

TRAVEL



OREGON



OREGON
DESTINATION
ASSOCIATION

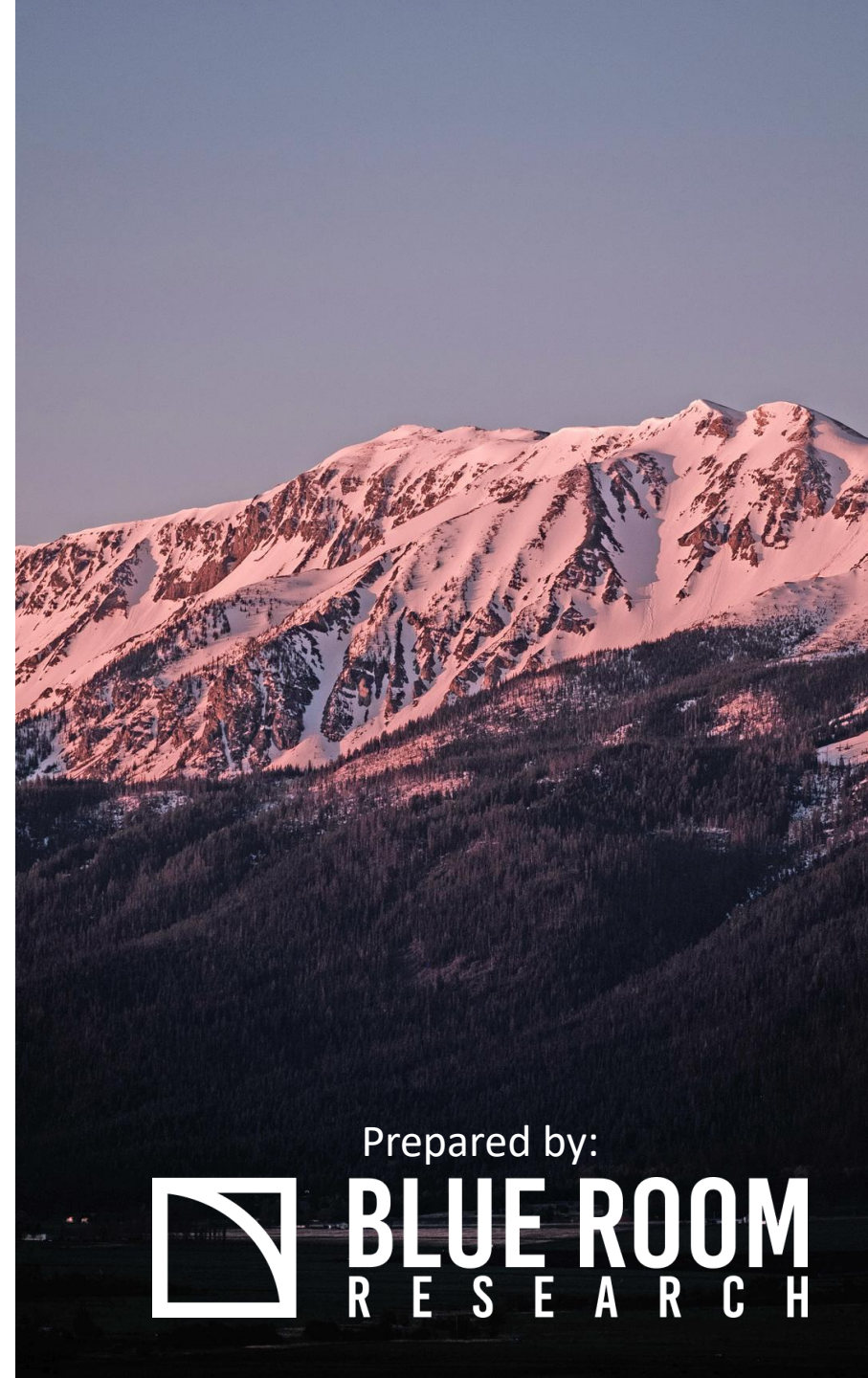


Destination Needs Survey Analysis

August 2025
Joey Hamilton

SURVEY OBJECTIVES & METHODOLOGY

- This report presents the findings of a survey aimed at gathering valuable insights regarding Oregon tourism organizations' current priorities, initiatives, and marketing efforts.
- The primary objective of this research was to learn more about the current Oregon tourism landscape and to understand the challenges, successes, and opportunities in attracting visitors to Oregon.
- It will directly contribute to Travel Oregon's and the Oregon Destination Association's efforts to improve service to tourism organizations by shaping future initiatives for the state of Oregon.



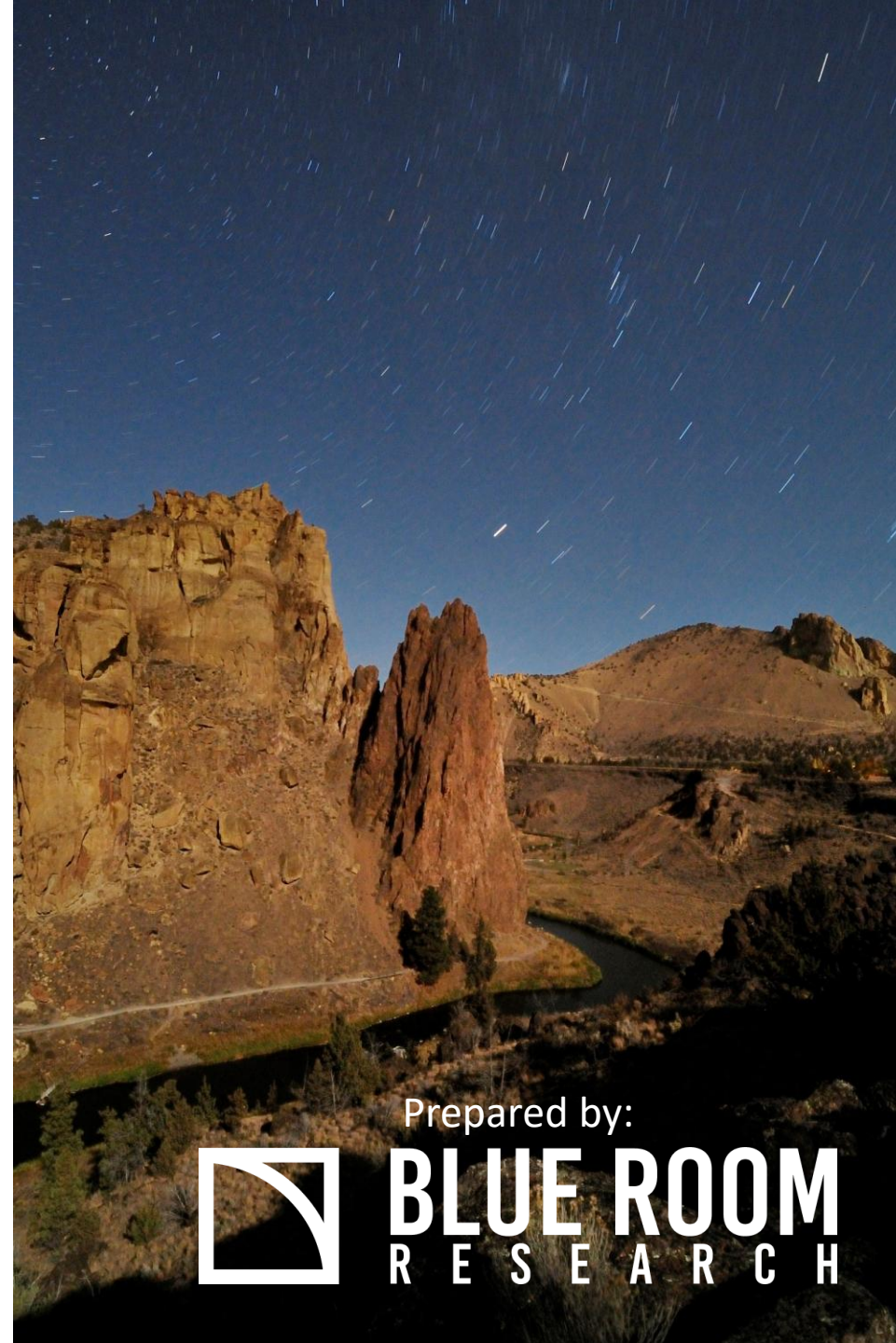
Prepared by:



BLUE ROOM
RESEARCH

SURVEY OBJECTIVES & METHODOLOGY (CONTINUED)

- This survey measures:
 - Organizational statistics
 - Budgets and funding models
 - Priorities and new initiatives
 - Destination assets
 - Visitor experience
 - Domestic and international marketing efforts
 - Tourism pressures
- 39 organizations from the state of Oregon participated using an online survey distributed via email.



Prepared by:



BLUE ROOM
RESEARCH

KEY TAKEAWAYS

- The majority (65%) of respondents operate on a budget of \$1 million or less and have a team of ten or fewer employees.
 - There is little growth in projected budgets for next fiscal year.
- Funding challenges and/or potential threats to funding have concerned most organizations surveyed in recent months, and almost all respondents have utilized Travel Oregon's grant program to their benefit.
- There is a gap in understanding funding models in most organizations surveyed. Many would welcome additional education from Travel Oregon and ODA so they could better identify, understand, protect, and influence their primary funding sources.
- Top initiatives and focus areas of respondents include driving demand to their destinations (especially during need times), destination development, attracting and grooming talent within their organizations, and optimizing marketing campaigns.

KEY TAKEAWAYS (CONTINUED)

- The popularity of some events and festivals has led to a perception of overcrowding during certain times of the year in some destinations.
 - Implementing solutions such as timed ticketing and increased public transportation options or increasing marketing around need times could alleviate some pressures within these communities.
- Respondents frequently requested that Travel Oregon assist them with additional marketing outreach, which included forming partnerships with influencers, assisting with social media strategy, and increasing website support.

RECOMMENDATIONS

Blue Room Research believes that Travel Oregon and the Oregon Destination Association (ODA) could benefit the Oregon tourism industry by acting on some of the requests made by respondents and by creating more ambitious strategic plans that would engage DMOs and fulfill some of the partners' requests. The following recommendations are based on both the volume of comments throughout the survey regarding these topics, combined with the feasibility of bringing some of these ideas to fruition, including:

- Travel Oregon and ODA should consider hosting a webinar and/or workshop that helps DMOs better understand their funding sources.
 - This could be a tremendous opportunity for Travel Oregon and ODA to educate their partners about the importance of understanding the many funding mechanisms that power Oregon's DMOs and tourism promotion industry.
 - It would also assist tourism organizations in speaking with the same voice and messaging when communicating with elected officials and industry partners.

RECOMMENDATIONS (CONTINUED)

- Further assist DMOs with communicating to residents and partners about the benefits of tourism by creating specific assets (such as a one-sheeter) that can be easily shared among partners and dispersed within communities.
- While most DMOs provide at least some training or professional development for their employees, this could be a great chance for Travel Oregon to provide these kinds of opportunities at no cost to the state's DMOs.
- Many respondents are struggling with staffing and workforce retention. Travel Oregon has an opportunity to assist organizations that are stretched thin by streamlining and standardizing certain tasks, such as aiding in applying for grants, providing additional training opportunities to DMO staff, and delivering research and educational tools to partners around the state.

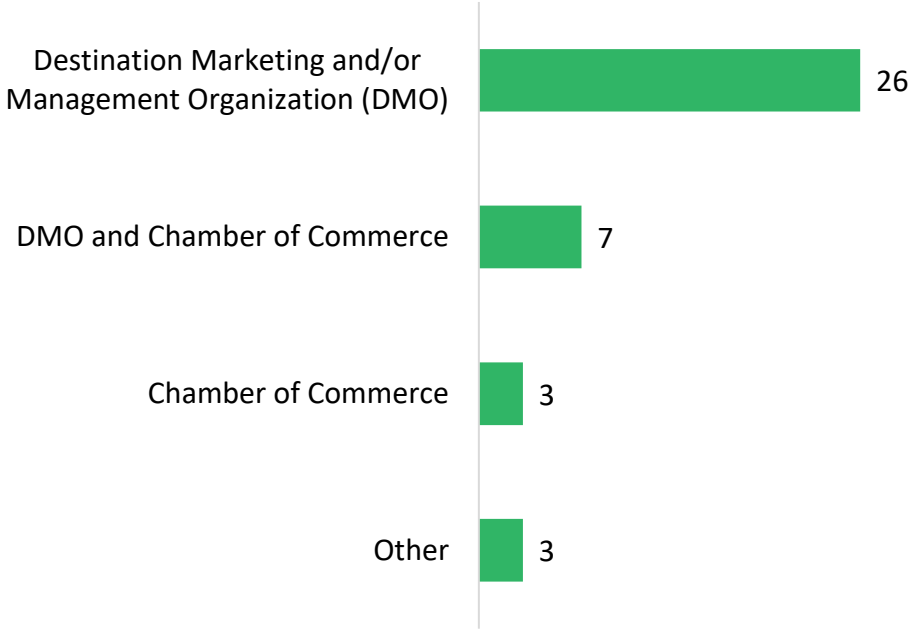
RECOMMENDATIONS (CONTINUED)

- The vast majority of respondents plan to develop new strategic and/or marketing plans in the next three years. Travel Oregon should consider creating a vetted list of consultants to offer to DMOs, in order to cut down on the time and effort required to find the right partners to perform this kind of work.
- Continue to promote Oregon as a best-in-class accessible travel destination, as it is apparent that the work being done around the state has paid off. Almost all Oregon DMOs are now pursuing initiatives to make their destinations as accessible as possible.

ORGANIZATIONAL STATISTICS

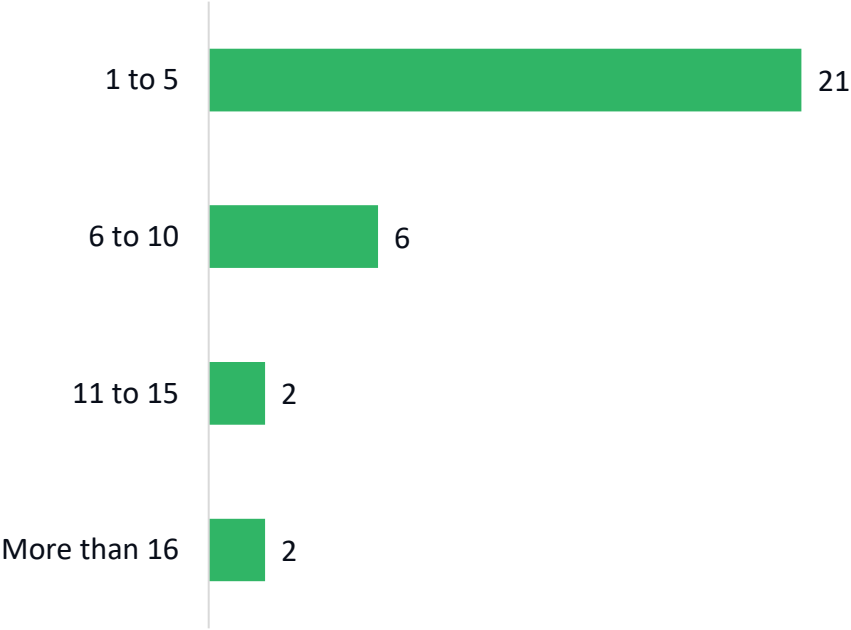
SURVEY RESPONDENT STATS

Organization Type



- Most respondents categorize themselves as a Destination Marketing Organization (DMO) or both a DMO and Chamber of Commerce.

Employee Headcount



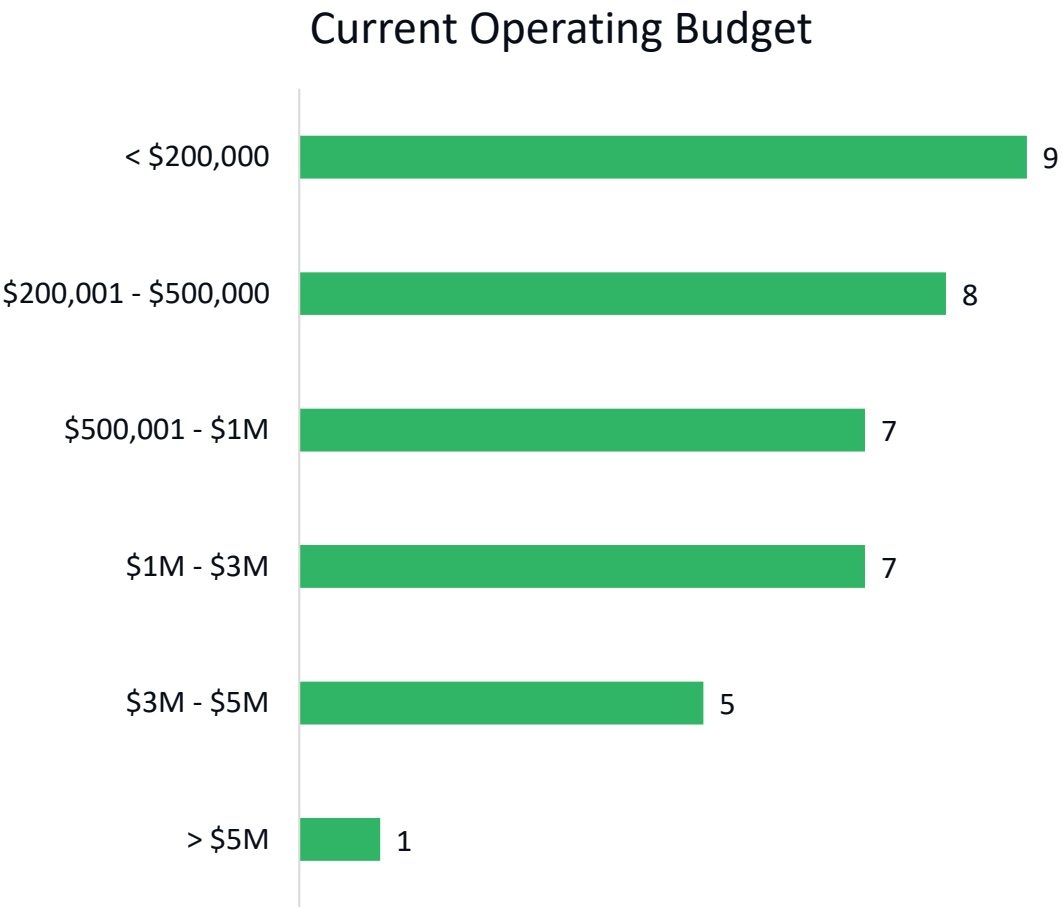
- The average Oregon tourism organization currently employs seven full-time employees, with the vast majority employing five or fewer full-time employees.

FY2025 OPERATING BUDGETS

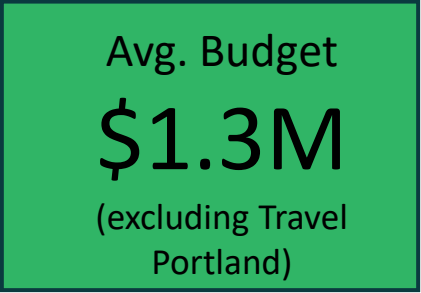
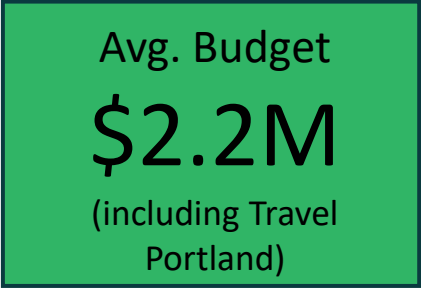
Avg. Budget
\$2.1M
(including Travel
Portland)

Avg. Budget
\$1.3M
(excluding Travel
Portland)

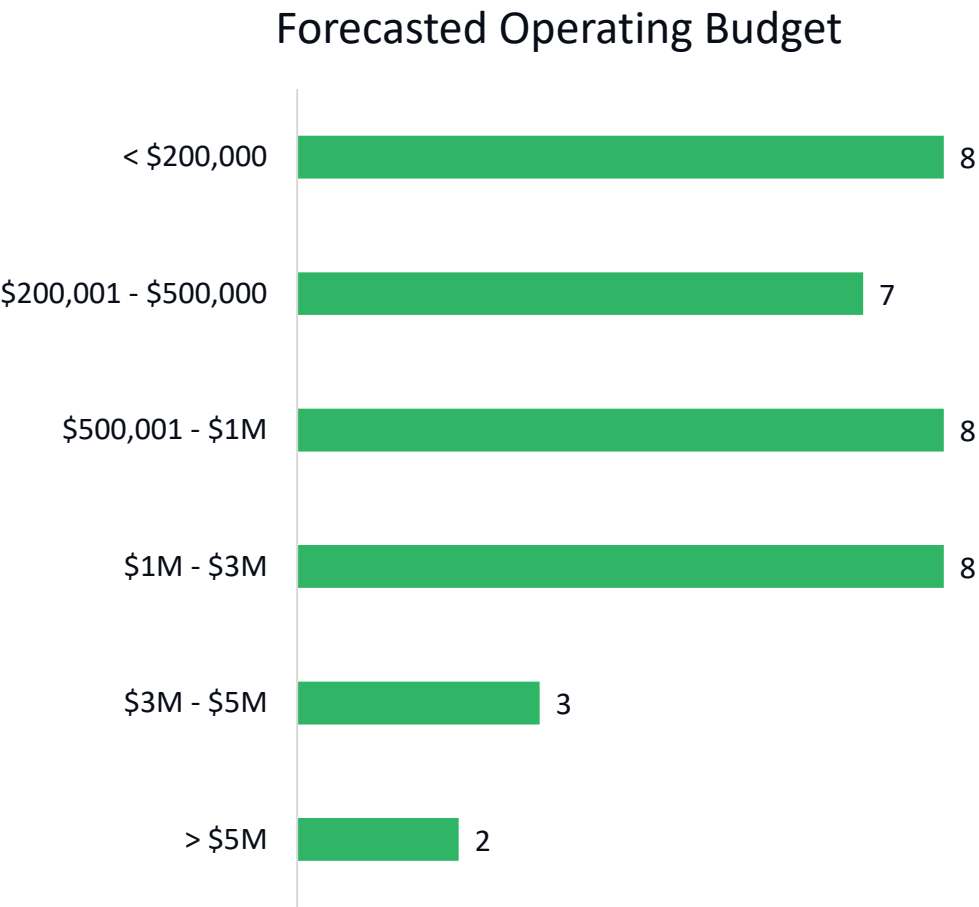
- Nine out of 37 (24%) respondents are operating with a budget less than \$200,000.
- 24 organizations (65%) have a budget of \$1 million or less.
- Five respondents (14%) have an operating budget between \$3-\$5 million.



FORECASTED FY2026 BUDGETS

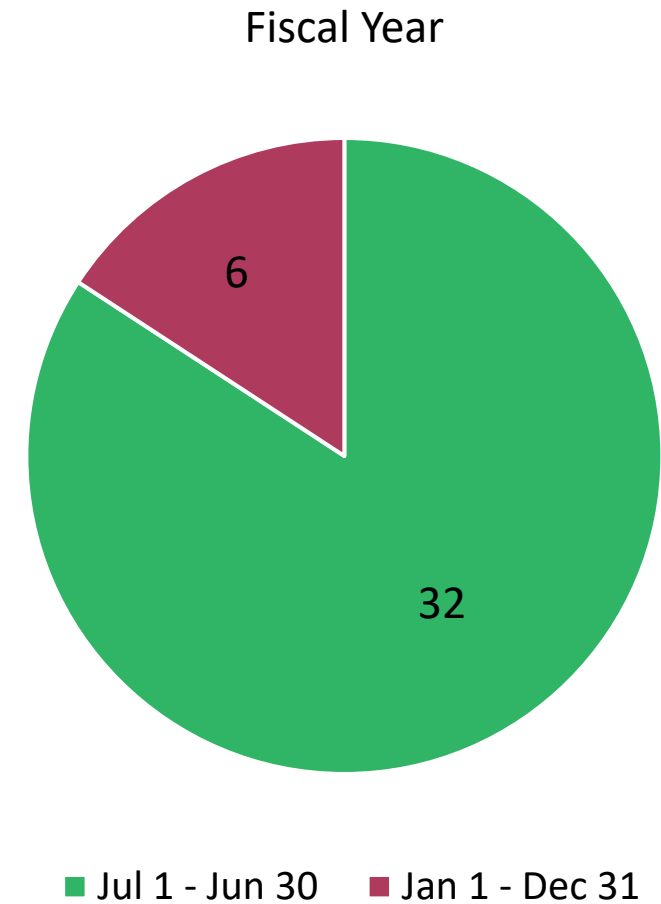


- There is little predicted movement in tourism budgets for the next fiscal year.



FISCAL YEAR UTILIZED

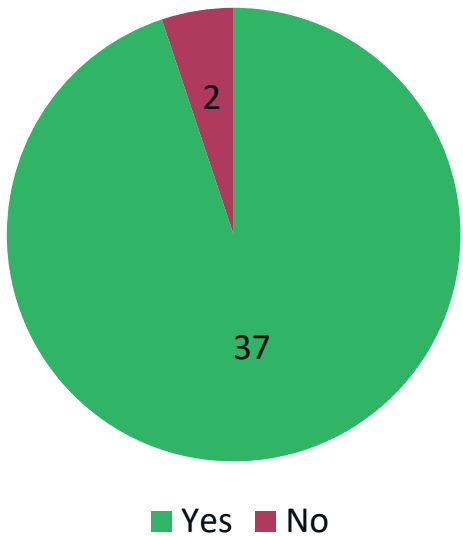
- The most typical fiscal year calendar among respondents is from July 1 through June 30.
- A minority of organizations (16%) follow the calendar year as their fiscal year.



FUNDING SOURCE ANALYSIS

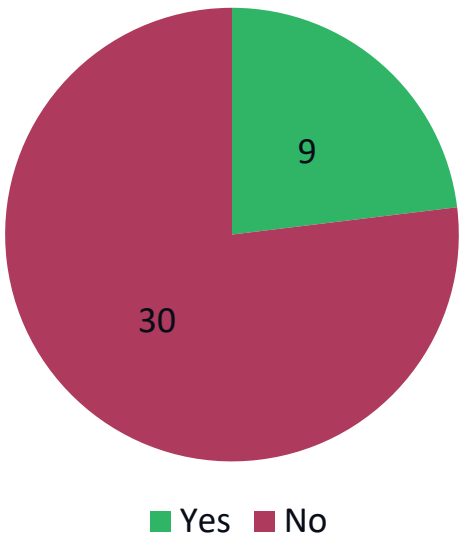
TRANSIENT LODGING TAX (TLT) RECEIPTS

TLT Received



- All but two respondents receive TLT to promote and develop tourism.

Multiple TLT Sources



- Most organizations (77%) receive TLT from multiple sources.

- Eight respondents receive all their funding (100%) from city TLT.
- One respondent gets all its funding from county TLT, one receives all its funds from state TLT, and another gets 100% from other TLT sources such as TID, the RCTP, or grants.
- The remaining 25 respondents receive their funding from a mix of city/county TLT, state TLT, other TLT sources, or other funding sources such as membership dues, partnerships, etc.

BLENDED TLT RATE AWARENESS

- The vast majority (90%) of respondents could not provide their **blended TLT rate** when prompted.
 - Only four DMOs surveyed know their blended rate.
- This represents a significant opportunity for Travel Oregon and ODA to educate their partners about the importance of understanding the various funding mechanisms that power Oregon's DMOs and tourism promotion industry.

ORGANIZATIONAL PRIORITIES & INITIATIVES

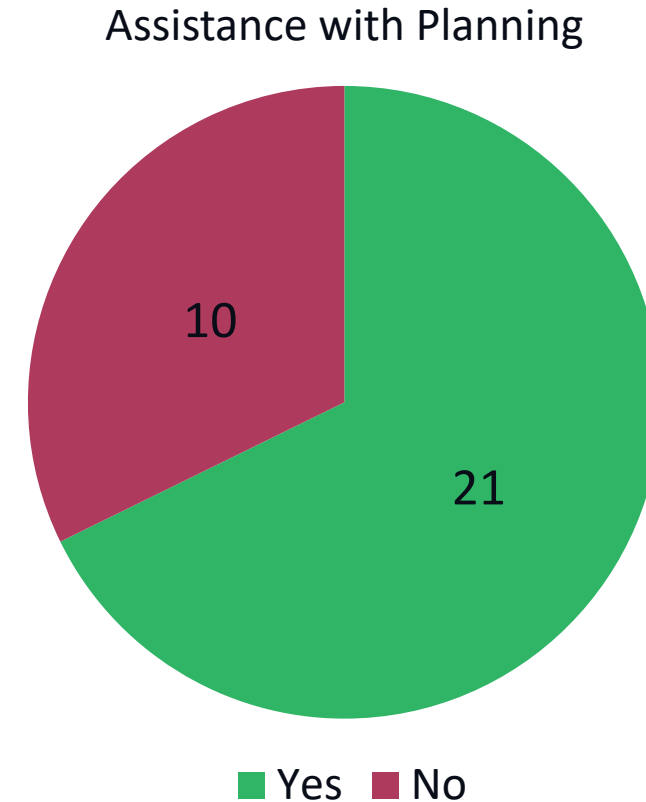
COMPLETED ORGANIZATIONAL PLANNING

- Most respondents have developed an organizational plan of some kind in the past three years, with only seven (18%) who have not.
- Of the three respondents that indicated they had developed some **other** kind of plan, one has developed a sports tourism strategic plan, one produced an annual business plan, and one created a destination management plan (with Leave No Trace partnership).



ASSISTANCE WITH ORGANIZATIONAL PLANNING

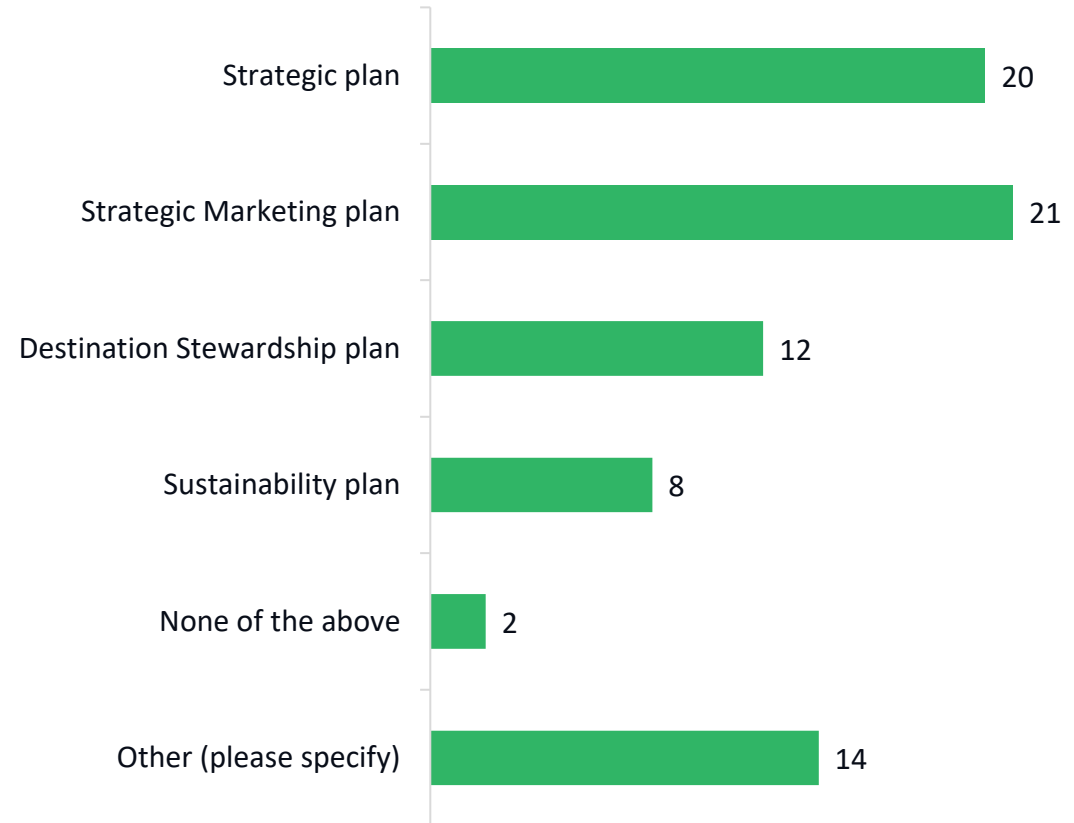
- Approximately two-thirds of all respondents used an **outside consultant** to develop their organizational plans in the last three years, while one-third did not.



PLANNING FOR THE FUTURE

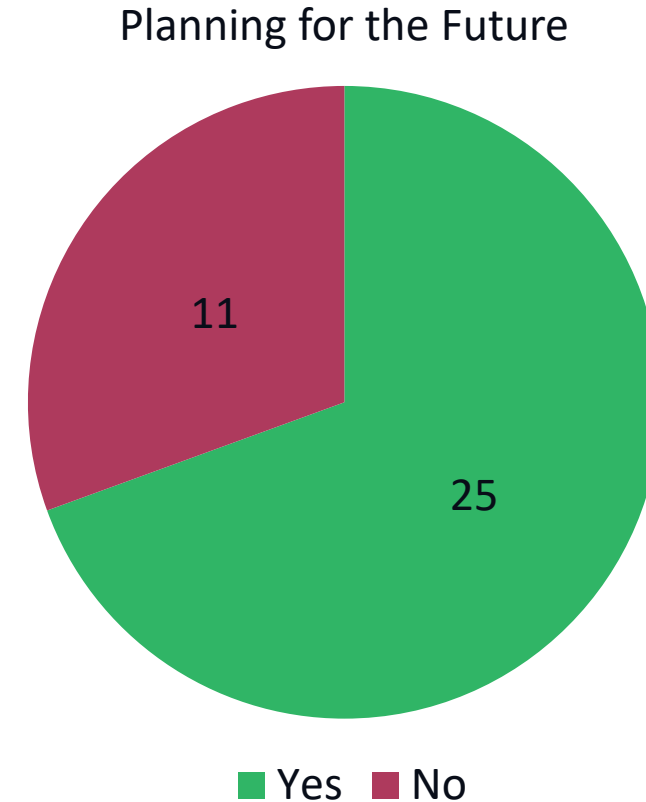
- Most respondents plan to develop new **strategic** and/or **marketing plans** in the next three years. Only two respondents do not have plans for developing any new organization plan in the next three years.
- Of the 14 organizations that intend to develop other kinds of plans, the types of plans include a destination experiences plan, a facility development plan, a crisis communications plan, and a social inclusion plan, among others.

Future Organizational Planning



PLANNING FOR THE FUTURE

- About 70% of all respondents intend to engage with an **outside consultant** to develop future organization plans.
- This presents an opportunity for Travel Oregon to offer a vetted list of consultants to DMOs, in order to cut down on time and money required to find the right partners to perform this kind of work.



TOP GOALS & INITIATIVES



Increase Demand = 28 mentions (26%)
Organizational Needs = 17 mentions (16%)
Marketing = 17 mentions (16%)
Destination Development = 16 mentions (15%)

- Respondents were asked to think about what specific **goals and outcomes** they were currently attempting to achieve as an organization.
- Increasing **demand** and **visitation** to their destination was mentioned most frequently and was top of mind for many respondents.
- Addressing **organizational needs** or **destination development**, as well as prioritizing their **marketing**, were mentioned at equal measure.

BIGGEST ORGANIZATIONAL CHALLENGES

- When asked about their biggest challenges, **funding** (or lack thereof) was by far the most mentioned issue. Many worry about their program of work not being respected by city officials or wanting to operate separately from city budgets.
- **Overcrowding, lack of capacity, staffing/workforce issues, and low demand** were all cited at equal measure.



Funding = 20 mentions (19%)
Overcrowding = 12 mentions (11%)
Capacity = 12 mentions (11%)
Staffing/workforce = 11 mentions (10%)
Low Demand = 11 mentions (10%)

BIGGEST ORGANIZATIONAL OPPORTUNITIES



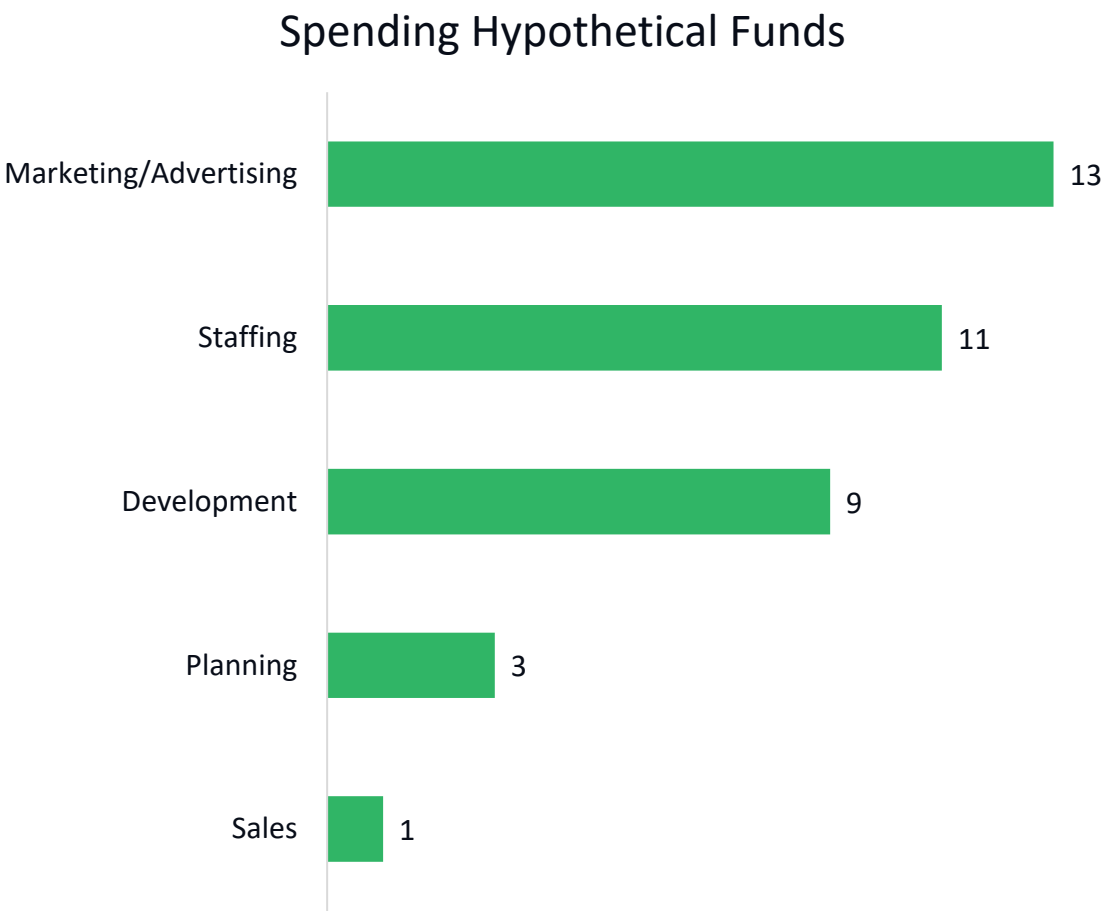
- Respondents were asked to think about how they could best **advance, grow, and/or achieve** their organizational goals.
- When asked about the biggest opportunities to help achieve their objectives, **destination development** was most frequently mentioned by respondents.
- The next most cited opportunities were for increasing **community collaboration**, as well as increasing **marketing/communications** capabilities, and securing additional **funding**.

Development = 33 mentions (32%)
Community/collaboration = 13 mentions (13%)
Marketing/communication = 12 mentions (12%)
Funding = 12 mentions (12%)

What are the three (3) biggest opportunities that currently exist within your organization/destination? (N=35, 103 responses, Open-ended)

SPENDING HYPOTHETICAL NEW FUNDS

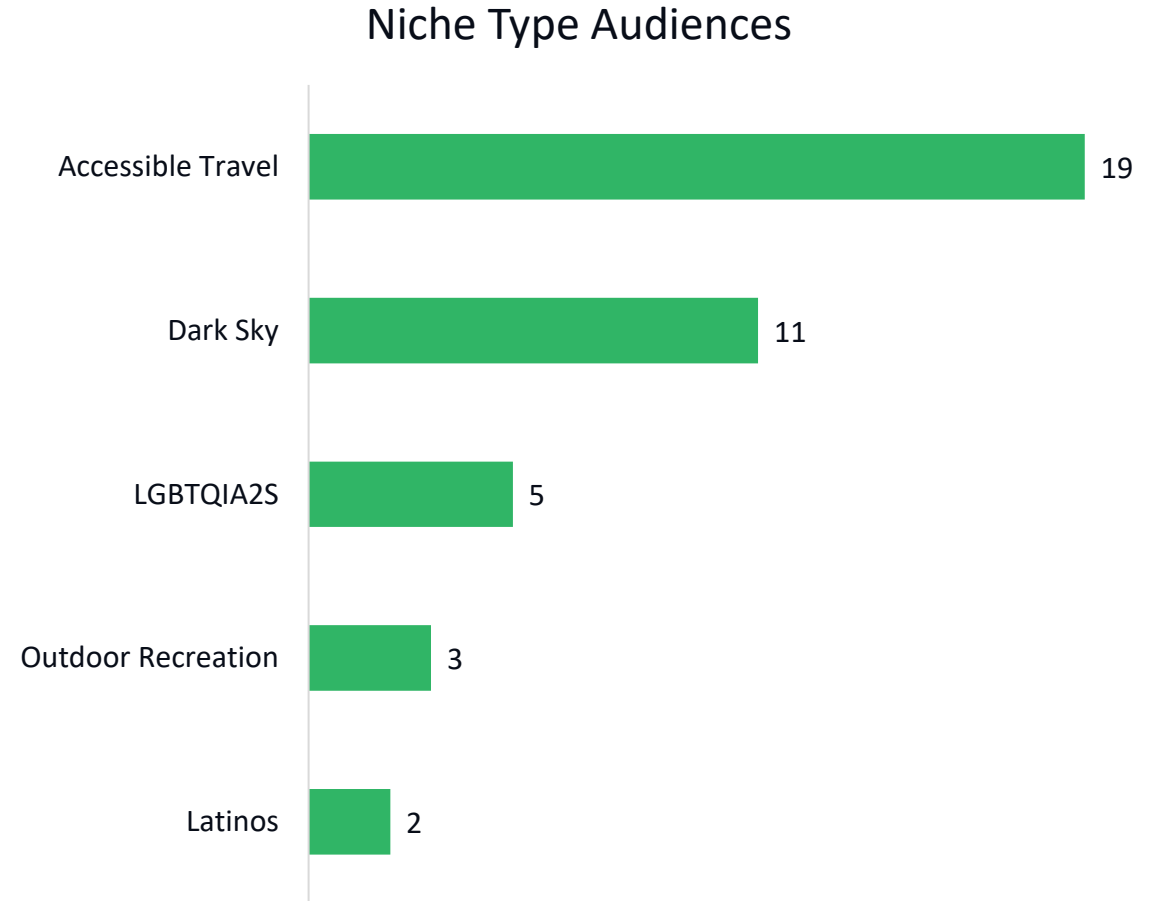
- Hypothetically, if respondents were to receive an additional 10% increase to their budget, 35% would spend it on more **marketing** or **advertising** for their destination.
- About 30% would increase their **staffing** capabilities, while 24% would spend that money on **destination/asset development** or investing it to improve the **visitor experience**.
- **‘Development’** responses included building a multi-use indoor facility, distinctive rural tourism facilities, direct investments to businesses to improve visitor experiences, and general ‘destination development’.



Hypothetically, if your budget were to increase by 10% next year, how would you most likely spend that money? (N=37, Open-ended)

PRIORITIZING NICHE AUDIENCES

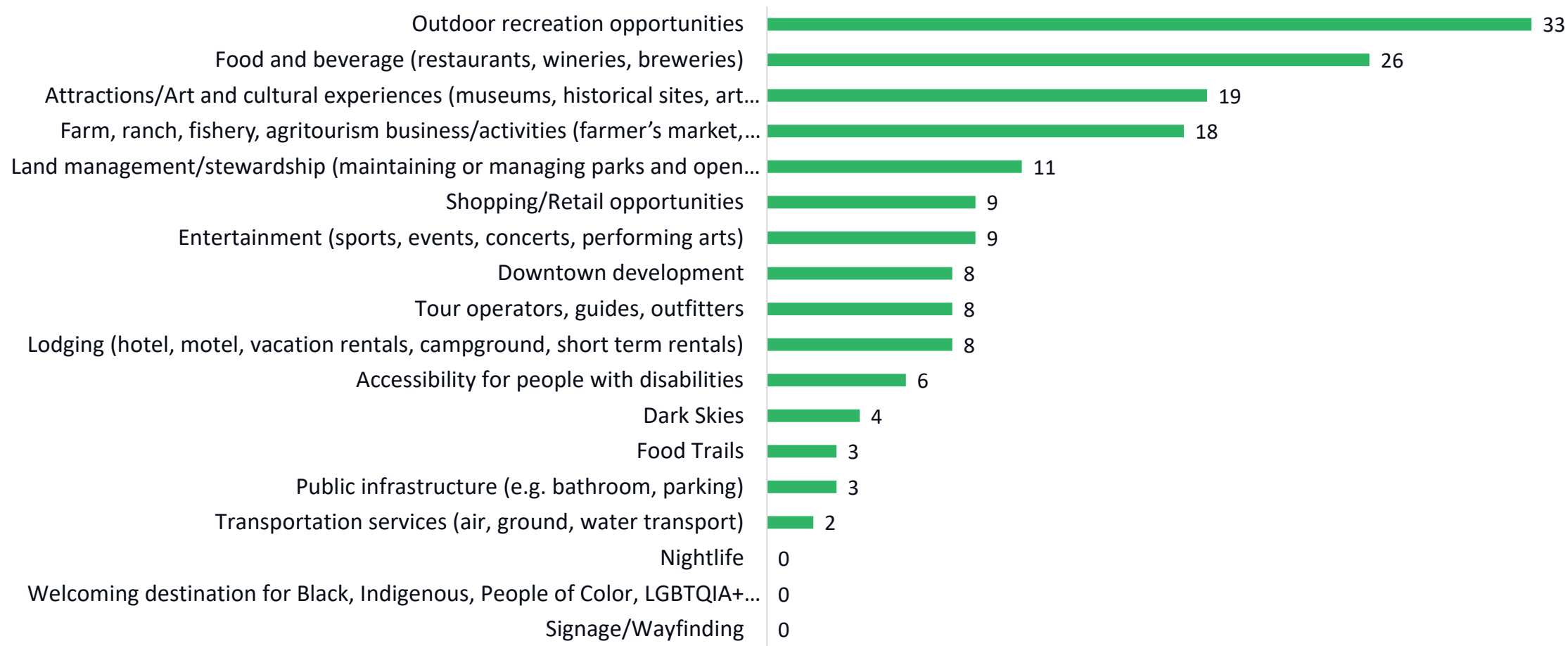
- **Accessible travel** is the largest niche audience throughout Oregon DMOs, with about 58% of all respondents planning to focus on this initiative in the future.
- One-third of respondents will be focusing on **dark sky development**, while about 15% intend to focus on marketing more to **LGBTQIA2S audiences**.
- **Outdoor Recreation** scored relatively low, but that is likely because it is already a major focus of most destinations in the state and thus not considered a niche opportunity.



TOURISM ASSETS

TOP DESTINATION ASSETS

Top 5 Tourism Assets



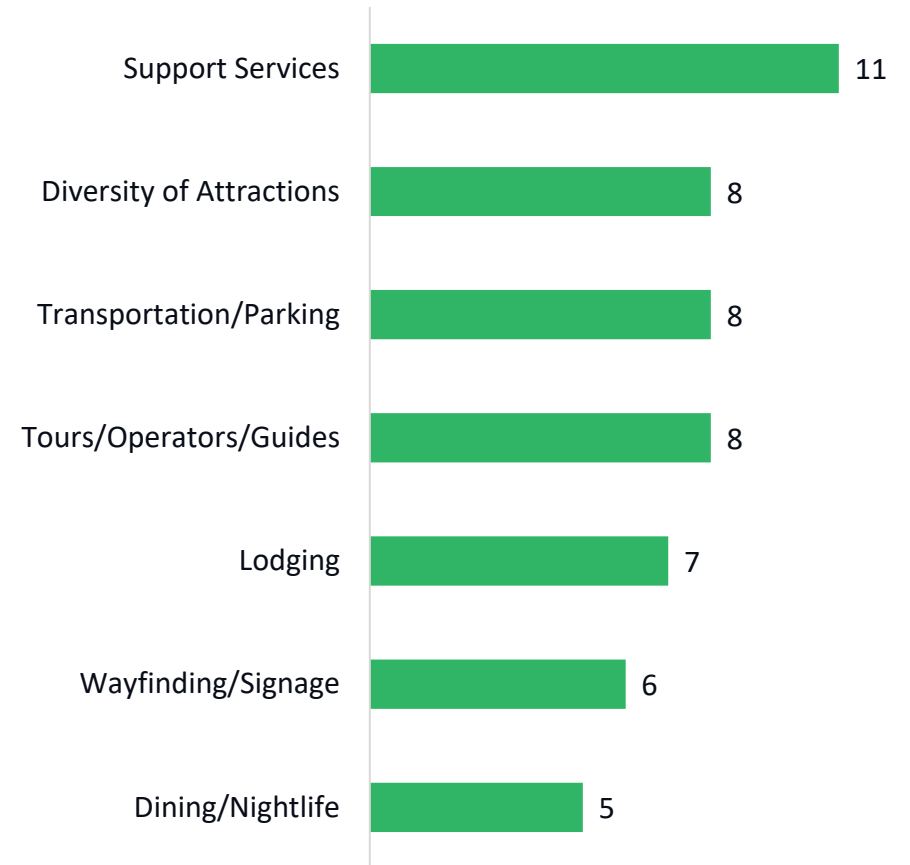
- It is no surprise that **outdoor recreation** opportunities tops the list of top tourism assets for almost every respondent surveyed. **Food and beverage** offerings were also highly ranked, as well as **arts and culture** experience offerings.

Thinking about the various assets offered within your destination, please select your top 5 tourism assets based upon how they encourage visitation to your community. (N=37, Multiple choice)

DESTINATION GAP ANALYSIS

- **Support services**, such as bike/gear shops, equipment rentals, or supply shops, were the most cited gap by respondents.
 - Travel Oregon may consider highlighting its partnership with **Locl** to help these support-type businesses gain more visibility with visitors.
- Lacking a **diversity of attractions and activities** within the destination, viable **transportation** and/or **parking**, and the offering of **guided tours** also had a high frequency of mentions by multiple respondents.
- One respondent explains, “We lack **comprehensive, cohesive signage** and **real-time visitor assistance tools**, both digital and physical, that help tourists navigate local offerings, trails, museums, wineries, and downtown experiences. Visitors often comment on **limited nightlife or evening activities**. Enhancing **after-hours offerings** - like live music, tasting room events, food trucks, and seasonal pop-ups - would keep **visitors engaged longer** and **increase overnight stays**.”

Critical Gaps in Leisure Travel Assets



DESTINATION ASSETS - STRENGTHS

Destination's Tourism Ecosystem - Strengths

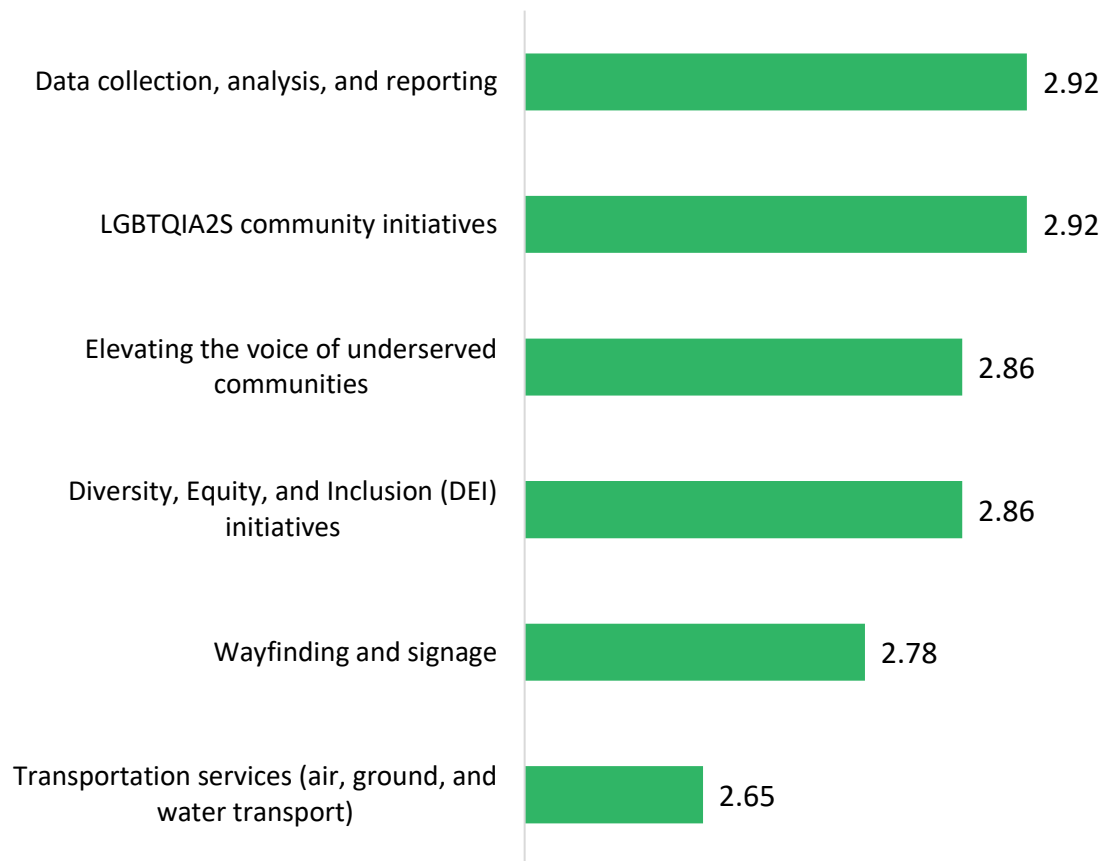


- **Events & festivals** ranked the highest of all the assets and elements listed, with DMOs' **social media** and **website** presence following close behind.
- Towards the bottom of the 'above neutral' (scoring 3.0 or higher) assets are **accessibility**, **public infrastructure**, and **visitation management**.

Considering the following elements of your destination's tourism ecosystem, how would you rate the quality of each? (On a 1-5 scale where 1 = Poor, 3 = Neutral, 5 = Excellent, and NA = "Not applicable/don't know") (N=37, Multiple choice)

DESTINATION ASSETS - WEAKNESSES

Destination's Tourism Ecosystem - Weakness



- Among the assets that scored 'below neutral' (scoring below 3.0), **transportation services** and **wayfinding/signage** were the lowest ranked among respondents.
- Minority community initiatives, including **LGBTQ, underserved communities**, and **DEI initiatives** were also scored poorly.

Considering the following elements of your destination's tourism ecosystem, how would you rate the quality of each? (On a 1-5 scale where 1 = Poor, 3 = Neutral, 5 = Excellent, and NA = "Not applicable/don't know") (N=37, Multiple choice)

VISITOR EXPERIENCE & TOURISM PRESSURES

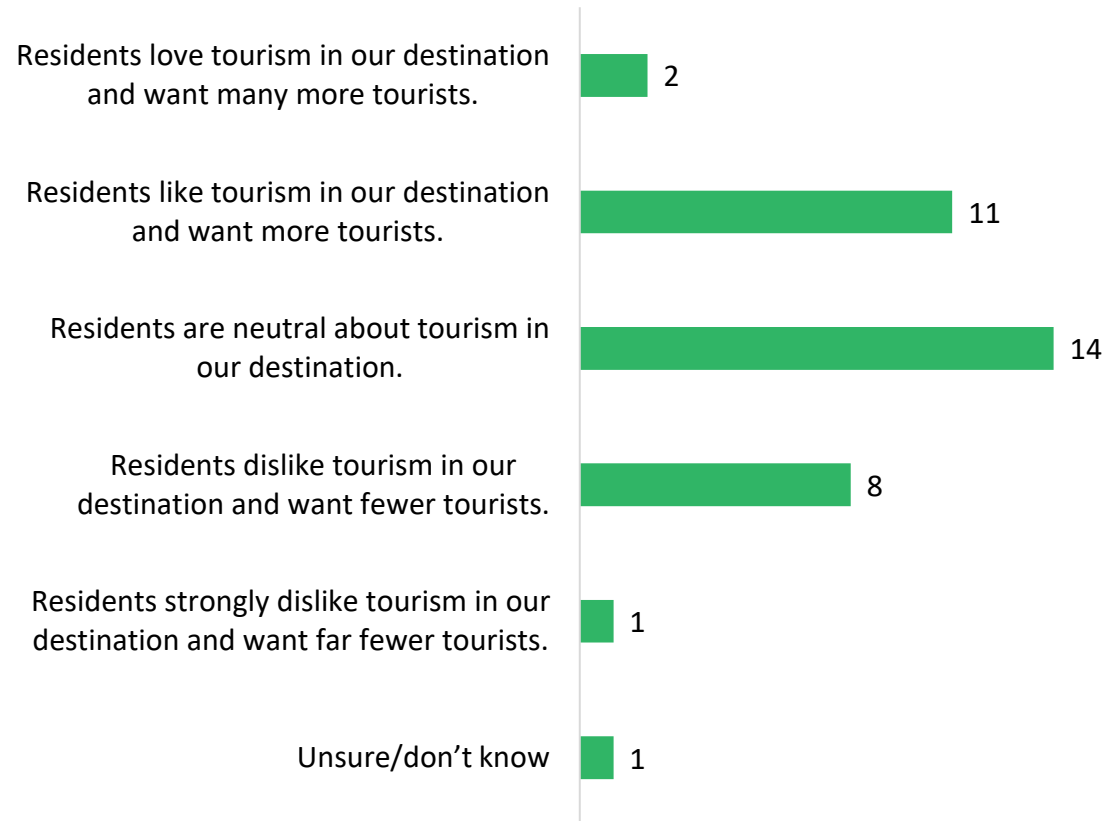
HOW DMO'S PERCEIVE RESIDENT SENTIMENT

Avg. Score

3.1

- This prompt netted an almost completely **neutral** average score of 3.1, suggesting there is **significant room for positive messaging towards Oregon residents** about the many benefits tourism provides to their communities.
- It may be beneficial for more research to be conducted on this topic to tease out all positive and negative sentiments held by residents on the topic of tourism.
- *Note: This survey asked DMO's to rate how they thought their residents perceived tourism, which is different from Travel Oregon's previous survey that surveyed Oregon residents directly.*

Perceived Resident Sentiment



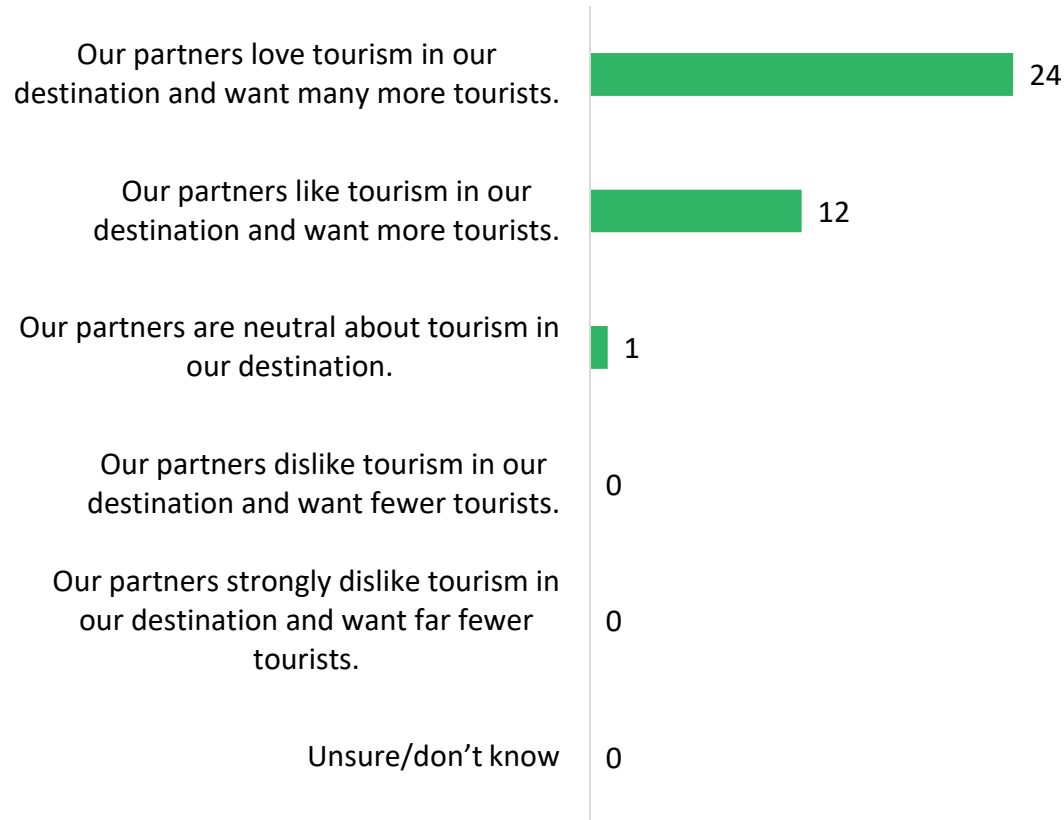
HOW DMO'S PERCEIVE RESIDENT SENTIMENT

Avg. Score

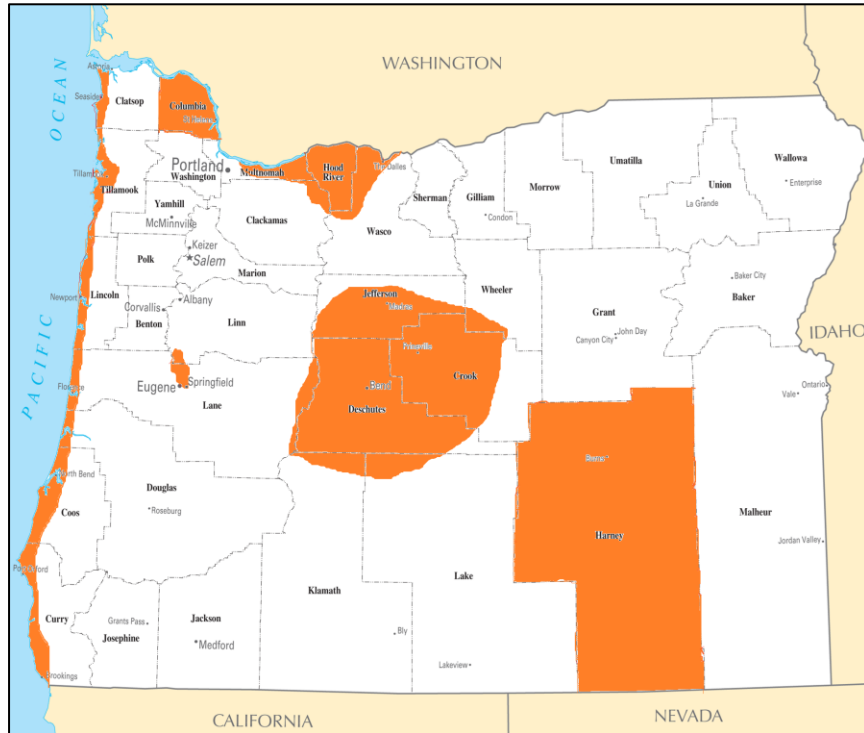
4.6

- It comes as no surprise that partners who rely on business from tourists **love tourism** and **want to see more** in their towns.
- *Note: This survey asked DMO's to rate how they thought their residents perceived tourism, which is different from Travel Oregon's previous survey that surveyed Oregon residents directly.*

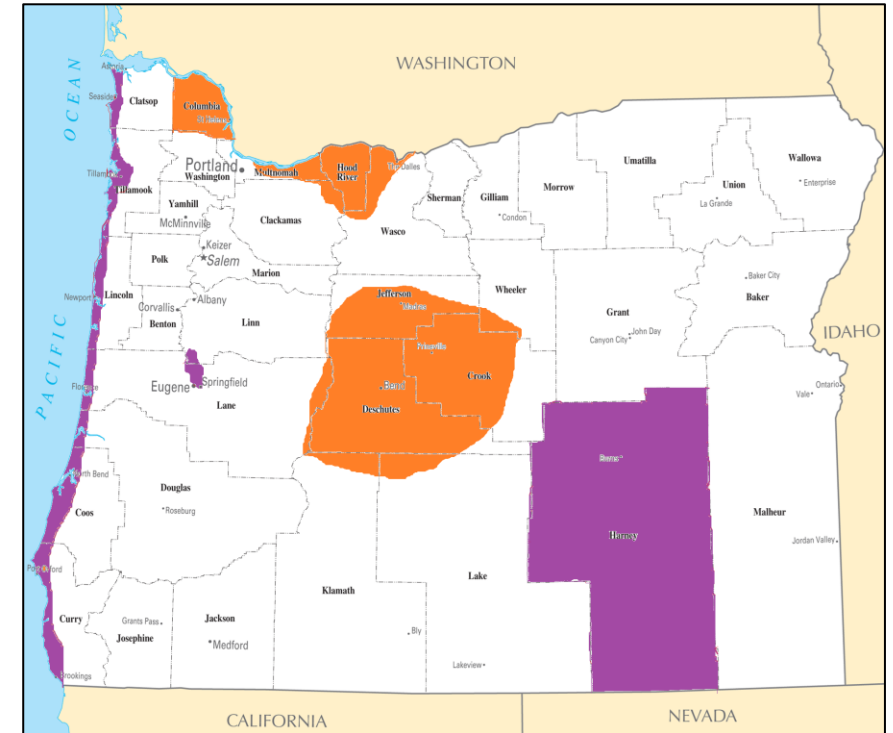
Perceived Stakeholder Sentiment



PERCEIVED TOURISM PRESSURES



- When asked about tourism pressures, **eleven respondents expressed concerns of overcrowding** in the past year, of which were nine DMOs and two were RDMOs (*indicated in orange*).

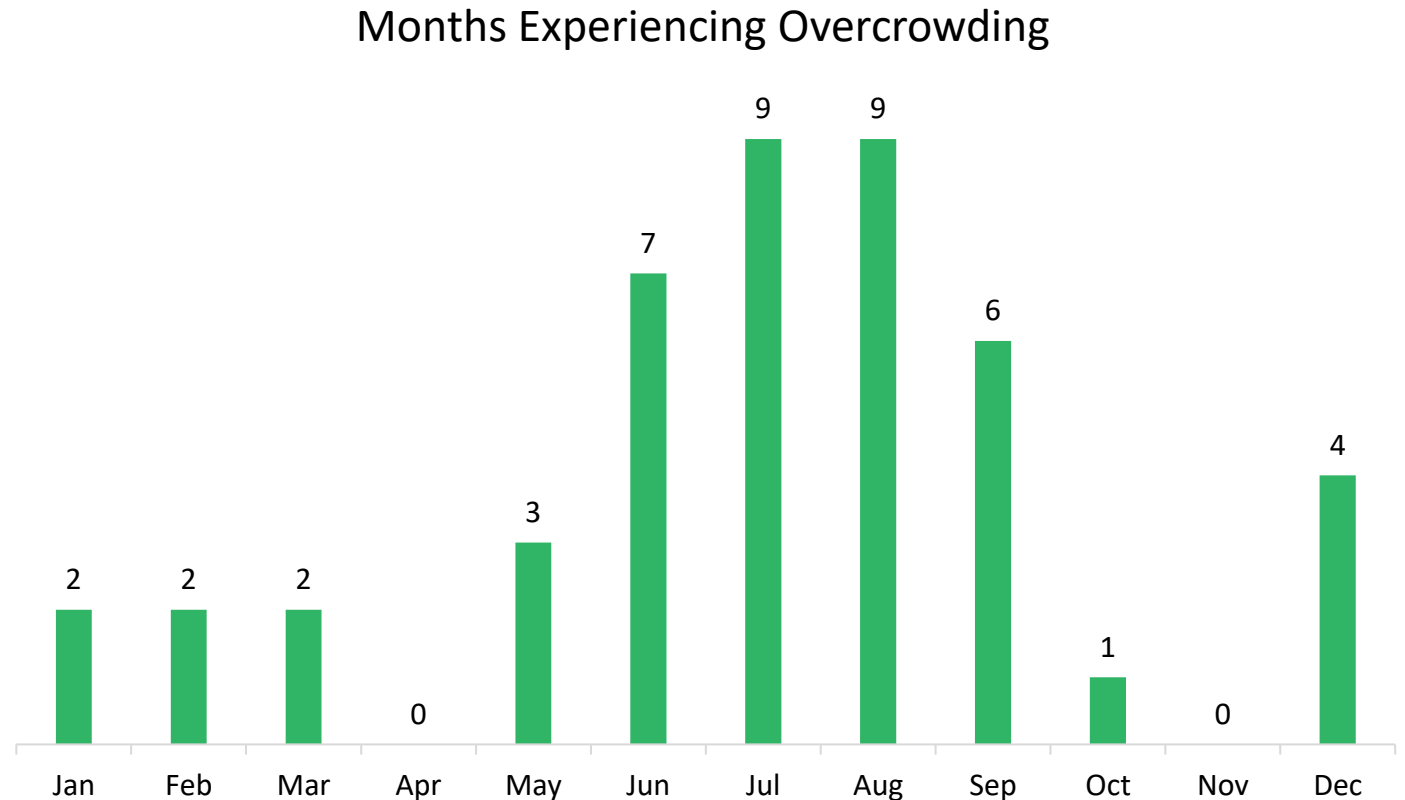


- Of those eleven, eight indicated that overcrowding was **only occurring on weekends** (*indicated in orange*). The purple areas above correspond to the **three regions** that believe **overcrowding is more common** than just on weekends.

Do you think your destination has experienced overcrowding and/or too much visitation in the last year? (N=37)
Is overcrowding and/or too much visitation typically specific to weekends in your destination? (N=11)

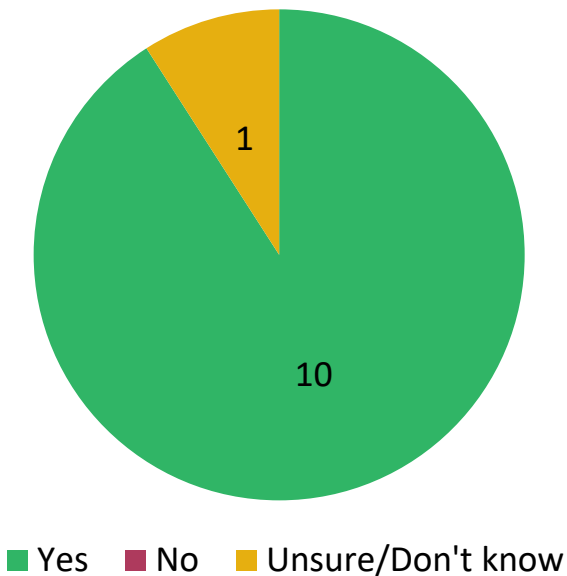
PERCEIVED OVERCROWDING - SEASONALITY

- Of the destinations that experienced overcrowding within the last year, most indicated that the **summer months** (June-September) were the major concern.
- Very few believe that the remaining months of the year (October-May) experience overcrowding.

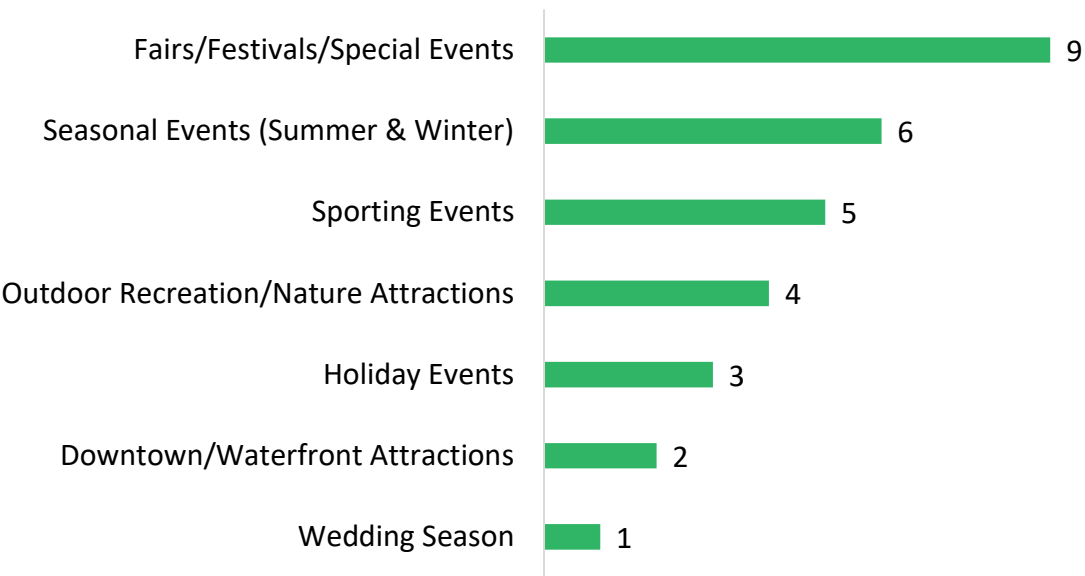


OVERCROWDING - EVENTS

Attractions/Events Contributing to Overcrowding



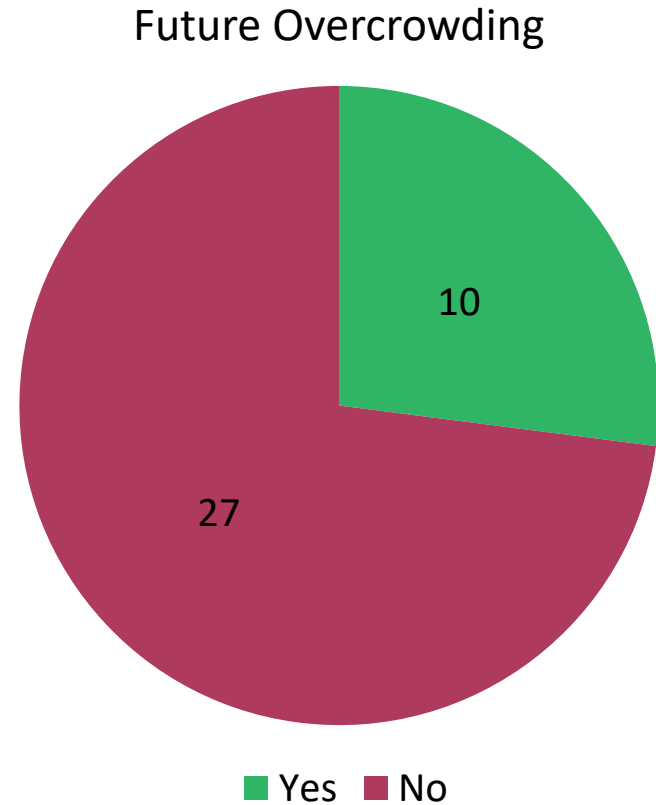
Attractions/Events Contributing to Overcrowding



- When asked about attractions or events that may be leading to overcrowding, many indicated it was the success of their **annual or seasonal events causing complications**. Some destinations have implemented solutions, such as **timed entry tickets** for popular events, while others have **limited their current marketing strategies** to try and lower demand around these events. It is worth noting that the perception of overcrowding may be a result of these destinations’ own successes. Many of these DMOs stated that their most valued assets were both their **events & festivals** and their **social media presence** but also assert that it is likely the combination of these same assets causing logistical challenges in their communities.

Are there specific attractions or events that typically contribute to the perception of overcrowding and/or too much visitation? (N=11, Multiple choice)
Which attractions and/or events typically contribute to overcrowding and/or too much visitation? (N=11, Open-ended)

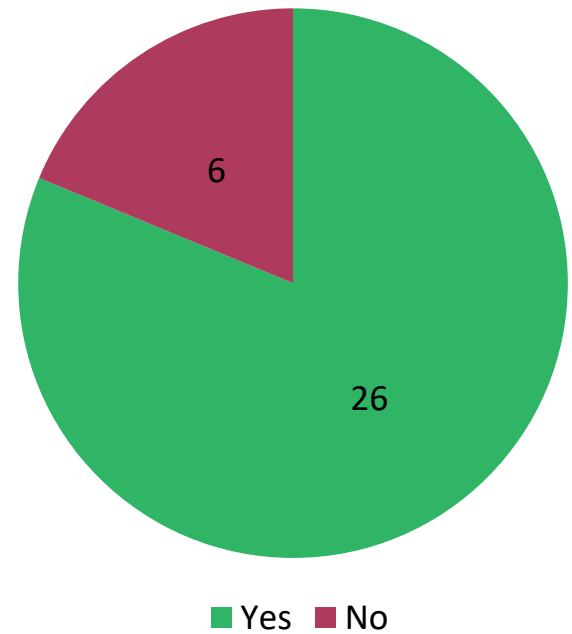
OVERCROWDING – FUTURE PREDICTIONS



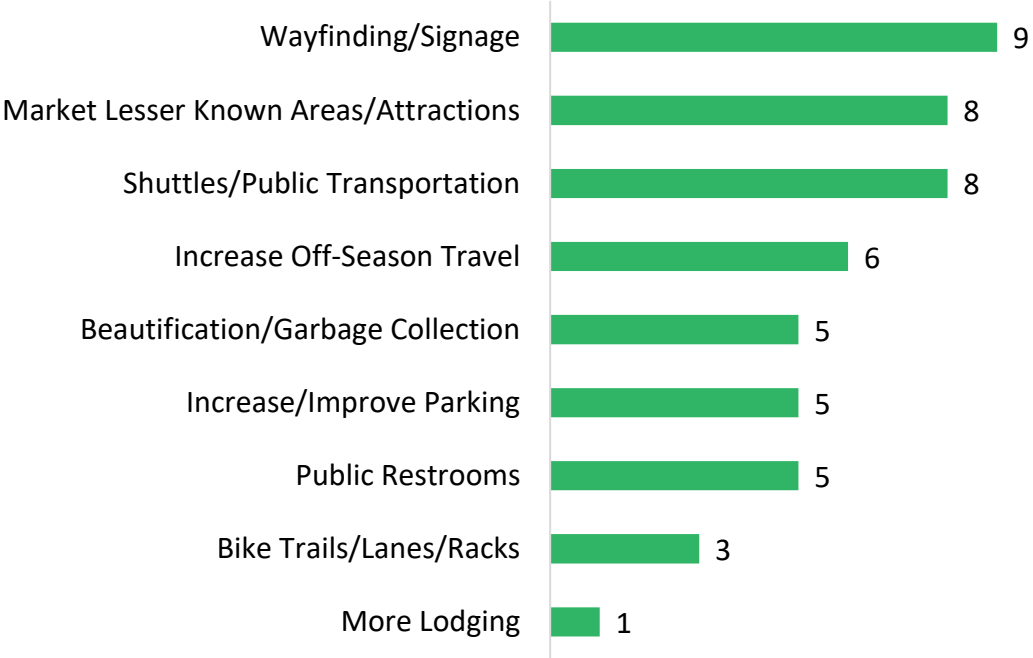
- The ten respondents (27%) that anticipate overcrowding in the next 12 months are the **same destinations** that have experienced it in the last year, with just one exception.

OVERCROWDING – POTENTIAL SOLUTIONS

Are There Solutions?



Types of Solutions



- Most destinations acknowledge that there are solutions to be deployed that could help alleviate the pressures of overcrowding, which include investing in **more signage**, marketing **lesser-known attractions**, or offering **public transportation** during peak demand periods.

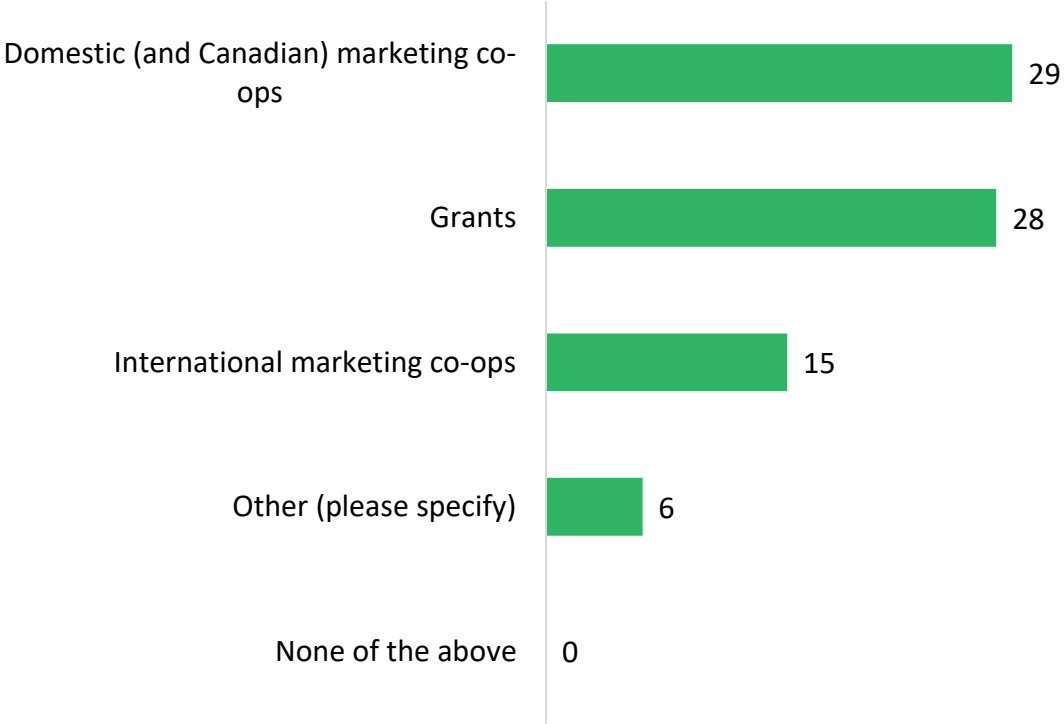
Are there investment solutions that could alleviate some of these overcrowding and/or too much visitation pressures? (N=32, Multiple choice)

What kinds of investments might help alleviate some of your overcrowding and/or too much visitation pressures? (N=29, Open-ended)

TRAVEL OREGON & ODA FEEDBACK

TOP NEEDS REQUESTED FROM TRAVEL OREGON

Top Needs from Travel Oregon



- **Domestic and Canadian marketing co-ops** and **grants** were the top requested areas that Travel Oregon could assist with marketing and promotional efforts.
- The ‘others’ include focusing on **sports tourism**, facilitating **partnerships** throughout the industry, helping to attract **meetings & group events**, and increasing **media missions**.

MARKETING ASSISTANCE REQUESTED FROM TRAVEL OREGON

- As **social media** continues to be a major driver of demand, many destinations would like help with developing **partnerships with influencers**, or assistance with their **social media strategy**. Many respondents are also interested in **SEO/SEM marketing** and **website support**.
- Other mentions include funding to increase their photo and video asset library, AI adoption and/or utilization, and adding staffing capacity to perform additional marketing.

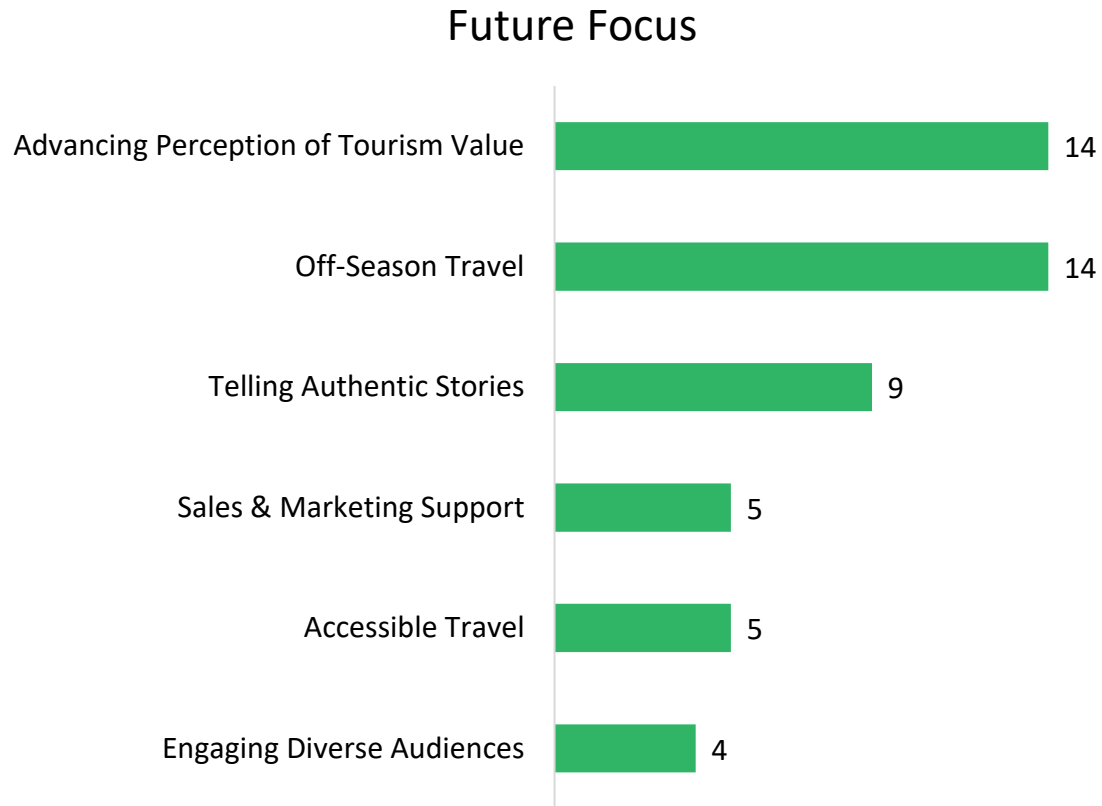


ADDITIONAL ASSISTANCE REQUESTED FROM TRAVEL OREGON

- “Enter info into OTIS for us - and supply to other state and/or regional tourism partners.”
- “I am considering if some standardization of DMO work processes could help the industry. SOP for organizing, operating, and staffing a DMO. Partnering with other DMOs, how to’s.”
- “Tools to help educate elected officials and the public on how tourism marketing and management work and the broad benefits of tourism.”
- “Large scale infrastructure investments. Advocate for a strong transportation system in Oregon and car-free access to and between iconic Oregon tourism experiences.”
- “Strategic backing for Transient Lodging Tax (TLT) adoption: We’d benefit from case studies, messaging tools, and expert guidance to help educate local leaders and the public on how a TLT directly fuels tourism infrastructure, small business growth, and quality-of-life improvements.”



DESIRED FUTURE FOCUS FOR TRAVEL OREGON



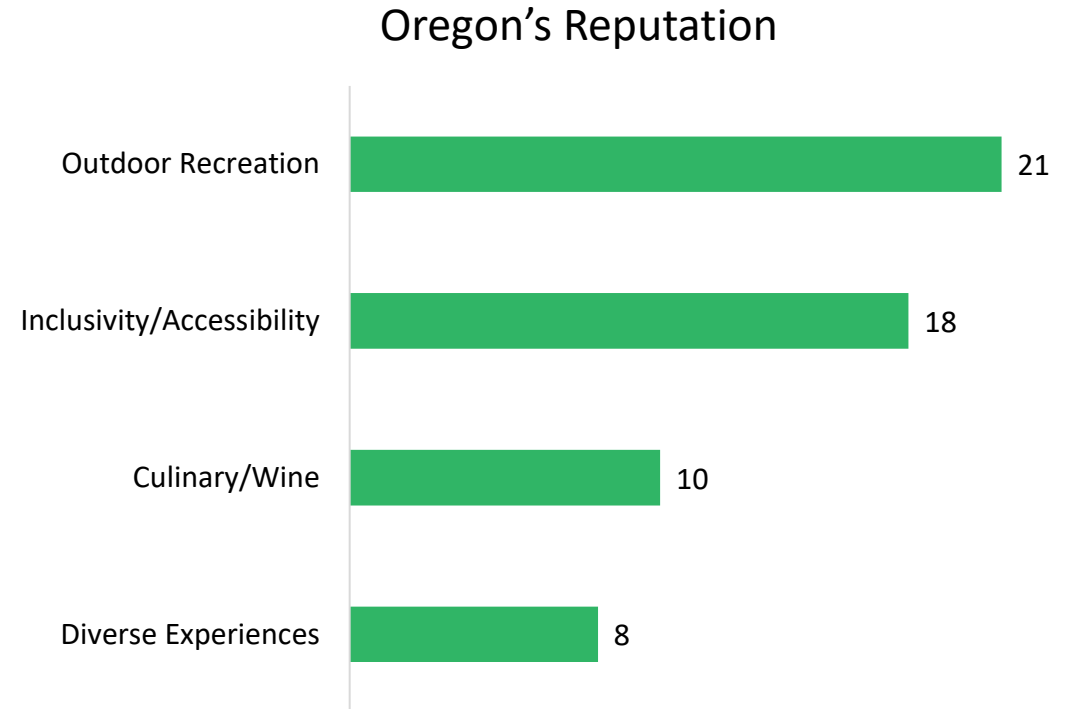
Feedback includes:

- “Telling authentic stories about Oregon cultures and highlighting our lesser-known and rural destinations.”
- “Shoulder season promotion for rural communities, lodging recruitment, organizational succession planning.”
- “I would like Travel Oregon to build awareness in high potential markets to open them up. People need an affinity for Oregon before we can drive them to our individual destinations, especially small rural communities where tourism is needed. In the current climate, we need Travel Oregon to maintain our international presence with travel trade and consumers. We will not be able to justify international investments as an individual destination.”
- “Sports tourism is a key driver for a lot of communities. We had the USA T&F Championships, upcoming is the World Cup, Olympics, the WNBA team, Salem has Ironman - there is a big draw from sports tourism in the state that is not talked about often at the statewide/GovCon level that is part of the tourism ecosystem.”

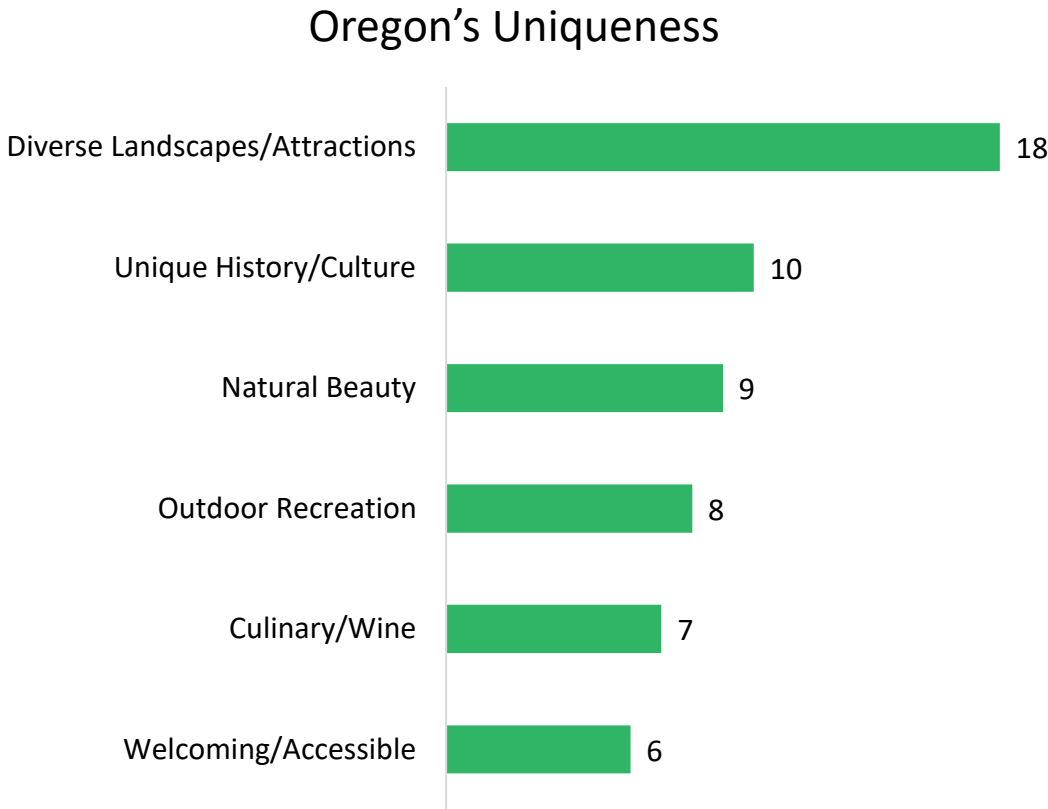
OREGON'S DESIRED REPUTATION

A single comment that encapsulated the overall sentiment expressed by most respondents:

- “We’d love for Oregon to be known as a place where authenticity meets accessibility—a state that welcomes all travelers with inclusive experiences, rich cultural stories, and world-class outdoor recreation that’s both awe-inspiring and approachable. Oregon should be celebrated for:
 - Its spirit of hospitality across communities both large and small
 - Diverse landscapes that invite exploration year-round—from coast to high desert to the Gorge
 - A thriving food, wine, and craft scene rooted in place, people, and sustainable practices
 - A deep respect for heritage and community voices, including tribal, agricultural, and immigrant contributions
 - And above all, a commitment to making travel in Oregon meaningful, regenerative, and open to everyone.”



OREGON’S PERCEIVED UNIQUENESS

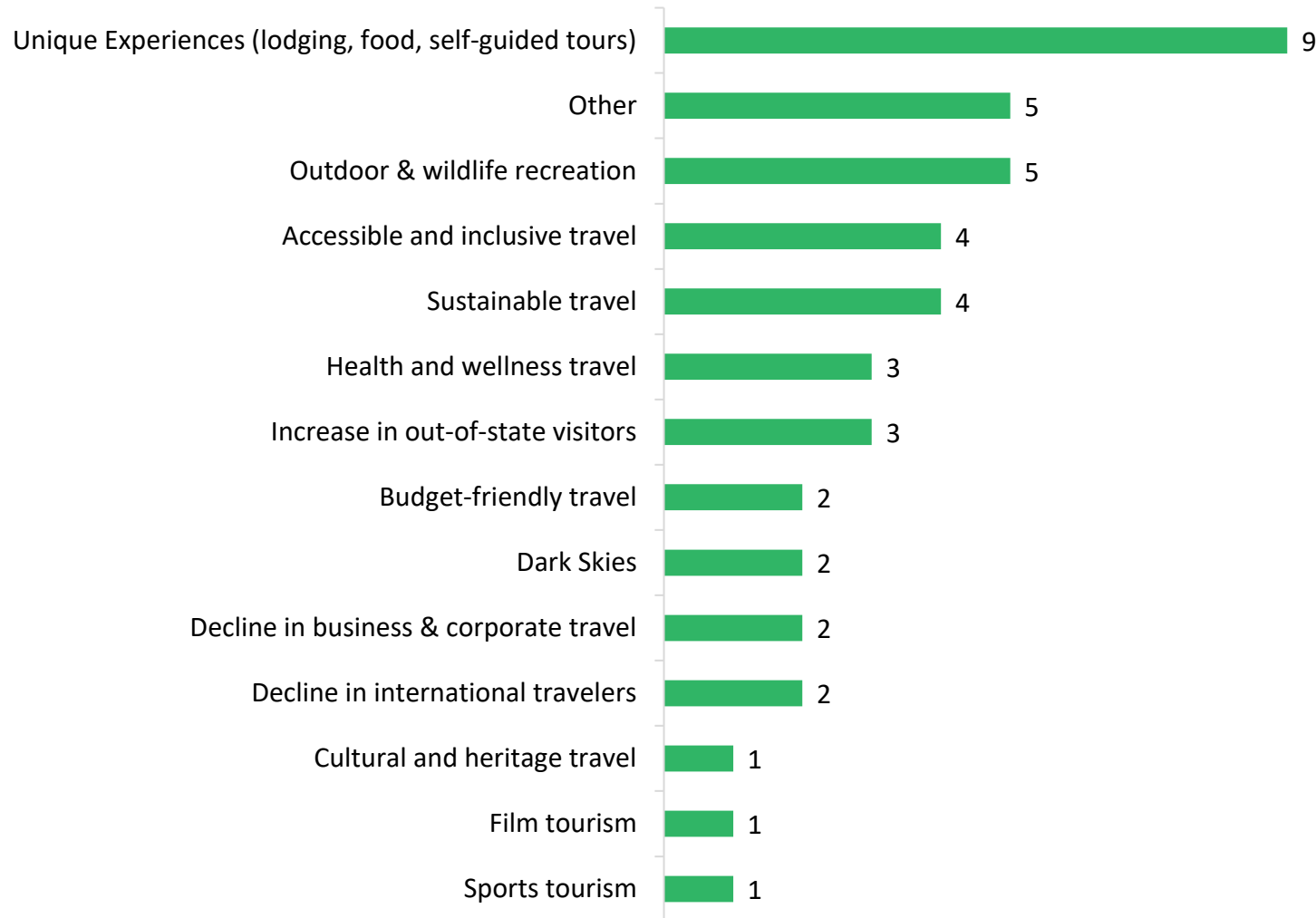


A specific comment about Oregon’s uniqueness:

- “Oregon’s most unique strengths lie in its geographic and cultural diversity—you can explore wild coastlines, lush forests, volcanic peaks, fertile valleys, and high desert, all within a day’s drive. This physical variety is matched by the richness of our communities: from small towns with deep roots and strong traditions to urban centers brimming with creativity.
- Key strengths to highlight include:
 - Outdoor recreation that’s immersive and accessible, whether it’s hiking, biking, paddling, skiing, or fishing.
 - Culinary and beverage experiences that reflect Oregon’s land and people—world-class wine, craft breweries, orchards, food trails, and farm-to-table dining.
 - Deep historical and cultural stories, including Indigenous heritage, pioneer history, and immigrant narratives that make each region distinct.
 - Authentic rural communities where visitors can slow down, connect, and experience Oregon beyond the usual paths.
- Oregon’s strength is not just in what we have—it’s in how it feels to be here.”

EMERGING TRAVEL TRENDS

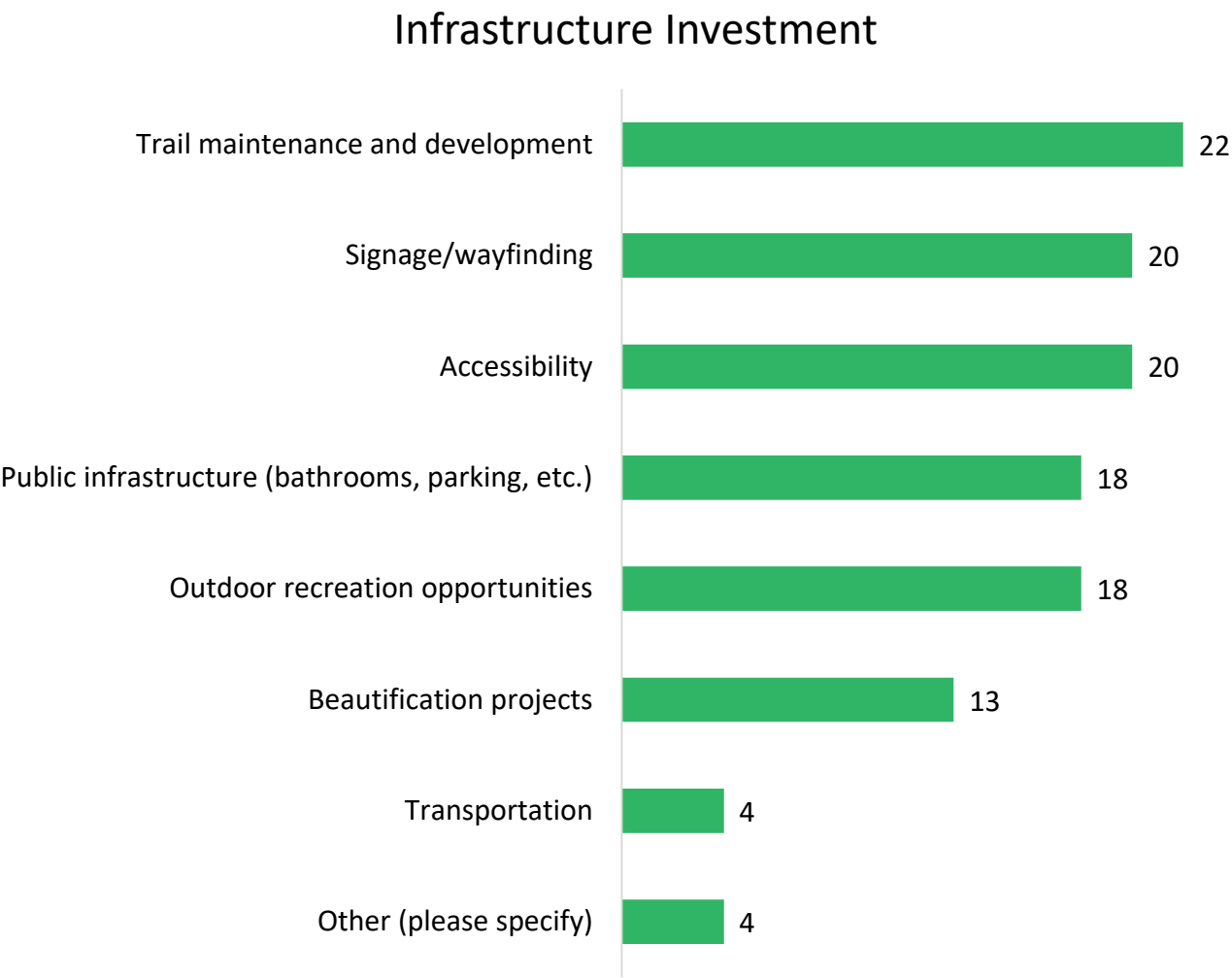
Emerging Travel Trends



- **Unique experiences** listed included mushroom hunting, cryptids (such as Bigfoot), unique lodging offerings, animal experiences, digital detox retreats, and yoga, to name a few.
- Interest in newer **outdoor trends**, such as paddleboarding and birding were also mentioned.

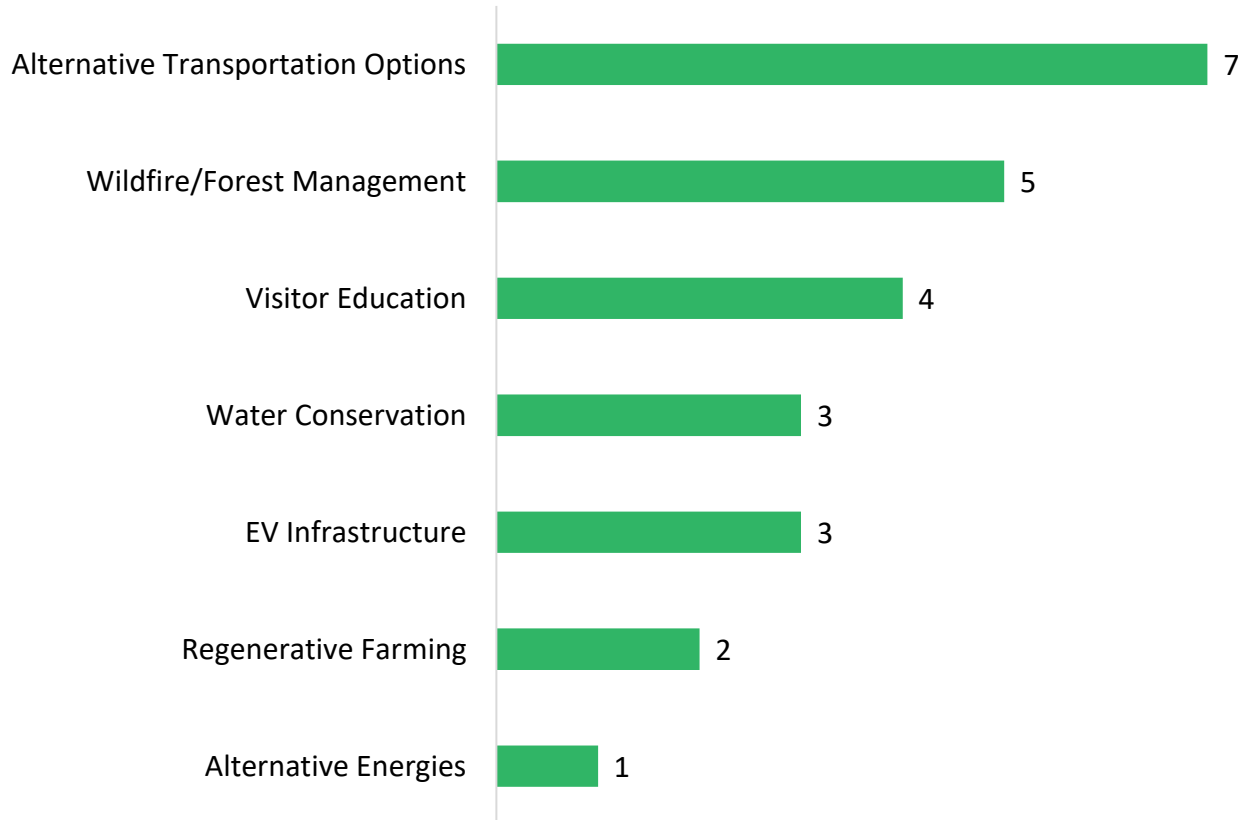
DESIRED TOURISM INFRASTRUCTURE INVESTMENT

- Top priorities centered around how visitors can **access Oregon’s natural beauty**, either through maintaining or creating new trails, providing wayfinding to get to those trails, and ensuring all travelers can enjoy those assets.



DESIRED SUSTAINABILITY & CLIMATE ACTION

Sustainability & Climate Action



- **Transportation** ideas included multimodal options such as trains, trolleys, or shuttles between destinations to get travelers out of their individual vehicles.
- **Wildfires** and **air quality** related to fires was also a top concern, and respondents voiced that **robust plans** need to be in place at the state level for when disaster strikes.

DESIRED ADDITIONAL PROGRAMS & RESOURCES

Additional Programs & Resources



- Most destinations are eager for additional **funding** and resources to build more **tourism infrastructure**.
- More access to **data** and **research** was also a top request.

TRAVEL OREGON'S PERCEIVED TOP STRENGTHS

- Strategic, Inclusive Marketing and Branding: “Travel Oregon sets the tone for how the world sees Oregon. Their storytelling consistently elevates lesser-known places, embraces diversity, and connects with values-based travelers—creating awareness and demand in ways that small communities couldn’t achieve on their own.”
- Statewide Leadership in Destination Development: “Travel Oregon provides visionary leadership in building and supporting sustainable, community-driven tourism infrastructure. Their programs empower local destinations—especially rural ones—to create experiences that are authentic, inclusive, and economically impactful.”
- “Great staff! Everyone I've worked with has been helpful and kind.”
- Collaborative Grant Programs and Technical Support: “From funding to follow-through, Travel Oregon’s grant opportunities are accessible, transparent, and paired with technical support that helps communities like ours succeed. Their willingness to walk alongside destinations makes them a true partner in progress.”



In your opinion, what are the three greatest strengths of Travel Oregon? (N=32, 94 responses, Open-ended)

TRAVEL OREGON’S PERCEIVED BIGGEST OPPORTUNITIES



- Expanding Training, Bootcamps, and Workforce Development: “There’s growing demand for workforce readiness across the tourism industry. Travel Oregon can lead the way with statewide workshops, certification programs, and tourism business bootcamps that help communities elevate service, accessibility, and hospitality standards.”
- Deepening Rural Tourism Investment and Support: “Travel Oregon has a powerful opportunity to further empower rural communities with ongoing funding, destination development guidance, and tools to create sustainable, year-round visitor economies.”
- “Aligning storytelling to help change the hearts and minds of Oregonians as we already do so well with visitors.”
- Elevating Oregon’s Leadership in Regenerative and Inclusive Travel: “Travel Oregon is well-positioned to define what it means to travel responsibly in Oregon—from inclusive storytelling to climate-conscious practices and community-first messaging. Leading this narrative statewide can help differentiate Oregon while encouraging more mindful visitor behavior.”

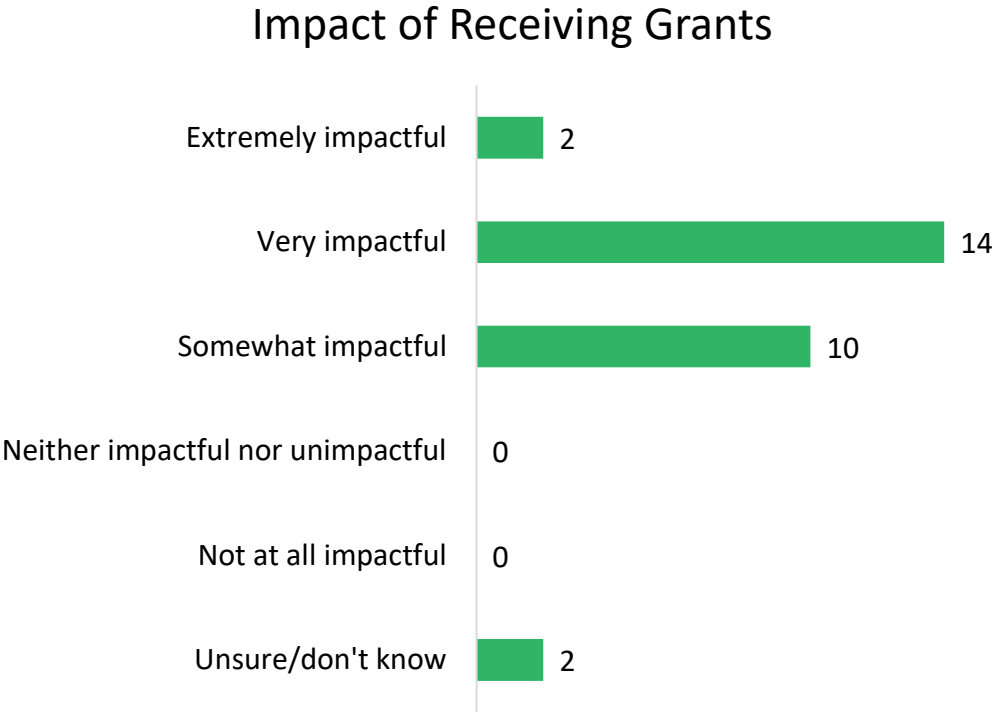
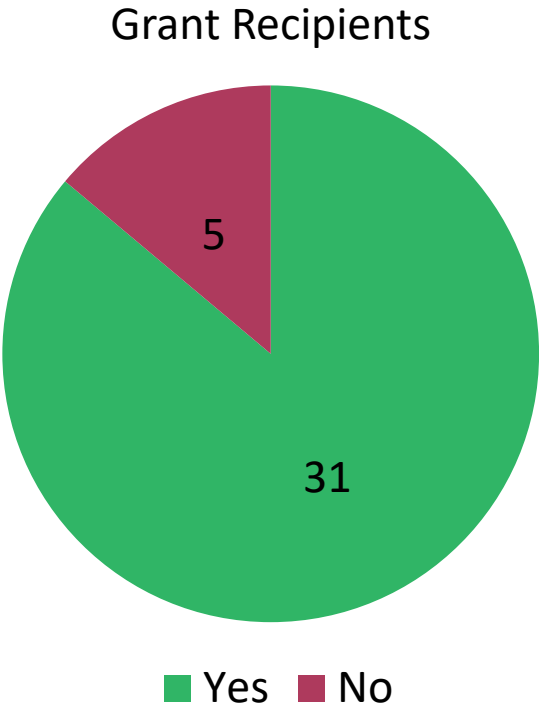
TRAVEL OREGON'S PERCEIVED BIGGEST OPPORTUNITIES (CONTINUED)

Additional specific suggestions include:

- “Create programming for small towns and underrepresented communities to tell their version of Oregon using local content creators.”
- “Onboarding resources for new DMOs. If they exist, they were never shared by regional.”
- “I think the tone from Travel Oregon on the current political/economic situations needs to be more realistic and less Pollyanna. If our tourism businesses and destinations are to be more resilient, we need statewide level projects and forecasting that we can realistically plan around, not just an optimistic story. My biggest disappointment at GovCon was the overly optimistic view of the political/economic outlook for tourism in the state. To have Fred Dixon on the stage saying everything is fine while Brand USA does not have secured funding from the US Government yet is a big red flag. For all the international teams to speak positively about visitation when the recent Canadian media event was canceled because journalists said no Canadian publication is taking US travel stories right now is a big red flag.”
- “We need more proactive work and less reactive work as it pertains to legislative advocacy. We all know that the 70/30 split will continue to be fought until it eventually breaks. I'd like our industry to collectively come to the table with some partnership or idea where we are seen as a part of the solution to what is facing Oregon cities. I feel our industry is in a very weak position as we are seeing Oregon's overall tax structure (Measure 5 & 50, Land Use, and no Sales Tax) make it increasingly more difficult for a black and white defense of the current TLT Law. I'd rather we at least try to drive our future. Thanks for all the hard work you are already doing.”

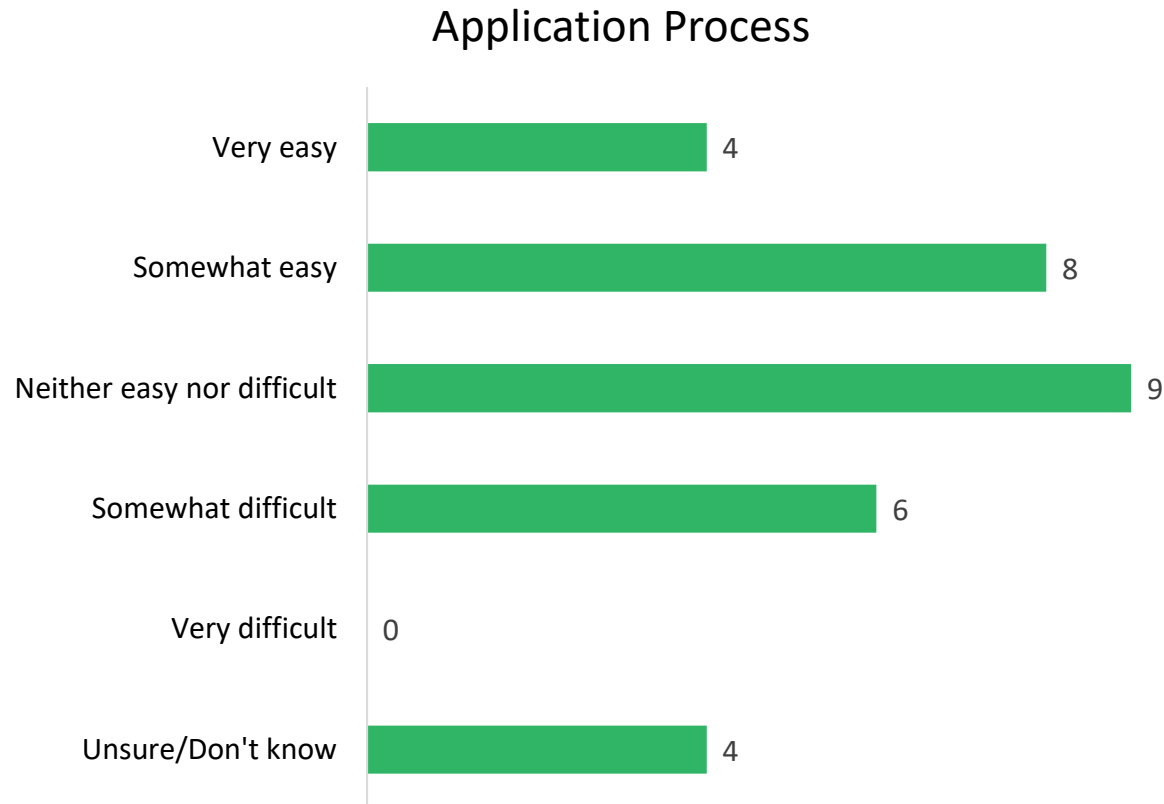
GRANTS

GRANT RECIPIENTS AND IMPACT



- The **majority** of DMOs have received grants from Travel Oregon, with an **overwhelmingly positive impact**. These funds frequently allowed DMOs to undertake and complete impactful projects that they could not otherwise afford to perform. Not one recipient experienced a negative impact from receiving additional funds.

DIFFICULTY OF APPLYING FOR AND RECEIVING GRANTS

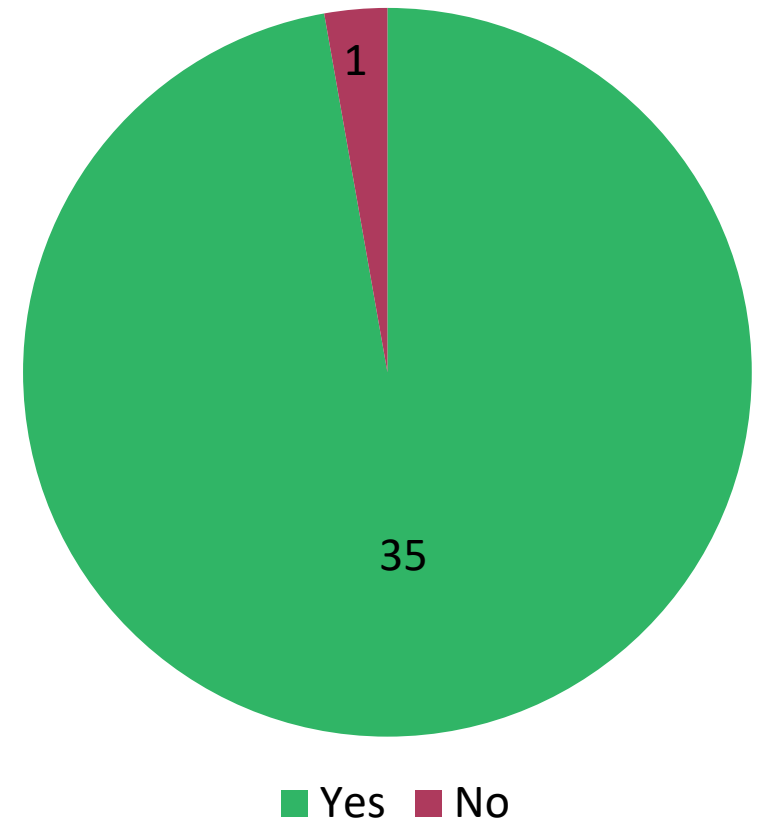


- Twelve of the 31 (39%) respondents believe applying for Travel Oregon grants was an **easy process**, while nine (29%) found it a neither easy nor difficult process.
- Six of the recipients (19%) however, did find the process at least **somewhat difficult**.

FUTURE GRANT APPLICATIONS

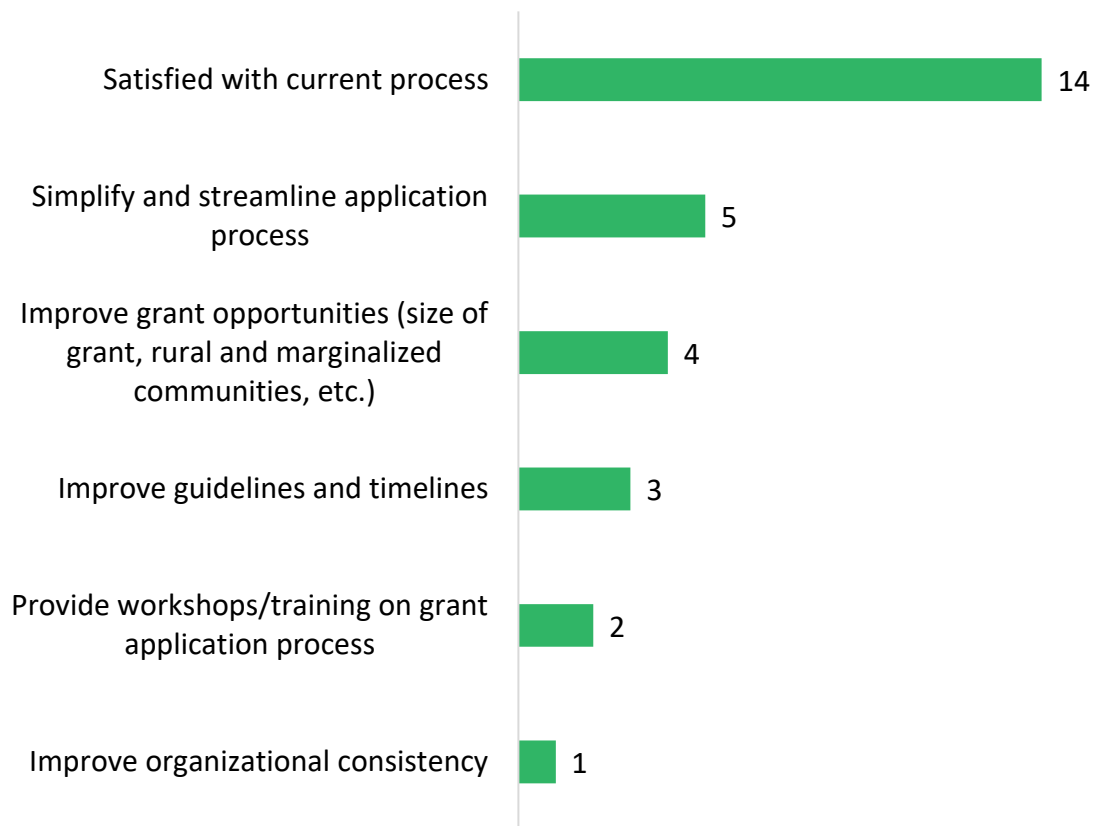
- Only one destination surveyed does **not** plan to apply for grant money in the future.

Will Apply for Grants in the Future



IMPROVING THE GRANT PROCESS

Grant Process Improvements



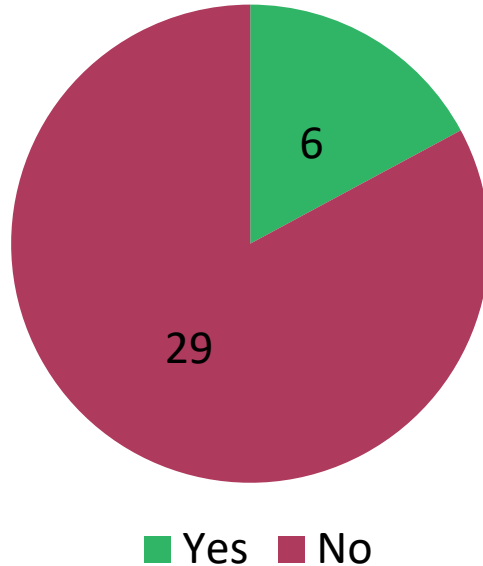
More than half of all respondents are happy with the current process and have no recommendations. Of those that had suggestions, they recommend:

- “In some grant cycles, the guidelines seem too narrow and limiting for a statewide grant program, given the diverse pool of potential applicants. It has been challenging for our DMO to identify projects that fit within the guidelines and timeline of the grant in the past, even though there were projects that would be mutually beneficial. We would like to see the guidelines better reflect the diverse needs of the state, where some areas are dealing with overtourism and other areas need additional marketing support to drive more tourism.”
- “Knowing what type of grant funding will be available many months in advance so that organizations can plan and strategize for what projects would benefit the most.”
- “The grant process is thoughtfully structured, with helpful templates, examples, and workshops that make it approachable. One area of opportunity might be offering more skill-building workshops focused on grant writing itself—not just the specifics of Travel Oregon’s application, but broader training on how to craft compelling, measurable proposals. This would be especially valuable for small and rural communities, where staff capacity is limited and even strong ideas may lack the polish or confidence to compete at the same level. Strengthening these skills statewide helps ensure a more equitable pool of applicants and broader impact across Oregon.”

EMPLOYEE & WORKFORCE

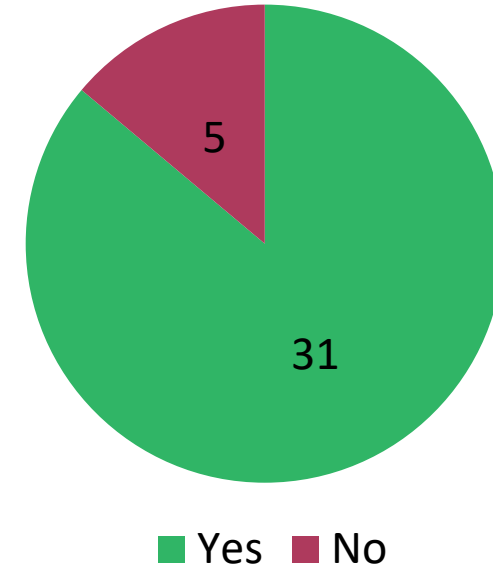
EMPLOYEE ROLES AND PROFESSIONAL DEVELOPMENT

Dedicated Employee for
Niche Opportunities



- Six (17%) DMOs have a dedicated employee(s) for niche opportunities like sustainability, accessibility, advocacy, and DEI related issues. It does not appear that DMO size or budget correlates closely to a DMO having this dedicated resource.

Professional Development
Available for All Employees



- While most respondents do provide at least some training or professional development for their employees, this could be a great opportunity for Travel Oregon to provide professional development opportunities at no cost to the state's DMOs.

WORKFORCE CHALLENGES

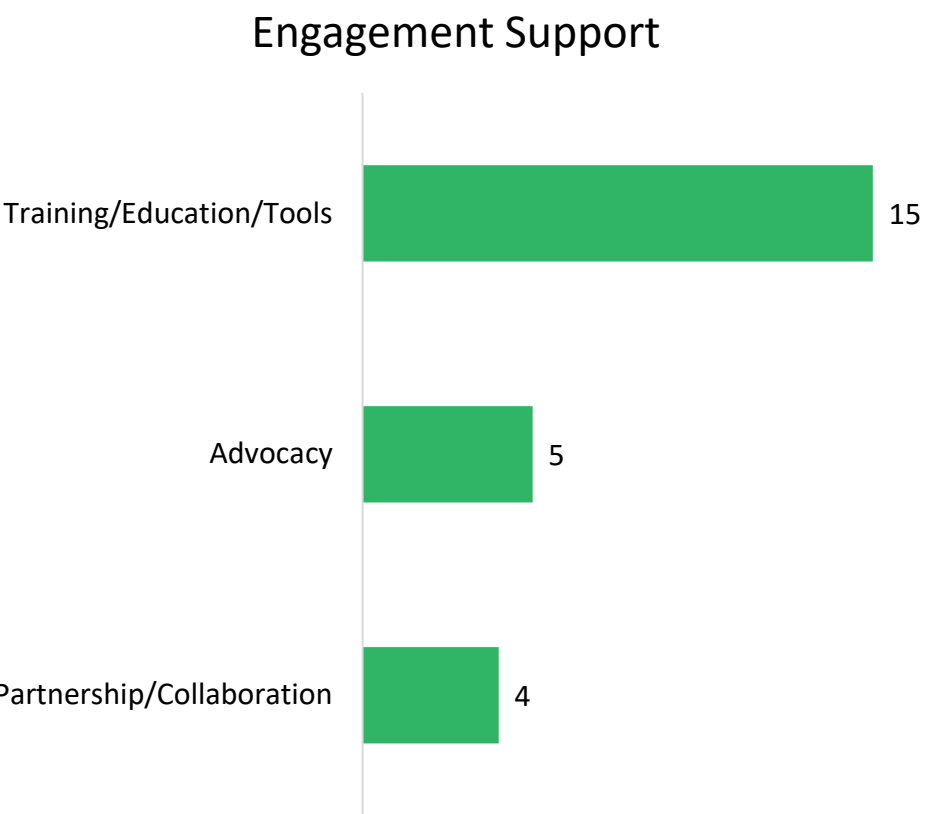
- **Training executive staff** appears to be a major issue facing DMOs in Oregon.
- However, if you were to combine all the responses mentioning the **lack of funding to attract, retain, support, and reward employees** to their organizations, that would in fact be the biggest workforce challenge facing the industry.
- Travel Oregon has an opportunity to direct staff to further assist these DMOs and fill the holes where applicable.

Workforce Challenges



LEGISLATIVE & ADVOCACY

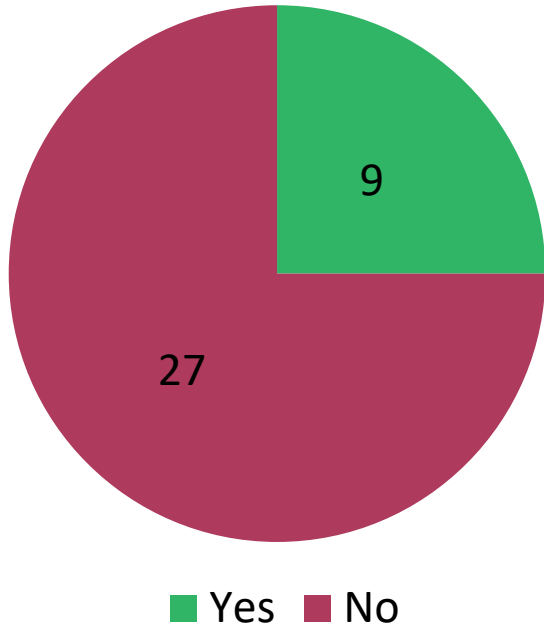
GOVERNMENTAL ENGAGEMENT SUPPORT



- “I am not sure for a local DMO fighting for funds, how to they ask for ODA/Travel Oregon/ORLA support in their fight? I don't know a DMO in my region that can afford lobby consultant hours, is that something Travel Oregon can provide?”
- “Local government doesn't understand the purpose and potential value of the TLT funds they have and allocate ad hoc to whatever pet projects or shiny objects come before them. Whatever data and assistance is available to convince them of the value of the DMO would be really helpful.”
- “Stated before but reiterating: We’d benefit from case studies, messaging tools, and expert guidance to help educate local leaders and the public on how a TLT directly fuels tourism infrastructure, small business growth, and quality-of-life improvements. Travel Oregon’s presence—whether through public endorsement, peer-to-peer connections with other communities, or technical assistance—could lend weight to our efforts.”
- “Tools and information to define the visitor life cycle and rebut the assumption that one busy year means we don't have to promote anymore.”

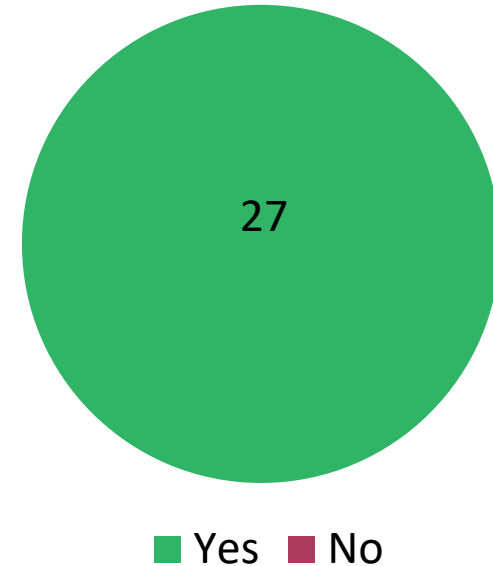
DOCUMENTING THE BENEFITS OF TOURISM

Have a 'Benefits of Tourism' doc?



- Only 25% of respondents currently have a '**Benefits of Tourism**' type document.

Can Travel Oregon/ODA assist with this?



- **Every respondent** that currently lacks a one-sheeter was **interested** in having Travel Oregon's assistance in creating one for their partners.

Does your organization currently have a one-sheet document that explains the benefits of tourism to your partners and community? (N=36, Multiple choice)

Would you be interested in getting assistance from Travel Oregon/ODA in creating one? (N=27, Multiple choice)

FUNDING AND BUDGET CHALLENGES

RESPONSE
As a chamber the majority of our funds area from membership, the rest is our big summer event. This past year we received a small amount of funding from our city to help with establishing this tourism program through 2025. Without additional funding for tourism, we don't have the capacity to do as much tourism work as we'd like.
City TLT funds decreasing based on how they allocate the money.
Communicating to the residents the benefits of tourism funds reinvested in the community. Threats to TLT
Defense of 70 - 30 split
Elected officials and staff do not share our commitment prioritize TLT investment in tourism generating and supporting projects
How TLT funding can be used?
Lack of funding and stress of chasing enough money to keep the doors open when I would rather be working on developing marketing and new tourism opportunities in the region.
My DMOs are experiencing this, not so much the RDMO. Some DMOs are battling yearly, very couple of years, 5-years etc. for their percentage of the TLT funds. The fights continue to get harder and adjacent organizations like Downtown Associations and Chambers see TLT as their funding solutions too.
Not at this time. We have very supportive funders and a steady board of directors.
Ongoing protection of local TLT resources and crumbling facilities infrastructure.
Our City is consistently complaining the we get too much funding, and in fact are now trying to redo our contract to reduce our funding.
Our current city manager does not support tourism marketing and promotion and would rather use the funds for staffing economic development.
Possibly looking at funding being reallocated to other groups.
Protecting local lodging tax allocations
Shrinking budget - In FY 26-27, we will experience a 10% drop in revenue due to the college conference realignment and current economic conditions. City Budget Pressure - Our City has \$255 million in deferred maintenance or replacement of facilities. While our City retains 70% of the TLT for its general fund, it would like to have our 30% for fire, police and Parks and Rec.

Are there specific funding or budget-related challenges facing your organization that require advocacy or policy adjustments? (N=25, Open-ended)

FUNDING AND BUDGET CHALLENGES (CONTINUED)

RESPONSE
Shrinking TRT contributions from cities as they prioritize local assets over visitor attraction and visitor center activities.
This is a constant. We would like to see the 25% allocation to our organization in the City charter. Right now, it is an ordinance that can be changed easily.
We are one of the most visited regions in the state, but because of our proximity to Portland and limitations on development in the region, we do not have the lodging product to support a larger budget to manage the load of visitors and their needs. The cost of doing business continues to rise, but the funding floor for the RCTP program do not increase at the same pace. While other regions budget rise each year, ours does not and programming becomes difficult to manage.
We have an old TLT ordinance with opposite percentages (70% general fund, 30% tourism). It's not quite enough to launch a new organization. 84% of our fire and EMS calls are for people who live out of town, mostly travelers on I-84, but it isn't considered a tourism-related service when it comes to funding.
We rely heavily on grants. Having consistent funding would greatly benefit the work that we do.
Yes, HB 3556 & Local elected official advocacy
Yes. Our city staff/council/budget committee no longer see the DMO as a partner for tourism. We were established in the early 90s purposefully to grow the TRT for our community, but now we are pitted against other organizations with smaller focus to apply for the funds. A lot of misunderstandings and little opportunity / listening when we explain/provide facts to counter what is said about tourism industry, our committee, etc. We serve two cities and both have this issue to a degree. Favoring use of TRT to other projects or groups and whittling away at our funds. it is hard to plan long-term projects without commitment we had in the past.
Yes. One of our most significant challenges is the uncertainty and inconsistency of tourism funding, especially when reliant on short-term contracts or grant cycles. This creates instability in staffing, limits long-term planning, and can stall momentum on critical destination development projects. Our city established its Transient Lodging Tax (TLT) ordinance before the state of Oregon and Travel Oregon set their own policies, which means we're not bound by statewide TLT allocation rules. Instead, our community determines how tourism funds are spent, and we are currently navigating a new public RFP process to determine future direction. This makes it all the more important that local voices remain central, and that state-level advocacy efforts respect and support locally governed tourism structures. We also see a need for policy support around workforce-related barriers—particularly housing and childcare—which, while not traditionally considered tourism line items, directly impact our industry's ability to recruit, retain, and grow a reliable workforce.

Are there specific funding or budget-related challenges facing your organization that require advocacy or policy adjustments? (N=25, Open-ended)

THANK YOU!

PREPARED BY:



BLUE ROOM
R E S E A R C H

APPENDIX

SURVEY RESPONDENTS

SURVEY RESPONDENTS

ORGANIZATION NAME	CEO/EXECUTIVE DIRECTOR	PRIMARY CONTACT
Albany Visitors Association	Rebecca Bond	Rebecca Bond
Astoria-Warrenton Area Chamber of Commerce Visitor Center	David Reid	David Reid
Cannon Beach Chamber of Commerce	James Paino	James Paino
Coburg Main Street / Discover Coburg	Megan Dompe	Megan Dompe
Columbia Economic Team	Paul Vogel	Wela Negelspach
Coos Bay-North Bend-Charleston VCB/Oregon's Adventure Coast	Janice Langlinais	Janice Langlinais
Destination Redmond	Redmond City Council	Heather Cassaro
Discover Klamath	Millie Osguthorpe	Millie Osguthorpe
Eastern Oregon Visitors Association	Alana Carollo	Alana Carollo
Experience Mt. Hood and the Gorge	Lizzie Keenan	Ithaca Janzen
Explore Lincoln City	Kim Cooper Findling	Kim Cooper Findling
Explore North Marion	Jamie Zamrin	Jamie Zamrin
Explore Sisters	Scott Humpert	Scott Humpert
Explore Tualatin Valley	Dave Parulo	Dave Parulo
Harney County Chamber of Commerce	Jess Hedges	Jess Hedges
Lake County Chamber of Commerce	Shelley Batty	Shelley Batty
Lower Columbia Tourism Committee	David Reid	Regina Willkie
Maupin Area Chamber of Commerce	Jordan Belozar	Jordan Belozar
Newport Chamber of Commerce	Wayne Patterson	Wayne Patterson
Oregon Coast Visitors Association (OCVA)	Marcus Hinz	Marcus Hinz or Arica Sears

SURVEY RESPONDENTS (CONTINUED)

ORGANIZATION NAME	CEO/EXECUTIVE DIRECTOR	PRIMARY CONTACT
Oregon's Mt. Hood Territory	Lizzie Keenan	Lizzie Keenan
Prineville - Crook County Chamber of Commerce and Visitor Center/Explore Prineville	Kim Molnar	Kim Molnar
Sandy Area Chamber of Commerce	Khrys Jones	Shannon Givens
The Dalles Area Chamber	Lisa Farquharson	Lisa Farquharson
Tillamook Coast Visitors Association	Nan Devlin	Nan Devlin
Travel Lane County	Samara Phelps	Samara Phelps
Travel Medford	T.J. Holmes	T.J. Holmes
Travel Portland	Megan Conway	Megan Conway
Travel Salem	Angie Villery	Angie Villery or Irene Bernards
Travel Southern Oregon	Bob Hackett	Bob Hackett
Visit Bend	Jeff Knapp	Jeff Knapp
Visit Cascade Locks	Jordon Bennett	Janice Crane
Visit Central Oregon	Scott Larson	Scott Larson
Visit Corvallis	Christina Rehklaue	Christina Rehklaue
Visit Hood River	Katie Kadlub	Katie Kadlub
Visit McMinnville	Dan Gibson	Dan Gibson
Visit Newberg dba Taste Newberg	Leigh Jensen	Leigh Jensen
Wallowa County Chamber of Commerce	Jennifer Piper	Jennifer Piper
Willamette Valley Visitors Association	Tori Middelstadt	Tori Middelstadt



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