

2018 OREGON TOURISM STAKEHOLDER SURVEY

Driftline Consulting

October, 2018

METHODOLOGY

GOALS

- The 2018 Oregon Tourism Stakeholder Survey was designed on behalf of Travel Oregon and regional tourism partners to elicit feedback from individuals and organizations linked to the tourism industry. The goal of the study was to obtain feedback and direction for Regional Destination Management Organizations (RDMOs).

METHODOLOGY

- Conducted online and distributed in September and October 2018, via emails and an open URL to Travel Oregon databases with additional distribution from RDMOs.
- A total of 1,512 valid responses were collected.

SIGNIFICANCE

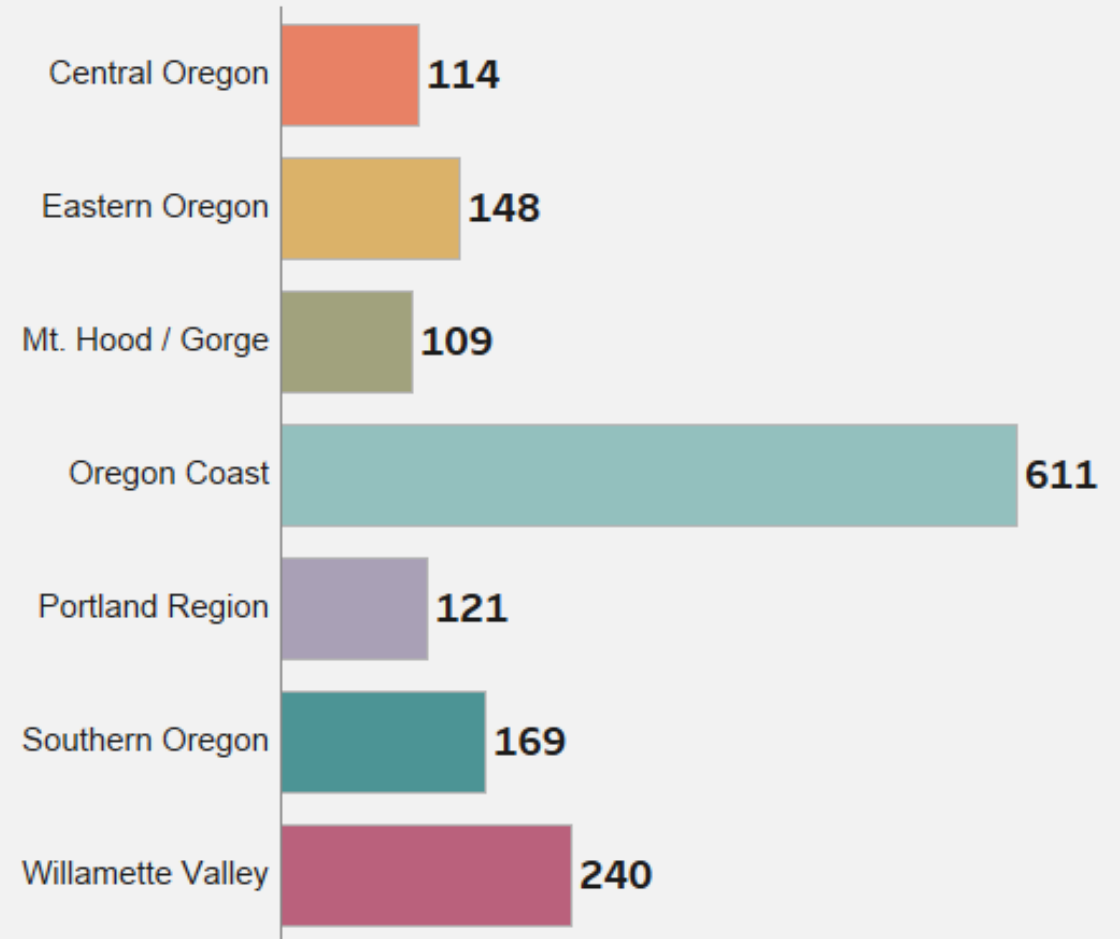
- Because this survey was not conducted from a random sample it is not appropriate to perform typical statistical tests on the data. The survey results should be viewed as an aggregation of relevant and thoughtful feedback from constituents.

RESPONSES BY REGION

A total of 1,512 valid responses were collected. Statewide results presented in this report have been weighted so that each region is represented equally.

Number of Respondents

Q. Your responses will be aggregated and analyzed by region, helping to inform strategies and investments for one specific region. In which region do you work or in which region is your business/organization/attraction located?



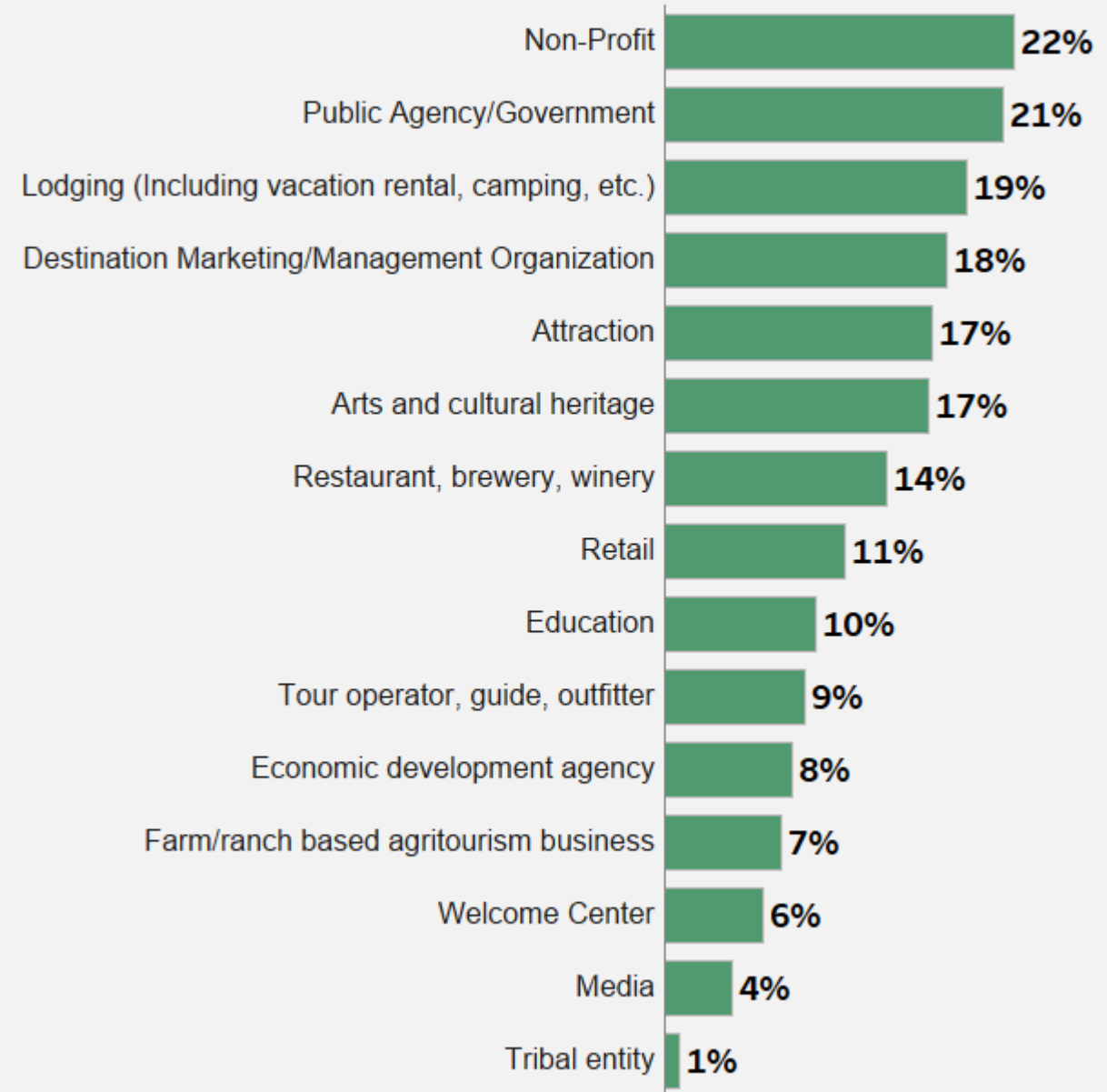
Source: 2018 Oregon Tourism Engagement Survey

INDUSTRY OF RESPONDENTS

A wide breadth of industries were represented in the respondents to the survey, with non-profit the most common industry type.

Organization Type

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



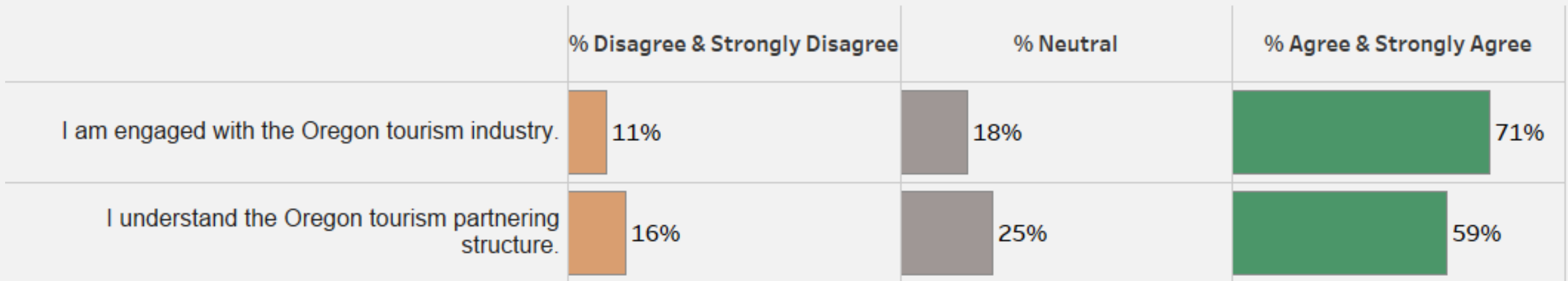
Source: 2018 Oregon Tourism Engagement Survey

HEALTH OF TOURISM INDUSTRY

- High levels of industry engagement.
- Fewer respondents, though still a majority, understand the Oregon tourism structure (agree or strongly agree with the statement).

Overall Health of the Tourism Industry

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



Source: 2018 Oregon Tourism Engagement Survey

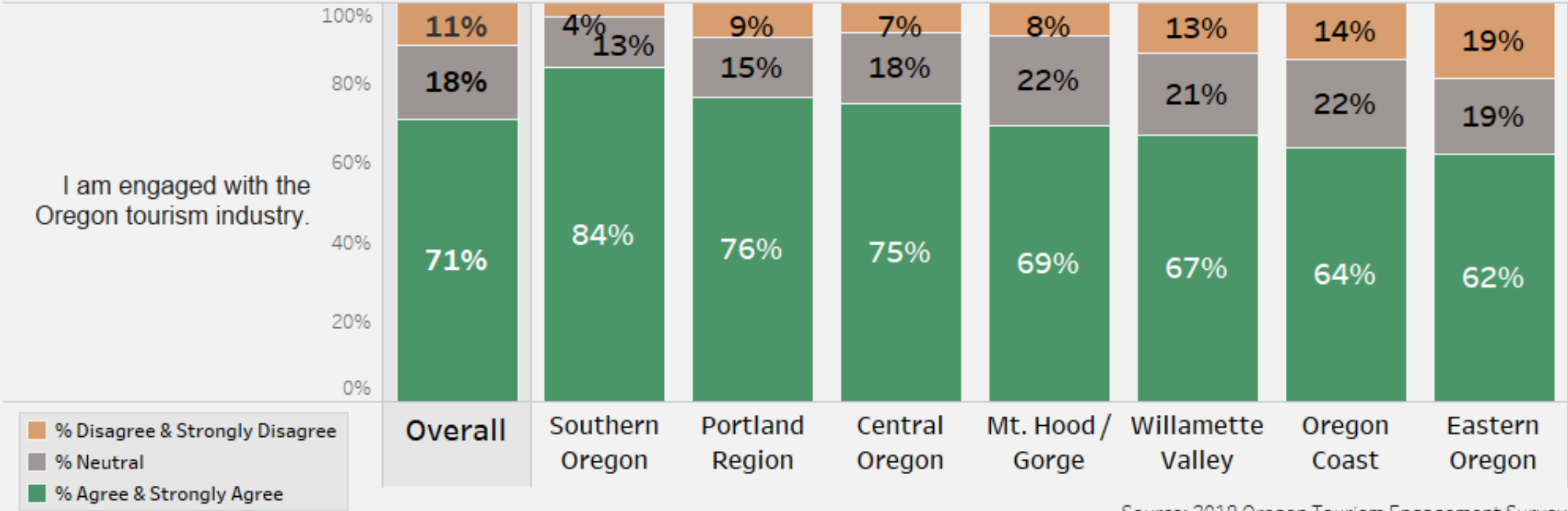
HEALTH OF TOURISM INDUSTRY

ENGAGEMENT BY REGION

- Highest levels of industry engagement were reported in Southern Oregon. Lowest levels in Eastern Oregon.

Tourism Industry Engagement by Region

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



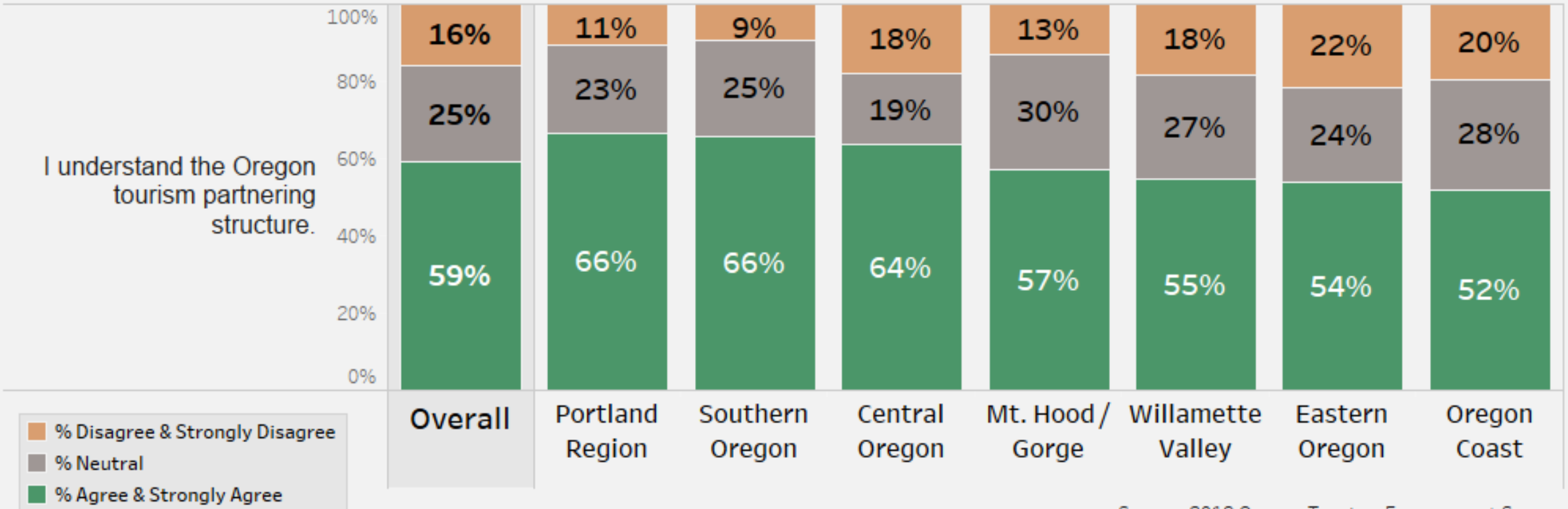
Source: 2018 Oregon Tourism Engagement Survey

HEALTH OF TOURISM INDUSTRY PARTNERING STRUCTURE BY REGION

- Respondents from the Portland region are most likely to have an understanding of the Oregon tourism partnering structure. Respondents from the Oregon Coast were least likely to report having an understanding.

Oregon Tourism Partnering Structure by Region

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



Source: 2018 Oregon Tourism Engagement Survey

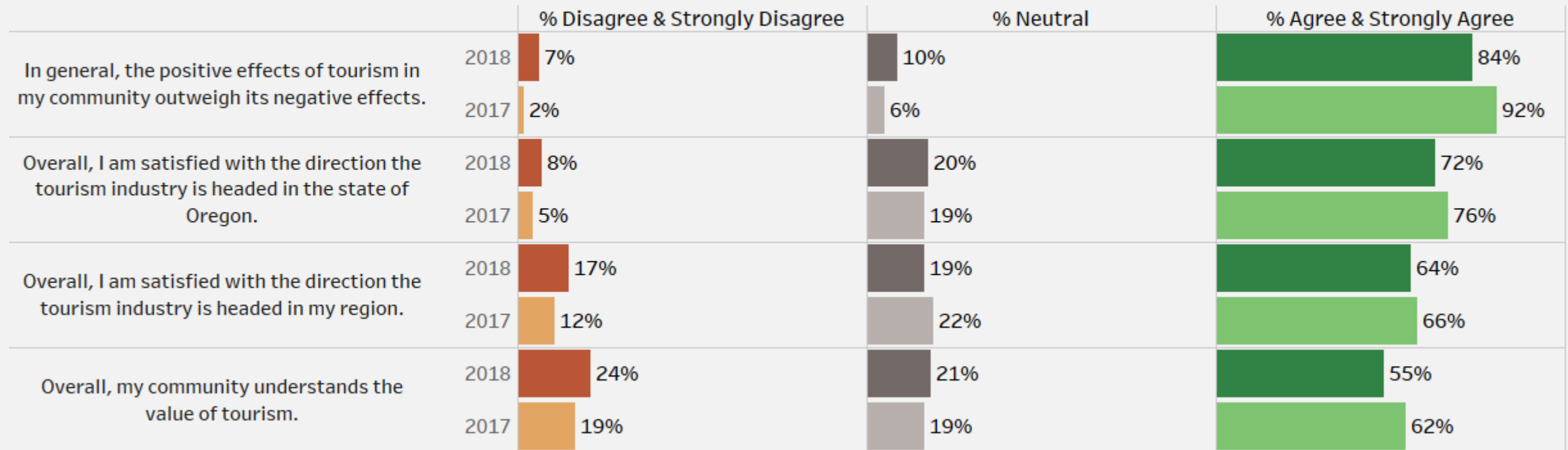
HEALTH OF TOURISM INDUSTRY, CONTINUED

2018 VS 2017

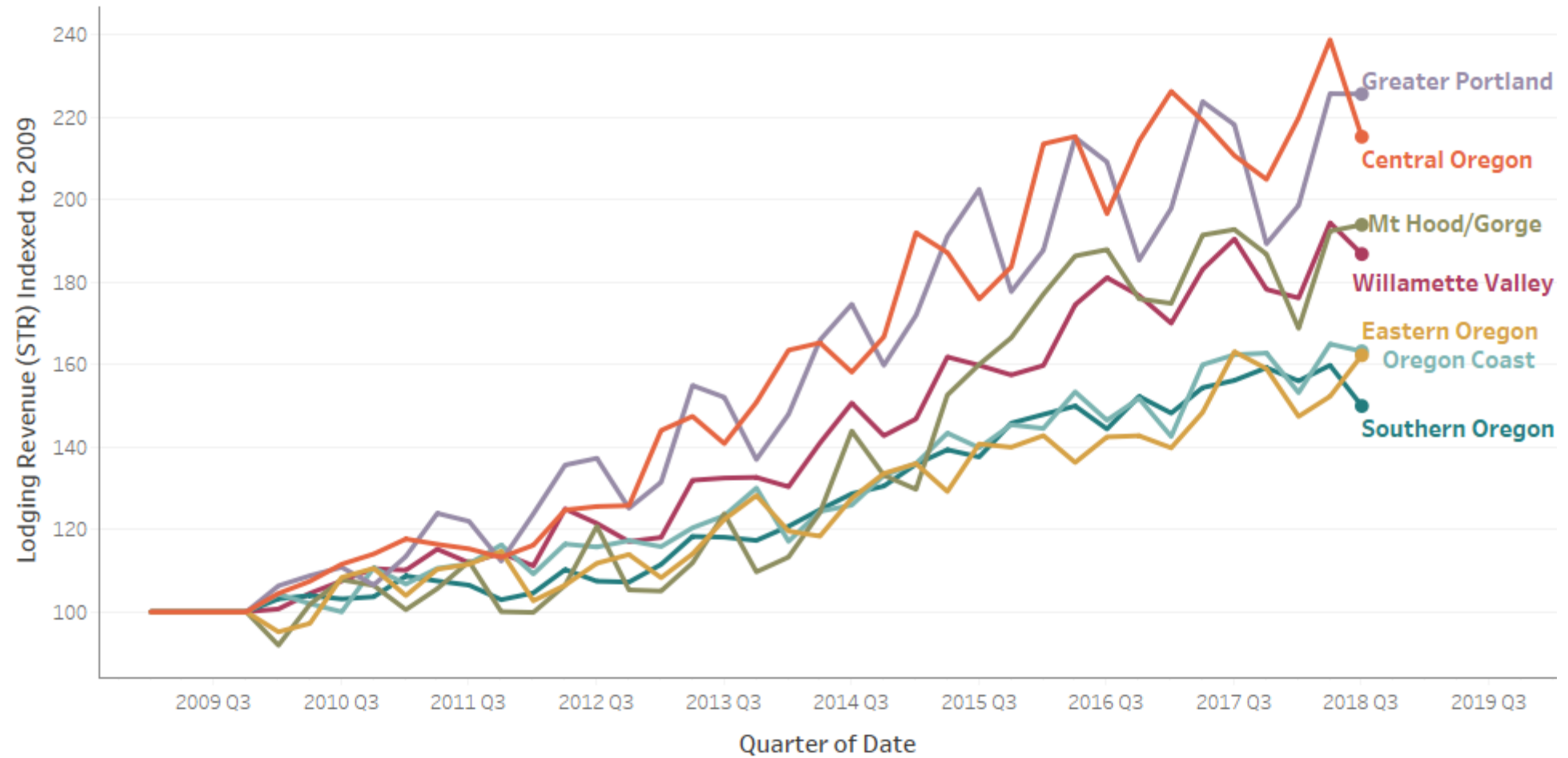
- Identical wording of this question enables comparisons to 2017.
- As in 2017, respondents are most in agreement that the positive effects of tourism outweigh its negative effects. They are least in agreement that their community understands the value of tourism.

Overall Health of the Tourism Industry

Q: Please indicate the level to which you agree or disagree with the following statements: (Strongly disagree, disagree, neutral, agree, strongly agree).



Regional Lodging Revenue Indexed to 2009

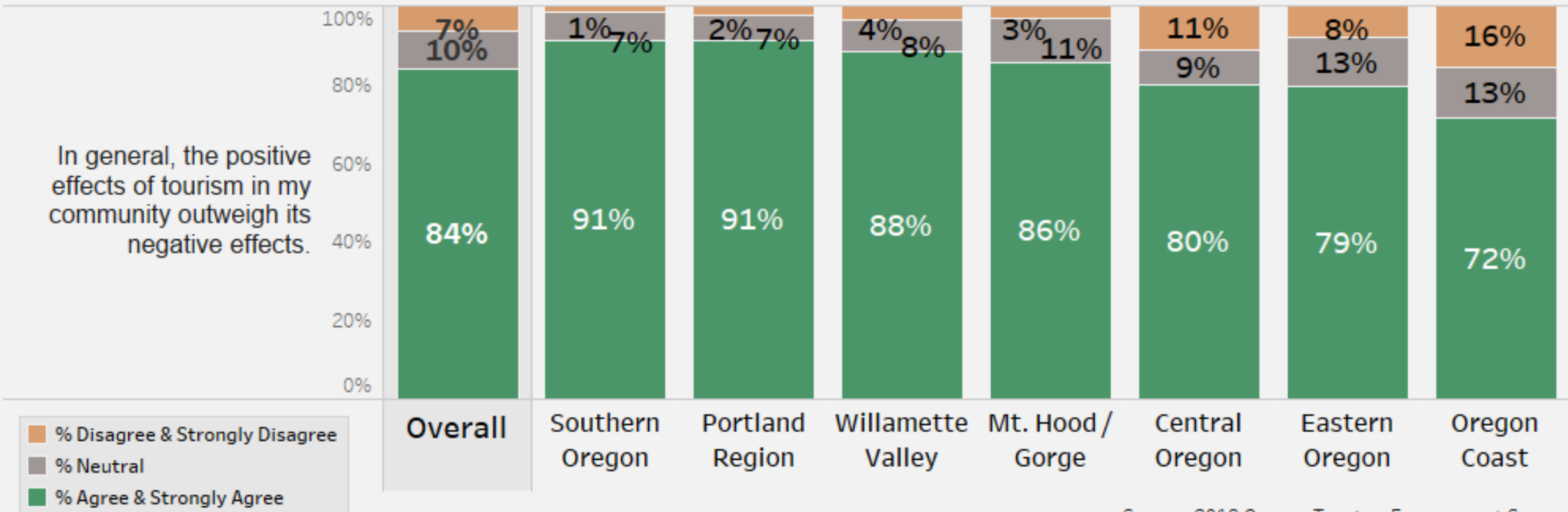


TOURISM POSITIVELY IMPACTS MY COMMUNITY BY REGION

- Respondents overwhelmingly agreed that tourism in their region positively impacts the community.

Overall Health of the Tourism Industry: Tourism Positively Impacts My Community

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



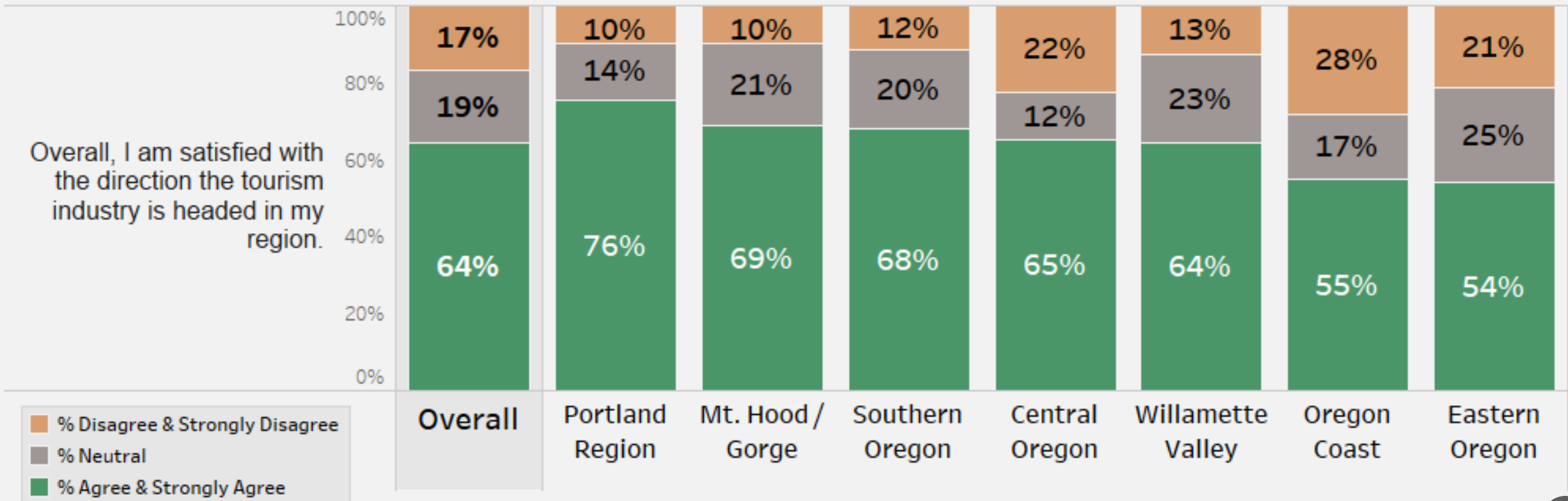
Source: 2018 Oregon Tourism Engagement Survey

SATISFACTION WITH REGIONAL TOURISM DIRECTION BY REGION

- Respondents were asked the extent to which they agreed or disagreed that they were “satisfied with the direction the tourism industry is headed in their region.” Respondents from the Portland region indicated the most amount satisfaction and respondents from the Oregon Coast indicated the least.

Overall Health of the Tourism Industry: Regional Direction

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

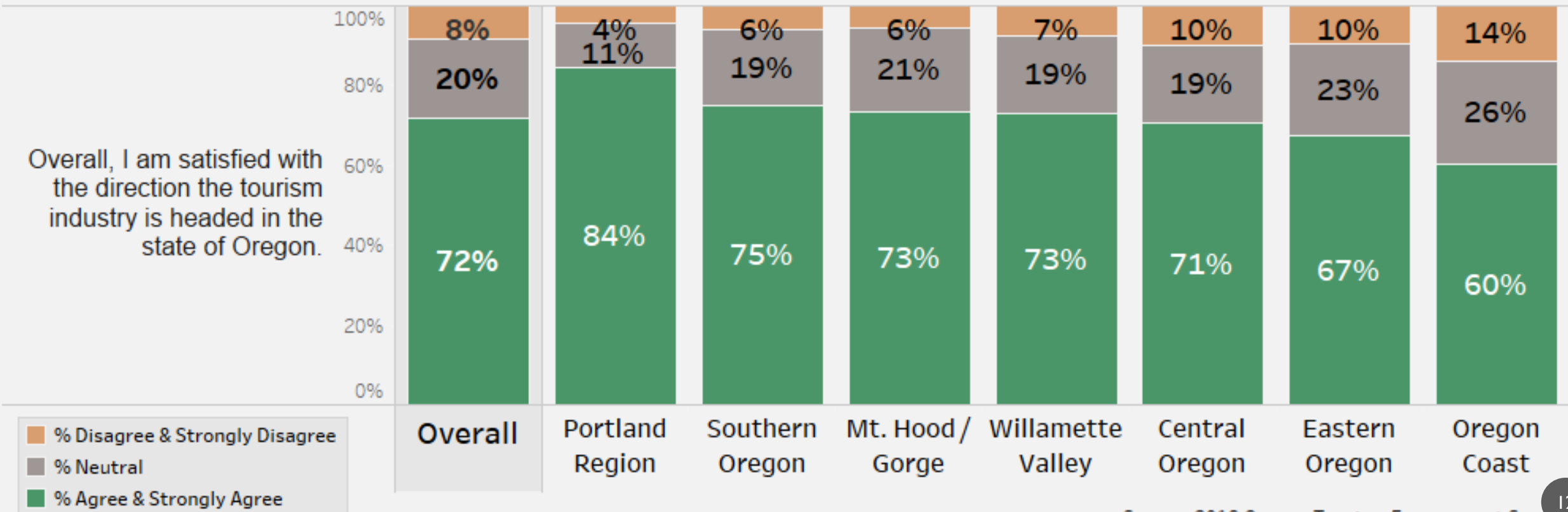


SATISFACTION WITH STATEWIDE TOURISM DIRECTION BY REGION

- Respondents were also asked about their satisfaction with the direction of the industry in the state. The vast majority of respondents expressed satisfaction with the direction of the industry.
- As in the previous statement, respondents from the Portland region indicated the most amount satisfaction. Oregon Coast respondents indicated the least. Other regions were more closely aligned in their responses.

Overall Health of the Tourism Industry: Statewide Direction

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

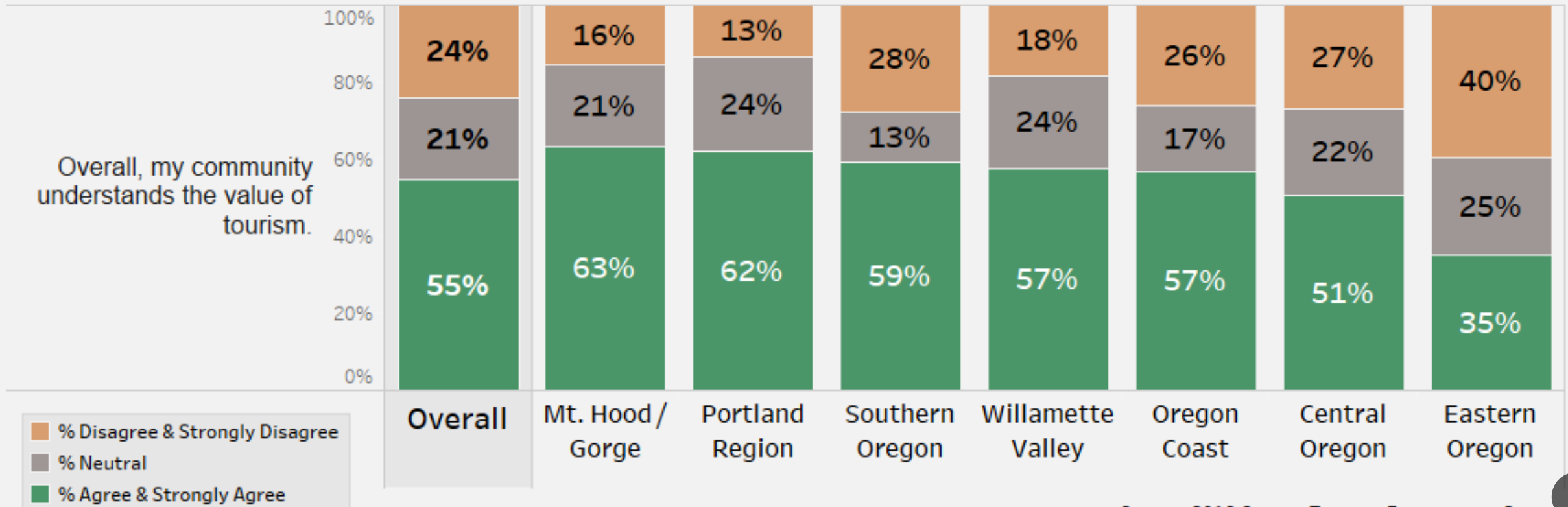


COMMUNITY UNDERSTANDS THE VALUE OF TOURISM BY REGION

- Respondents were asked to rate the extent to which they agreed with the statement that their community understands the value of tourism.
- As in 2017, Eastern Oregon was the only region in which less than half of respondents agreed with the statement. Relative to Eastern Oregon, all other regions had significantly higher percentages of respondents agreeing with the statement.

Overall Health of the Tourism Industry: Community Values Tourism

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

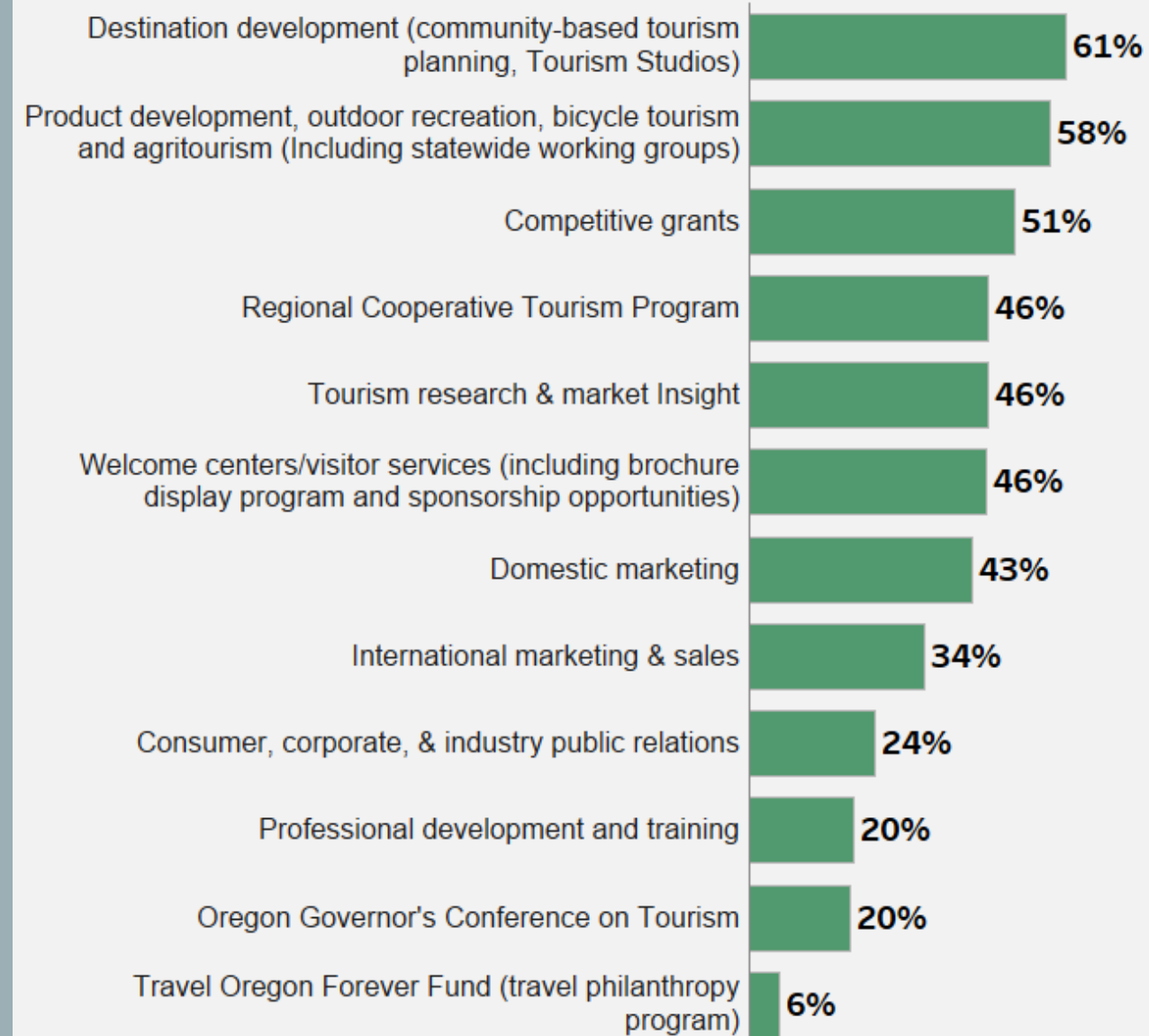


TRAVEL OREGON PROGRAMMING

Destination development and product development were cited most often among top five most-impactful Travel Oregon programs.

Travel Oregon Programming

Q: Choose the top five Travel Oregon programs that you believe are the most impactful:



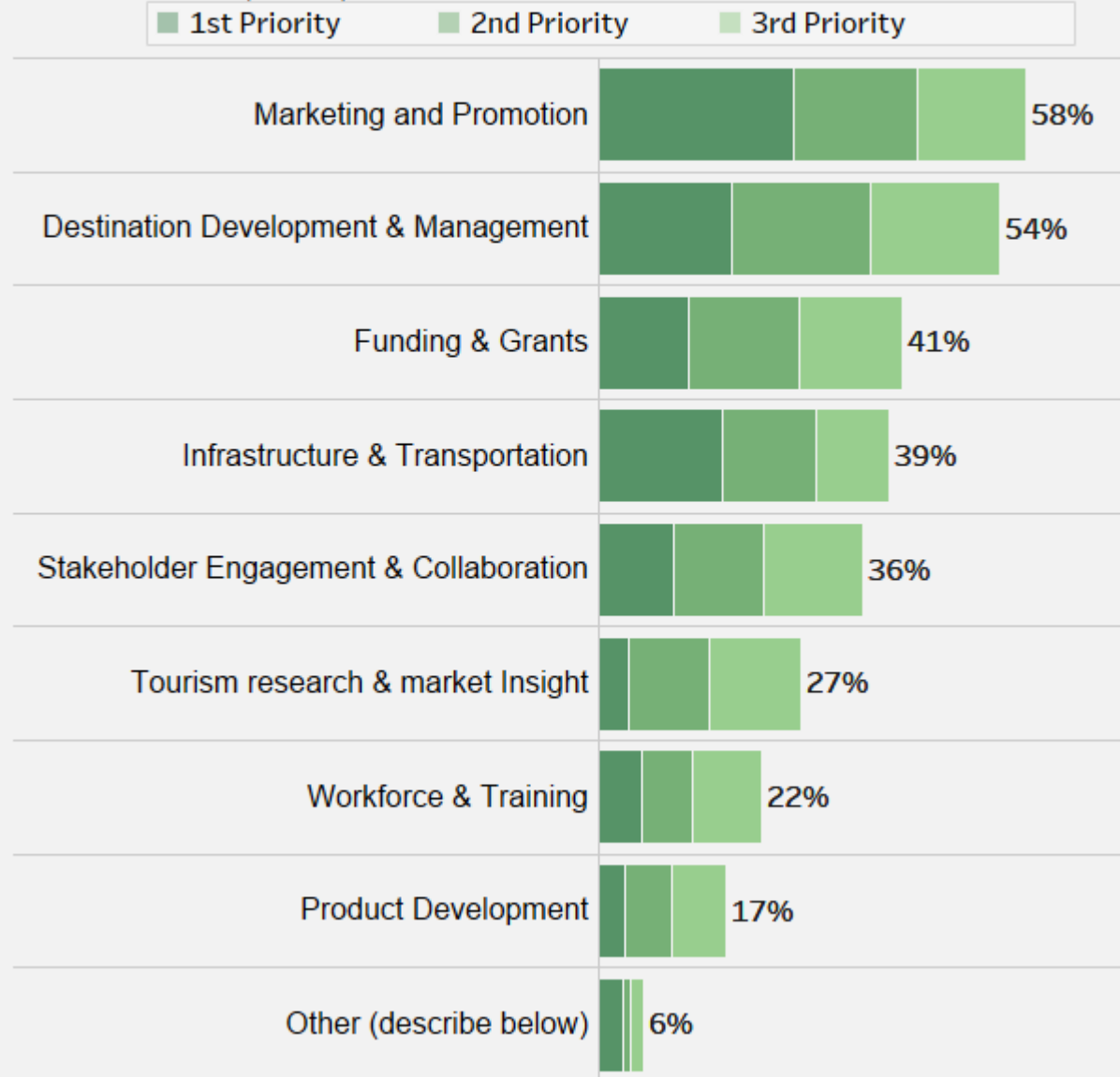
Source: 2018 Oregon Tourism Engagement Survey

DESIRED TOURISM PRIORITIES & FOCUS AREAS

Marketing and promotion top
priority statewide for 2019-
2021 tourism planning.

Statewide Desired Tourism Priorities & Focus Areas

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



TACTICAL OPPORTUNITIES

Respondents prioritized specific tactics.

Respondents rated a large variety of potential tactics. For all ratings, respondents were asked to prioritize the tactics from “not a priority” to “extremely high priority” along a five point scale.

As a follow up, respondents were asked to identify their top two tactics.

These tactics were organized into the following categories:

- Marketing
- Global Sales, Promotions, PR, Media, & Marketing
- Destination Development
 - Planning and Management
 - Product Development
 - Training and Capacity Building
- Global Strategic Partnerships
- Public Affairs and Communications

FAMILIARITY WITH RDMO INITIATIVES

- Before prioritizing specific tactics, respondents were asked to indicate how familiar they were with specific tactics undertaken by their RDMO. This wasn't intended as a qualifying question, but was asked in order to provide more context to the findings. The results at left aggregate all respondents and indicate relatively low levels of familiarity with specific tactics.

Familiarity with RDMO Initiatives

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

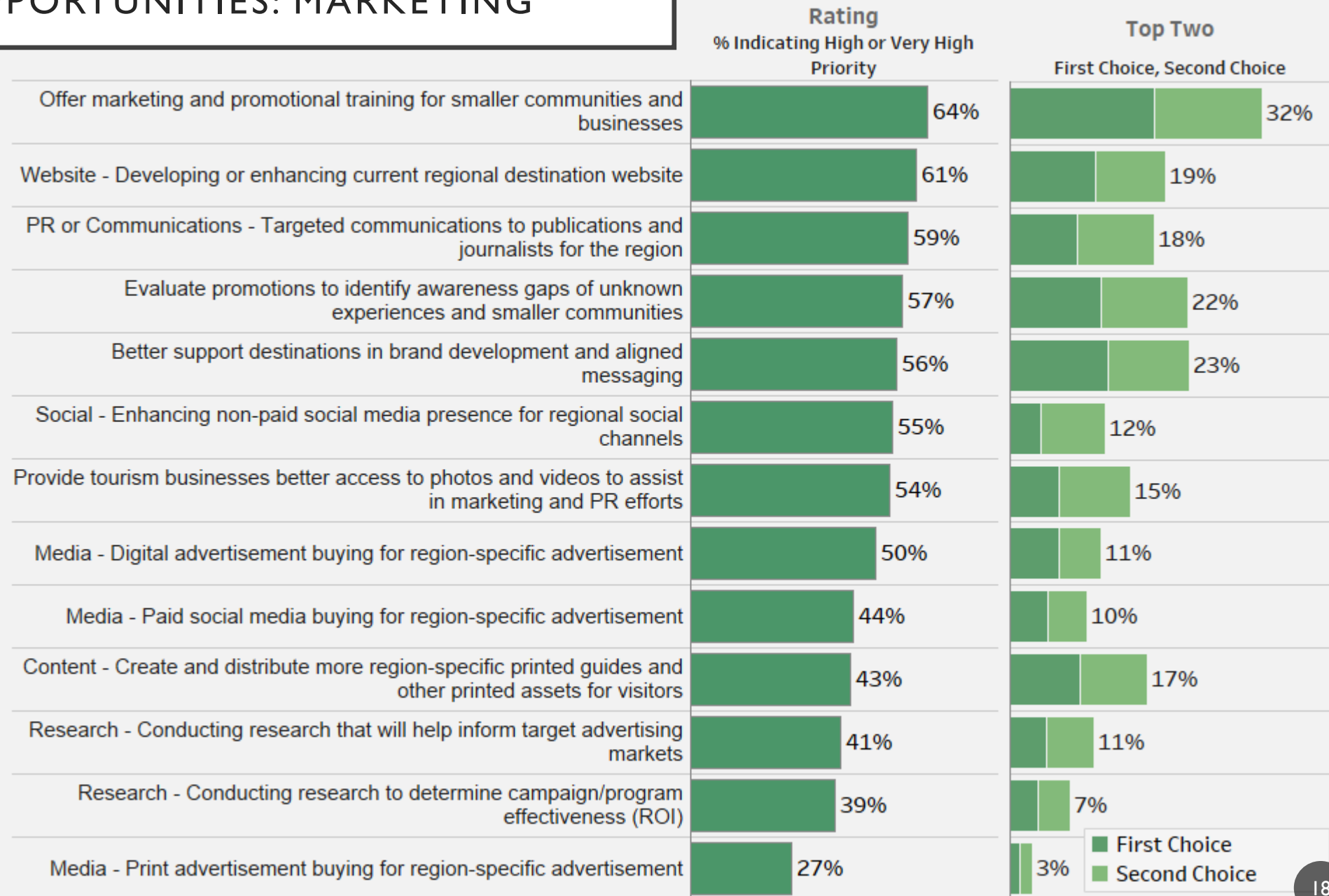
	Not Familiar	Somewhat Familiar	Very Familiar
Marketing tactics	25%	52%	23%
Destination development programs/efforts	29%	50%	21%
Public relations tactics	36%	46%	18%
Research efforts and reports	42%	44%	14%
Training programs	48%	39%	14%
Capacity building programs	59%	32%	10%
Global sales tactics	63%	26%	11%

TACTICAL OPPORTUNITIES: MARKETING

Q. Please indicate how you would prioritize the following tactical MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability.

With limited resources available not all items should be considered to be an extremely high priority and some may not even be feasible given budget realities.

Please differentiate between tactics that you believe deserve new/continued investment and those areas which you believe to be less important.

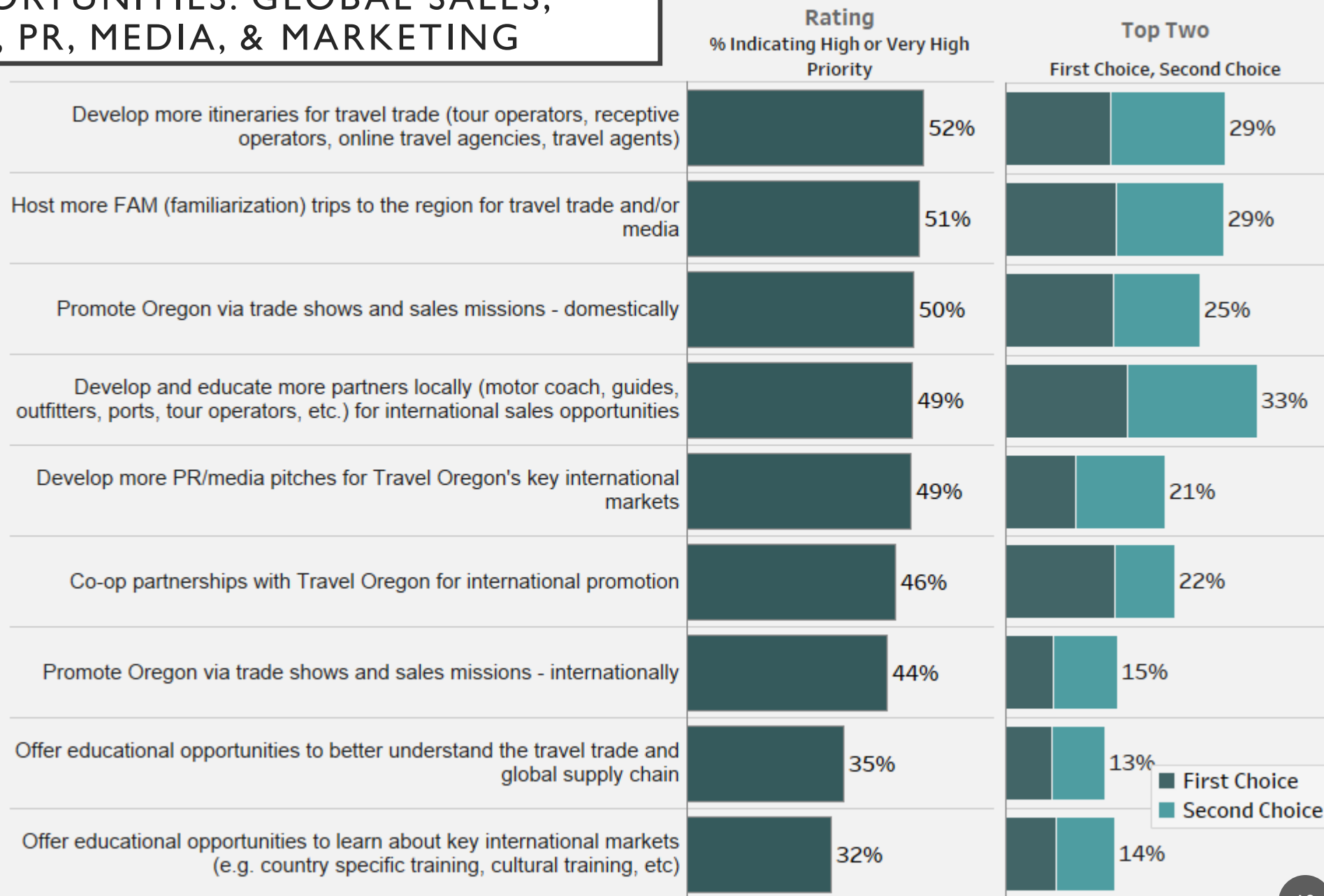


TACTICAL OPPORTUNITIES: GLOBAL SALES, PROMOTIONS, PR, MEDIA, & MARKETING

Q. Please indicate how you would prioritize the following tactical GLOBAL SALES, PROMOTIONS, PR, MEDIA, & MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability.

With limited resources available not all items should be considered to be an extremely high priority and some may not even be feasible given budget realities.

Please differentiate between tactics that you believe deserve new/continued investment and those areas which you believe to be less important.

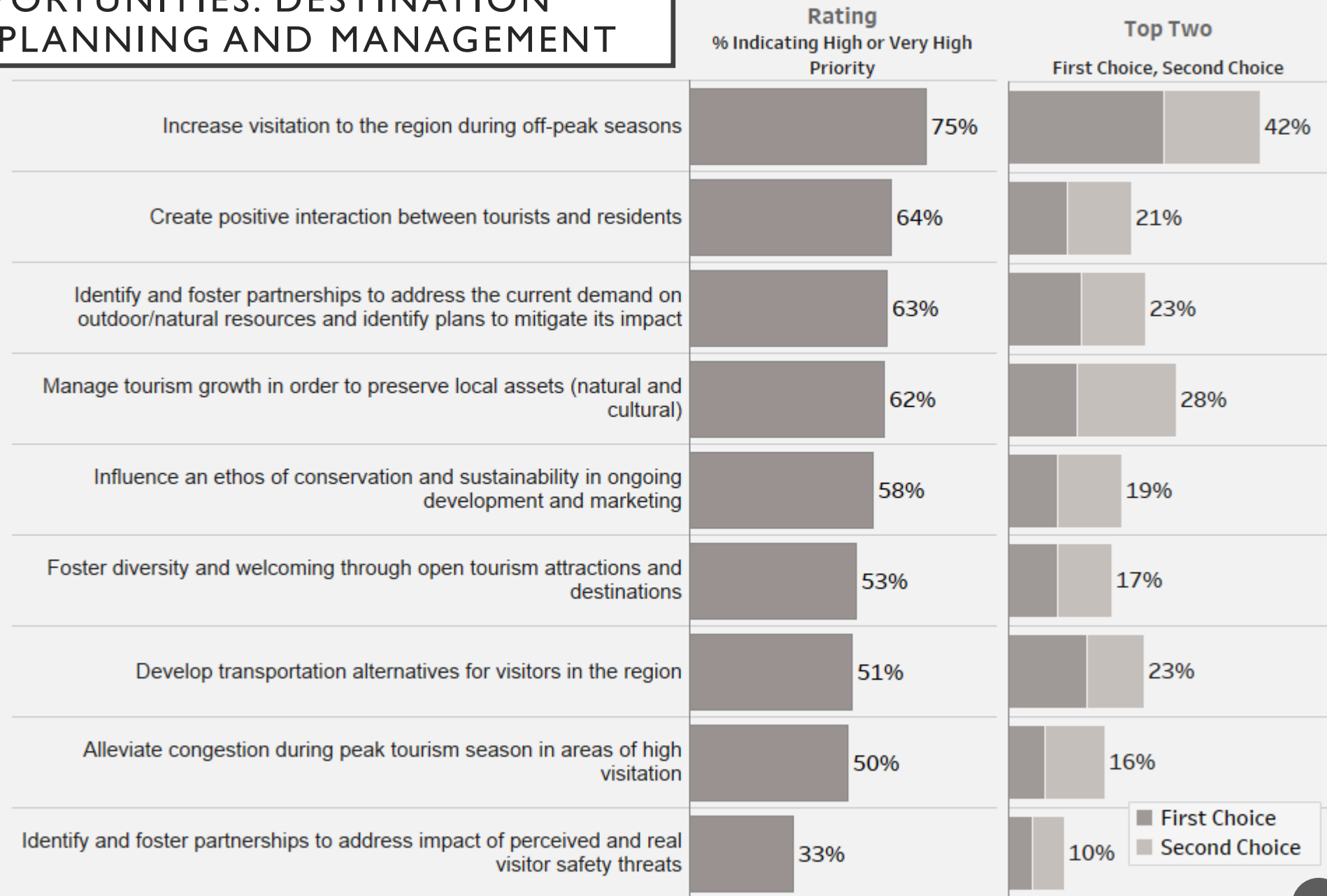


TACTICAL OPPORTUNITIES: DESTINATION DEVELOPMENT – PLANNING AND MANAGEMENT

Q. Please indicate how you would prioritize the following PLANNING AND MANAGEMENT OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability.

With limited resources available not all items should be considered to be an extremely high priority and some may not even be feasible given budget realities.

Please differentiate between tactics that you believe deserve new/continued investment and those areas which you believe to be less important.



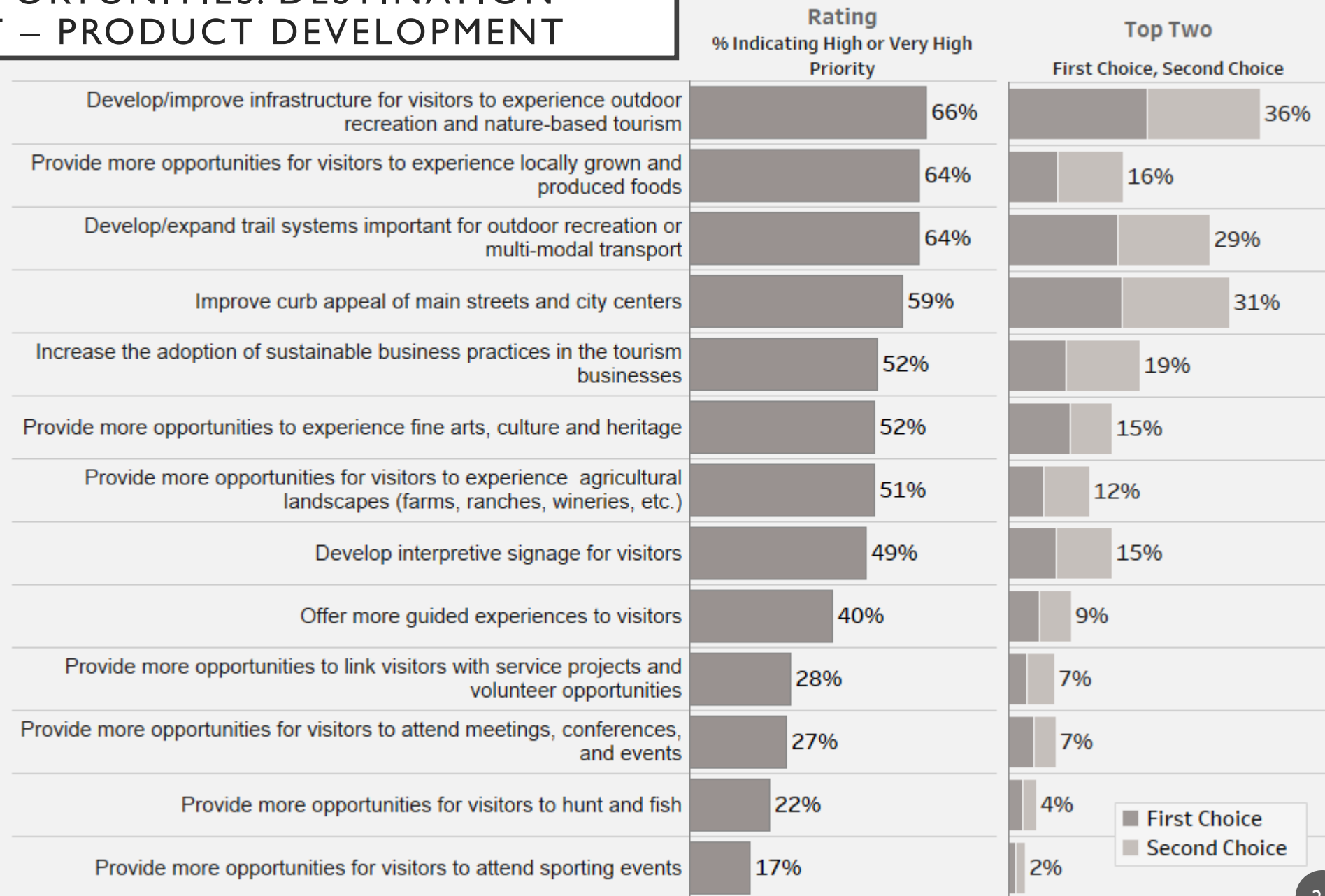
TACTICAL OPPORTUNITIES: DESTINATION DEVELOPMENT – PRODUCT DEVELOPMENT

Q. Please indicate how you would prioritize the following PRODUCT DEVELOPMENT

OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability.

With limited resources available not all items should be considered to be an extremely high priority and some may not even be feasible given budget realities.

Please differentiate between tactics that you believe deserve new/continued investment and those areas which you believe to be less important.

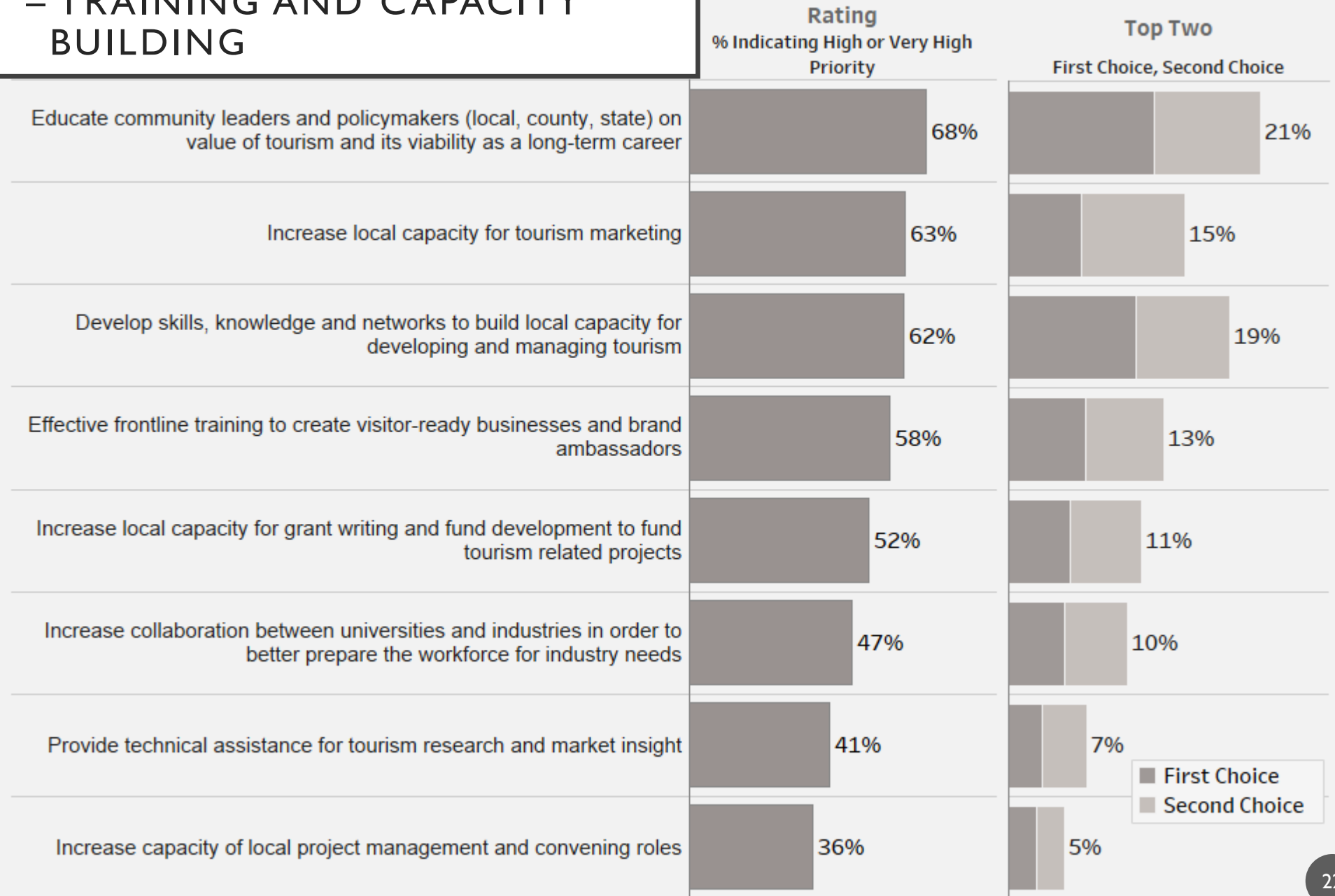


TACTICAL OPPORTUNITIES: DESTINATION DEVELOPMENT – TRAINING AND CAPACITY BUILDING

Q. Please indicate how you would prioritize the following TRAINING AND CAPACITY BUILDING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability.

With limited resources available not all items should be considered to be an extremely high priority and some may not even be feasible given budget realities.

Please differentiate between tactics that you believe deserve new/continued investment and those areas which you believe to be less important.



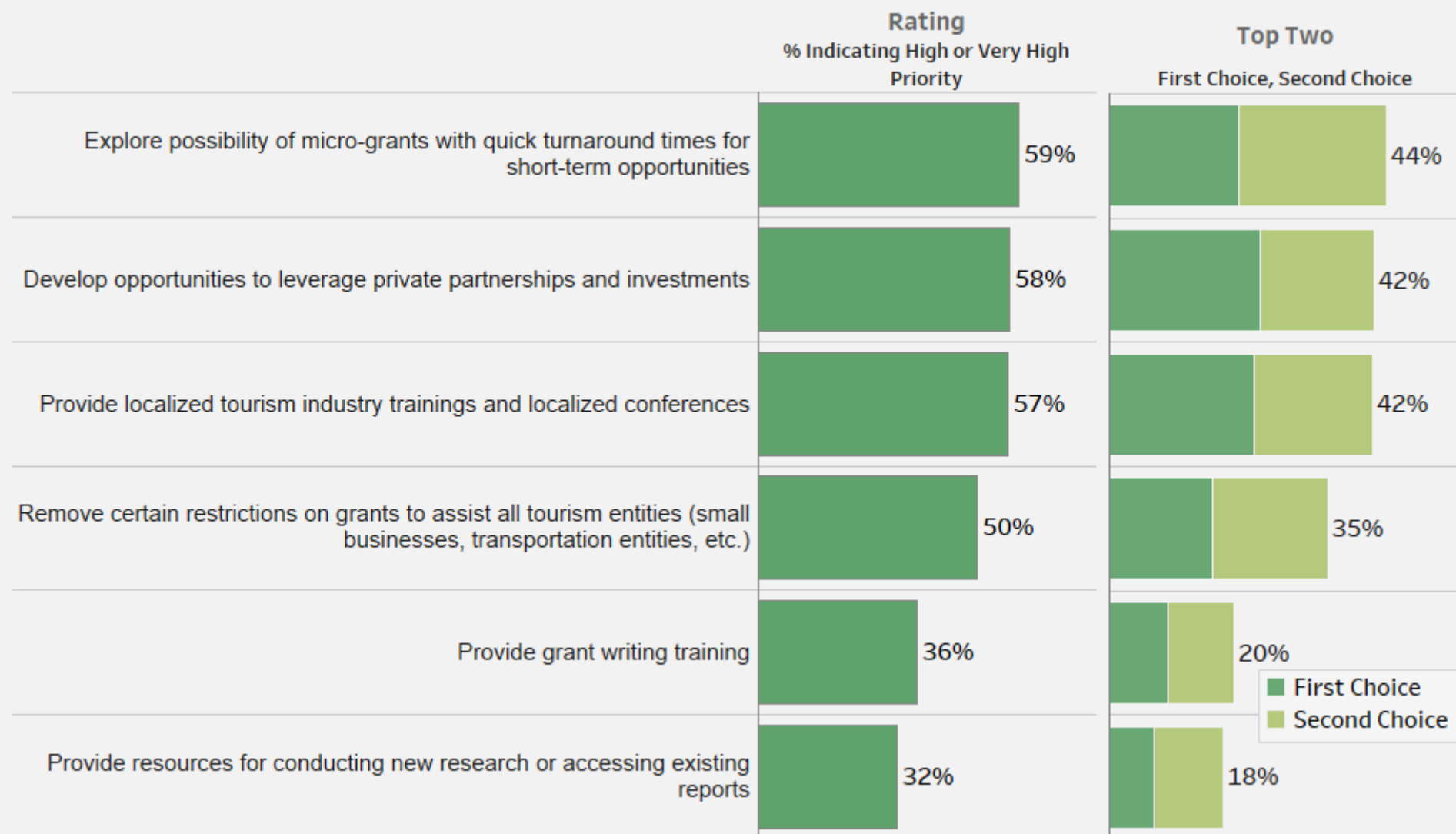
TACTICAL OPPORTUNITIES: GLOBAL STRATEGIC PARTNERSHIPS

Q. Please indicate how you would prioritize the following GLOBAL STRATEGIC PARTNERSHIP

OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability.

With limited resources available not all items should be considered to be an extremely high priority and some may not even be feasible given budget realities.

Please differentiate between tactics that you believe deserve new/continued investment and those areas which you believe to be less important.

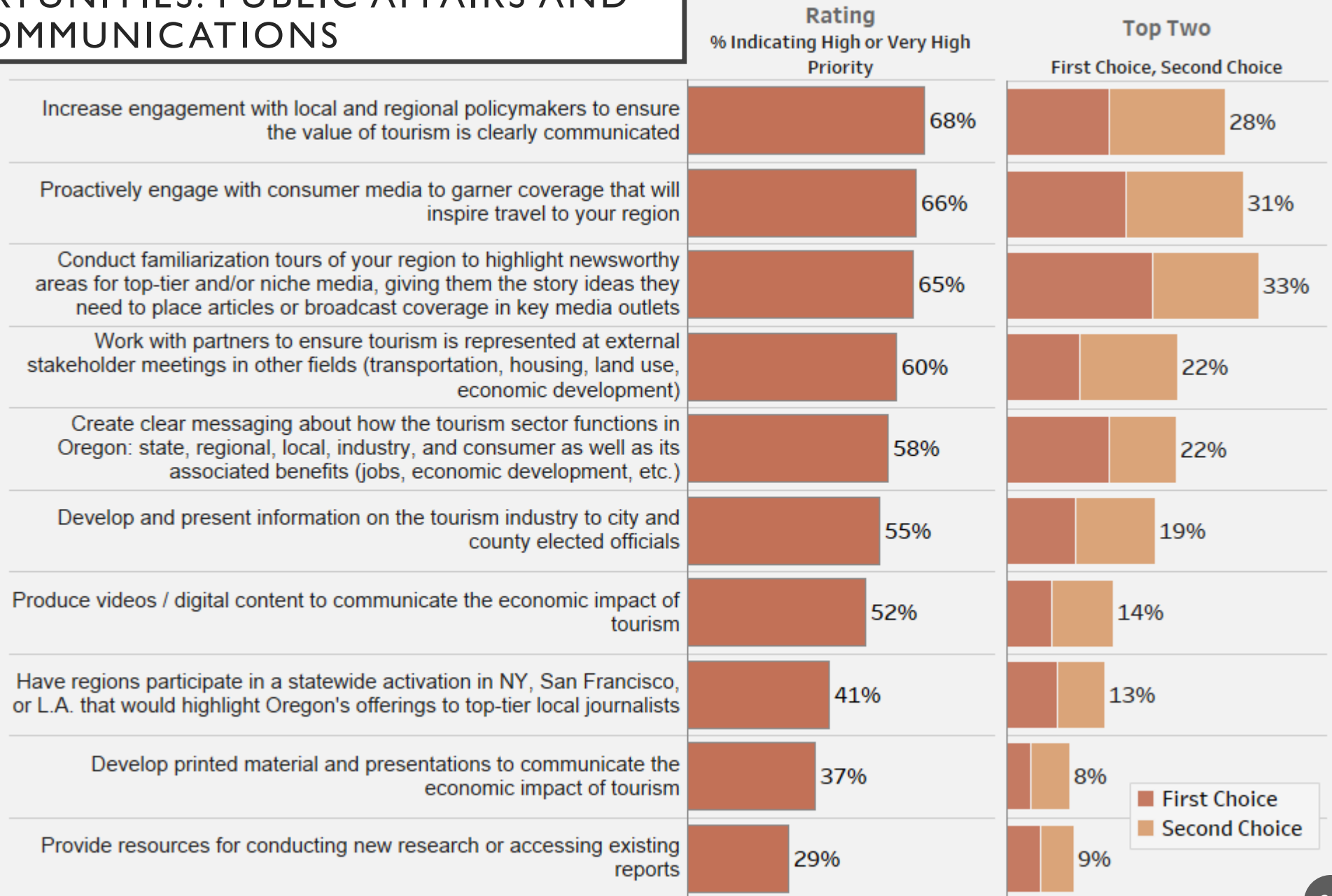


TACTICAL OPPORTUNITIES: PUBLIC AFFAIRS AND COMMUNICATIONS

Q. Please indicate how you would prioritize the following PUBLIC AFFAIRS AND COMMUNICATIONS OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability.

With limited resources available not all items should be considered to be an extremely high priority and some may not even be feasible given budget realities.

Please differentiate between tactics that you believe deserve new/continued investment and those areas which you believe to be less important.



REGIONAL FINDINGS AND SUMMARY

Top Tactics From Each Region:
66% or More Rating the Tactic
as High or Very High Priority.

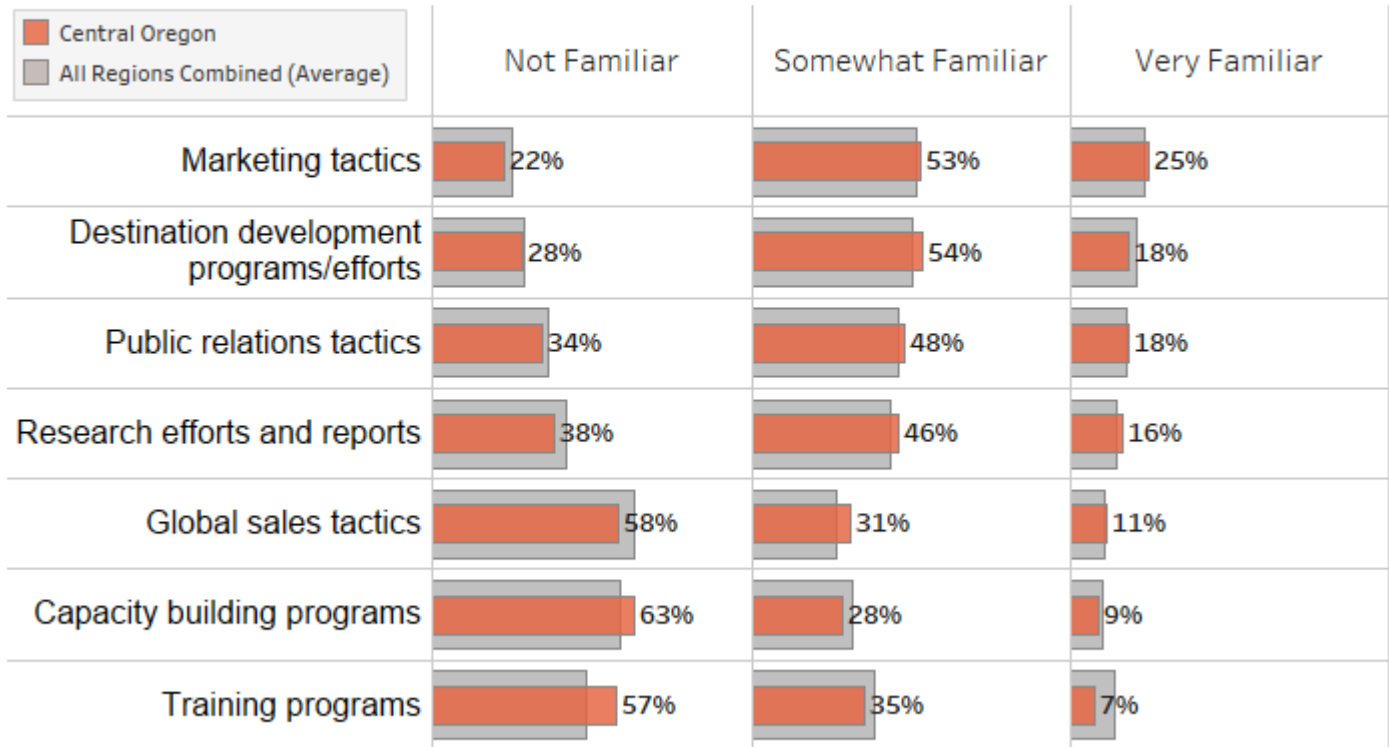
This section segments responses by region to allow for insights into what the highest priorities are for respondents from their RDMOs.

CENTRAL OREGON

Familiarity with initiatives of
RDMO

Familiarity with Initiatives

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

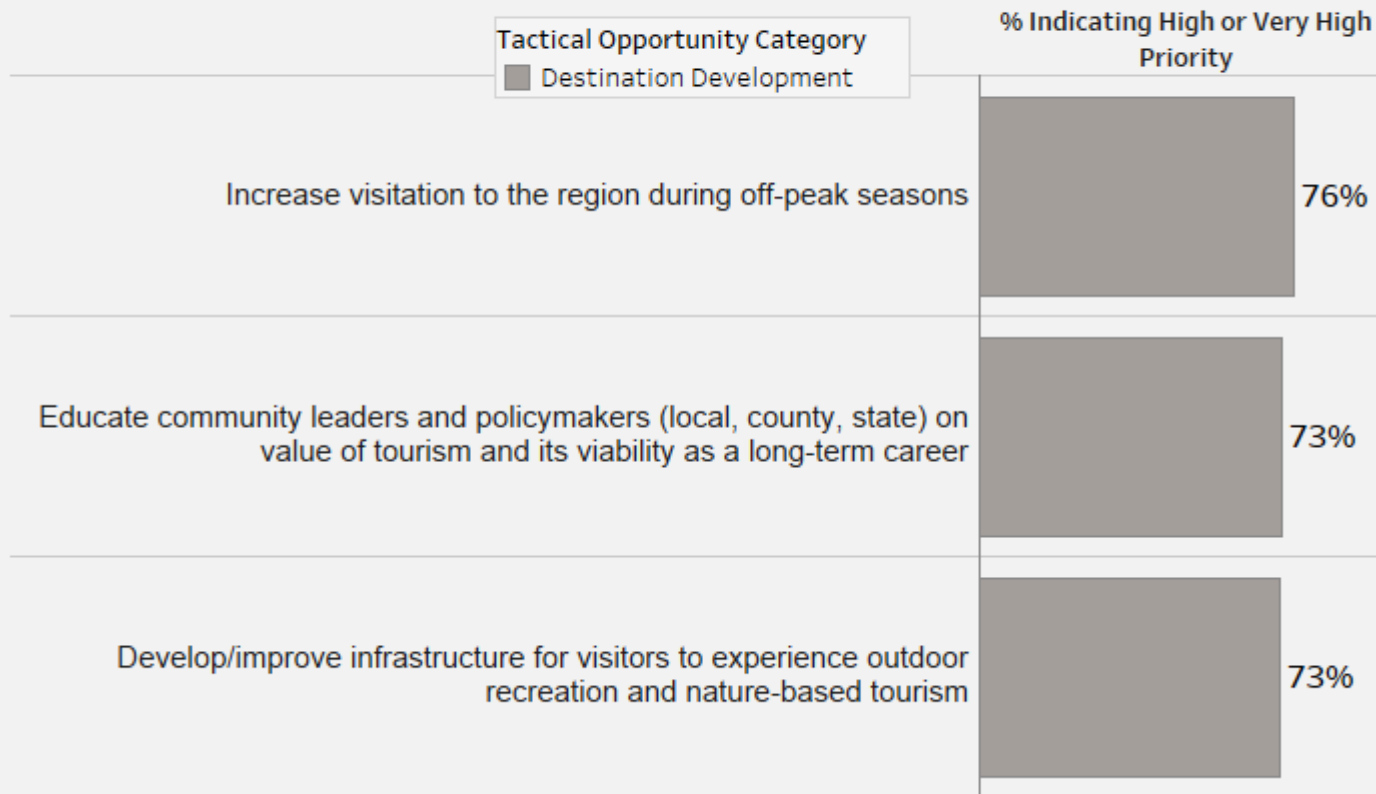


Sorted by in-region percent responding "Very Familiar"

Source: 2018 Oregon Tourism Engagement Survey

Central Oregon

Tactics From All Categories Rated as High or Very High Priority by More Than Two-Thirds of Respondents



CENTRAL OREGON

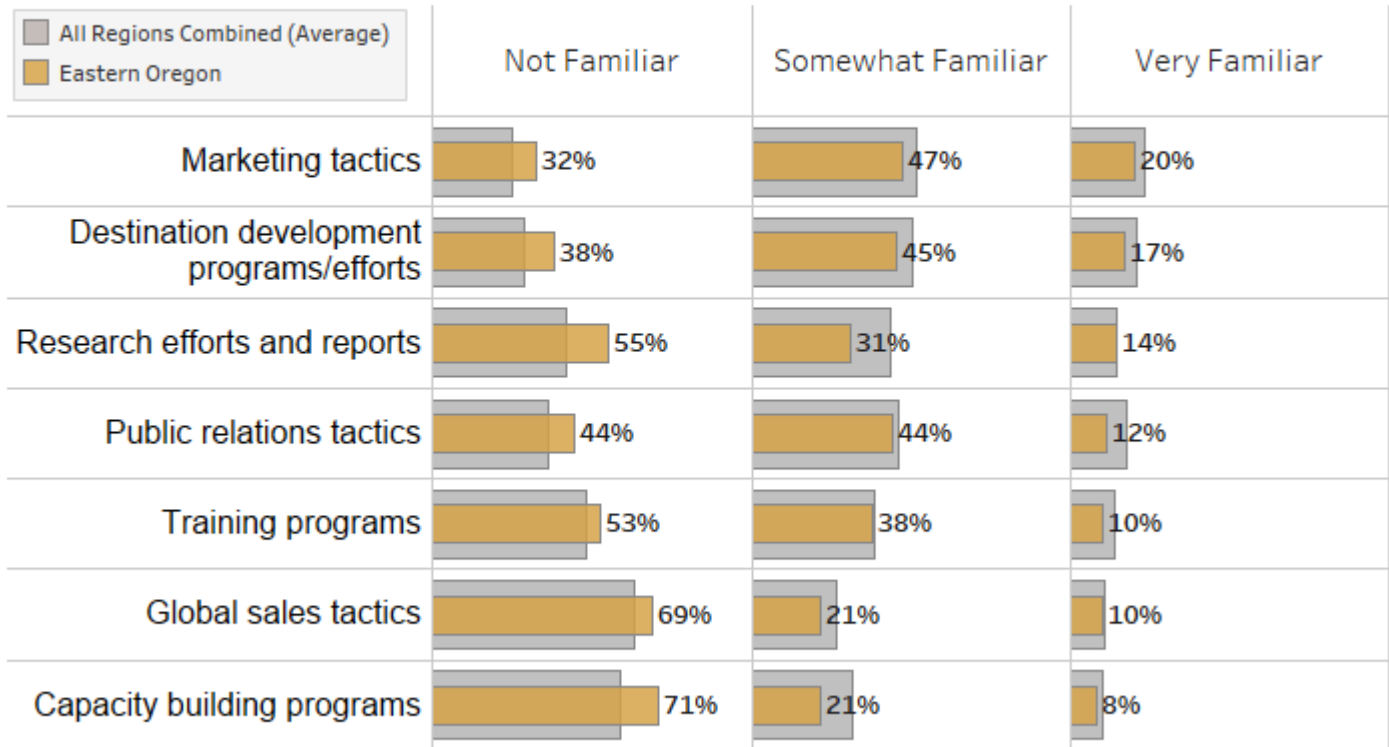
Tactics rated as “High” or “Very High” Priority for RDMO by more than 66% of Respondents.

EASTERN OREGON

Familiarity with initiatives of
RDMO

Familiarity with Initiatives

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

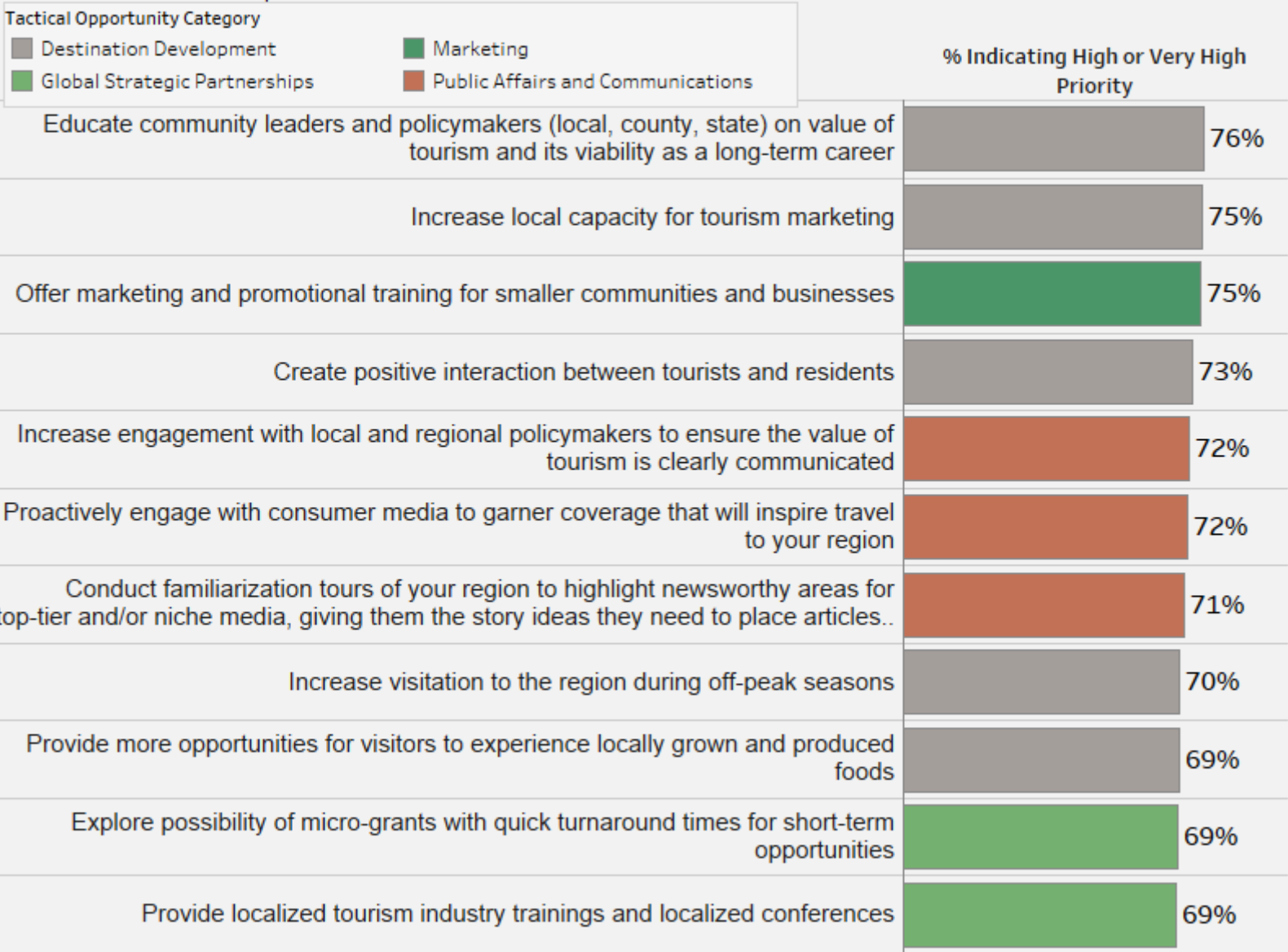


Sorted by in-region percent responding "Very Familiar"

Source: 2018 Oregon Tourism Engagement Survey

Eastern Oregon

Tactics From All Categories Rated as High or Very High Priority by More Than Two-Thirds of Respondents



EASTERN OREGON

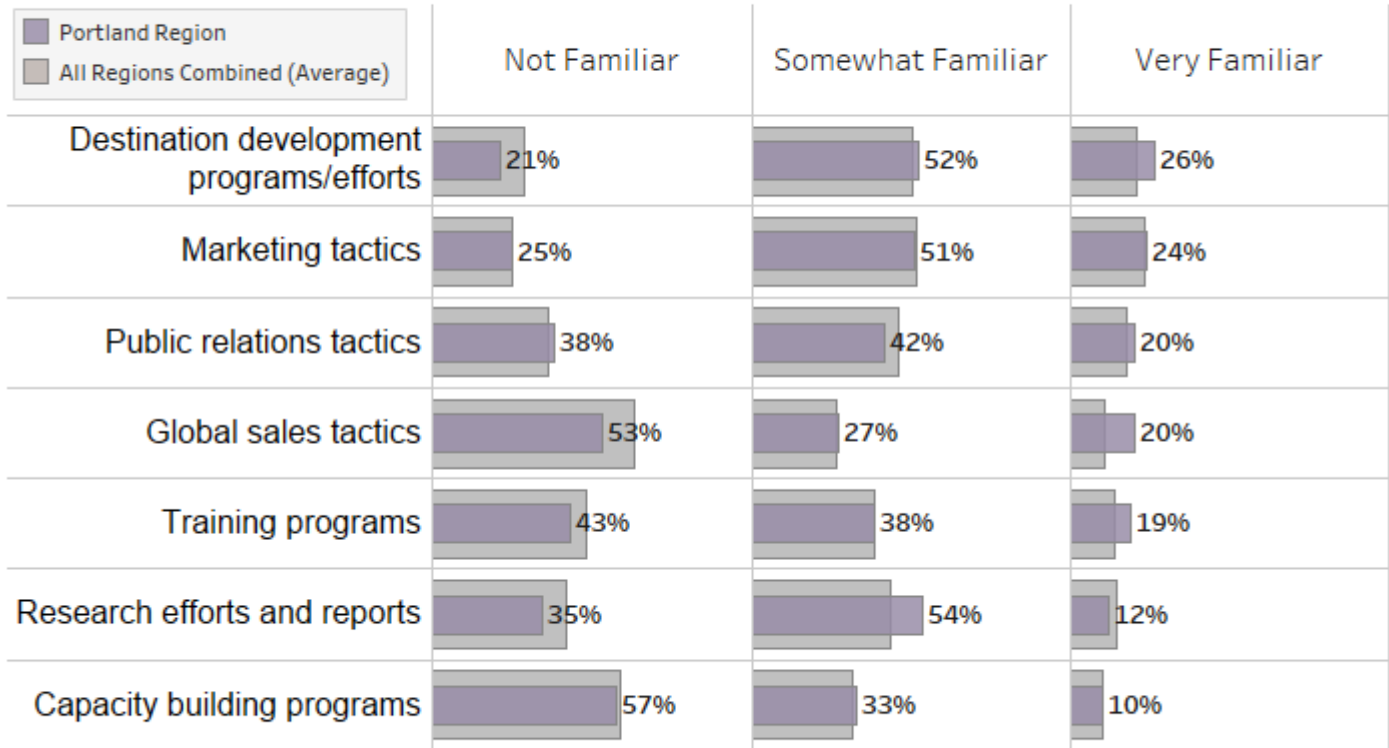
Tactics rated as “High” or “Very High” Priority for RDMO by more than 66% of Respondents.

PORTLAND REGION

Familiarity with initiatives of
RDMO.

Familiarity with Initiatives

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

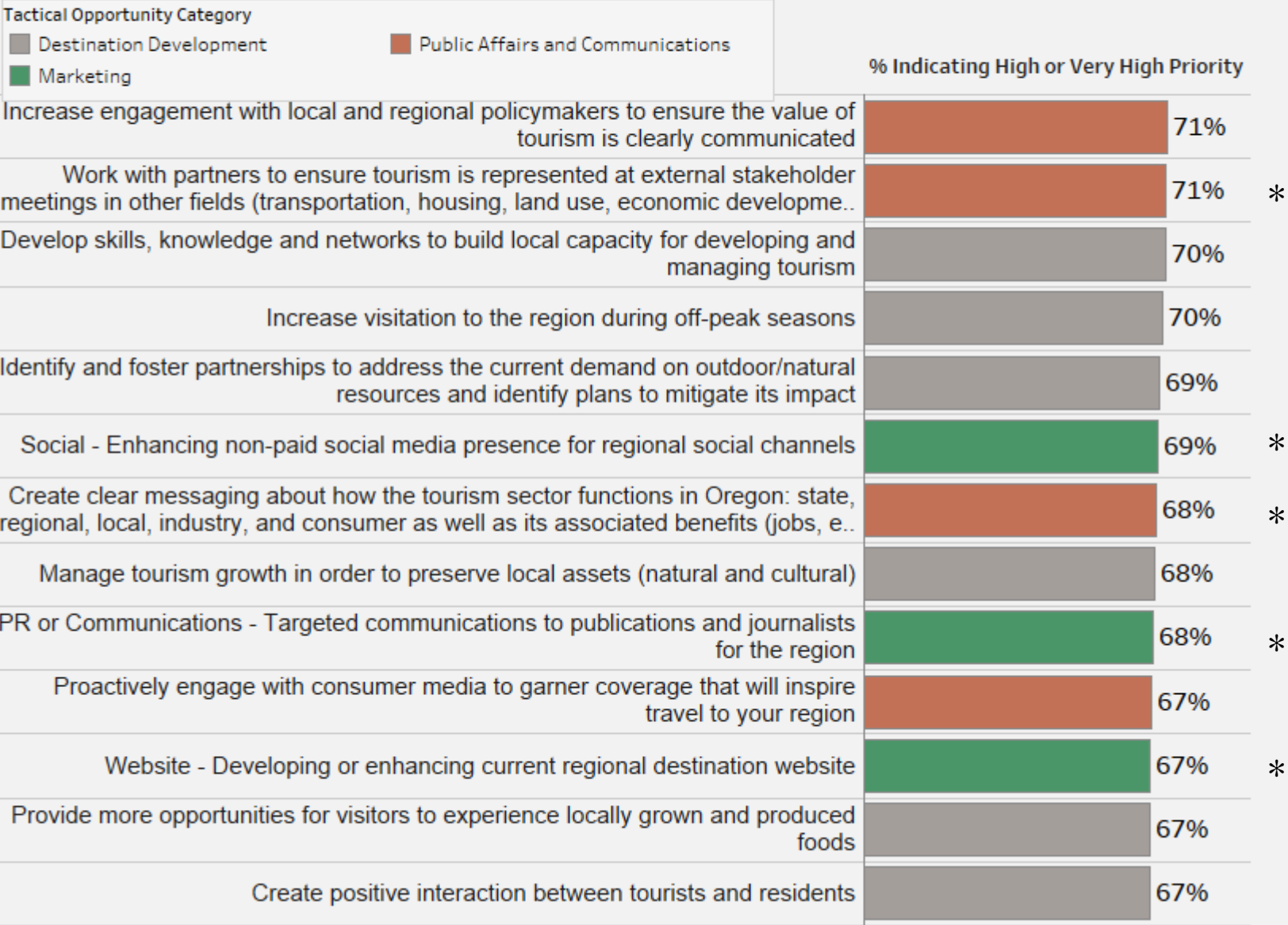


Sorted by in-region percent responding "Very Familiar"

Source: 2018 Oregon Tourism Engagement Survey

Portland Region

Tactics From All Categories Rated as High or Very High Priority by More Than Two-Thirds of Respondents



GREATER PORTLAND

Tactics rated as “High” or “Very High” Priority for RDMO by more than 66% of Respondents.

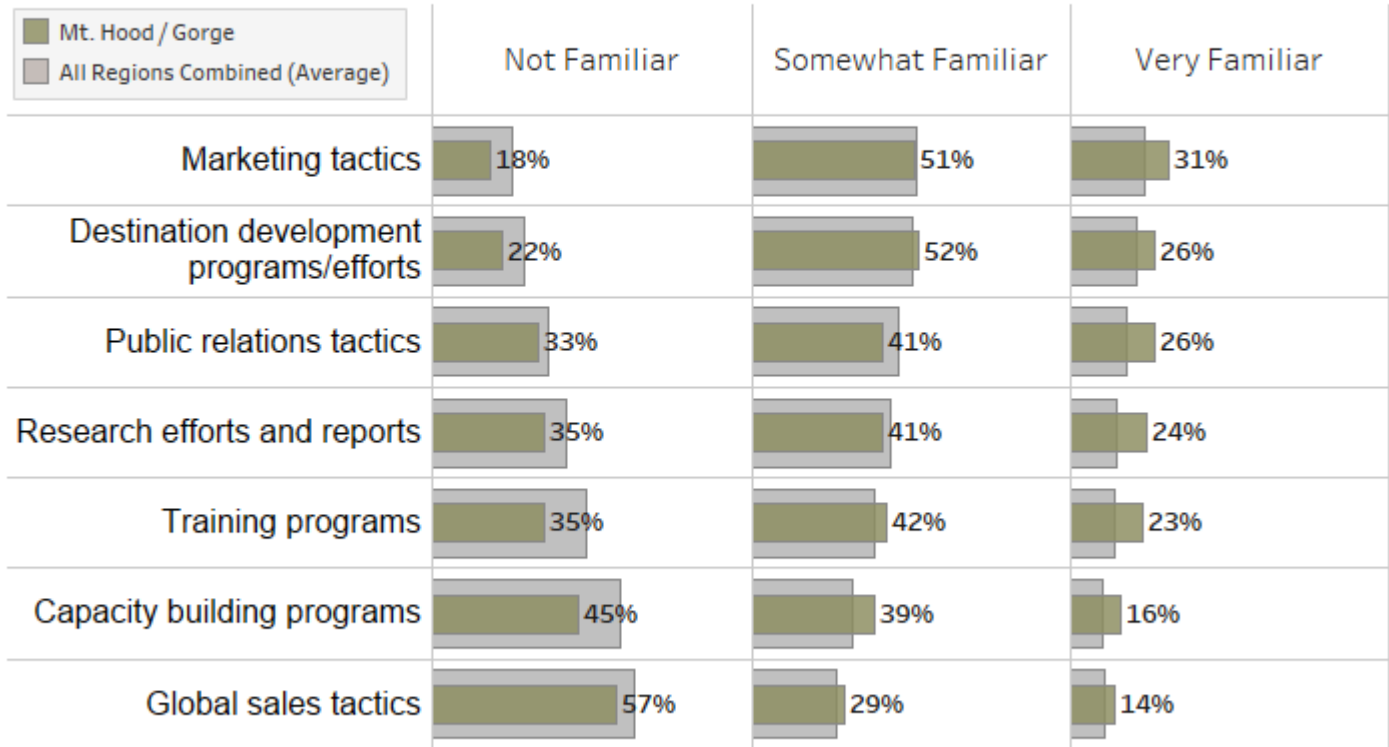
*Uniquely identified as top tactics in the Portland Region

MT. HOOD / COLUMBIA RIVER GORGE

Familiarity with initiatives of
RDMO.

Familiarity with Initiatives

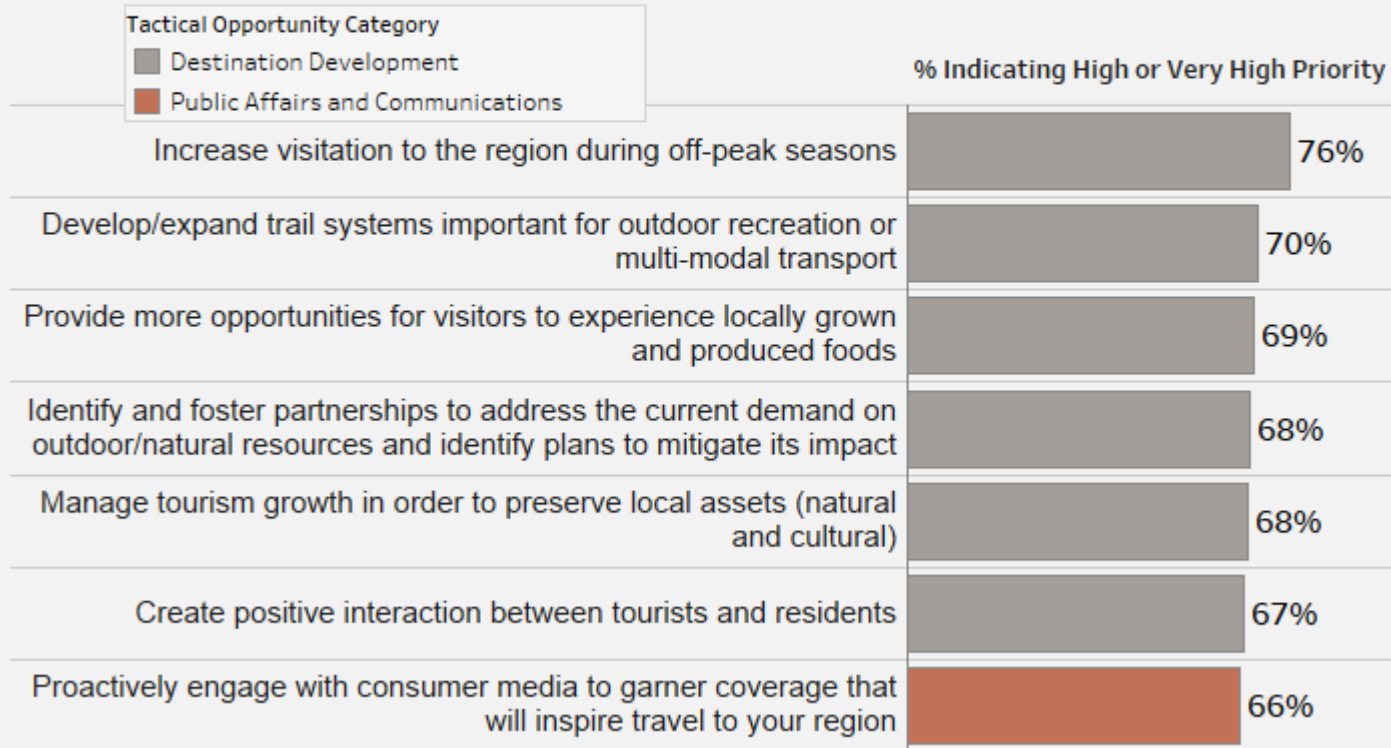
Q: Please indicate how familiar you are with the initiatives undertaken by your regional destination management organization in the following areas in the past 12 months:



Sorted by in-region percent responding "Very Familiar"
Source: 2018 Oregon Tourism Engagement Survey

Mt. Hood / Gorge

Tactics From All Categories Rated as High or Very High Priority by More Than Two-Thirds of Respondents



Source: 2018 Oregon Tourism Engagement Survey

MT. HOOD / GORGE

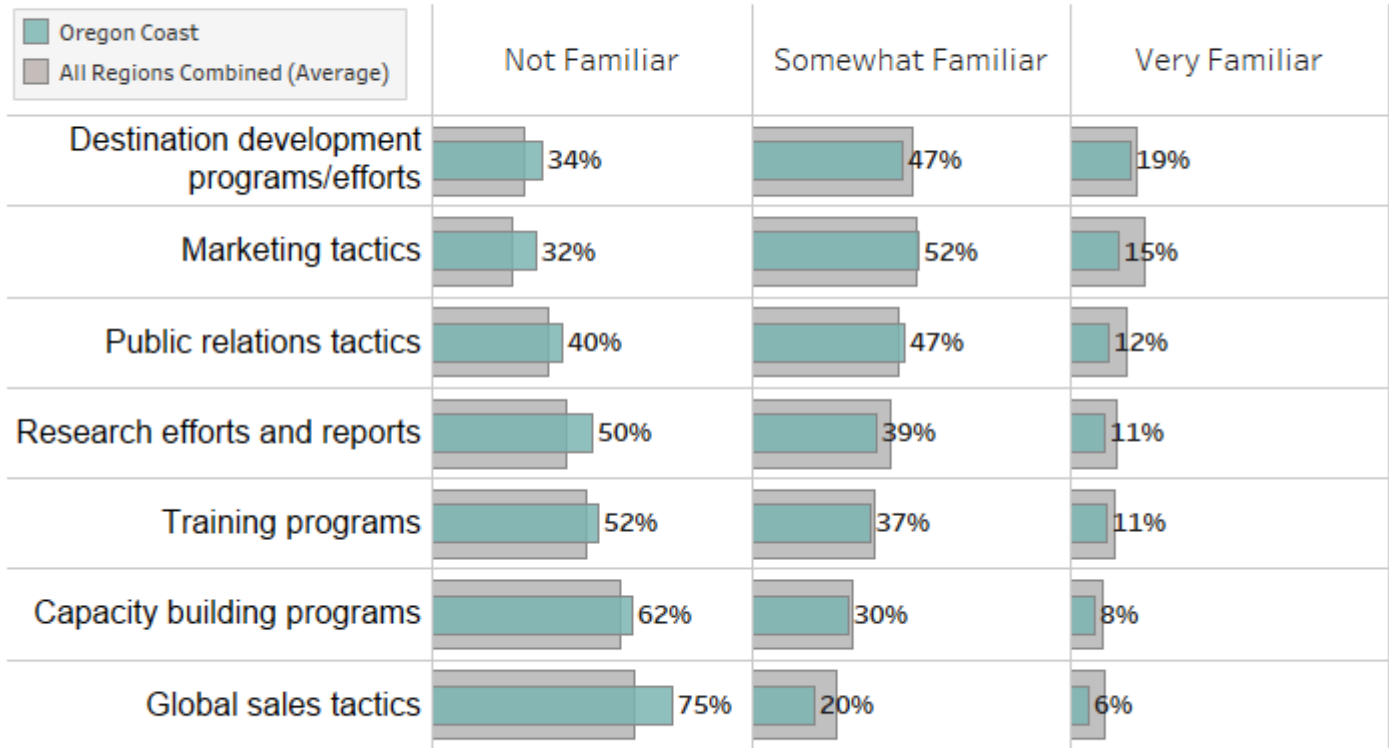
Top Initiatives across all categories

OREGON COAST

Familiarity with initiatives of
RDMO.

Familiarity with Initiatives

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

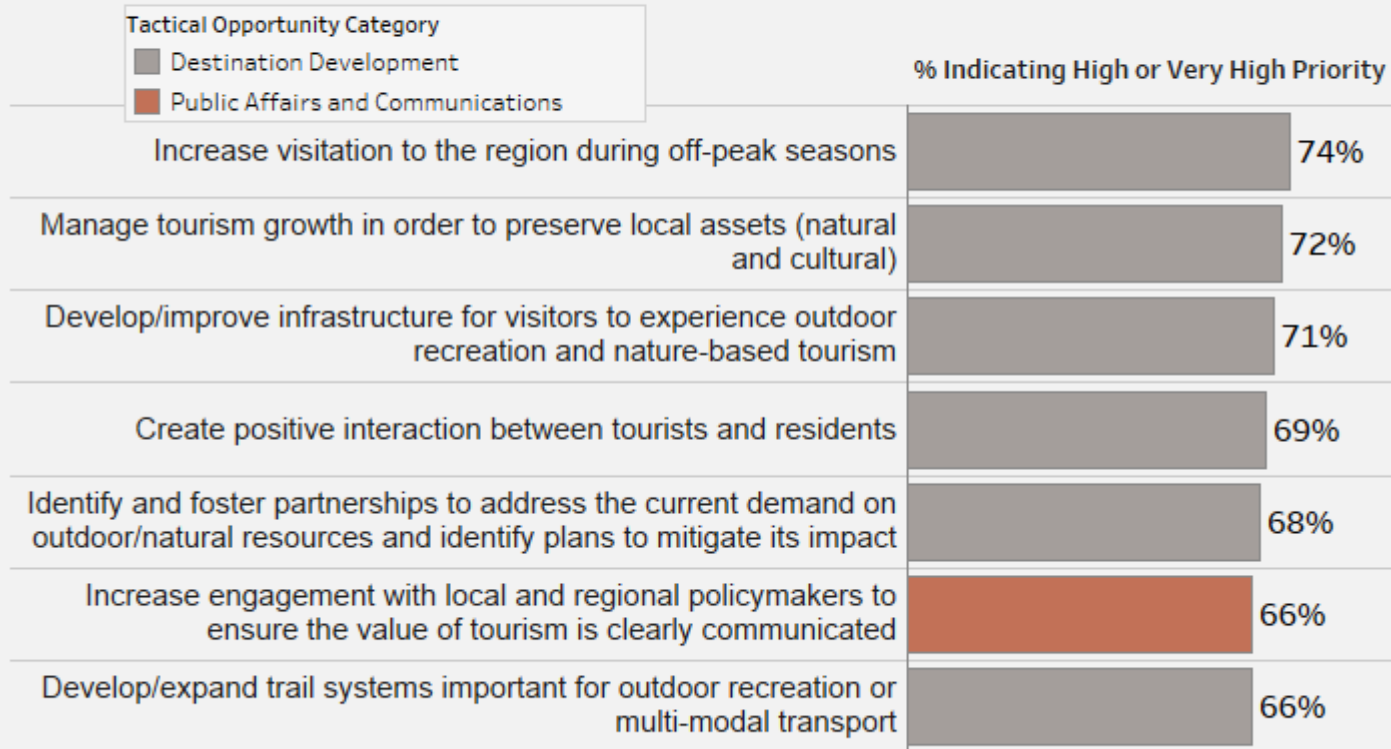


Sorted by in-region percent responding "Very Familiar"

Source: 2018 Oregon Tourism Engagement Survey

Oregon Coast

Tactics From All Categories Rated as High or Very High Priority by More Than Two-Thirds of Respondents



Source: 2018 Oregon Tourism Engagement Survey

OREGON COAST

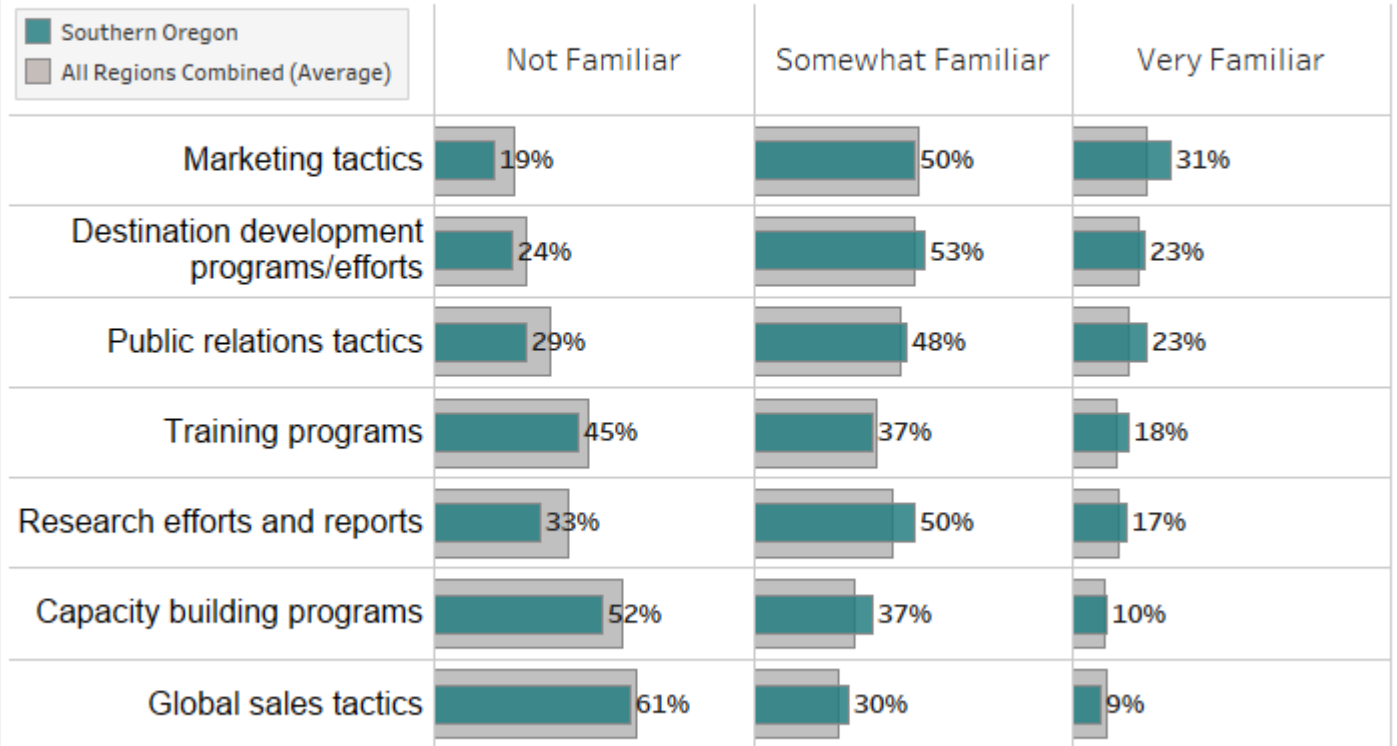
Tactics rated as “High” or “Very High” Priority for RDMO by more than 66% of Respondents.

SOUTHERN OREGON

Familiarity with initiatives of
RDMO.

Familiarity with Initiatives

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

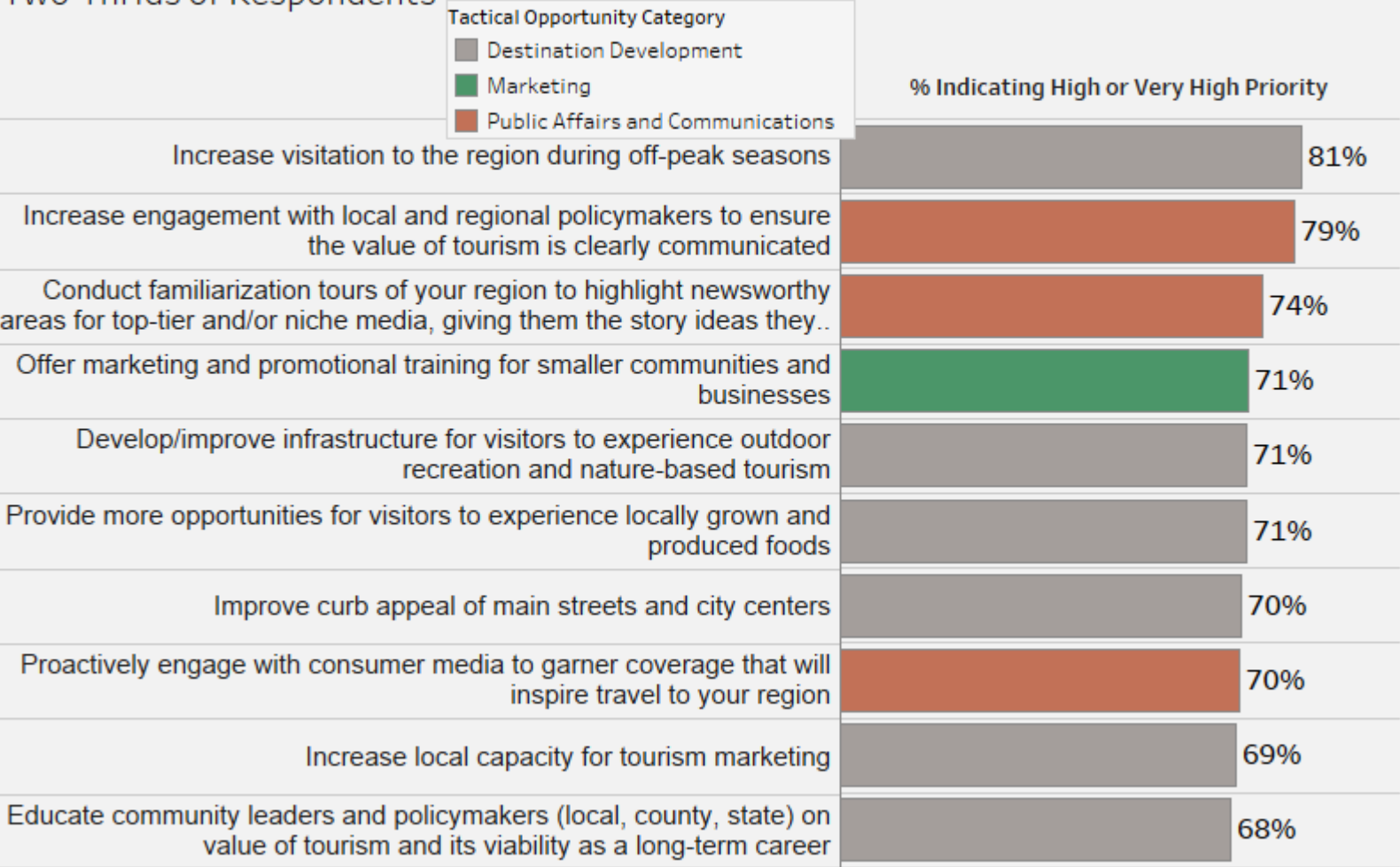


Sorted by in-region percent responding "Very Familiar"

Source: 2018 Oregon Tourism Engagement Survey

Southern Oregon

Tactics From All Categories Rated as High or Very High Priority by More Than Two-Thirds of Respondents



Source: 2018 Oregon Tourism Engagement Survey

SOUTHERN OREGON

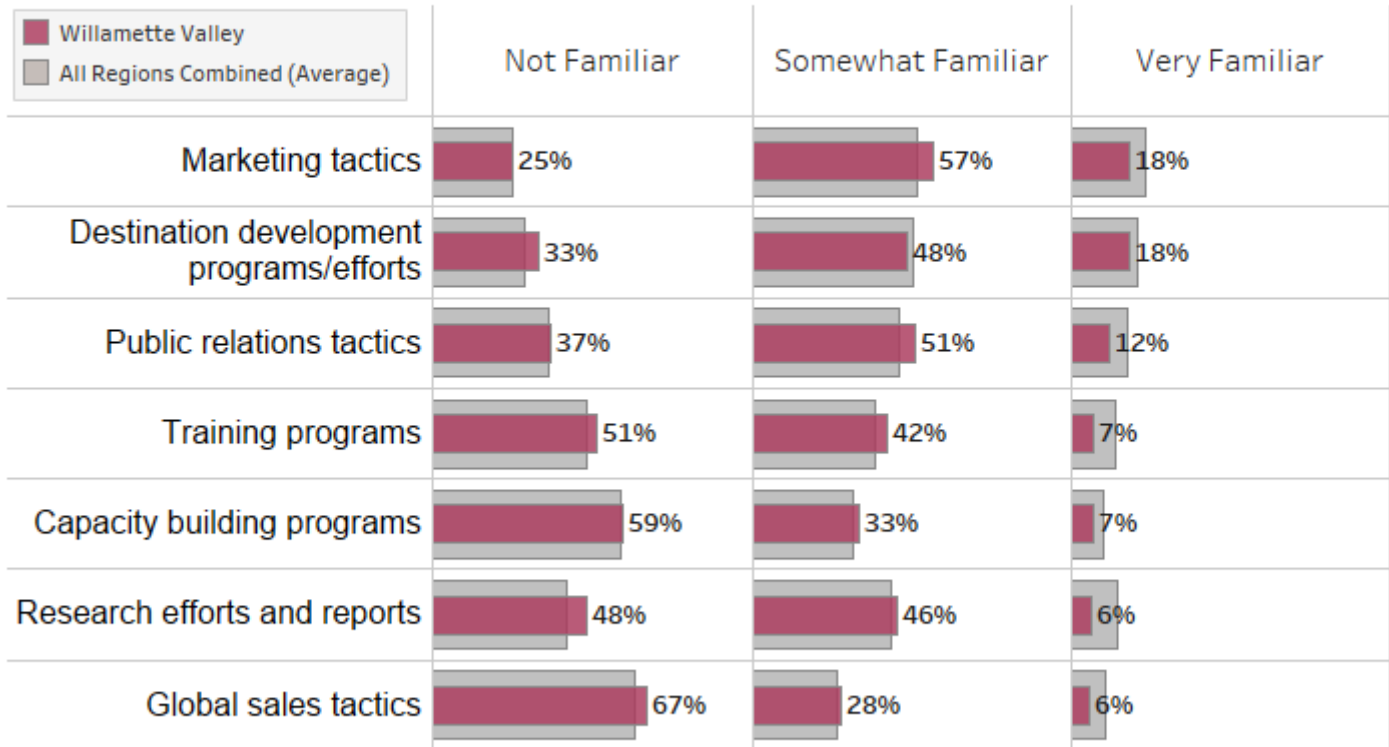
Tactics rated as “High” or “Very High” Priority for RDMO by more than 66% of Respondents.

WILLAMETTE VALLEY

Familiarity with initiatives of
RDMO.

Familiarity with Initiatives

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

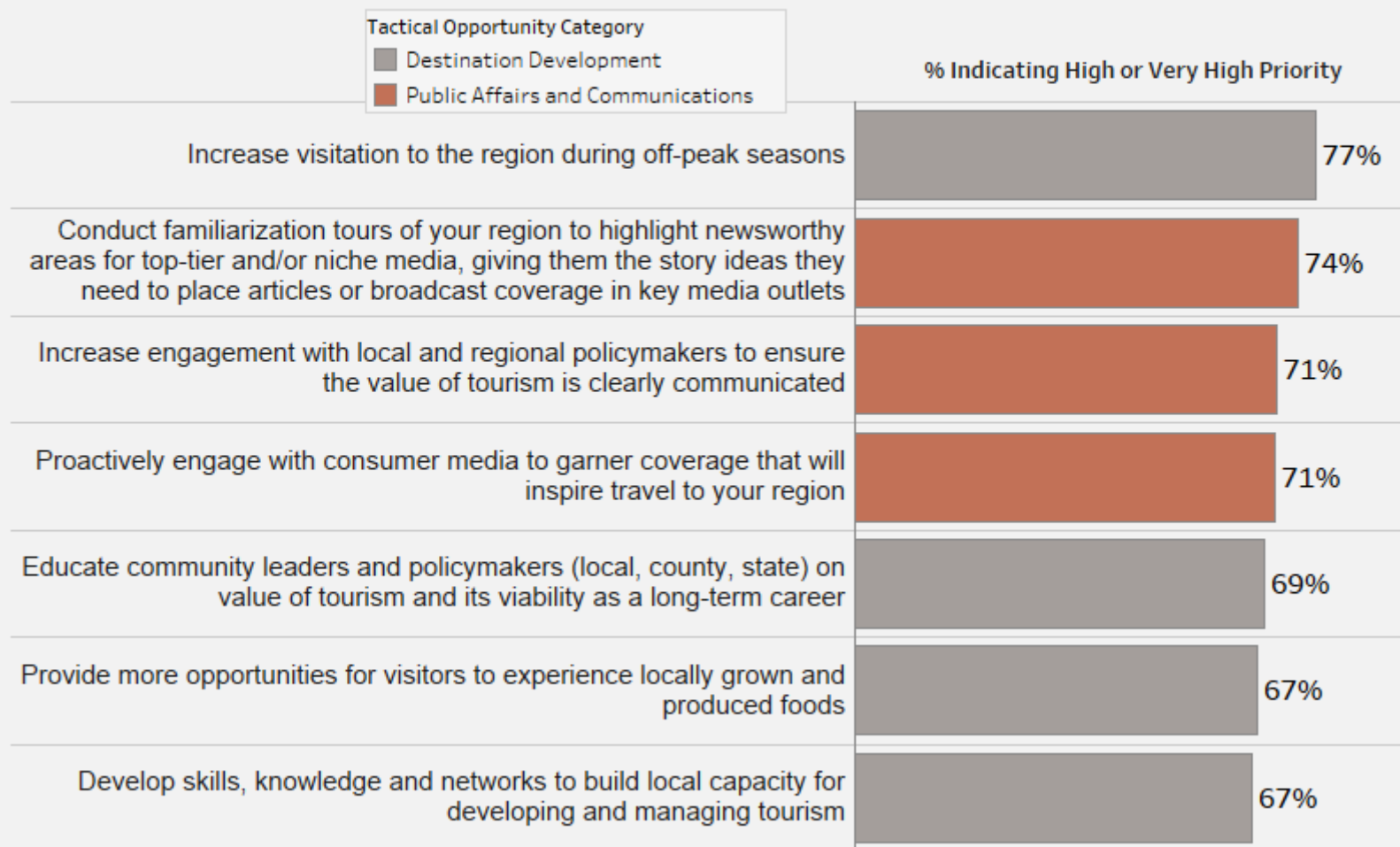


Sorted by in-region percent responding "Very Familiar"

Source: 2018 Oregon Tourism Engagement Survey

Willamette Valley

Tactics From All Categories Rated as High or Very High Priority by More Than Two-Thirds of Respondents



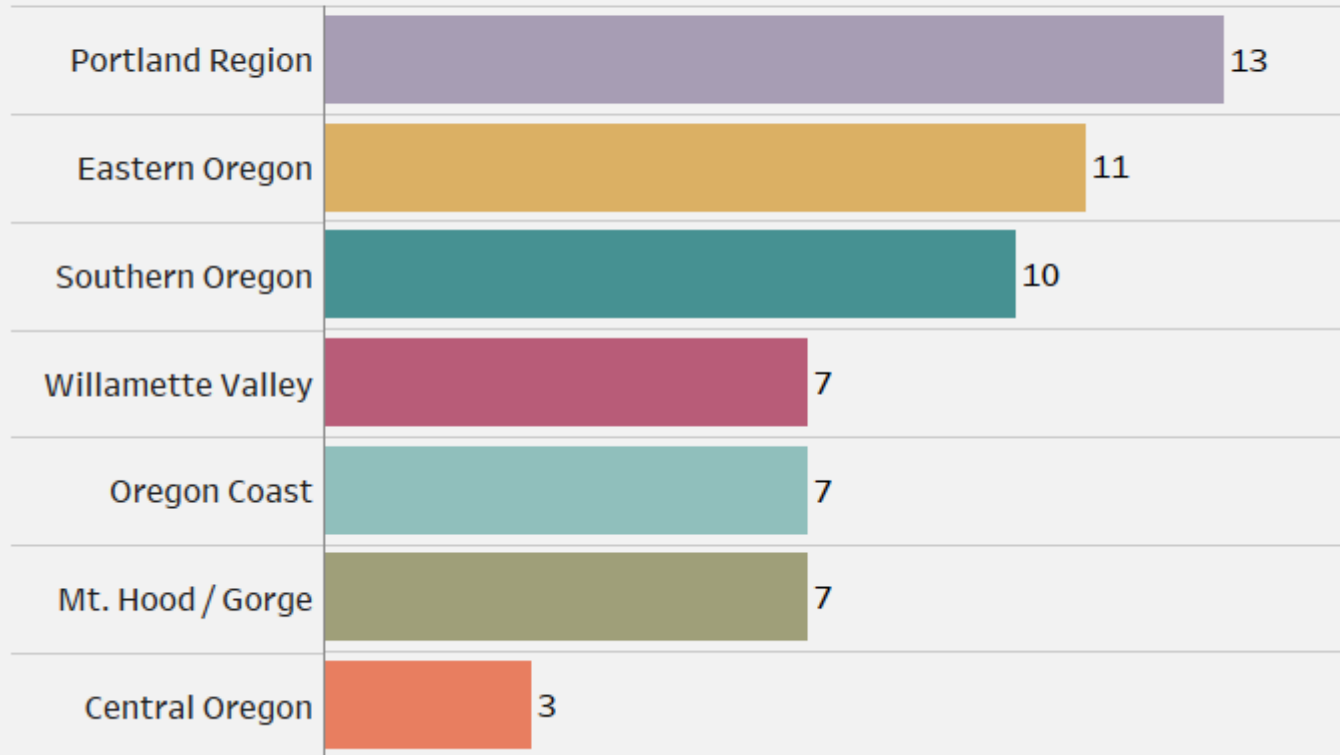
WILLAMETTE VALLEY

Tactics rated as “High” or “Very High” Priority for RDMO by more than 66% of Respondents.

Source: 2018 Oregon Tourism Engagement Survey

Top Tactics

Number of Tactics Considered High or Very High Priority by More Than Two Thirds of Respondents



NUMBER OF TOP TACTICS

Top Initiatives across all categories

CONCLUSIONS: OVERALL

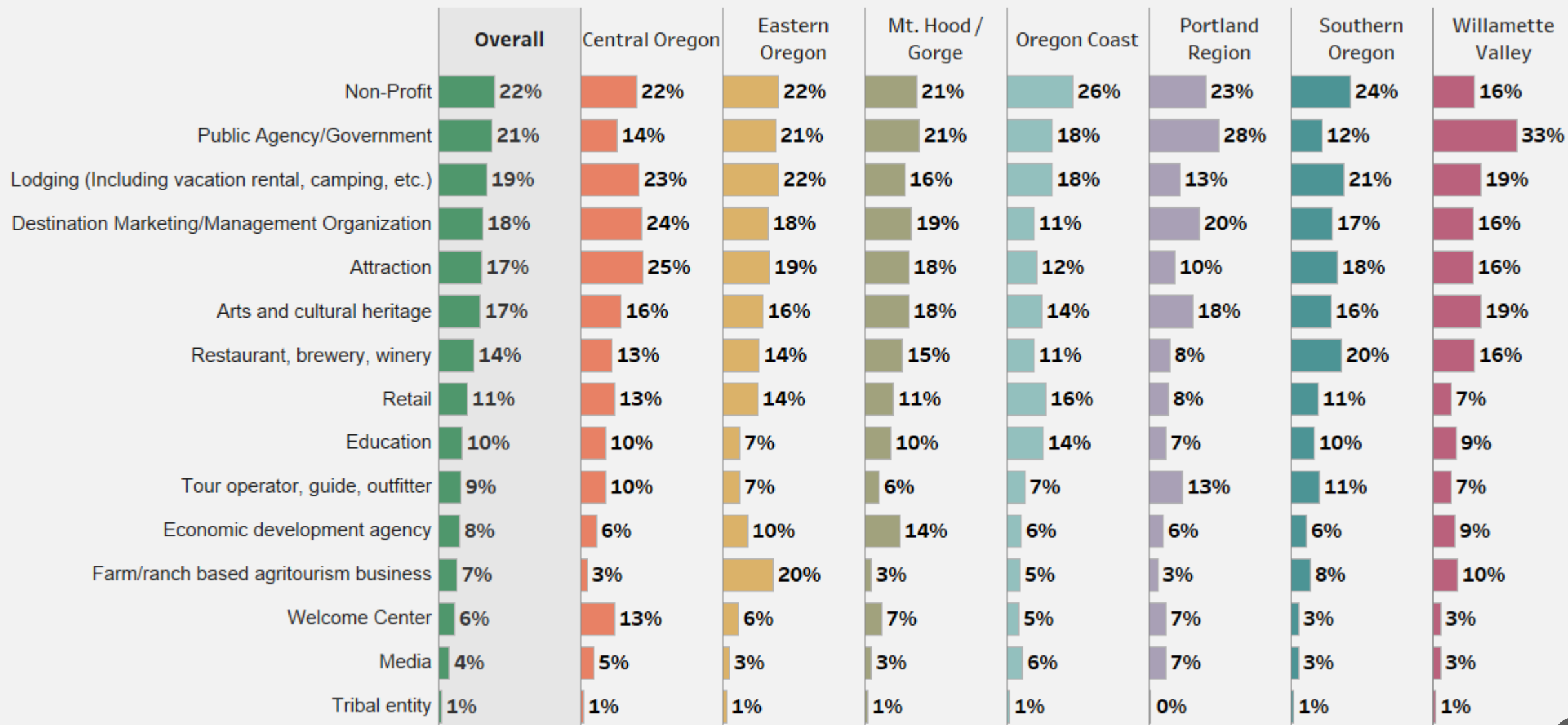


- Continued need for outreach and education – on the value of tourism and also on some aspects of training and development.
- For areas where tactics weren't in the top grouping – this may be an opportunity for Travel Oregon to shoulder more of the responsibility or to engage in more outreach to explain the importance of such initiatives.
- Overall attitudes toward tourism are very positive. This needs to be monitored going forward as the industry expands and matures in certain regions there is potential for discontent.

ORGANIZATION TYPE BY REGION

Organization Type by Region

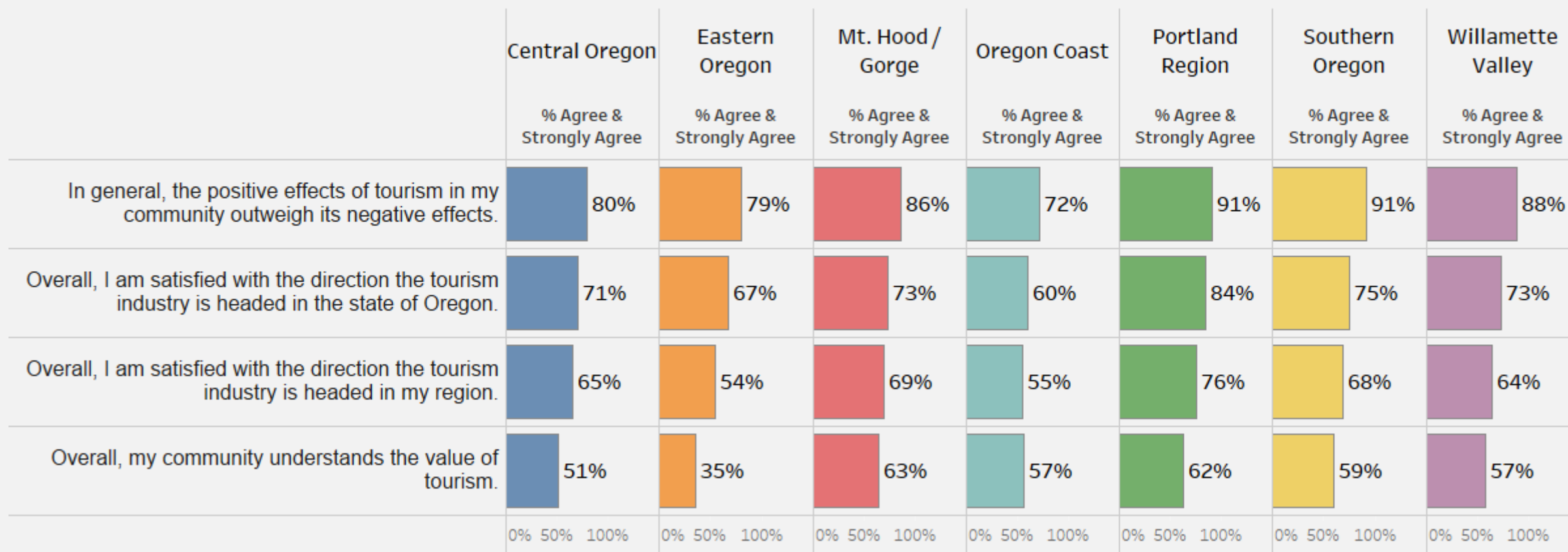
Q: Please indicate the sector of the tourism industry in which you work by checking all that apply:



OVERALL HEALTH OF TOURISM INDUSTRY BY REGION

Overall Health of the Tourism Industry

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



Source: 2018 Oregon Tourism Engagement Survey

TRAVEL OREGON PROGRAMMING BY REGION

Impactful Travel Oregon Programs by Region

Q: Choose the top five Travel Oregon programs that you believe are the most impactful:

