaging in best practices when disposing of waste.
Opportunities to volunteer at the children's museum, opportunities to help create or repair exhibits, opportunities to create art
Organic Vineyard, Salmon Safe, Dry Farming
ORLA works to support local businesses and keep them open. Earlier this year, we sent out a letter notifying local businesses about a restaurant that was closed due neighbor's complaint of an 'odor'. ORLA took action with the city council to help this business owner get their business back open.
Our businesses are B Corp, LIVE and Salmon-Safe certified. Please note that your definitions of regenerative are very different than those in the farming world.
Our engagment could begin sustainable travel, particularly with picking up trash along the side of our roads, especially near waterways.
Our non profit does not have a destination, but we could promote it on our website and social media pages.
Our organization centers community interests and opportunities in our work so we are collaborators in improving the community through tourism.
Our organization is a DMO, so at our best we participate in regenerative travel by promoting our tourism assets equitably, participating in our community and adding capacity to sustainable development projects in our community, increasing equitable access to our communities resources (i.e. ADA compliance, outdoor recreation access, bi/trilingual messaging)
Promotes alternative transportation (current survey out on this topic) to staff and visitors, zero waste, depts invested in teaching about climate change. Large events could so better at this.
Public transportation would be amazingly helpful
Recycle, use environmentally friendly materials.
River clean up events with Willamette River Keepers. Removal of derelict vessels from the river. Assist the Yamhill County Marine Patrol on keeping boaters safe and providing assistance when they encounter problems or accidents on the river.
River clean up with rafting tripl
River clean-ups; picking up refuse and removing invasive species.

Signage in our parks
Support the sustainably grown wine that comes from our region
The use of the historic building is a form of sustainability. We are starting to talk about what we do to be more sustainable internally. This is to help educate our community about reuse and sustainable practices.
There is a 501 C3 component to my work, we host large scale, trail work parties, where we rehabilitate trails throughout the Pacific Northwest.
Through education.
until we respect the rights of poor people this is not possible.
Using recycled materials, sponsoring community cleanups, community art projects and teaching opportunities.
Volunteering for cleanup on trails or at parks.
we try to help our guests make good choices like recycling. And we try to make good choices around purchasing and energy.
We are a LEED certified hotel and follow a variety of sustainable practices.
We are a walkable destination so once someone arrives in downtown Salem they can leave their car parked and walk to restaurants, shopping, etc. We are also just a few blocks from Amtrak so that makes it convenient for car-less travel too.
We are actively working on several destination development projects alongside local, regional and national organizations that will improve the quality of life for locals.
We are building our DMO right now in coburg with regenerative practices, stewardship, and resident sentiments as our 3 building blocks of the DMO. I actually supplied a few main stakeholders with copies of the WVVA Regenerative tourism report.
We are stewards of the land and resources
We are very involved but could do more with opportunity for funding and marketing.
We currently encourage tourists, and locals, to buy and support local. We also invite other non-profit organizations that support sustainable and/or regenerative processes to participate.
We do service projects, cleaning up areas, providing support at community gardens, etc.
We have promoted Take Care out There campaigns, promoting river and downtown cleanups and give a hoot city wide volunteer organized efforts. Mid-Willamette Valley Food Trail efforts to source local ingredients.
We highly support this. Any race site we have built from Oregon to Florida and back we set a goal to leave it better than we found it.
We just keep things clean in places people want to visit.
We participate in Adopt-a-Road with Lane County so the road looks nicer to guests as they travel in. We want to highlight more of our vineyard practices and how Raptors benefit the land (Cascades Raptor Center). We are not certified sustainable or organic because of the cost, time required to fill out forms and paperwork, and additional

headaches associated with it - but we do practice organic and are sustainable with our wine growing practices.
We regularly contribute to trail stewardship, serve on the board of the local trail work alliance, we provide invitations for our clients to join trail work parties, we sponsor the local NICA chapter,
We support local Businesses so our travel would be regenerative.
We work with our rural community to develop more recreation infrastructure. Destination development is inherently sustainable and regenerative.
We would love to offer courses for communities to learn more about how to create sustainable/regenerative travel/outdoor recreation opportunities.

<i>When thinking about the ability to welcome visitors to your destination, what are some of the greatest challenges your local community is facing? Other (please specify)</i>
climate change, visitors stop coming when there's fire nearby or even in the state!
convention and sports tournament space needed
Cost of doing business in Oregon is much higher than in other states and causes lots of folks to think twice about coming back. I have clients from all over the country that hate coming to Oregon (sports teams, concerts etc) because it is too expensive.
Expendable income
For the product we work with, the greatest challenge is building new trails to attract the modern mountain biker.
lack of a useful RDMO
lack of accessible transportation from the airport
Lack of hospitality (too casual/perceived lack of care about the guest)
Lack of knowledge of our area for visitors. Oregonians don't even know where we are located. We need more visitors and positive stories about our assets.
Lack of workforce
Land use barriers to agritourism
Local land use policy is hostile to development of lodging options outside of VERY small city centers, and visitors to this area very much want to stay in rural areas.
No leadership
None, really. Just maybe need to do more marketing to attract said visitors.
Our local community is fine, it's the perception and decline of the City of Portland that keeps people away.
parking close to desired locations
Perception of Oregon.
Perception of Portland safety limiting visitation to the WV by out of state
Theft
Tourism infrastructure is lacking and cohesion

Tourism offerings outside of regular business hours.
Visibility of local assets
Workforce in area to operate