



2023 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY

SUMMARY OF RESULTS | PORTLAND REGION

March 2023



This report summarizes findings from a 2023 survey of tourism industry stakeholders in Oregon. The survey sought feedback from stakeholders to provide guidance and perspective on priorities for future investments from Regional Destination Management Organizations. This report summarizes findings from respondents in Portland Region with additional statewide results provided for context.

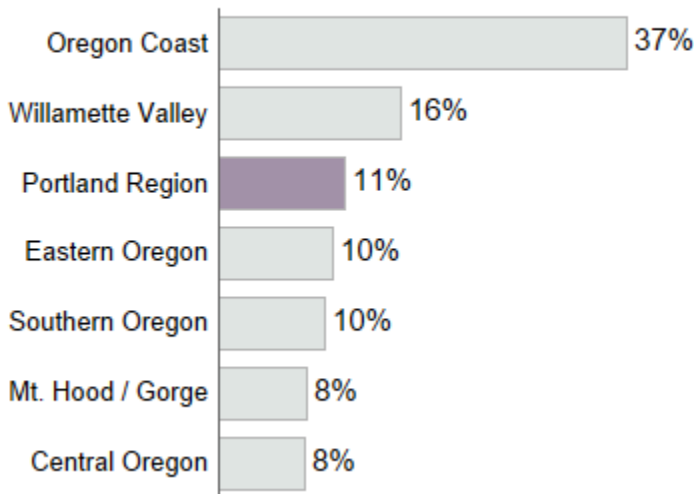
OBJECTIVES

The 2023 Oregon Tourism Stakeholder Survey was designed to gather feedback from Oregon’s tourism industry professionals, employees, and stakeholders to provide feedback and direction for Travel Oregon and Regional Destination Management Organizations (RDMOs) in setting strategic directions and making funding and programmatic decision in marketing, grants, tourist-related infrastructure, visitor management, and more. The survey built on a framework of past stakeholder surveys conducted in 2018 and 2020. The survey was developed collaboratively by Travel Oregon, the seven RDMOs, and Driftline Consulting.

DATA COLLECTION

The survey was conducted online and distributed in both English and Spanish between February 9-March 7, 2023, via direct email communications, a press release, industry newsletters and industry partners' distribution channels to an open URL hosted on Travel Oregon's industry website. The survey resulted in a total of 115 valid responses from the Portland Region and 1,018 responses overall. 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 the Portland Region compared to the statewide survey results (referred to as the “overall” in figures).

Number of Respondents



115

Portland Region
Responses

1,018

Overall Responses

LIMITATIONS

The survey results should be viewed as an aggregation of relevant and thoughtful feedback from stakeholders. The applicability of findings to real life circumstances may depend on whether the feedback is from a broad enough (or representative) swath of stakeholders and whether individual RDMOs believe they have engaged with enough stakeholders to have a good gauge of the stakeholders’ priorities. An assessment of the industries represented, and the overall response numbers suggest that for all regions, a diverse and appropriately sized cross-section of stakeholders responded, adding confidence to the applicability of results. 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 stakeholder 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 dashboards by going to: bit.ly/2023Stakeholder

TABLE OF CONTENTS

Key Findings..... 3

Respondent Profile 5

Travel Oregon’s 2023 – 2025 Strategies..... 10

Industry Engagement and Communications..... 21

Portland Region Questions 23

KEY FINDINGS

TOURISM DEVELOPMENT

- Half of respondents (50%) in the Portland Region said they were satisfied with the direction of tourism development in Oregon (selected 4 or 5 on a five-point scale), while 24% were unsatisfied (selected 1 or 2) and 26% were neutral.
- Most respondents in the Portland Region agreed or strongly agreed with statements related to what Oregon should do to promote tourism, including advertise tourism/attract more visitors (81% agreed or strongly agreed), encourage tourism development in their community (79%), promote responsible visitor behavior (79%), and consider tourism as a primary priority for economic development (79%).
- Respondents in the Portland Region were most in agreement that they are comfortable collaborating with groups of varying sizes and backgrounds to make positive changes in the tourism industry (95% agreed or strongly agreed), and they were least in agreement that they are able to lobby legislators and policy makers to create positive change within the industry (46%).

STRENGTHS AND AREAS FOR IMPROVEMENT

- The top three areas that respondents from the Portland Region considered strengths in their community were food and beverage (59%), outdoor recreation opportunities (40%) and events and/or entertainment (33%).
- The top three areas that Portland Region respondents said their community needs to focus on to improve residents' and visitors' experiences were a safe environment for travelers (55%), public infrastructure (e.g., bathroom, parking) (26%), and workforce availability (26%).

ADDRESSING RISKS TO TOURISM


- The top three challenges that respondents in the Portland Region identified as high risks to tourism were houselessness (62%), community violence and crime (58%), and increasing negative visitor perception (58%).
- The top two strategies that respondents in the Portland Region selected to best assist their business/organization or community if faced with the challenges listed in the previous question were resources to build tourism related infrastructure (52%) and grant and funding resources/opportunities (49%).

WORKFORCE

- To develop, attract and retain the local workforce associated with the tourism industry, 54% of respondents in the Portland Region selected the strategy, "Campaigns to raise awareness of hospitality and tourism career options locally", followed by "Hospitality and tourism career programs in local high schools and colleges" (53%).

TOURISM PRIORITIES AND FOCUS AREAS

- Respondents were asked to identify the three areas that should be emphasized for tourism planning over the next 2-5 years. Fifty-five percent of Portland Region respondents selected



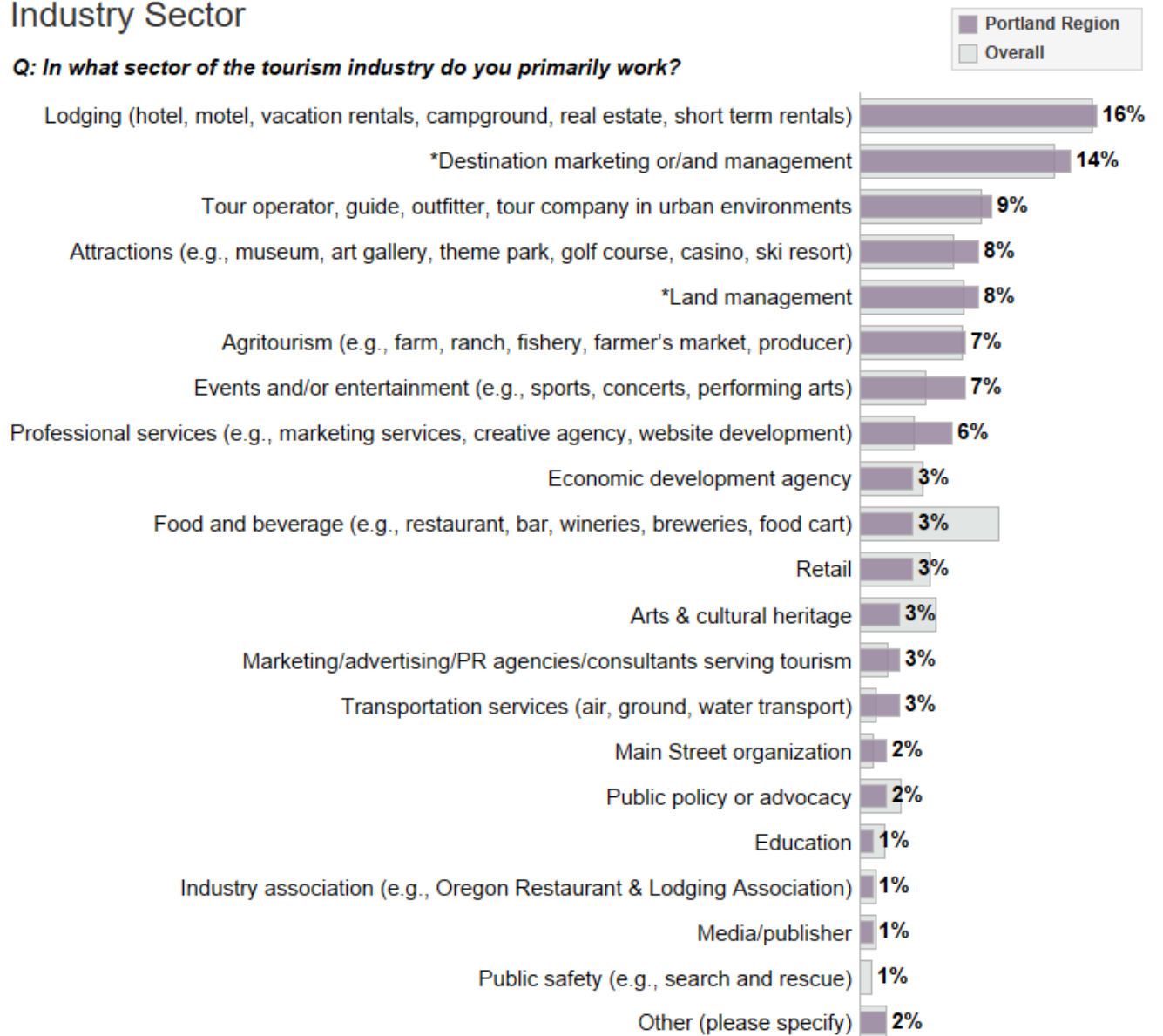
marketing and promotion among their top-three priorities, followed by grant and funding resources/opportunities (44%) and tourism-related infrastructure (41%).

RESPONDENT PROFILE

The survey received broad participation by tourism industry sector. Overall, the lodging sector accounted for 15% of total respondents, followed by destination marketing/management (13%), food and beverage (9%), and “Tour operator, guide, outfitter, tour company in urban environments” (8%). “Other” write-in responses, comprising 14% of the overall responses, were diverse and reflected the broad reach of the survey. Members from the Travel Oregon and Driftline Consulting teams collaborated to re-code the “Other” responses to fit into the provided response options, where applicable. Relative to the statewide overall results, respondents from the Portland Region were less likely to be employed in the food and beverage sector (3% vs 9% of the overall).

Industry Sector

Q: In what sector of the tourism industry do you primarily work?



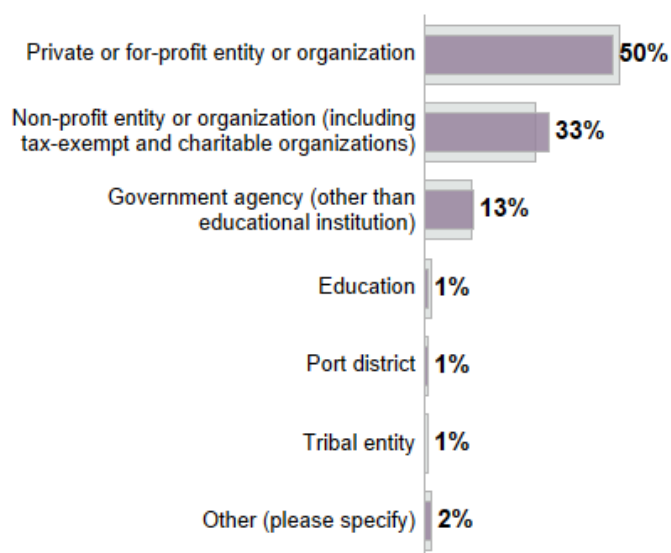
*Answer option abbreviated in reporting.

Respondents were asked which entity type best describes their business or organization. In the Portland Region, the top two response options were private or for-profit entities/organizations (50%) and non-profit entities/organizations (33%). The make-up of entity types was similar among respondents from the Portland Region compared to those in the overall sample.

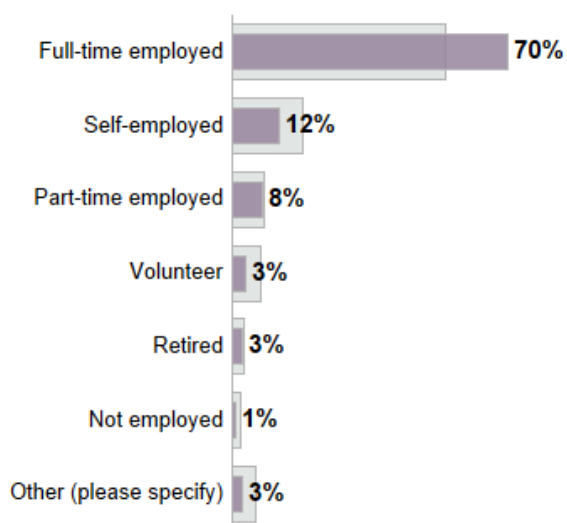
The top employment statuses for the region are full-time employed (70%), self-employed (12%), and part-time employed (8%). Compared to the overall responses, the Portland Region had a higher proportion of full-time employed individuals (58% in the overall) and a lower proportion of self-employed individuals (22% in the overall).

Entity Type, & Employment Status

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



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



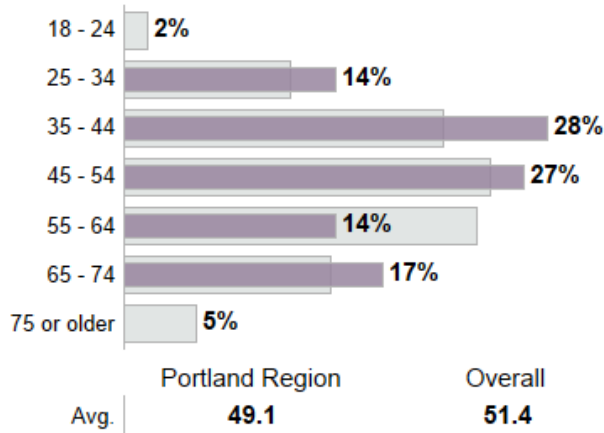
*For both questions, where applicable, "Other" write-in responses were recoded to appropriate categories.

In the Portland Region, the majority of respondents fell into the 35-54 age range, with 28% aged 35-44 and 27% aged 45-54. Compared to the overall sample, there was a higher proportion of respondents in the 35-44 year range in Portland (28% vs 21% in the overall), a higher proportion in the 25-34 year range (14% vs 11% in the overall) and a lower proportion in the 55-65 year range (14% vs 23% in the overall). The average age of respondents in the Portland Region was 49.1, compared to 51.4 in the overall sample.

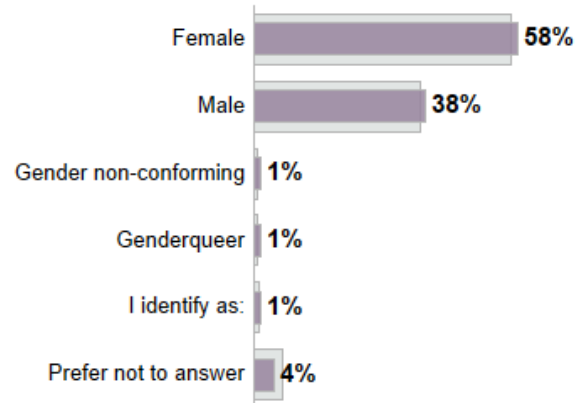
Statewide, 56% of respondents identified as female and 37% identified as male. These break-downs were similar among respondents in Portland where 58% were female and 38% were male.

Age & Gender

Q: Respondent Age



Q: To which gender identity do you most identify? Please check all that apply.

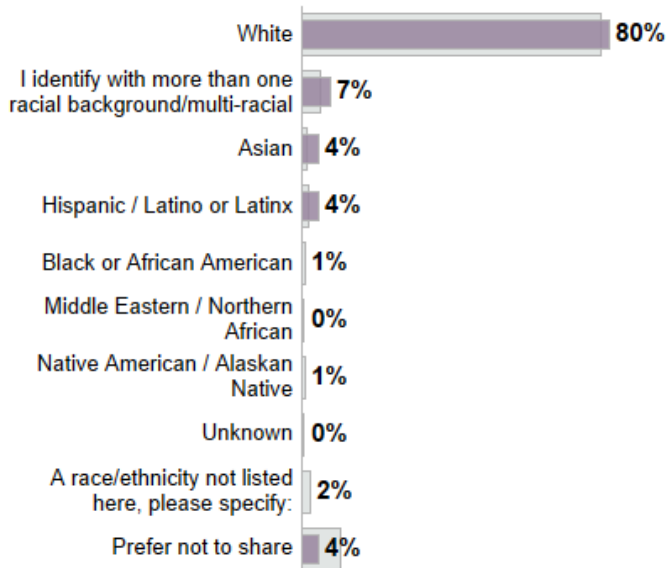


Statewide, just over three quarters of respondents (78%) described themselves as white, and 5% identified as multi-racial. Results from the Portland Region closely resembled the statewide overall.

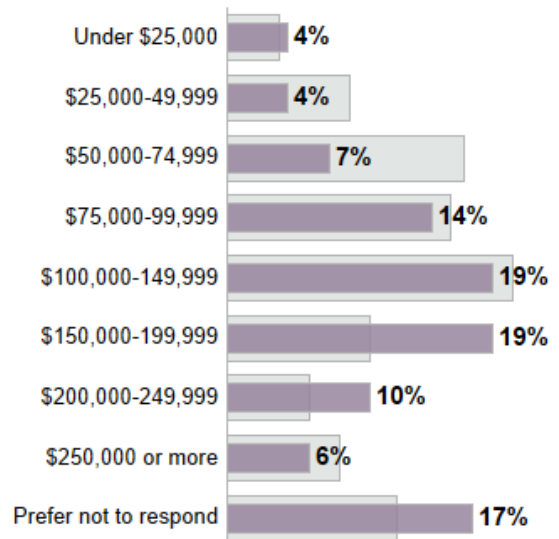
Forty-four percent of survey respondents overall indicated that they had annual household incomes of \$75,000 or more. In the Portland Region, the most common response options were \$100,000-149,999 (19%) and \$150,000-199,999 (19%). Compared to the overall, the Portland Region had a higher percentage of respondents in the \$150,000-199,999 range (19% vs 10%) and a lower percentage in the \$25,000-49,999 range (4% vs 9%) and the \$50,000-74,000 range (7% vs 17%).

Race & Household Income

Q: Which of the following best describes you? (Please select one answer)



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

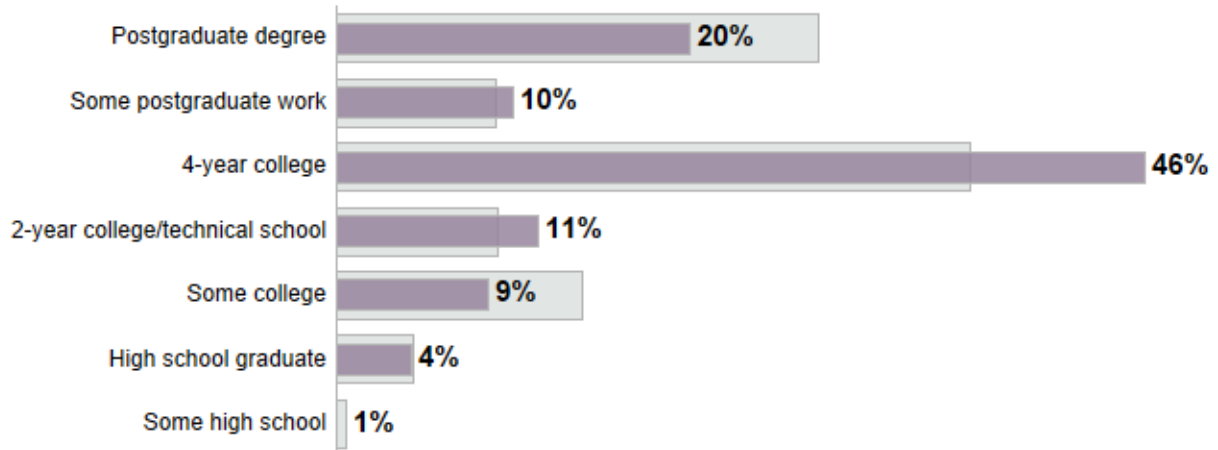


In the Portland Region, a larger percentage of respondents completed a 4-year college degree (46% vs 36% of the overall) and a smaller percentage had a postgraduate degree (20% vs 27% in the overall).

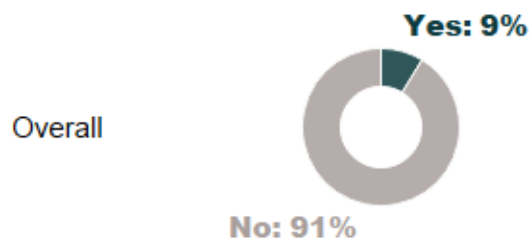
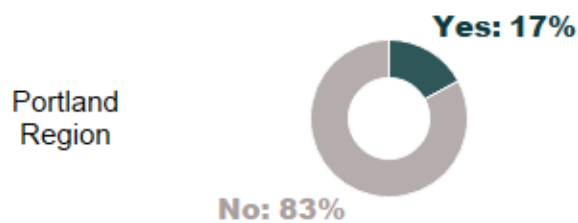
Seventeen percent of Portland Region respondents reported having a disability, compared to 9% among respondents overall.

Education & Presence of Disabilities

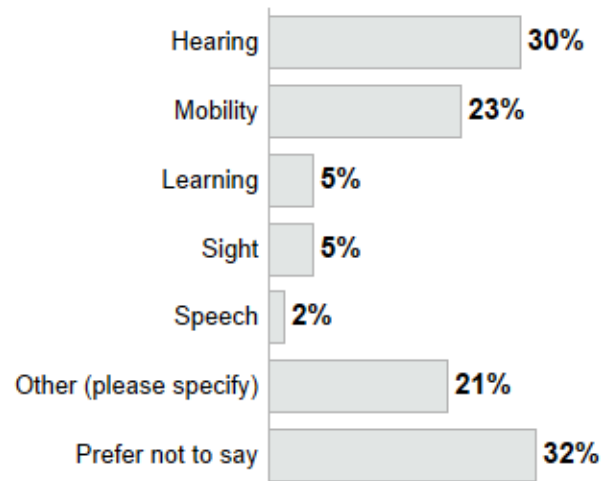
Q: Which option best describes your education?



Q: Do you have a disability? Yes No



Q: [If yes] What are these disabilities? (Select all that apply)



*Overall only due to insufficient sample size within regions.

TRAVEL OREGON'S 2023 – 2025 STRATEGIES

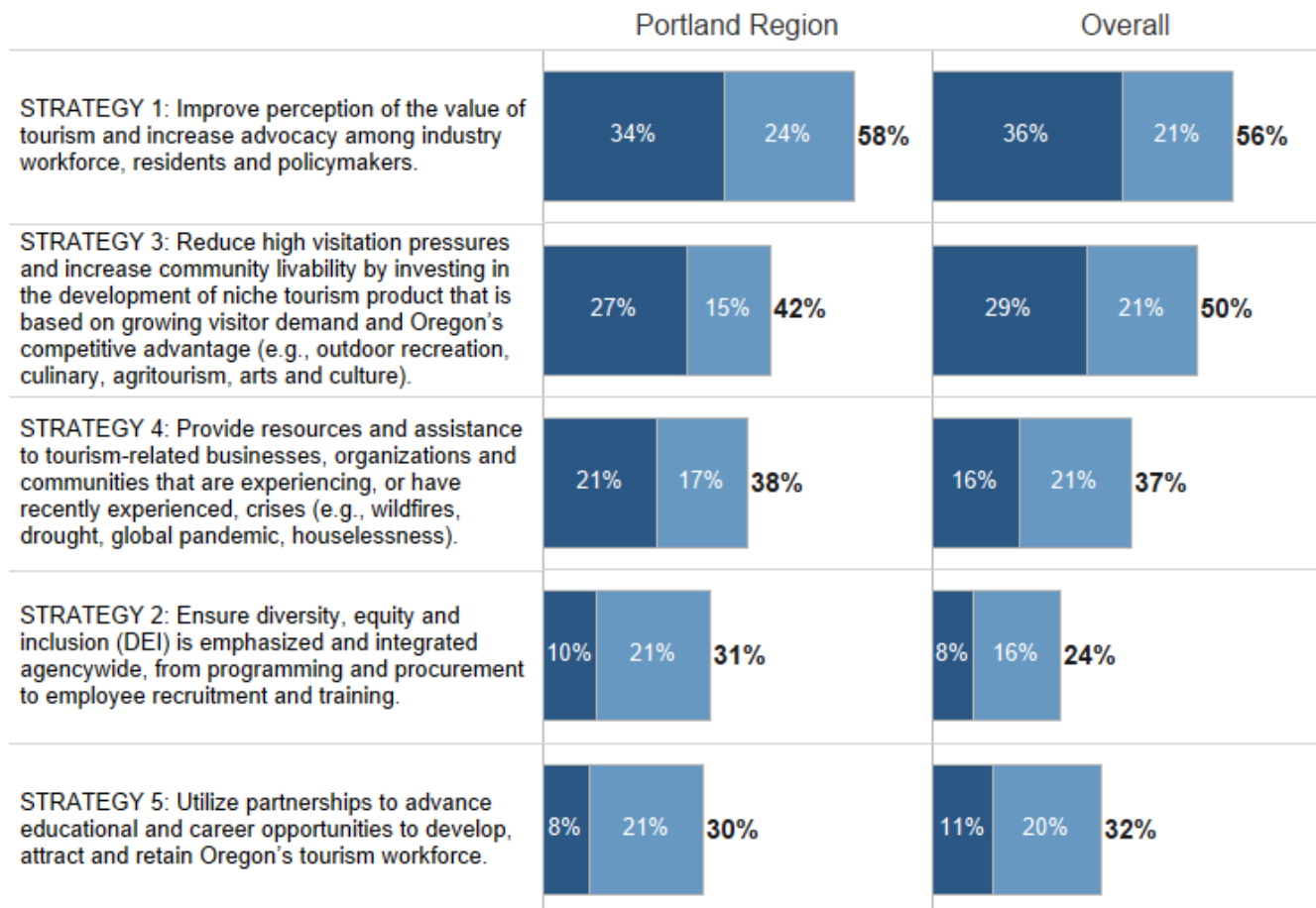
Travel Oregon has embarked on its 10-year strategic vision for tourism in the state, focusing on a destination stewardship approach that aims to maximize the economic potential of Oregon's economy while protecting the environment and promoting cultural diversity. A series of questions were identified to inform various strategies for the next biennium (2023 – 2025) to meet these goals.

Respondents were asked to rank five strategies in terms of how they would prioritize them for their community. Strategy 1, improving the perception of the value of tourism and increasing advocacy among industry workforce, residents and policymakers was ranked highest, with 34% of Portland Region respondents identifying it as their top priority and 58% identifying it among their top-two highest priorities. Strategy 3, reducing high visitation pressures and increasing community livability by investing in the development of a niche tourism product that is based on growing visitor demand and Oregon's competitive advantage, was identified as the second most-favored strategy, with 27% of Portland Region respondents identifying it as their top priority and 42% identifying it among their top-two highest priorities. Overall, these were also the top-two strategies identified among respondents, with Strategy 1 rated as the first or second priority among 56% of respondents, and Strategy 3 rated as the first or second priority among 50% of respondents.

Strategies

Q: Please read the following 5 strategies that are being prioritized by Travel Oregon, and rank them based on priority for your community, from 1=highest priority to 5=lowest priority.

Top 2 Priorities Displayed ■ First Rank ■ Second Rank

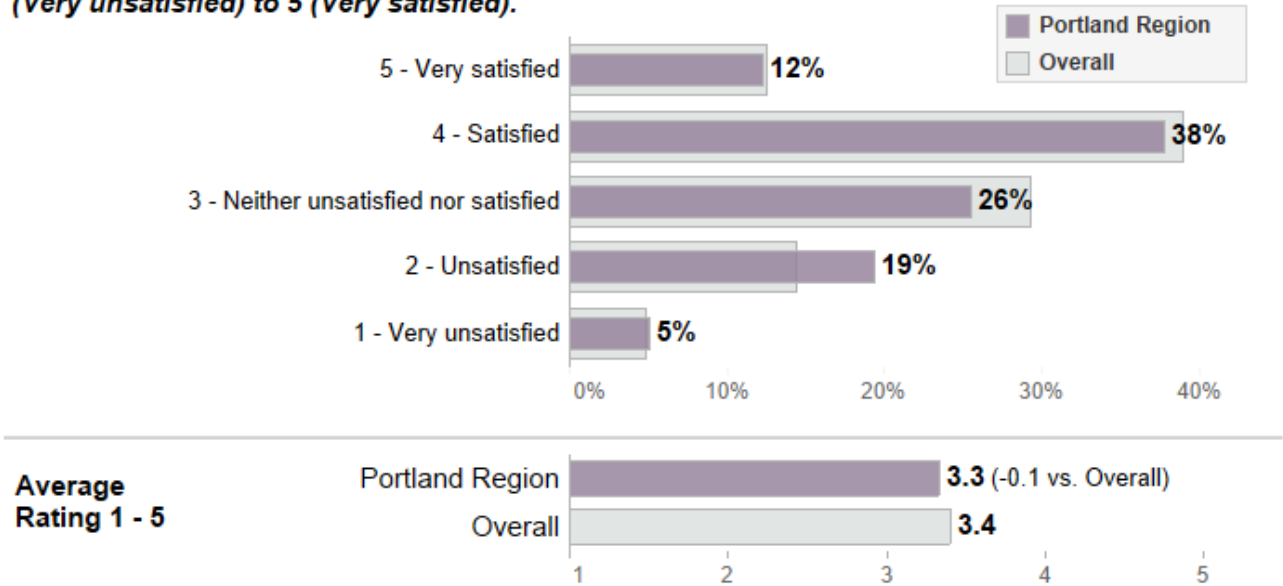


Respondents were also asked to characterize their satisfaction with the general direction of tourism development in Oregon. Note that “tourism development” refers to overall tourism development in Oregon. The following definition was provided to survey respondents: “Tourism development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets.”

Overall, 52% of respondents were satisfied with the direction of tourism development in Oregon (selected 4 or 5 on a five-point scale), while 19% were unsatisfied (selected 1 or 2). Twenty-nine percent were neutral (selected 3, neither unsatisfied nor satisfied). In the Portland Region, the results were similar; the average rating among Portland respondents was 3.3, compared to 3.4 among the overall sample.

Satisfaction with Tourism Development in Oregon

Q: Please rate your satisfaction with the direction of destination development in Oregon, from 1 (Very unsatisfied) to 5 (Very satisfied).

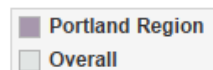


Note that “Destination Development” refers to overall tourism development in Oregon. The following definition was provided to survey respondents: “Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets.”

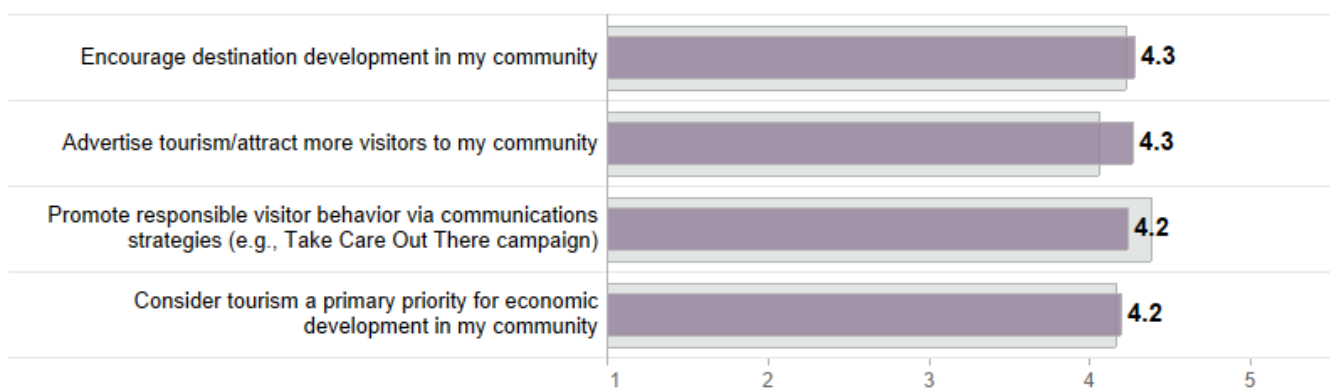
Both overall and in the Portland Region, most respondents agreed or strongly agreed with each statement related to their support for tourism development, including encouraging tourism development in their community, advertising tourism/attracting more visitors, promoting responsible visitor behavior, and considering tourism as a primary priority for economic development. The statement with the greatest support among Portland Region respondents was, "I believe Oregon should encourage tourism development in my community" with an average rating of 4.3 on a five-point scale (and 4.4 among the overall sample).

Respondents were also asked to provide their level of agreement with four statements that were meant to measure their advocacy for tourism. Both overall and among Portland Region respondents, there was the most agreement around feeling comfortable collaborating with groups of varying size and backgrounds to make positive changes in the tourism industry and the least agreement that they are able to lobby legislators and policy makers to create positive change within the industry.

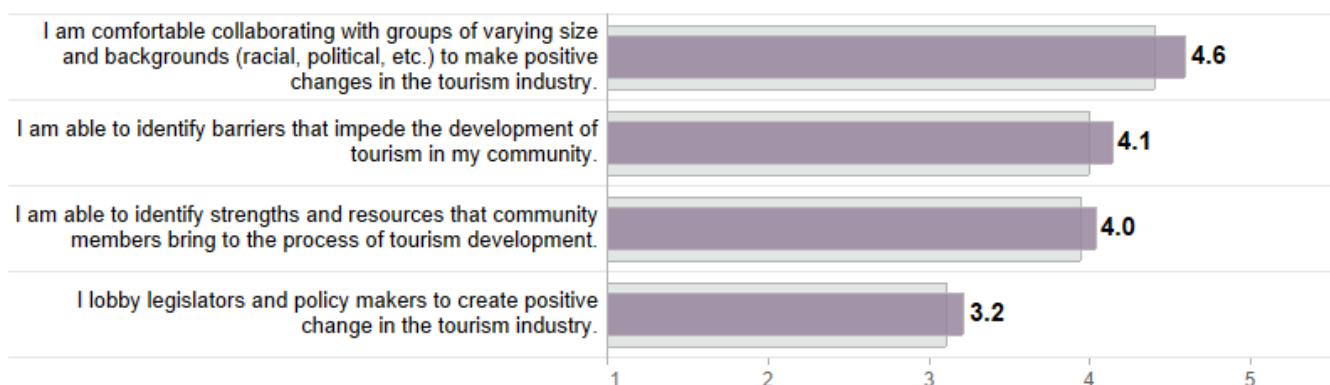
Tourism Development in Oregon



Q: Please rate your level of agreement with the statements below, from 1 (Strongly Disagree) to 5 (Strongly Agree). I believe Oregon should...



Q: Please rate your level of agreement with the statements below, from 1 (Strongly Disagree) to 5 (Strongly Agree).



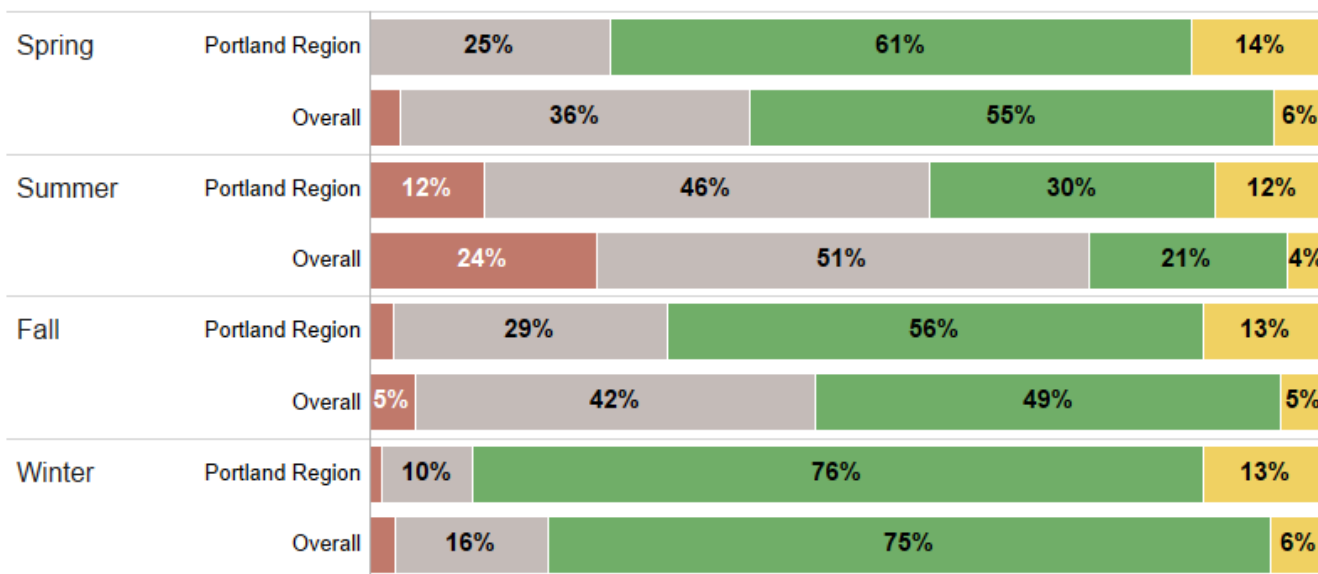
Respondents were asked to characterize the number of visitors their community receives during each of the four seasons. Overall, 3% of respondents said there were too many visitors in the spring, followed by 24% in summer, 5% in fall and 3% in winter. For the spring, summer and fall seasons, more Portland Region respondents indicated that they have too few visitors compared to the overall sample.

Visitation Levels by Season

Q: With respect to the number of visitors that your community receives each season, would you say there are:

Response

- Too many visitors
- About the right number of visitors
- Too few visitors
- Don't know/no opinion



The following figure portrays areas that respondents felt are strengths in their community and areas they felt their community needs to focus on to improve residents' and/or visitors' experiences. The top three areas that respondents from the Portland Region considered strengths in their community were food and beverage (59%), outdoor recreation opportunities (40%) and events and/or entertainment (33%). In comparison to the overall responses, respondents in the Portland Region were less likely to identify outdoor recreation opportunities as a strength (74% in the overall) and more likely to identify food and beverage (40% in the overall). A greater share of respondents in the Portland Region also identified shopping/retail opportunities as a strength (19% vs 7% in the overall) and being a welcoming destination for Black, Indigenous, People of Color, LGBTQIA+ community as a strength (3% vs 6% in the overall).

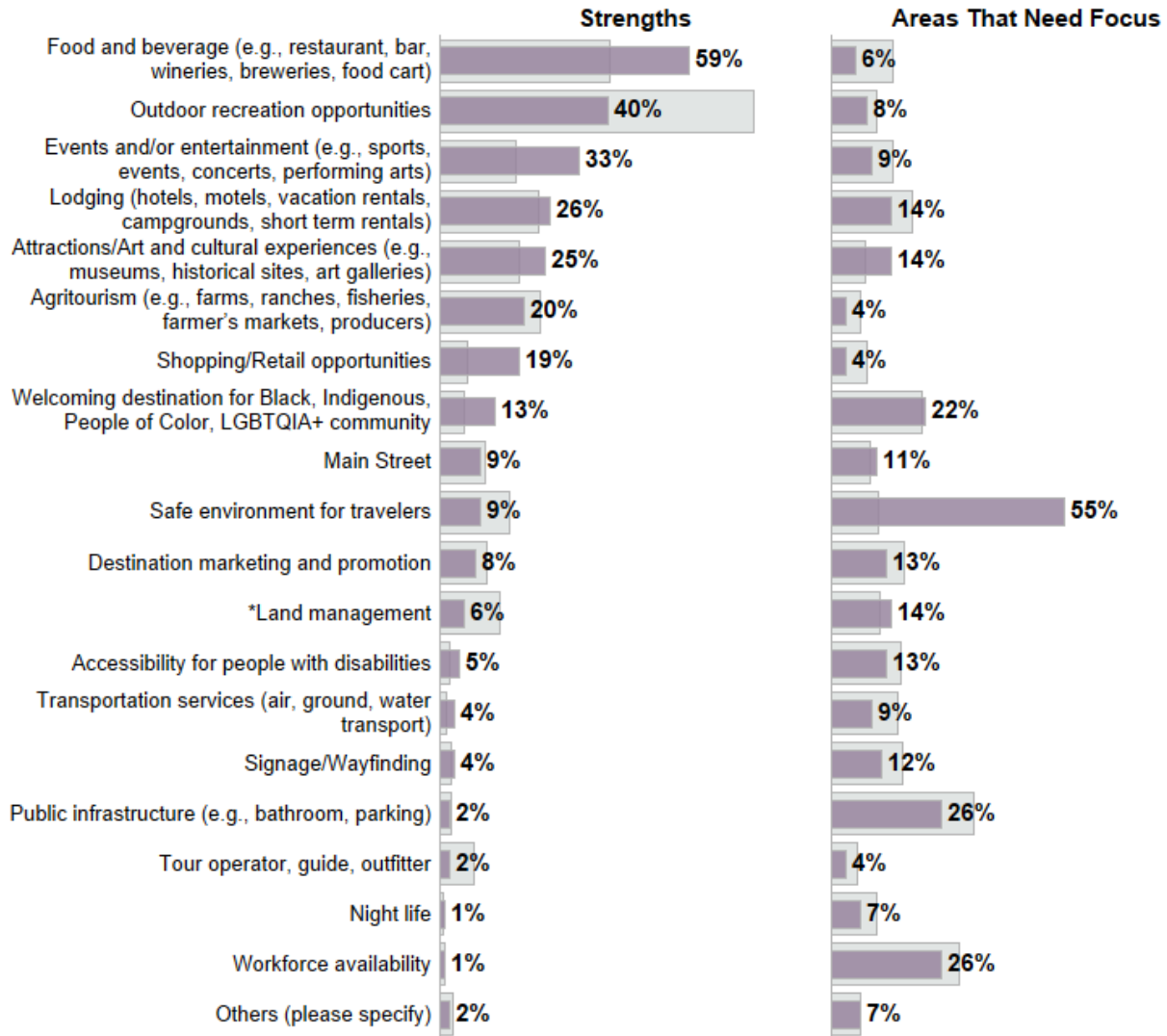
The top three areas that Portland Region respondents said their community needs to focus on to improve residents' and visitors' experiences were being a safe environment for travelers (55%), public infrastructure (e.g., bathroom, parking) (26%), and workforce availability (26%). It's worth noting that when looking at the results for the overall survey population, the top three areas were public infrastructure being the top priority (34%), followed by workforce availability (30%), and then being a welcoming destination for Black, Indigenous, People of Color, LGBTQIA+ community (21%).

Strengths & Areas to Improve

Portland Region
Overall

Q: Please identify up to three areas that you consider strengths in your community &

Q: Please identify up to three areas that your community needs to focus on to improve residents' and visitors' experiences:



*Answer option has been abbreviated

The survey asked respondents to rate the extent to which various challenges pose a risk to tourism in their communities. The top three challenges that respondents in the Portland Region identified as high risks were houselessness (62%), community violence and crime (58%), and increasing negative visitor perception (58%). These were all rated as higher risks in the Portland Region compared to the overall sample. Additionally, a high share of respondents, both overall and in the Portland Region, indicated that lack of affordable housing was a risk (80% responding high or medium risk in the Portland Region).

Risks to Tourism in Your Community

Q: Please rate the extent to which each challenge poses a risk to tourism in your community:

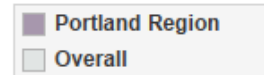
Response
■ High risk
■ Medium risk
■ Low risk

| | | | | |
|---|-----------------|-----|-----|-----|
| Houselessness | Portland Region | 62% | 23% | 15% |
| | Overall | 42% | 33% | 25% |
| Community violence and crime | Portland Region | 58% | 19% | 23% |
| | Overall | 13% | 30% | 57% |
| Increasing negative visitor perception | Portland Region | 58% | 15% | 27% |
| | Overall | 22% | 40% | 39% |
| Lack of affordable housing | Portland Region | 51% | 29% | 20% |
| | Overall | 65% | 24% | 10% |
| Economic downturn | Portland Region | 43% | 40% | 17% |
| | Overall | 33% | 50% | 17% |
| Overburdened public resources | Portland Region | 32% | 35% | 33% |
| | Overall | 33% | 35% | 32% |
| Global pandemic or other health concerns | Portland Region | 28% | 35% | 37% |
| | Overall | 15% | 36% | 49% |
| Increasing negative resident sentiment towards visitors | Portland Region | 16% | 35% | 49% |
| | Overall | 25% | 42% | 33% |
| Wildfires | Portland Region | 14% | 38% | 49% |
| | Overall | 33% | 35% | 32% |
| Flooding | Portland Region | 6% | 23% | 71% |
| | Overall | 7% | 27% | 66% |
| Drought | Portland Region | | 25% | 70% |
| | Overall | 18% | 29% | 54% |
| Other | Portland Region | 55% | 27% | 18% |
| | Overall | 45% | 19% | 35% |

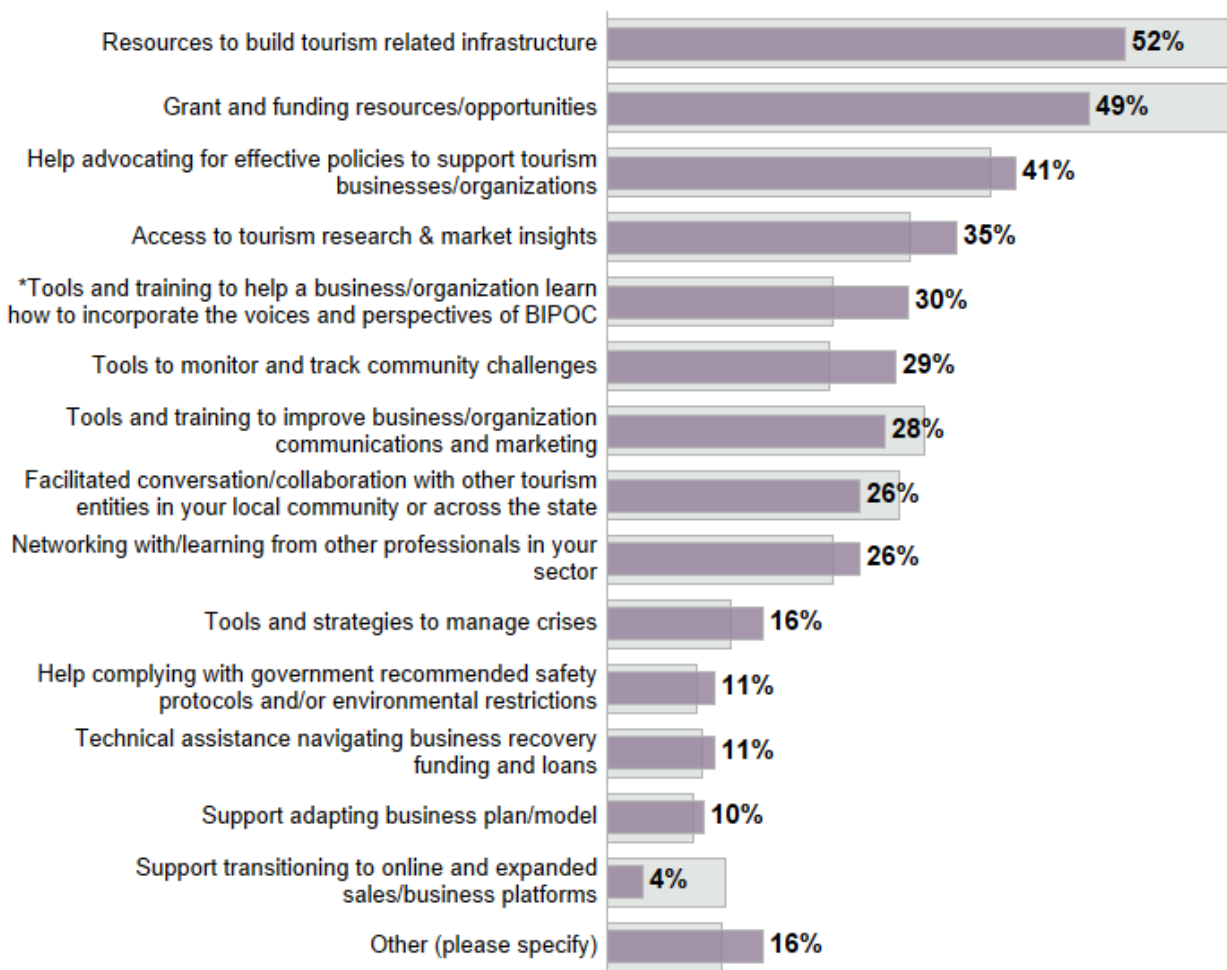
*Categories sorted in descending order by the percent of Portland Region respondents selecting "High risk."

The survey asked respondents to identify the resources or programs that would best assist their business/organization or their community if faced with the challenges listed in the previous question. Two strategies emerged as likely to be particularly effective among respondents overall and those in the Portland Region: resources to build tourism related infrastructure (64% overall and 52% in Portland) and grant and funding resources/opportunities (64% overall and 49% in Portland). In addition, help advocating for effective policies to support tourism businesses/organizations and access to tourism research and market insights were also rated highly among Portland respondents (41% and 35%, respectively).

Resources & Programs (1 of 2)



Q: Please select up to five resources or programs that would best assist your business/organization or community if faced with the challenges listed in the previous question.



Respondents were then asked to specifically rank the programs or resources that they selected from the previous question from highest to lowest priority. Again, grant and funding resources/opportunities and resources to build tourism-related infrastructure emerged as clear top priorities among overall respondents and those in the Portland Region; however, these two areas were rated higher among overall respondents compared to those in the Portland Region.

Resources & Programs (2 of 2)

Q: Please rank the top resources or programs that would best assist your business/organization or community if faced with the challenges previously listed (1=the top resource or program).

Top 2 Priorities Displayed ■ First Rank ■ Second Rank

| | Portland Region | | Overall | |
|--|-----------------|-----|---------|-----|
| Grant and funding resources/opportunities | 29% | 11% | 30% | 20% |
| Resources to build tourism related infrastructure | 13% | 22% | 25% | 20% |
| Help advocating for effective policies to support tourism businesses/organizations | 12% | 13% | 8% | 11% |
| Access to tourism research & market insights | 8% | 9% | 5% | 7% |
| Facilitated conversation/collaboration with other tourism entities in your local community or across the state | 6% | 7% | 5% | |
| Tools to monitor and track community challenges | 8% | | 5% | |
| Tools and training to help a business/organization learn how to incorporate the voices and perspectives of BIPOC communities | 7% | | 6% | |
| Tools and training to improve business/organization communications and marketing | 7% | | 9% | |
| Networking with/learning from other professionals in your sector | | | | |
| Tools and strategies to manage crises | | | | |
| Help complying with government recommended safety protocols and/or environmental restrictions | | | | |
| Support adapting business plan/model | | | | |
| Support transitioning to online and expanded sales/business platforms | | | | |
| Technical assistance navigating business recovery funding and loans | | | | |
| Other | 9% | 7% | 8% | |

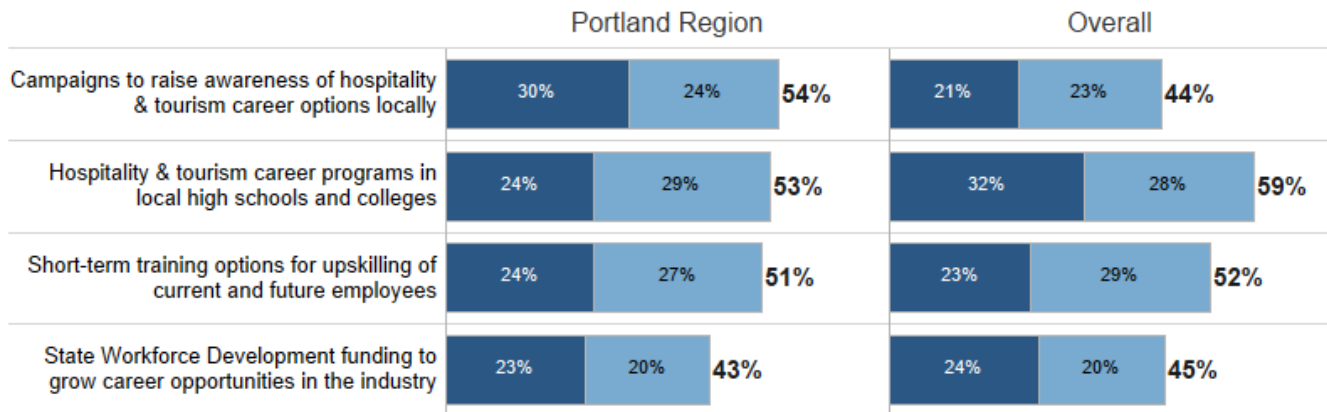
In order to rebuild the local workforce, the survey asked respondents to rank educational and career opportunities from highest to lowest priority in order to develop, attract and retain the local workforce to the industry. The following figure shows the share of respondents that rated each category among their top-two highest priorities. The highest rated priority among Portland respondents was, “Campaigns to raise awareness of hospitality and tourism career options locally” (54% rated it as their first or second priority), whereas this was the fourth highest rated priority among the overall sample. The second highest rated priority among Portland respondents was, “Hospitality and tourism career programs in local high schools and colleges”, which was the highest rated priority among the overall sample.

Developing the Local Workforce

Q: As we seek to rebuild the local workforce, please rank (from 1=highest priority to 4=lowest priority) the following educational and career opportunities to develop, attract and retain the local workforce to our industry.

Top 2 Priorities Displayed

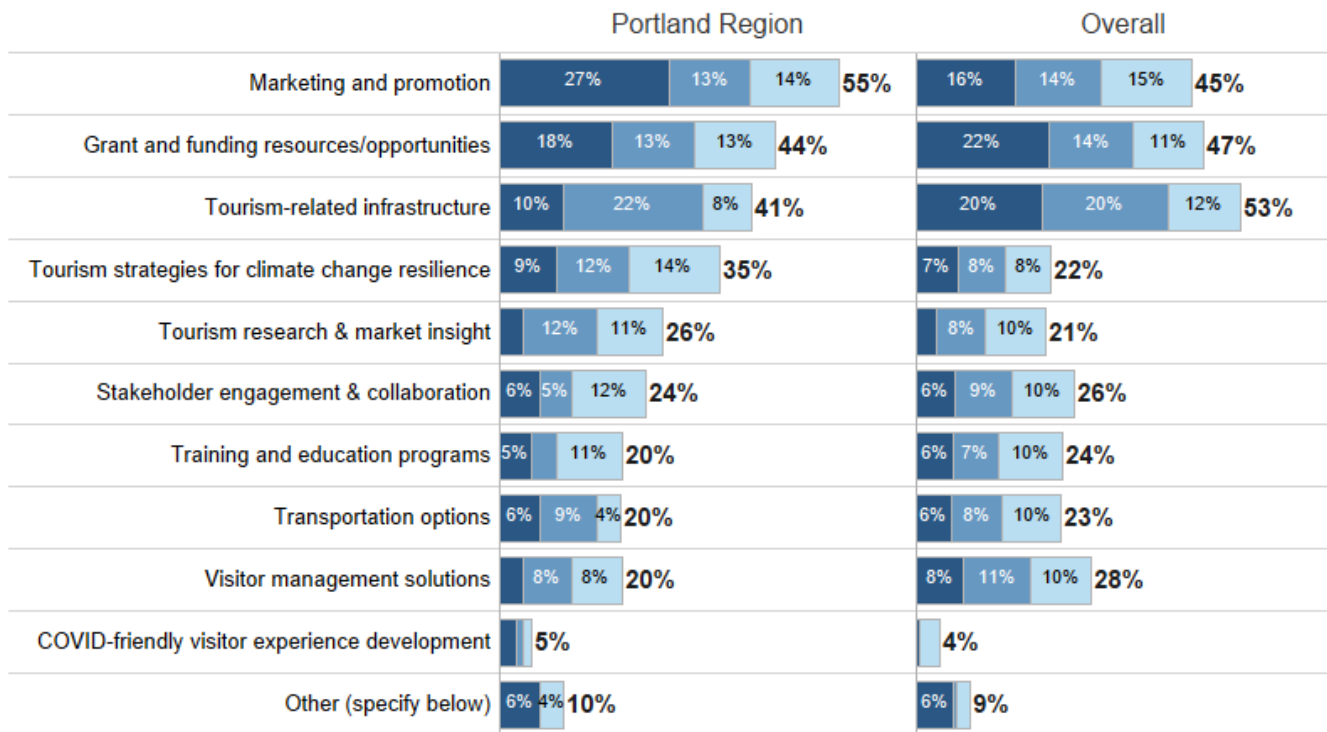
■ First Rank ■ Second Rank



As in prior iterations of the Oregon Tourism Industry Stakeholder Survey, respondents were asked to identify the three areas that should be emphasized for tourism planning over the next 2-5 years. Overall, tourism-related infrastructure emerged as the top priority with 20% of respondents identifying it as their top priority and 53% identifying it among their three highest priorities. Grant and funding resources/opportunities was the second most-identified priority (47% among their top three), followed by marketing and promotion (45% among their top three). Relative to 2020, these are the same top focus areas; however, the rank order changed with marketing falling from first to third priority. Portland Region respondents, however, were more likely to favor marketing and promotion with 55% identifying it among their top-three priorities. Although not a favored priority, Portland Region respondents were also more likely to identify tourism research and market insights as a priority (35% vs. 22% among respondents overall).

Tourism Priorities & Focus Areas

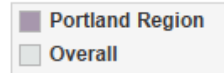
Q: Please identify the three areas that you believe should be emphasized for tourism planning over the next 2 to 5 years in Oregon: ■ First Rank ■ Second Rank ■ Third Rank



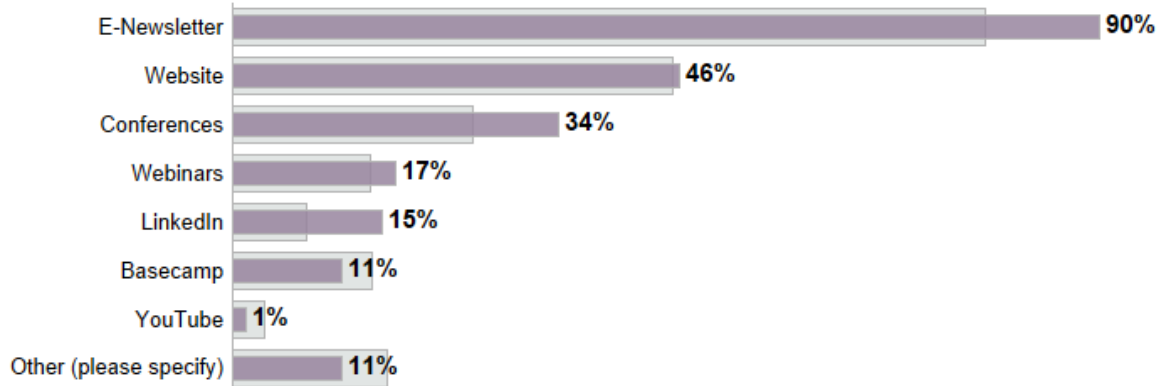
INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Ninety percent of Portland Region respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter, followed by website (46%). By a large margin, e-newsletters are considered the best way for respondents to receive information.

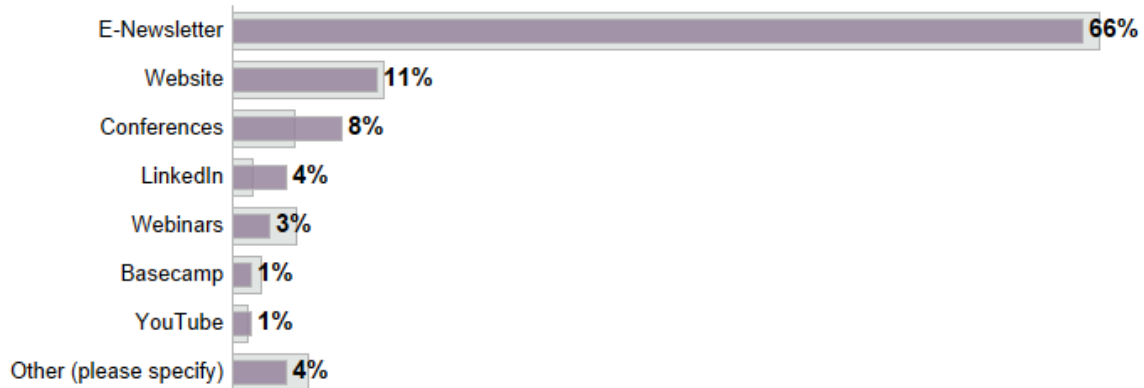
Communications



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



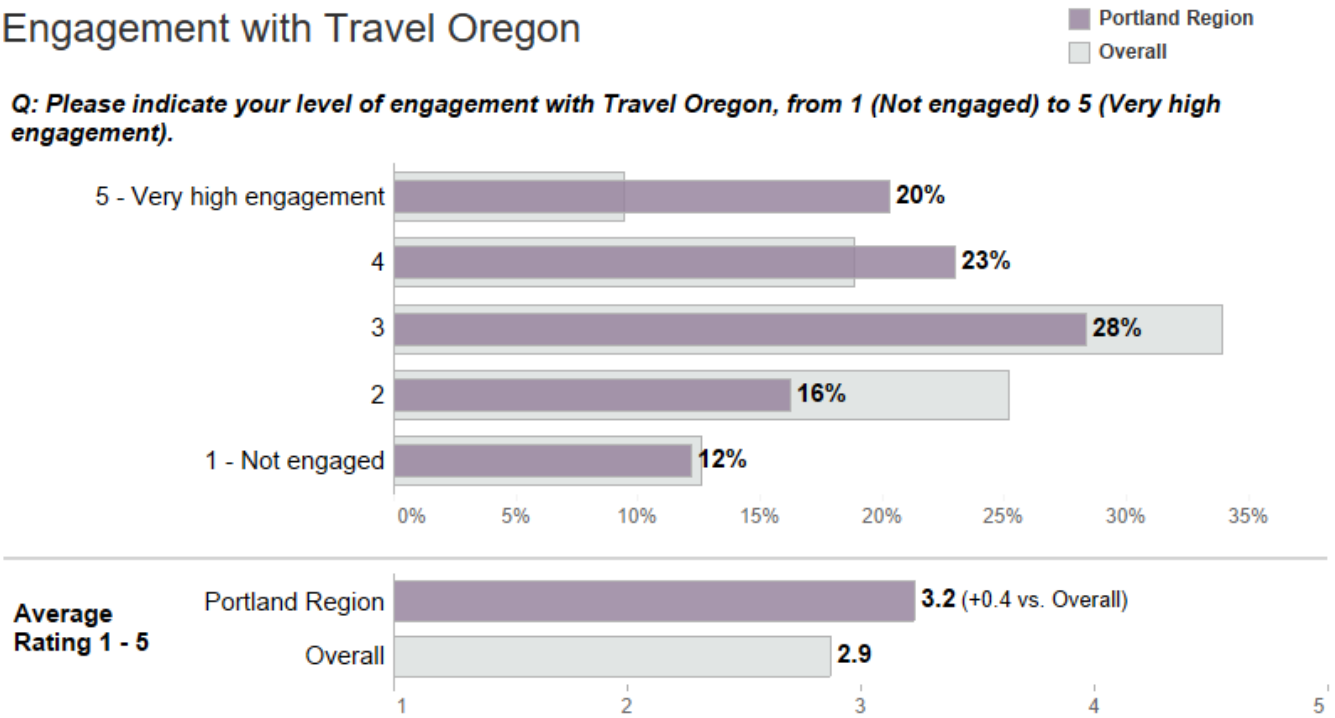
Q: What is the best way for you to receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization?



Respondents were asked to rate their engagement with Travel Oregon, from 1 (not engaged) to 5 (very high engagement). Forty-three percent of respondents in the Portland Region rated this question a 4 or 5, compared to 28% in the overall sample. The average rating was higher among Portland respondents (3.2) compared to the overall average (2.9).

Engagement with Travel Oregon

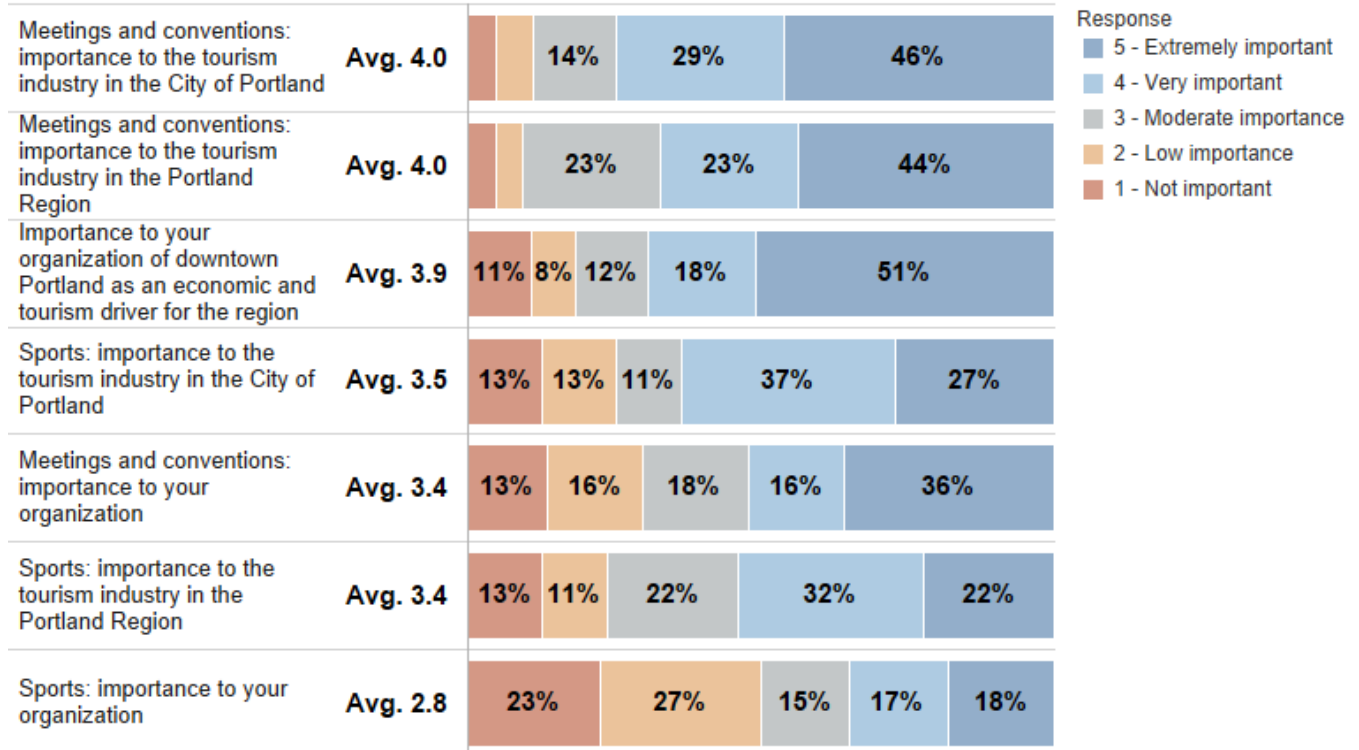
Q: Please indicate your level of engagement with Travel Oregon, from 1 (Not engaged) to 5 (Very high engagement).



PORTLAND REGION QUESTIONS

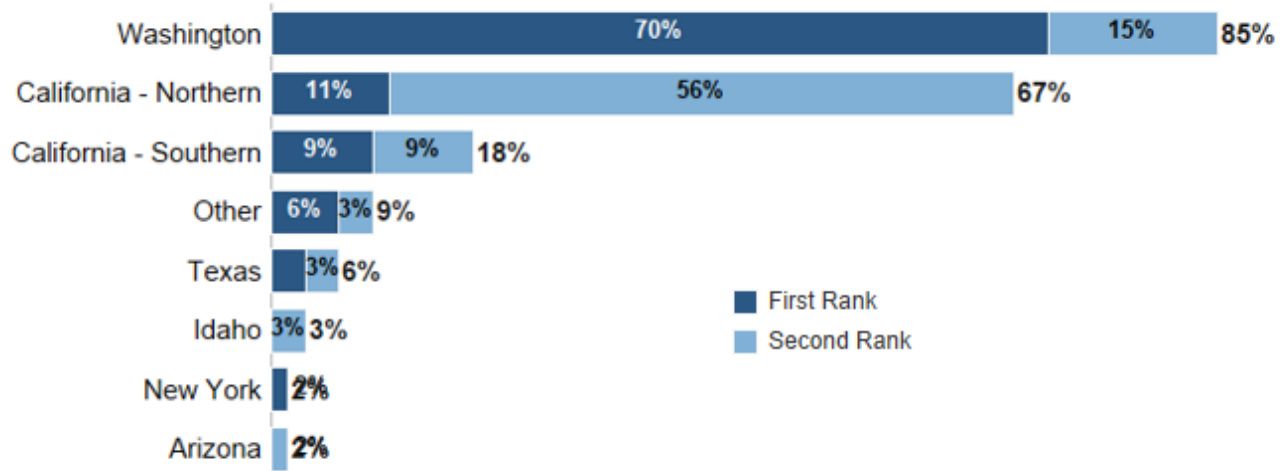
Each region had the opportunity to ask a series of custom questions of specific interest to their stakeholders, challenges, and opportunities. The findings from these custom questions are presented below. The survey resulted in an extensive number of open-ended responses. All open-ended responses are viewable in a spreadsheet format or in an online dashboard format with accompanying word clouds and bar charts.

Q: Please indicate the importance you would place on the meetings, conventions, and sports business in the areas below, from 1 (Not important) to 5 (Extremely important):



*Categories sorted in descending order by the average rating
Source: 2023 Oregon Tourism Stakeholder Survey

Q: Please indicate the top two domestic source markets for your organization (excluding Oregon):



Source: 2023 Oregon Tourism Stakeholder Survey