



# **2023 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY**

## **SUMMARY OF RESULTS | WILLAMETTE VALLEY**

March 2023



**DRIFTLINE**  
CONSULTING

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 Willamette Valley with additional statewide results provided for context.

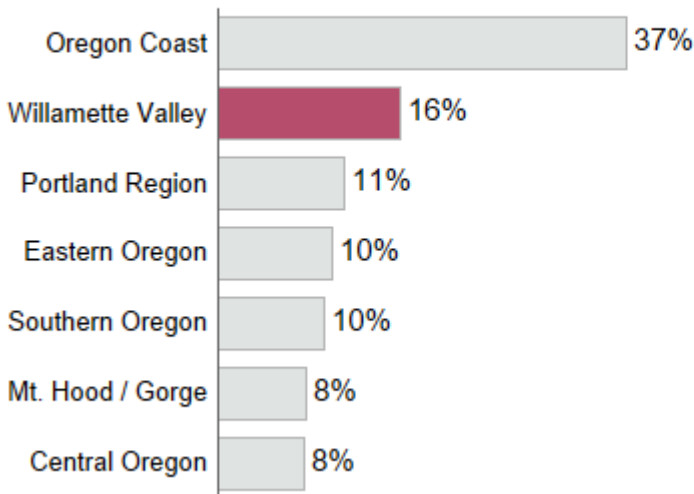
## OBJECTIVES

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 166 valid responses from the Willamette Valley 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 Willamette Valley compared to the statewide survey results (referred to as the “overall” in figures).

### Number of Respondents



**166**

Willamette Valley  
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](https://bit.ly/2023Stakeholder)

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## KEY FINDINGS

### TOURISM DEVELOPMENT

- Over half (51%) of respondents in the Willamette Valley said they 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) and 29% were neutral.
- Most respondents in the Willamette Valley agreed or strongly agreed with statements related to what Oregon should do to promote tourism, including encourage tourism development in their community (95% agreed or strongly agreed), advertise tourism/attract more visitors (88%), promote responsible visitor behavior (86%), and consider tourism as a primary priority for economic development (86%).
- Respondents in the Willamette Valley were most in agreement that they are comfortable collaborating with groups of varying size and backgrounds to make positive changes in the tourism industry (93% 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 (41%).

### STRENGTHS AND AREAS FOR IMPROVEMENT

- The top three areas that respondents from the Willamette Valley considered strengths in their community were outdoor recreation opportunities (59%), food and beverage (55%), and agritourism (40%).
- The top three areas that Willamette Valley respondents believe their community needs to focus on to improve residents' and visitors' experiences were being a welcoming destination for Black, Indigenous, People of Color, LGBTQIA+ community (31%), workforce availability (27%), and public infrastructure (e.g., bathroom, parking) (26%).

### ADDRESSING RISKS TO TOURISM

- The top three challenges that respondents in the Willamette Valley region identified as high risks to tourism in their community were lack of affordable housing (46%), homelessness (44%), and wildfires (32%).
- The top two strategies that respondents in the Willamette Valley selected to best assist their business/organization or community if faced with the challenges listed in the previous question were grant and funding resources/opportunities (64%) and resources to build tourism related infrastructure (62%).

### WORKFORCE

- To develop, attract and retain the local workforce to the tourism industry, over half of respondents in the Willamette Valley (58%) selected the strategy, "Hospitality & tourism career programs in local high schools and colleges", followed by "Short-term training options for upskilling of current and future employees" (52%).



## **TOURISM PRIORITIES AND FOCUS AREAS**

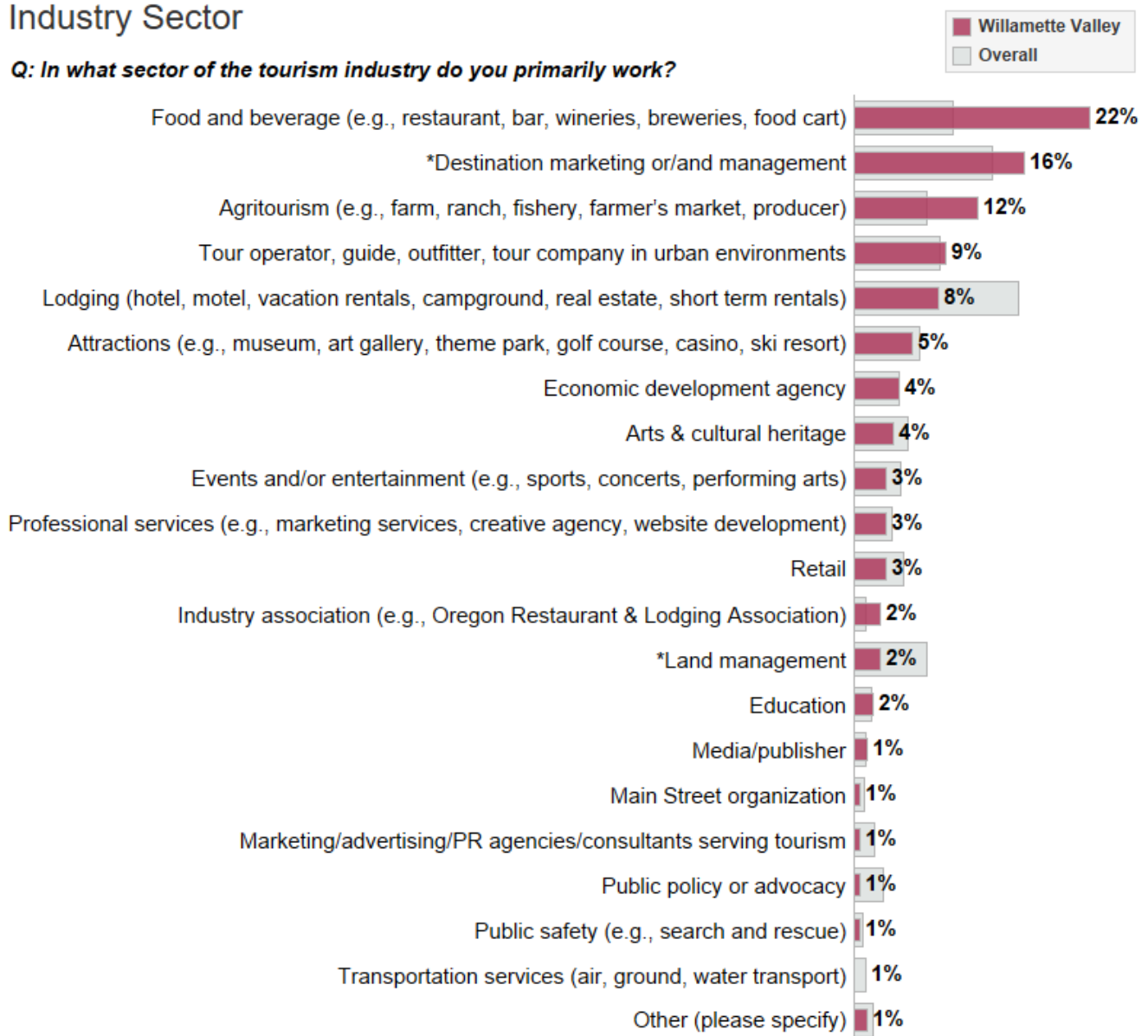
- Respondents were asked to identify the three areas that should be emphasized for tourism planning over the next 2-5 years. Sixty percent of Willamette Valley respondents selected marketing and promotion among their top-three priorities, followed by 48% who selected tourism-related infrastructure and 43% who selected grant and funding resources/opportunities.

## 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 Willamette Valley were more likely to be employed in the food and beverage, destination marketing, and the agritourism sector. The Willamette Valley also had a smaller share of respondents employed in the lodging sector relative to the overall.

### Industry Sector

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



\*Answer option abbreviated in reporting.

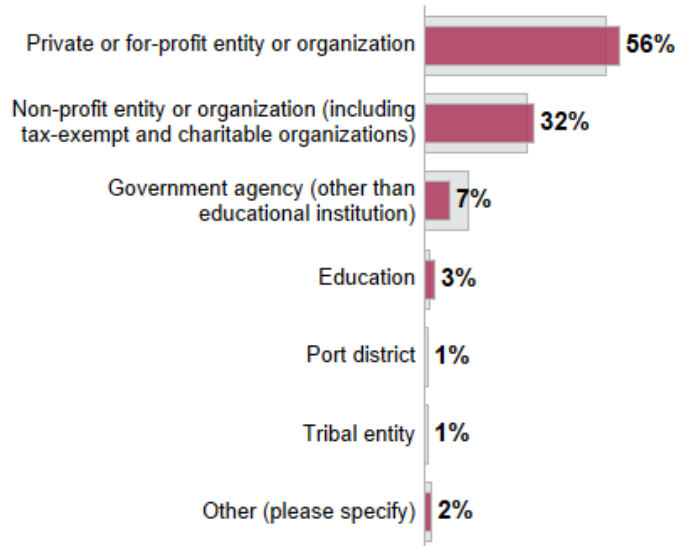


Respondents were asked which entity type best describes their business or organization. In the Willamette Valley, the top two response options were private or for-profit entities/organizations (56%) and non-profit entities/organizations (32%). The major difference relative to the overall was that the government agency response option has a much lower percentage in the Willamette Valley (7%) compared to the overall (13%). Additionally, the education response option had a slightly higher percentage in the Willamette Valley (3%) compared to the overall (2%).

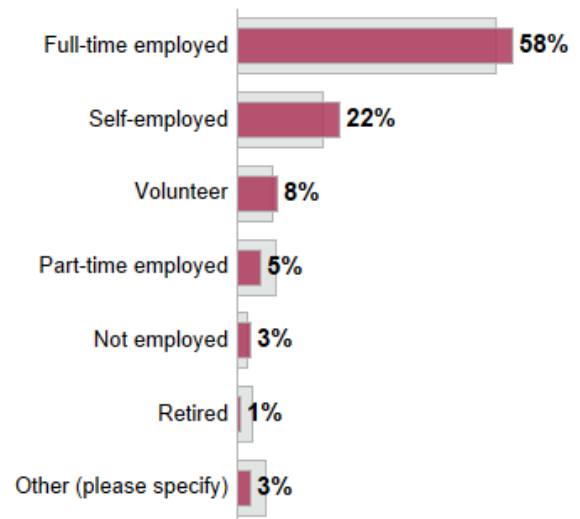
The top employment statuses for the region were full-time employed (58%), self-employed (22%), and volunteer (8%). Compared to the overall responses, the Willamette Valley region had a higher proportion of full-time employed individuals and a higher proportion of self-employed individuals. However, the proportion of volunteer employment status is relatively similar across the region and overall responses.

## 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)**



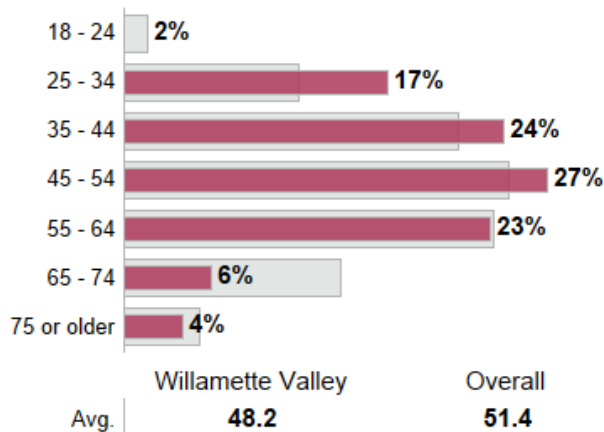
\*For both questions, where applicable, "Other" write-in responses were recoded to appropriate categories.

In the Willamette Valley, the majority of respondents fell into the 35-54 age range, with 27% aged 45-54 and 24% aged 35-44. This was different from the overall results, where the largest age group was 45-54, followed by 55-64. The proportion of respondents aged 65 and older was also smaller in the Willamette Valley compared to the overall results.

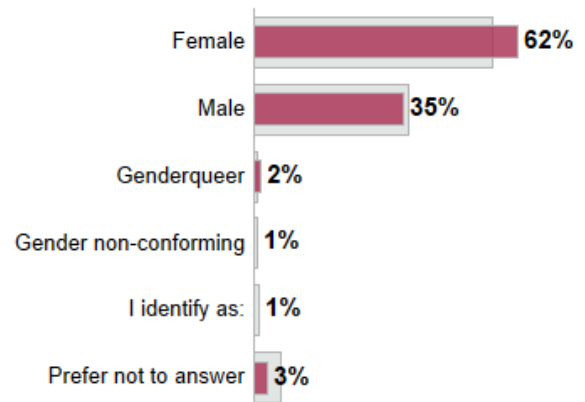
Statewide, 56% of respondents identified as female and 37% identified as male. Willamette Valley respondents skewed slightly more female at 62%.

## Age & Gender

### Q: Respondent Age



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



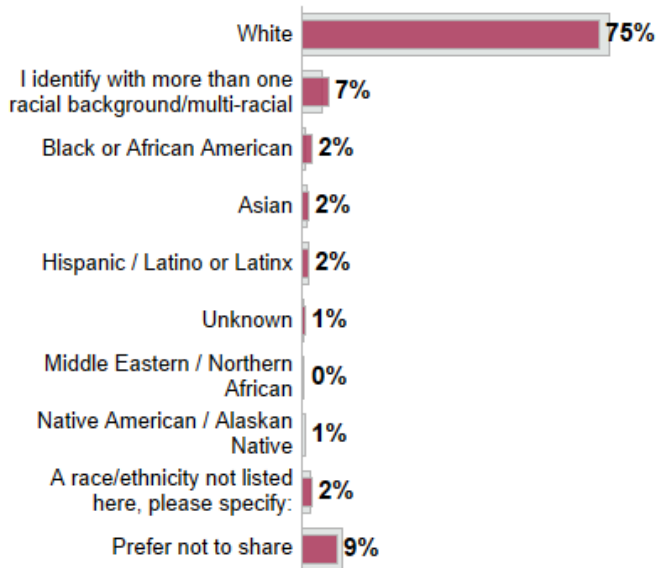


Statewide, just over three quarters of respondents (78%) described themselves as white, and 5% identified as multi-racial. Results from the Willamette Valley closely resemble the statewide overall.

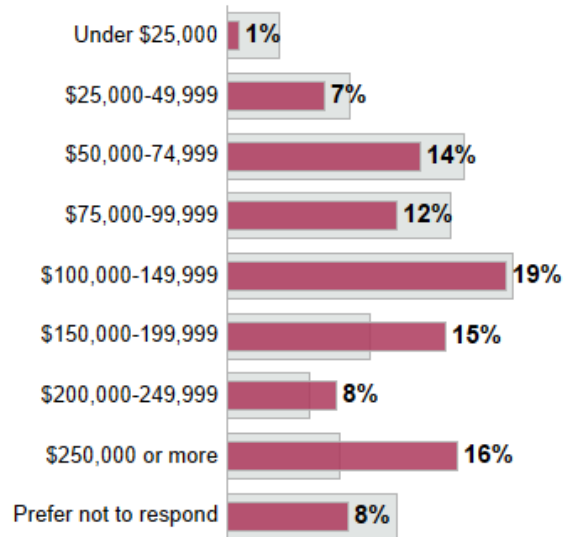
Forty-four percent of survey respondents overall indicated that they had annual household incomes of \$75,000 or more. In the Willamette Valley region, the most common response options were \$100,000-149,999 (19%) and \$250,000 or more (16%). Compared to the overall, the Willamette Valley region had a higher percentage of respondents in the \$150,000-199,999 range (15% vs 10%) and a lower percentage in the under \$25,000 range (1% vs 4%).

## 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)?**

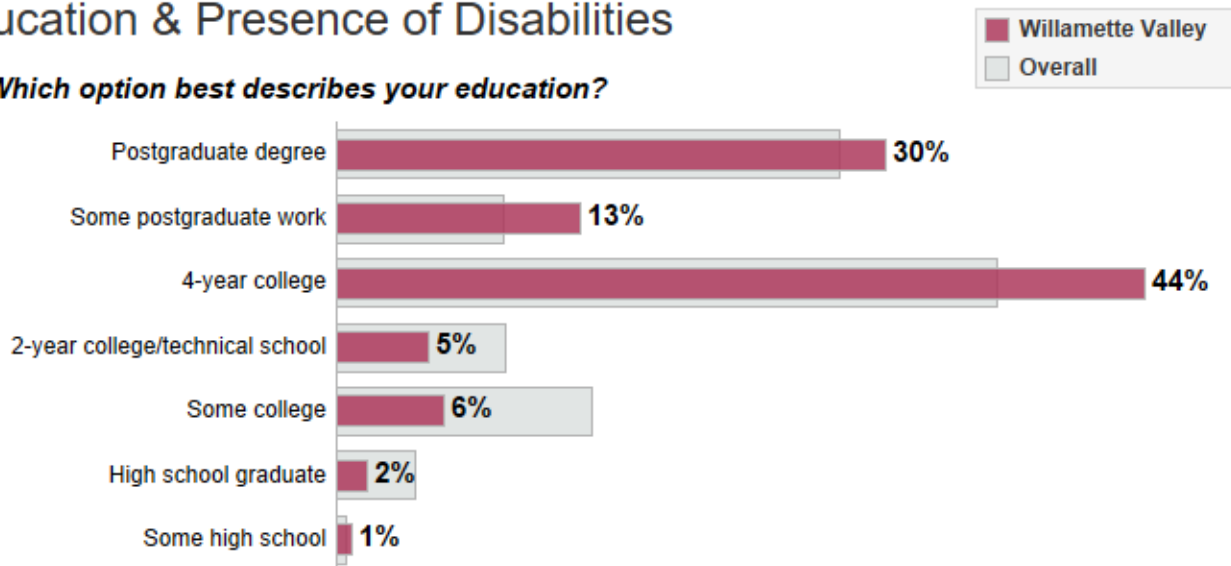


Willamette Valley respondents had a higher level of education compared to the overall respondents. Specifically, a larger percentage of Willamette Valley respondents completed a 4-year college degree (44%) and a postgraduate degree (30%) compared to the overall respondents (36% and 27%, respectively).

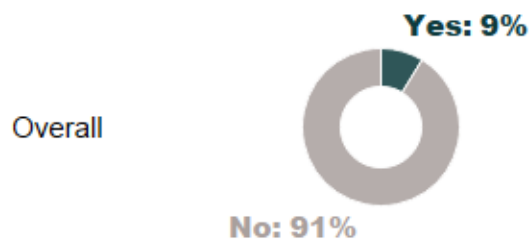
Seven percent of Willamette Valley respondents reported having a disability, compared to 9% of respondents overall.

## Education & Presence of Disabilities

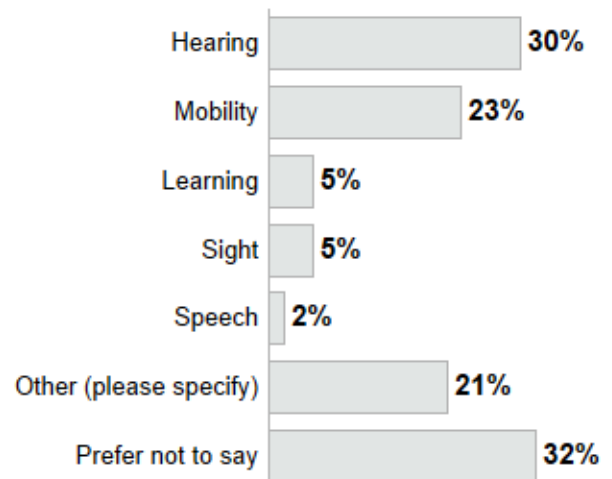
**Q: Which option best describes your education?**



**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

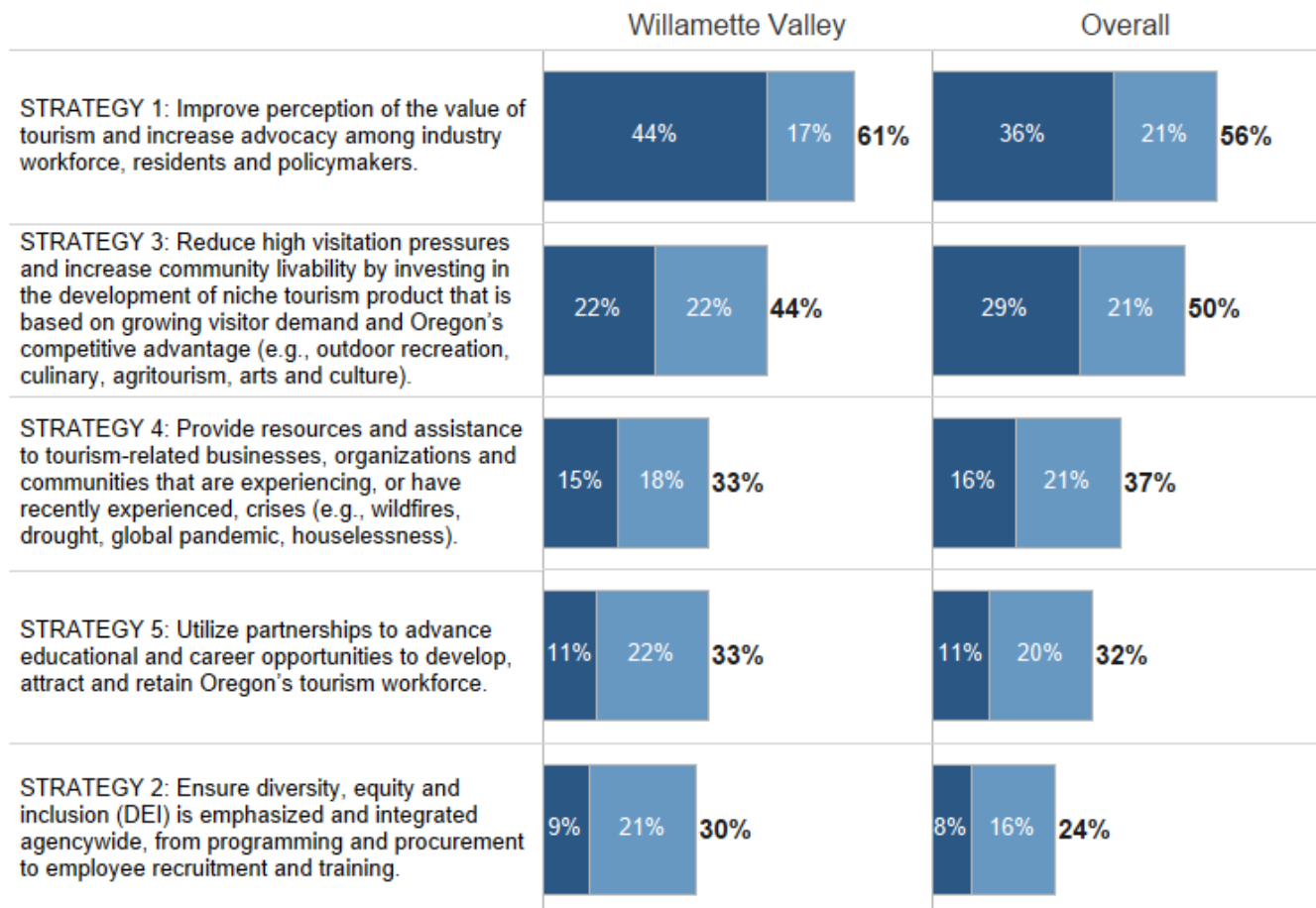
Travel Oregon has embarked on its 10-year strategic vision for tourism in the state, focusing on a destination stewardship approach that aims to maximize the economic potential of Oregon's economy while protecting the environment and promoting cultural diversity. A series of questions were identified 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 44% of Willamette Valley respondents identifying it as their top priority and 61% 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 22% of Willamette Valley respondents identifying it as their top priority and 44% 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

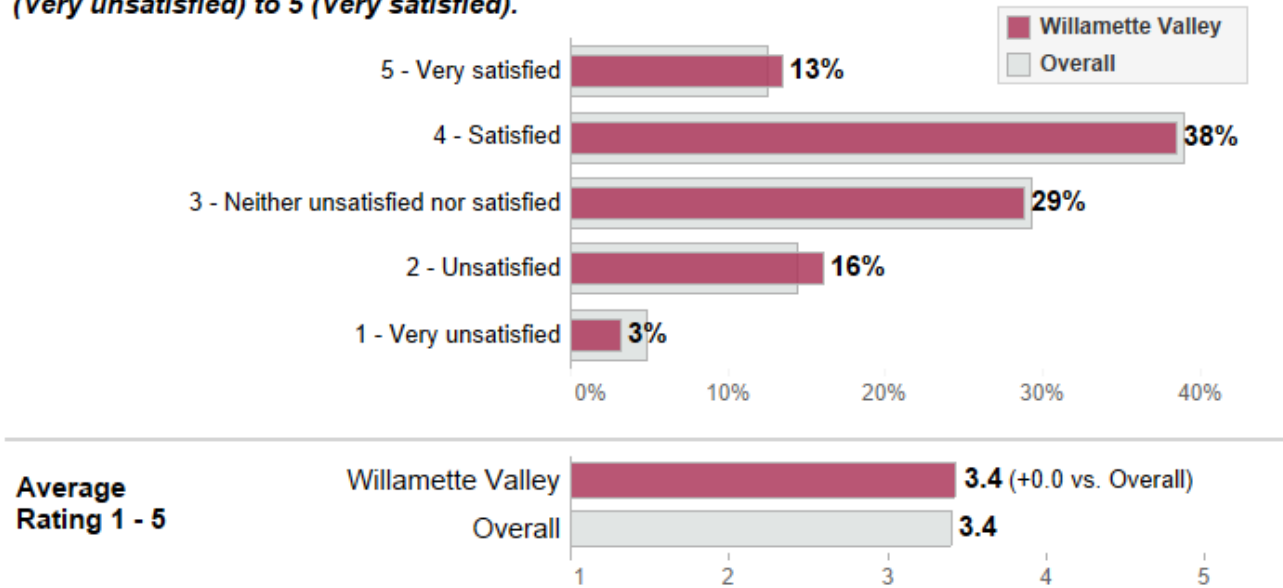


Respondents were also asked to characterize their satisfaction with the general direction of tourism development in Oregon. Note that “tourism development” refers to overall tourism development in Oregon. The following definition was provided to survey respondents: “Tourism development refers to the 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 Willamette Valley, the results were very similar: among both samples the average rating was 3.4.

## 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.”

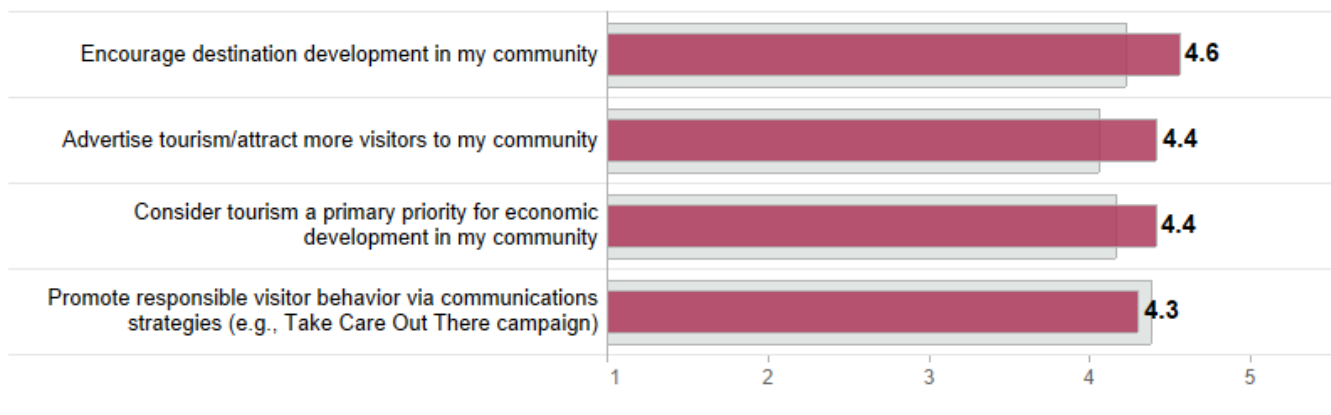
Both overall and in the Willamette Valley, a majority of respondents agreed or strongly agreed with each statement related to their support for tourism development, considering tourism as a primary priority for economic development, encouraging tourism development in their community, and promoting responsible visitor behavior. The statement with the greatest support among the overall sample was, "I believe Oregon should promote responsible visitor behavior via communications strategies" with an average rating of 4.4 on a five-point scale. In the Willamette Valley, however, there was greater support for statements related to how Oregon should encourage tourism development, advertise tourism in order to attract more visitors, and consider tourism a priority for economic development.

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 in the Willamette Valley, respondents were most in agreement that they are comfortable collaborating with groups of varying size and backgrounds to make positive changes in the tourism industry and least in agreement that they are able to lobby legislators and policy makers to create positive change within the industry. The patterns of support for the statements were similar between the overall and the Willamette Valley.

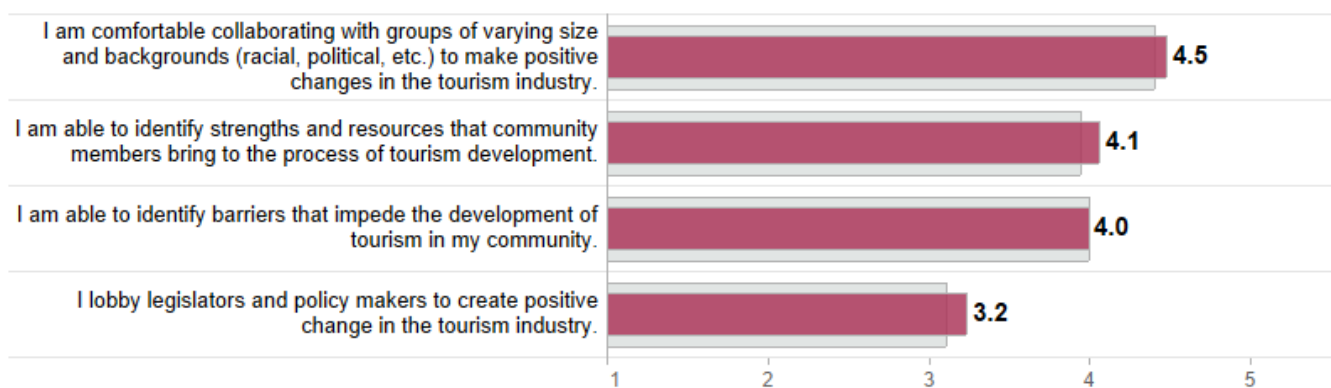
## Tourism Development in Oregon



**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).**





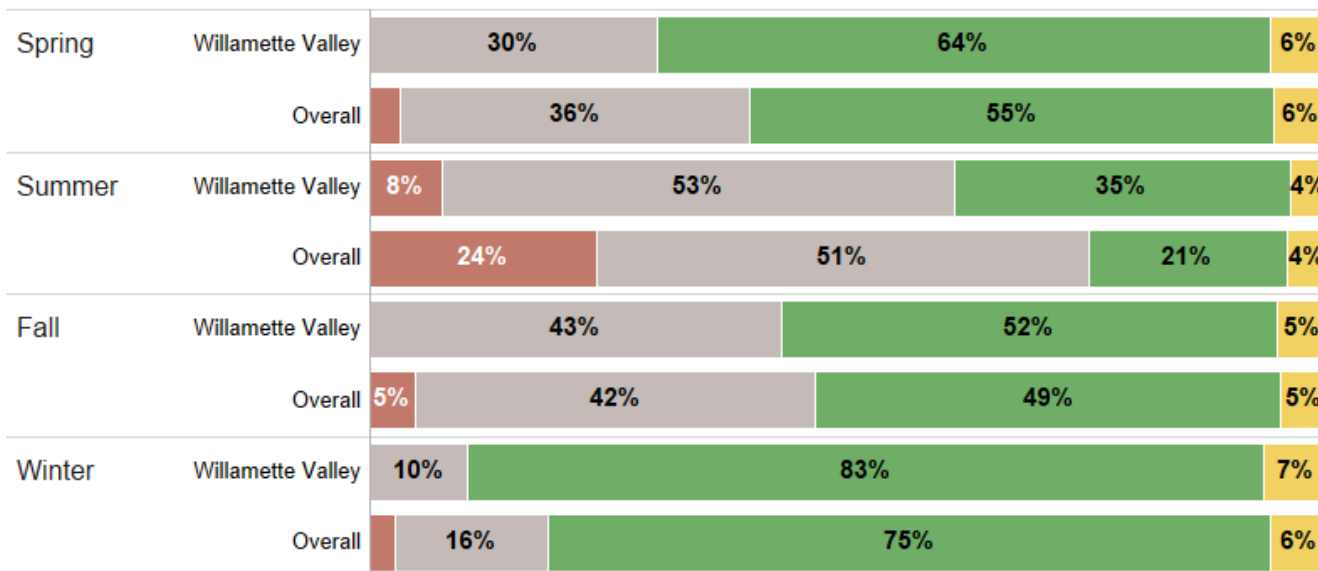
Respondents were asked to characterize the number of visitors their community receives during each of the four seasons. Overall, 3% of respondents said there were too many visitors in the spring, followed by 24% in summer, 5% in fall and 3% in winter. In each season, Willamette Valley respondents were less likely to respond that visitation levels were too high, indicating that they are either not experiencing or are handling the visitation pressures better than other regions.

## 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 Willamette Valley considered as strengths in their community were outdoor recreation opportunities (59%), food and beverage (55%), and agritourism (40%). In comparison to the overall responses, respondents in the Willamette Valley region were less likely to identify outdoor recreation opportunities as strengths and more likely to identify food and beverage and agritourism. A greater share in the Willamette Valley also identified safe environment for travelers and Main Street as strengths.

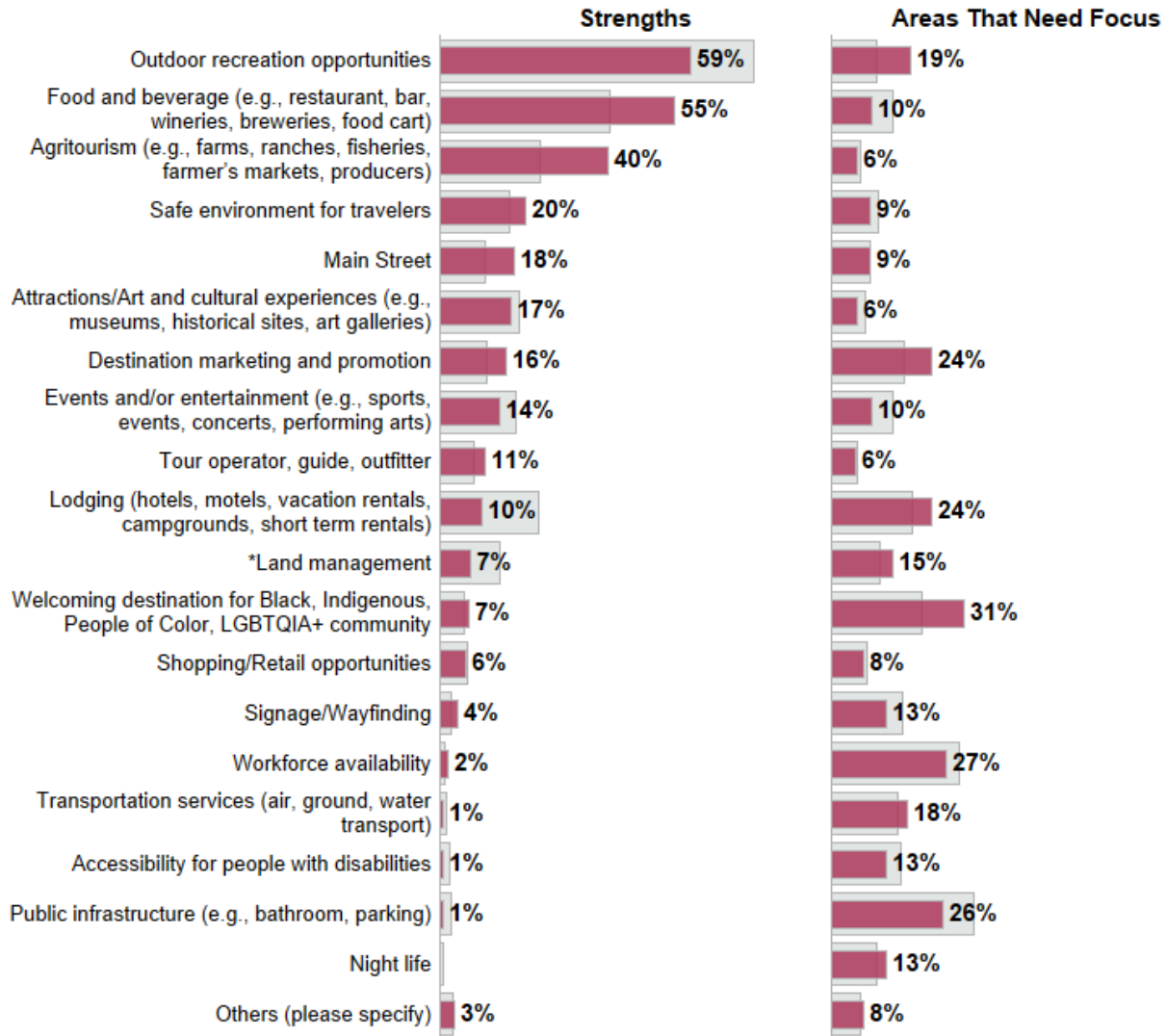
The top three areas that the Willamette Valley respondents said their community needs to focus on to improve residents' and visitors' experiences were being a welcoming destination for Black, Indigenous, People of Color, LGBTQIA+ community (31%), workforce availability (27%), and public infrastructure (e.g., bathroom, parking) (26%). It's worth noting that when looking at the results for the overall survey population, the top three areas were different, with 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

■ Willamette Valley  
■ 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 Willamette Valley region identified as high risks were lack of affordable housing (46%), houselessness (44%), and wildfires (32%). The percentage of respondents who rated lack of affordable housing as a high risk was higher among the overall respondents (65%) compared to those in the Willamette Valley (46%). Additionally, a high share of respondents, both overall and in the Willamette Valley, indicated that an economic downturn was a risk (86% responding high or medium risk in the Willamette Valley).

## 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

Lack of affordable housing	Willamette Valley	46%	38%	16%
	Overall	65%	24%	10%
Houselessness	Willamette Valley	44%	31%	25%
	Overall	42%	33%	25%
Wildfires	Willamette Valley	32%	45%	23%
	Overall	33%	35%	32%
Economic downturn	Willamette Valley	31%	55%	14%
	Overall	33%	50%	17%
Overburdened public resources	Willamette Valley	20%	39%	41%
	Overall	33%	35%	32%
Increasing negative visitor perception	Willamette Valley	18%	42%	41%
	Overall	22%	40%	39%
Community violence and crime	Willamette Valley	15%	39%	46%
	Overall	13%	30%	57%
Drought	Willamette Valley	14%	32%	54%
	Overall	18%	29%	54%
Global pandemic or other health concerns	Willamette Valley	14%	34%	52%
	Overall	15%	36%	49%
Increasing negative resident sentiment towards visitors	Willamette Valley	14%	39%	47%
	Overall	25%	42%	33%
Flooding	Willamette Valley	24%	73%	
	Overall	7%	27%	66%
Other	Willamette Valley	42%	23%	35%
	Overall	45%	19%	35%

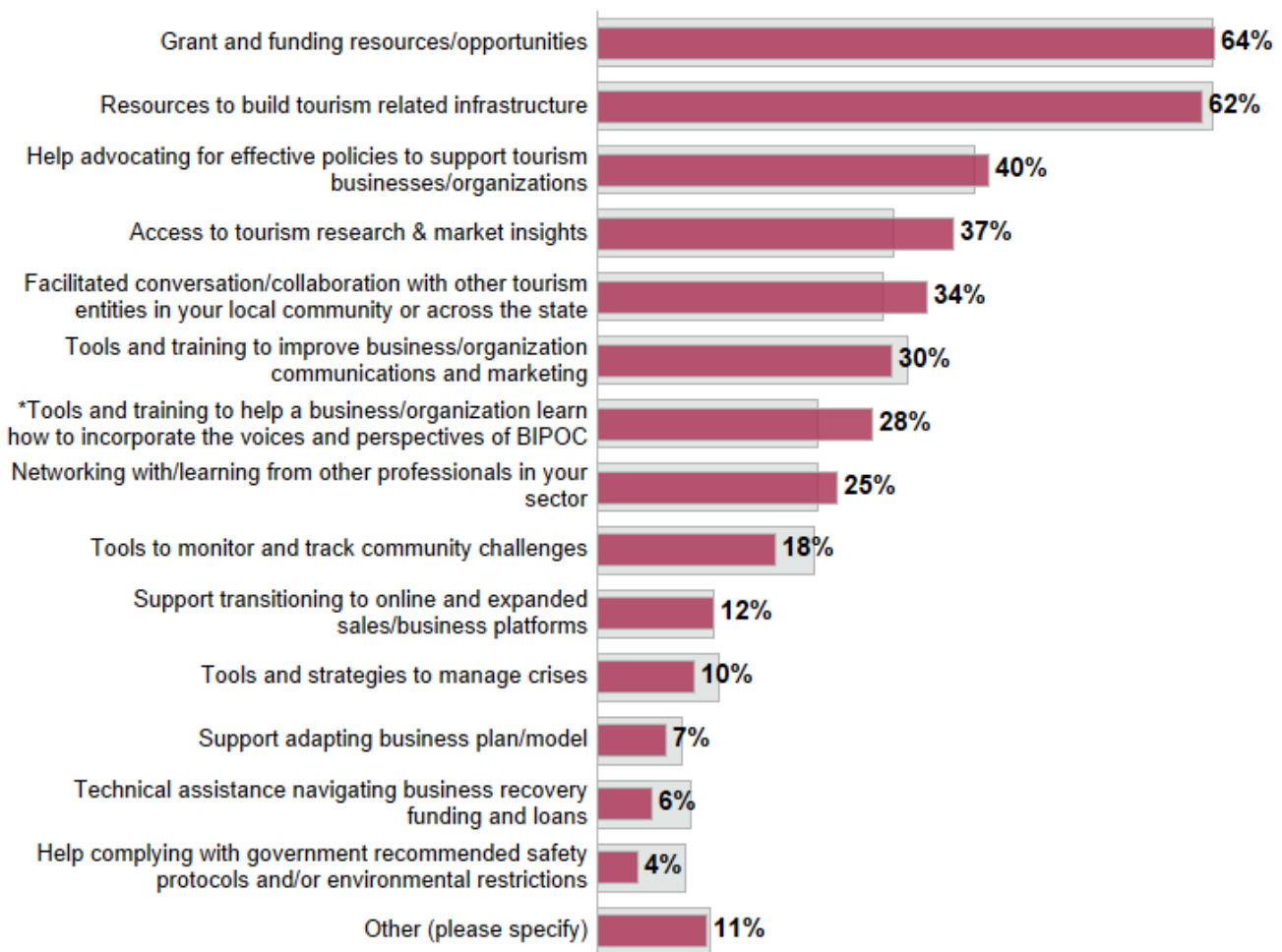
\*Categories sorted in descending order by the percent of Willamette Valley respondents selecting "High risk."

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 Willamette Valley: grant and funding resources/opportunities (64% among respondents overall and 64% among respondents in the Willamette Valley) and resources to build tourism related infrastructure (64% among respondents overall and 62% among respondents in the Willamette Valley). Support adapting business plan, technical assistance navigating business recovery funding and loans, and help complying with government recommended safety protocols and/or environmental restrictions are not considered by many to be among the top five resources/programs that would be of assistance.

## 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 with 50% and 44% of overall and Willamette Valley respondents identifying them among their top-two highest priorities.

## 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

	Willamette Valley		Overall
Grant and funding resources/opportunities	26%	24%	50%
Resources to build tourism related infrastructure	26%	18%	44%
Help advocating for effective policies to support tourism businesses/organizations	7%	14%	21%
Tools and training to improve business/organization communications and marketing	6%	8%	14%
Access to tourism research & market insights	7%	6%	13%
Tools and training to help a business/organization learn how to incorporate the voices and perspectives of BIPOC communities	7%		11%
Facilitated conversation/collaboration with other tourism entities in your local community or across the state	7%		10%
Tools to monitor and track community challenges			8%
Networking with/learning from other professionals in your sector			6%
Support transitioning to online and expanded sales/business platforms			5%
Technical assistance navigating business recovery funding and loans			4%
Tools and strategies to manage crises			3%
Help complying with government recommended safety protocols and/or environmental restrictions			1%
Support adapting business plan/model			1%
Other	7%		10%

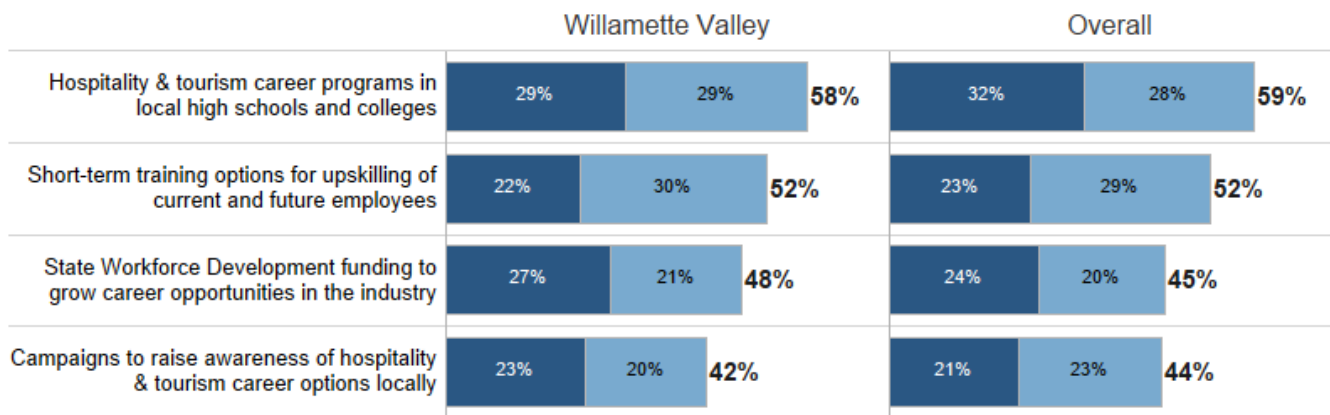
In order to rebuild the local workforce, the survey asked respondents to rank educational and career opportunities from highest to lowest priority in order to develop, attract and retain the local workforce to the industry. The following figure shows the share of respondents that rated each category among their top-two highest priorities. Overall, "Hospitality & tourism career programs in local high schools and colleges" was the most popular strategy (59% overall and 58% in the Willamette Valley), followed by "Short-term training options for upskilling of current and future employees" (52% overall and in the Willamette Valley).

## 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

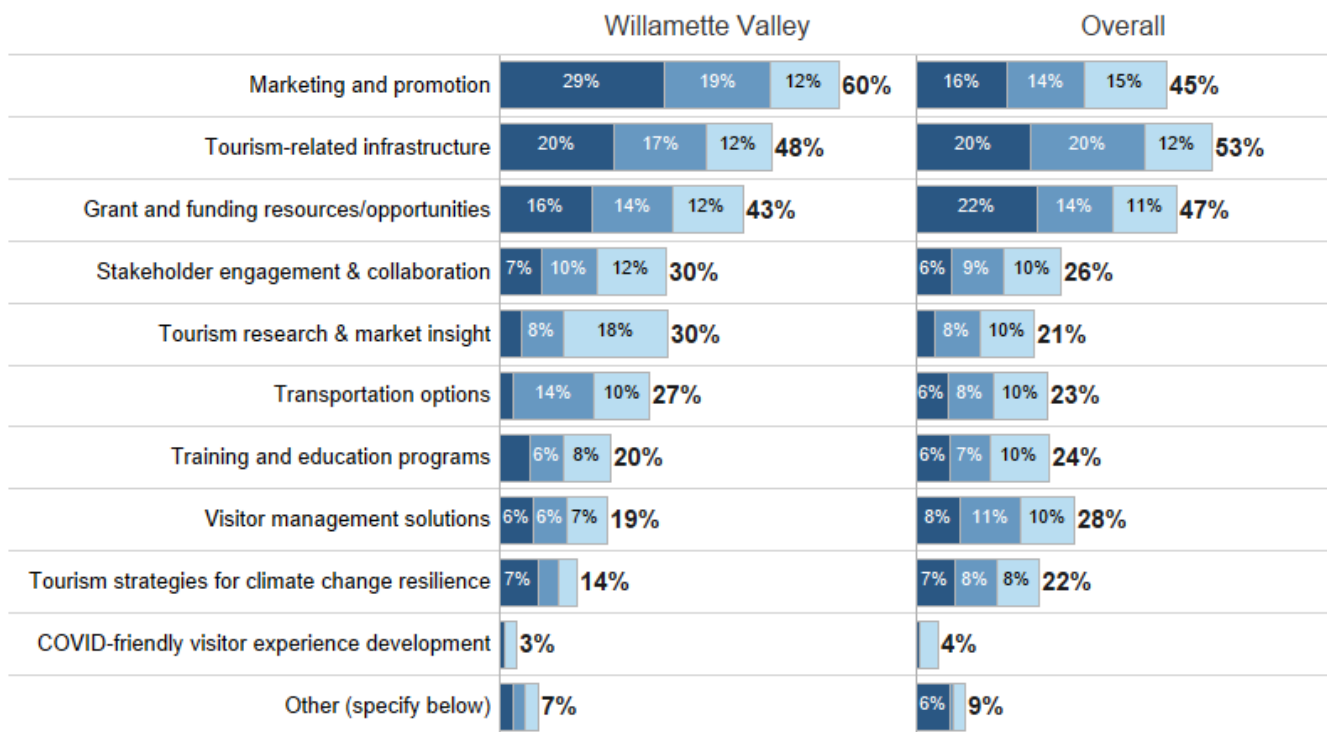




As in prior iterations of the Oregon Tourism Industry Stakeholder Survey, respondents were asked to identify the three areas that should be emphasized for tourism planning over the next 2-5 years. Overall, tourism-related infrastructure emerged as the top priority with 20% of respondents identifying 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. Willamette Valley respondents, however, were more likely to favor marketing and promotion with 60% identifying it among their top-three priorities. Although not a favored priority, Willamette Valley respondents were also less likely to identify visitor management solutions as a priority (19% vs. 28% 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



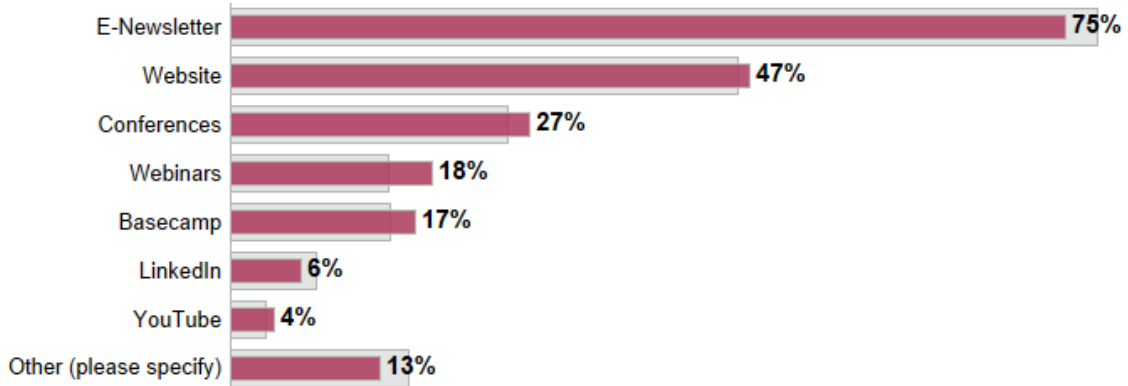
## INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Seventy-five percent of Willamette Valley respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter (75%), followed by website (47%). By a large margin, e-newsletters are considered the best way for respondents to receive information.

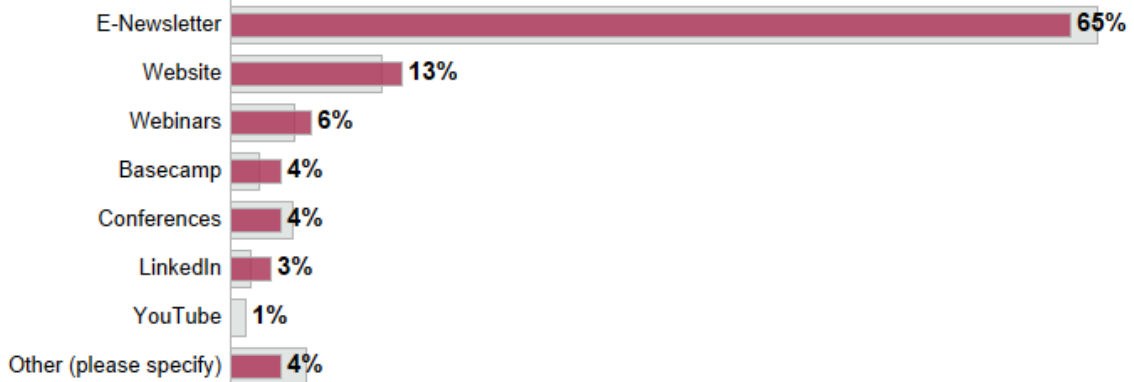
### Communications



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



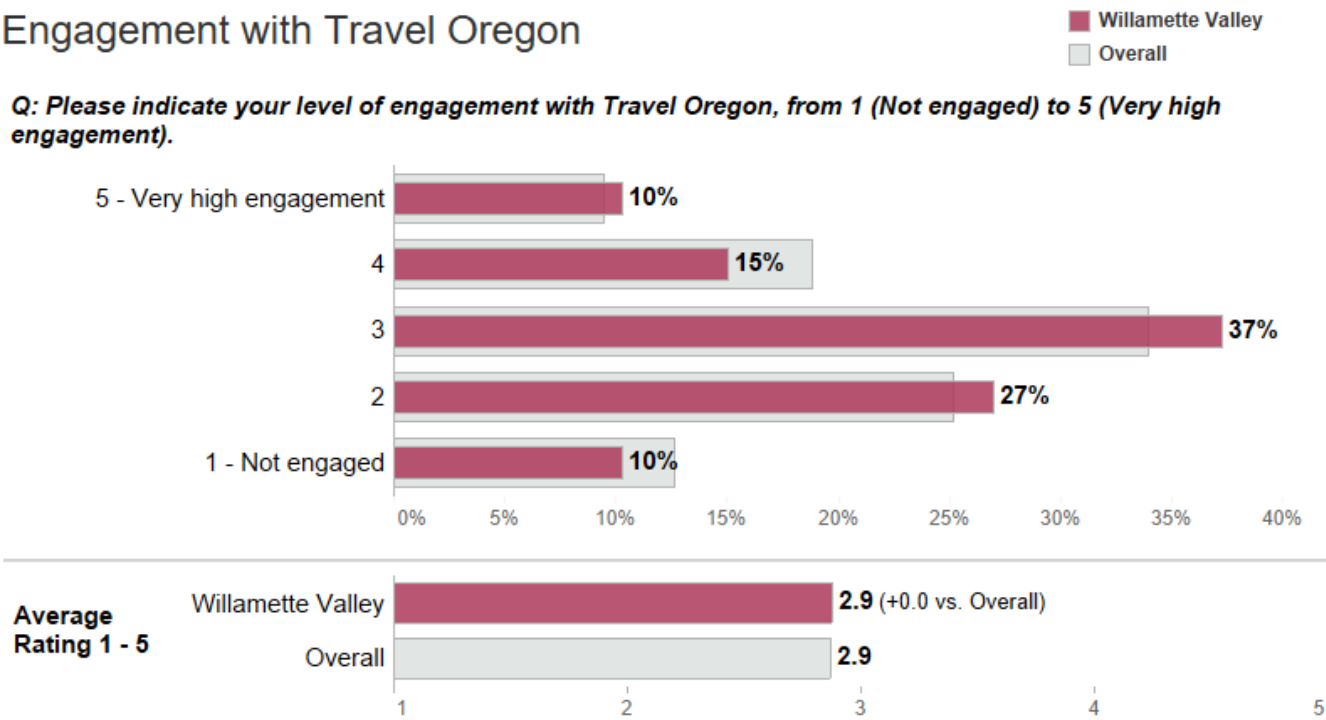
**Q: What is the best way for you to receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization?**



Respondents were asked to rate their engagement with Travel Oregon, from 1 (not engaged) to 5 (very high engagement). Twenty-five percent of respondents in the Willamette Valley rated this question a 4 or 5, compared to 28% in the overall sample. The average rating was the same overall and among respondents in the Willamette Valley at 2.9.

### Engagement with Travel Oregon

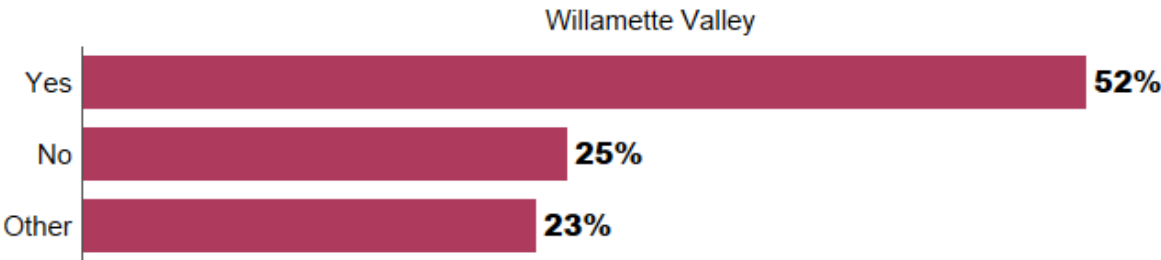
**Q: Please indicate your level of engagement with Travel Oregon, from 1 (Not engaged) to 5 (Very high engagement).**



### WILLAMETTE VALLEY QUESTIONS

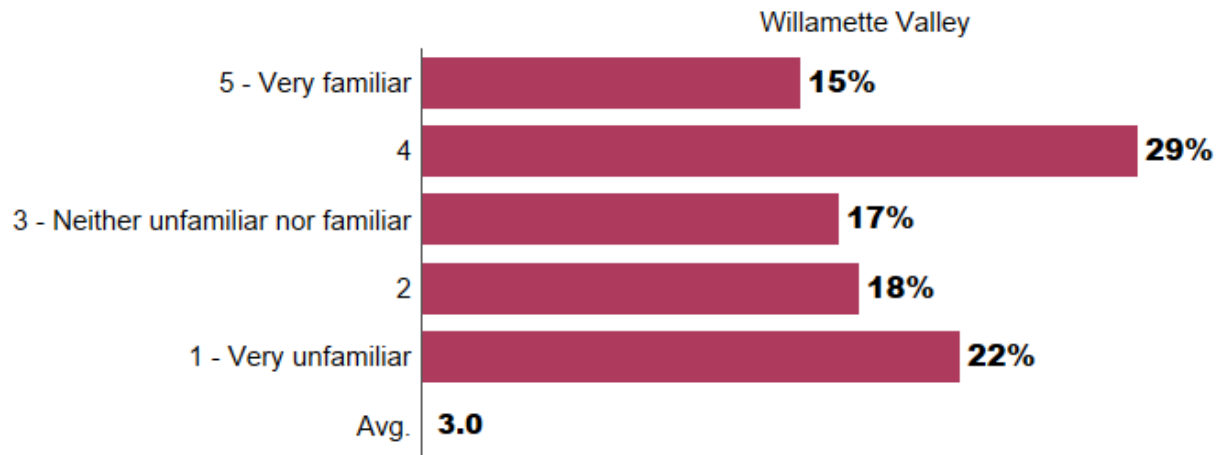
Each region had the opportunity to ask a series of custom questions of specific interest to their stakeholders. The findings from these custom questions are presented below. Responses to regional questions that were open-ended are presented in the open-ended response appendix.

**Q: Do you feel that current marketing efforts from your regional DMO, Willamette Valley Visitors Association (WVVA), are inclusive and representative of Willamette Valley communities?**



Source: 2023 Oregon Tourism Stakeholder Survey

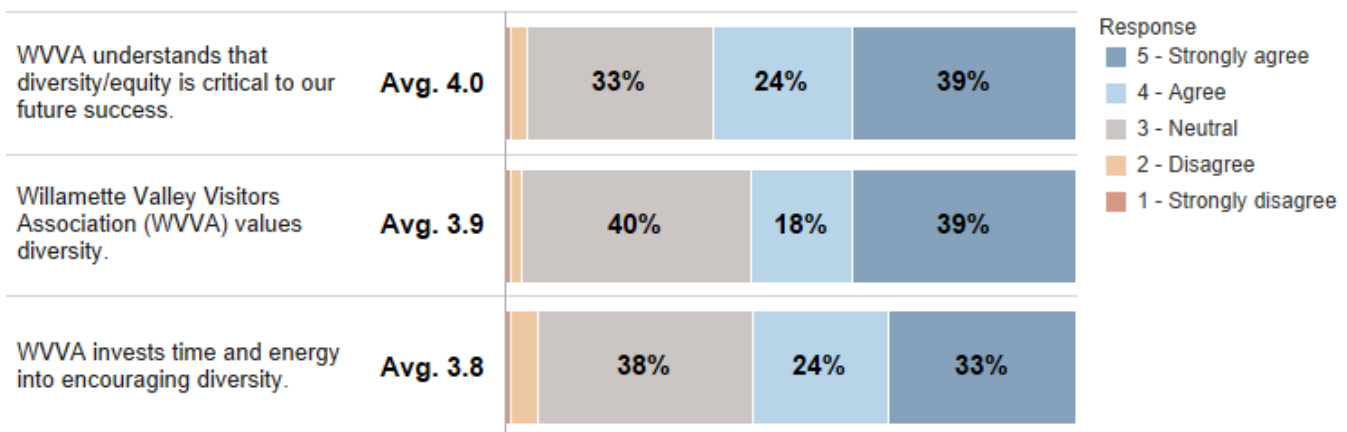
**Q: How familiar are you with the concept of regenerative tourism?**



Source: 2023 Oregon Tourism Stakeholder Survey

**Q: How would you rate your agreement with the statements below, on a scale from 1 (Strongly disagree) to 5 (Strongly agree)?**

**\*Respondents familiar with the WVVA only**



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

## OPEN-ENDED RESPONSES

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

- In a few words, please explain your rating above (Do you feel that current marketing efforts from your regional DMO, Willamette Valley Visitors Association (WVVA), are inclusive and representative of Willamette Valley communities?)*
- Describe what you know about regenerative tourism.*

Note that responses are presented in the respondents' own words with no editing, spelling, or punctuation changes. The opinions expressed are the respondents' own and do not reflect the opinions

of Travel Oregon. All other open-ended responses are viewable in a spreadsheet format or in an online dashboard format with accompanying word clouds and bar charts.

**Q32: In a few words, please explain your rating above (Do you feel that current marketing efforts from your regional DMO, Willamette Valley Visitors Association (WVVA), are inclusive and representative of Willamette Valley communities?)**

**99% of local (Salem) people say they've never been to the backcountry of Silver Falls State Park, where we are located.**

**Ample opportunity for all members and locals to be heard, communication and availability from WVVA is amazing.**

**Could be better but it is also up to us to ensure they are getting our information.**

**don't know**

**Don't even know what Willamette Valley Visitors Association is. Is that Travel Salem?**

**Dundee is not represented nearly enough, even though we are a main destination... way too much \$\$\$ is given to Salem and surrounding areas**

**Education and research are being undertaken. There's a lot of work to do but there are strong attempts.**

**Great team of people! Wonderful discussions and very open to hearing from others. Always enjoy speaking with Travel Oregon and other!**

**Had not considered involvement with the organization.**

**Honestly, I've lost track of what they are doing since 2020. Seems like they are super quiet these days.**

**I am confident in their proactive work in this area.**

**I didn't even know it existed**

**I don't have a clue what the WVVA does or if it is at all relevant.**

**I don't know either way.**

**I don't see much from them at all.**

**I don't see much, maybe I am on the wrong channels, or because I'm in Oregon, but I don't see much for the area.**

**I don't think WVVA has a vision and action plan that correctly and completely understands and includes the Willamette Valley wine industry.**

**I enjoy seeing small businesses highlighted and reading about their journeys.**

**I feel like i am not directly invited to participate in events/show or marketing opportunities I do not know about. Most of the focus is on the winery's.**

**I feel like the outlying areas of Albany are not given as much attention**

**I feel marketing efforts are inclusive as they can be. I would highly encourage a look at a regional focus on development rather than marketing**

**I feel that they reach out to partners often and make sure various stakeholders are heard and represented**

**I feel the efforts fall way short of where we are at in the Westfir/Oakridge area.**

**I find the RDMOs very responsive and thoughtful in their marketing efforts.**

**I haven't seen any.**

**I think the material is inclusive and representative. But I do not know if it is successfully reaching diverse audiences.**

I think the resources/information are helpful including the information on the Travel Oregon website, social media channels, etc.
I think the WVVA is doing a good job, so, technically yes, but they could be stronger. De-prioritizing wine is a benefit, but the pendulum has swung too far in the opposite direction, and visitation in the region is down double digits, which is frightening.
I think they try to be inclusive, but being representative is a challenge based upon the distinct differences in the various communities
I think Travel Lane County is more involved with us locally
I think we can do a lot more to be inclusive of other businesses and local communities.
I work for a state agency
I would rate WVVA as 50% representative of WV communities. They need to diversify their areas of focus to include the Albany (Linn County) and Corvallis (Benton County) area more.
If you are a larger business I feel there is a lot of support in their marketing department. Small businesses that can't afford the larger payments to advertise are not represented even though we support the area.
I'm not familiar with WVVA's efforts
I'm not fully informed enough to answer
I'm not really sure what those efforts are.
I'm not sure what they are always doing... haven't had time to keep up with COVID, but know that local Visit Corvallis has done all they could to help get \$\$ our way.
Inclusive and diverse, they have always done a great job.
McMinnville seems to get the lions share
Mixed. I feel like the represent my organization well, but does not represent the diversity in the WV overall.
Not aware of what the marketing efforts have been
Not sure.
Not totally. I think the Linn-Benton-Lincoln area gets much less attention than the south valley and certainly less than wine country.
Our business has benefited from the DMO and we appreciate their help.
Our DMO is siloed to Salem, and their slogan is unpopular with the rest of our constituents. Agritourism in north/south Marion County isn't really being captured, wildfire recovery in the North Santiam Canyon isn't being supported.
Our local DMO has been very active throughout the pandemic in assisting local businesses and in bringing tourism back to our area.
Plenty of inclusion and outreach has occurred.
Results speak for themselves.
Some communities are emphasized, others would like to be featured more.
The challenge in the wine industry is that wine region boundaries (Willamette Valley AVA) don't synch with tourism boundaries (Willamette Valley Tourism)
The current structure of the organization leads to DMO's and partners having no voice, very limited communication unless you on the cool kids list. Current leadership spends time that only benefits a part of the community not the whole.



<b>The people that are most involved in the tourism industry get the most press, publicity and support. Just because a business or organization isn't intimately involved with Travel Oregon or other DMO's, doesn't mean that their efforts or business isn't important or need support.</b>
<b>The Willamette Valley covers such a broad range of destinations, that the Mid-Willamette Valley sometimes gets lost with the wine culture in McMinnville and the happenings in Eugene.</b>
<b>The Willamette Valley does not have an RDMO that represents all communities - they are focused on Salem, McMinnville, and Newberg and all three of those entities compete against each other, to the detriment of themselves and those unrepresented outside their communities.</b>
<b>There is a strong focus on wine and the Willamette valley is much more than wine.</b>
<b>There needs to be much more coordination between Travel Oregon and the wine industry.</b>
<b>they are trying to include rural areas like the mid willamette food trail</b>
<b>They are not getting the economic support that is directly proportional to the fees collected and the associated tourism economic value the region generates.</b>
<b>They are very inclusive and representative. However, the bigger issue is that the WV is experiencing a significant decline in out of town visitors to WV tasting rooms. What is urgently needed are campaigns for both residents for day trips and out of town visitors,</b>
<b>They aren't visible and seldom see anything they're doing. I didn't even know they existed until last week and was disappointed to find out that they aren't doing more to support small towns like Carlton.</b>
<b>They do a nice job promoting the valley</b>
<b>They focus mostly on specific communities while not promoting others.</b>
<b>Travel Oregon and Travel Salem have a great presence in the region and do a superb job of highlighting regional events and businesses.</b>
<b>Visit McMinnville does great work locally and for the region working hard to build connections between organizations. WVVA represents the region well.</b>
<b>We clearly have a very long way to go with engaging BIPOC communities, visitors, and tourism providers but WVVA has not shied away from this.</b>
<b>We have conversation, active listening and engagement</b>
<b>We haven't been addressed as a community</b>
<b>What have they done? I don't see a improvement.</b>
<b>Wine Regions are organized by American Viticultural Areas, which tend to overlap counties and boundaries that don't align with other DMOs</b>
<b>WVVA continues to strive for inclusivity. Everyone can work to do better, WVVA has made concerted efforts to reach out to partners and stakeholders to represent our area and what we have to offer to visitors.</b>
<b>WVVA does an incredible job of representing us. Their staff are incredible and representative of the bipoc members of our community. They work hard, creatively and with incredible understanding. We love them.</b>
<b>WVVA doesn't seem engaged in the smaller communities outside of the 5 corridor.</b>
<b>WVVA doesn't seem to do much in my area</b>

WVVA is doing a great job of inclusion and representation, but Travel Salem offers little collaboration beyond its city borders
WVVA is great at being inclusive and does the best they can with the resources they have. However, marketing isn't always the best use of their funds and they are too limited in the support they are able to give communities due to the rules of the RCTP program (percentage spent on staff, rigid programming, etc).
WVVA does a great job promoting WV as a tourist destination and attracts out of state visitors. They offer a platform for location business to promote themselves to tourists
Yes in some aspects (especially in the larger cities), but coverage/promotion of rural areas and smaller towns is lacking
Yes, and the desire for continued partnerships and collaboration is impressive.

<b>Q34: Describe what you know about regenerative tourism.</b>
"Regenerative" tourism is when visitors travel with a mindset to leave a destination better than it was before they arrived, and experiences go beyond a traditional vacation
A step beyond sustainability - leaving a place better than you found it
Boy Scout pack it in, pack it out: leave it as good or better than before
Brings not just economic value from tourism dollars but provides a range of benefits that improve the core of the host community through engaged, deliberate visitation.
Concept of leaving a place that you visit better than when you go there. Getting involved with a cause or program to "do something to feel good and make a difference" in a place. In some form of what missionaries essentially did.
From newsletter
Have not heard the term
I am a part of the WVVA taskforce on regenerative tourism so a lot.
I have a consulting side gig for regenerative tourism, and get paid for my time to explain.
I know it is a term to describe tourism efforts that are regenerative in nature whether that be for the ecology or economy
I know it is important for the future of our destination
I know nothing as of now.
I know this is something WVVA has been working on and the premise is around environmental sustainability and longevity, but I'm not sure what it entails beyond that.
I know what the term regenerative agriculture is trying to achieve, but I am not clear what that adjective means with regard to tourism
Including tourists in the regenerative process of the local surroundings.
Intuitively to me, it sounds like the ability for our community and tourism sector to retain customers and have them visit year after year.
it is rooted in sustainability and respect
It gives back to the location/community instead of taking away.
It is both customer and host awareness of the need to protect natural and economic resources for the future. Besides sustainability, it focus on both short and long term strategies

It provides opportunities for participants to give back to an area through service while also enjoying a leisure experience
its the new sustainable tourism with an emphasis on making our communities better and healing areas that are visited by tourists
leaving a travel destination better than you found it
Leaving a place better than you found it. I've done this when travelling to third-world countries. I don't know that it's a priority in the WV.
Leaving the location you visit better than it was before you arrived. Leave no trace, CSR's, etc.
My area of focus is wildfire impacted. There is a real need to incorporate more opportunities in regenerative tourism on public lands.
Niche programs, keeping in mind the environment, community needs
No expert but I understand the general concept.
No MOOP, and leave your space looking better than when you arrived.
Nothing
pilots have not been an economic success, nor highly patronized, but everyone likes the concept. It will eventually catch on, I think.
positive visitor experiences that lead to repeat visits or encouraging others to visit
Promoting tourism that is meaningful to visitors and leaves a light footprint on the areas they visit. Working to lessen overtourism in places it exists and prevent it in others. Recognizing the importance of the environment, culture and heritage of the community when developing visitor opportunities and marketing with this lens.
regenerative tourism would imply an ever improving network of destinations, community and customers, ideally this system would get better year after year growing from a strong foundation.
Regenerative tourism is a construction of independent activities, operating randomly from each other, that when considered as a whole represent a model of the environment. Timing and many other variables within activities will affect the state and outcome of other activities.
Regenerative tourism is a wholistic approach to travel that aims to enrich and nourish the local community of travel destinations through travel.
Regenerative tourism is the idea that tourism can provide a net benefit to those places where tourism occurs.
Regenerative tourism represents a sustainable way of travelling and discovering new places, also known as "Woke Traveling".
Regenerative tourism uses the visitor economy to add more to our communities than what it detracts. This is different for every community; some use programming to rebuild trails, some for marketing alternate tourism products to spread out visitation, some to solve outside problems that negatively impact hospitality businesses like housing or transportation.
Regenerative Tourism is about traveling in an intentional way to help restore and ultimately regenerate the environment around you. It could be travelling to an area devastated by a natural disaster to help rebuild the ecosystem.
repeat visitors?

<b>Sees humans as inherently a part of Nature and advocates human practices through tourism that nurture, conserve and sustain the environment while creating positive experiences for visitors, locals and tourist industry workers alike.</b>
<b>sustainable visitation</b>
<b>Sustainable tourism- respective the land and people</b>
<b>Taking care of the place so that it minimizes wear and tear and actually benefits the local resources</b>
<b>The concept of balancing out the impacts of tourism on destinations and leveraging it to make a community better.</b>
<b>The regenerative approach thinks of travel and tourism as a healing force and a change agent to revitalize human and natural ecosystems. Achieving such an ambitious objective requires a shift in our economic model and societal paradigms to evolve from seeking "sustainable" growth in volume to pursuing a more qualitative development that fosters human health and wellbeing through ecosystems' health.</b>
<b>tourism which improves the location people visit-like regenerative farming- increasing sustainability instead of degrading it</b>
<b>Tourism that's environmentally responsible</b>
<b>Tourists know and make efforts to leave the attractions they visit either better than it was when they visited or to do no harm.</b>
<b>travel with a view towards positive impacts rather than negative impacts, in environment and people</b>
<b>Travel makes the location of travel better, meaning those who visit the area spend \$\$ locally.</b>
<b>traveler mindset to leave a place better than found and/or focus on deeper connection to place through lens of sustainability, cultural awareness, &amp; environmental stewardship</b>
<b>Travelers give back in some way, making the place they are visiting better.</b>
<b>Use tourism as a way to drive positive changes within ecosystems communities</b>
<b>Visitor should be encouraged to leave a destination in better condition than it was before or at least cause no further problems.</b>
<b>Visitors have a positive impact on tourism, leaving the place they visited better than when they came.</b>
<b>Visitors participate in behaviors and activities that leave a destination better than it was before they arrived. WVVA has been working in this space with its Willamette River trips and the fire-impacted areas of the Mackenzie River.</b>
<b>visits create virtuous cycle, not drawing resources, but replenishing them and adding to them when done right.</b>
<b>We have a lot of volunteers that don't live in the Santiam Canyon, but they visit to do projects and help restore properties and recreation sites. This directly helps with the recovery and will build the recreation for future visitors.</b>
<b>We practice regenerative agriculture, so it would make sense that regenerative tourism has a positive impact on the environment and isn't reliant on fossil fuels. I suppose a rodeo would not be regenerative tourism whereas a community garden day would be.</b>
<b>when tourists have awareness of the impact each has while taking part of tourism activities such that they leave the area better than how they found it, reduce the carbon footprint, etc.</b>

**Where visitors are thoughtful and aware of how they are impacting the area they're visiting. Hopefully adding to the nature, culture, etc. and not taking away or harming it. Also, ensuring the asset is available and in pristine condition for future generations.**