



**TRAVEL OREGON**

TRAVEL OREGON & OREGON  
WILDFIRE IMPACTS – 2017 & 2018

July 2019

# PRIMARY OBJECTIVES

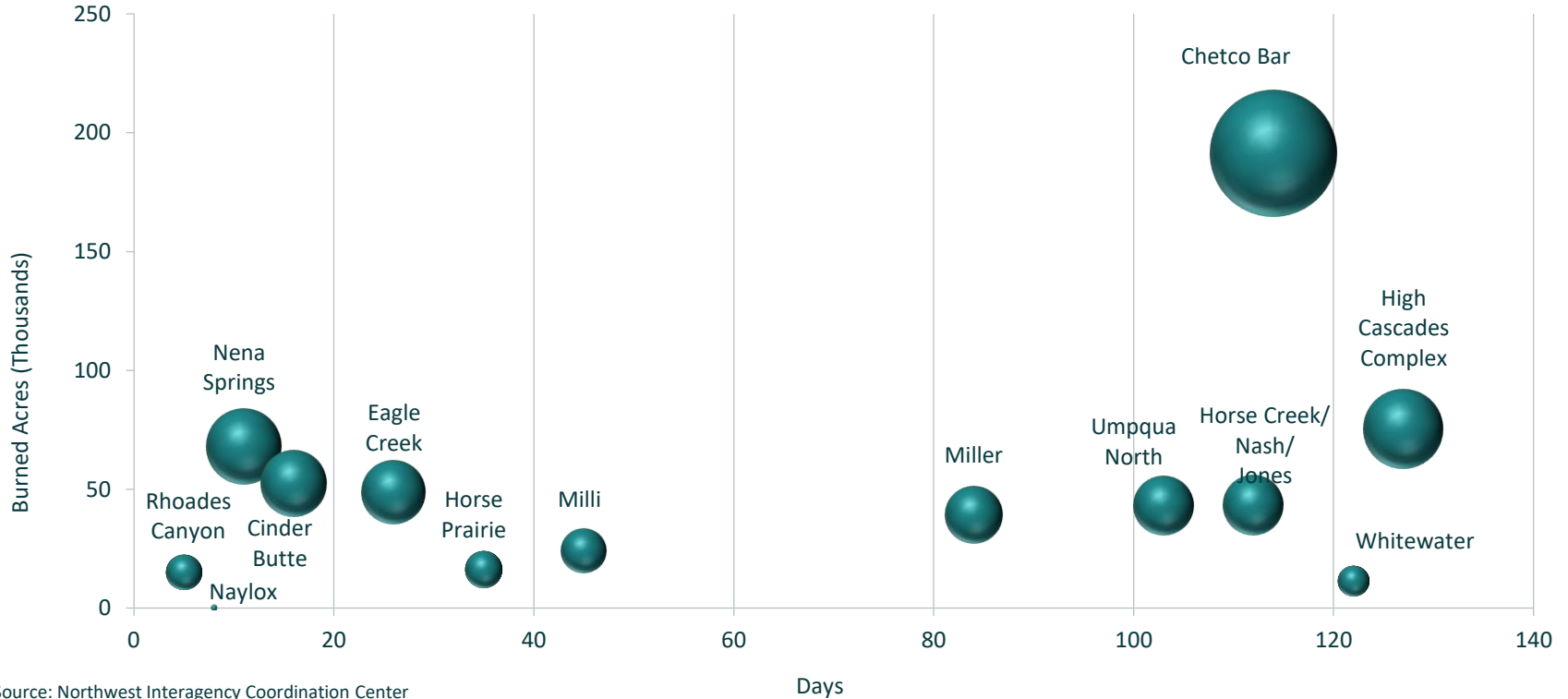
- Introduce Travel Oregon
- 2017 wildfire economic impact study results
- 2018 visitor perception study results
- Travel Oregon's wildfire response: before, during, after

# TRAVEL OREGON

- Semi-independent state agency
- Communication with agencies, visitors and industry partners
- Conduct research to measure impact on industry
- Work with tourism industry leaders to drive visitors to areas impacted by wildfire

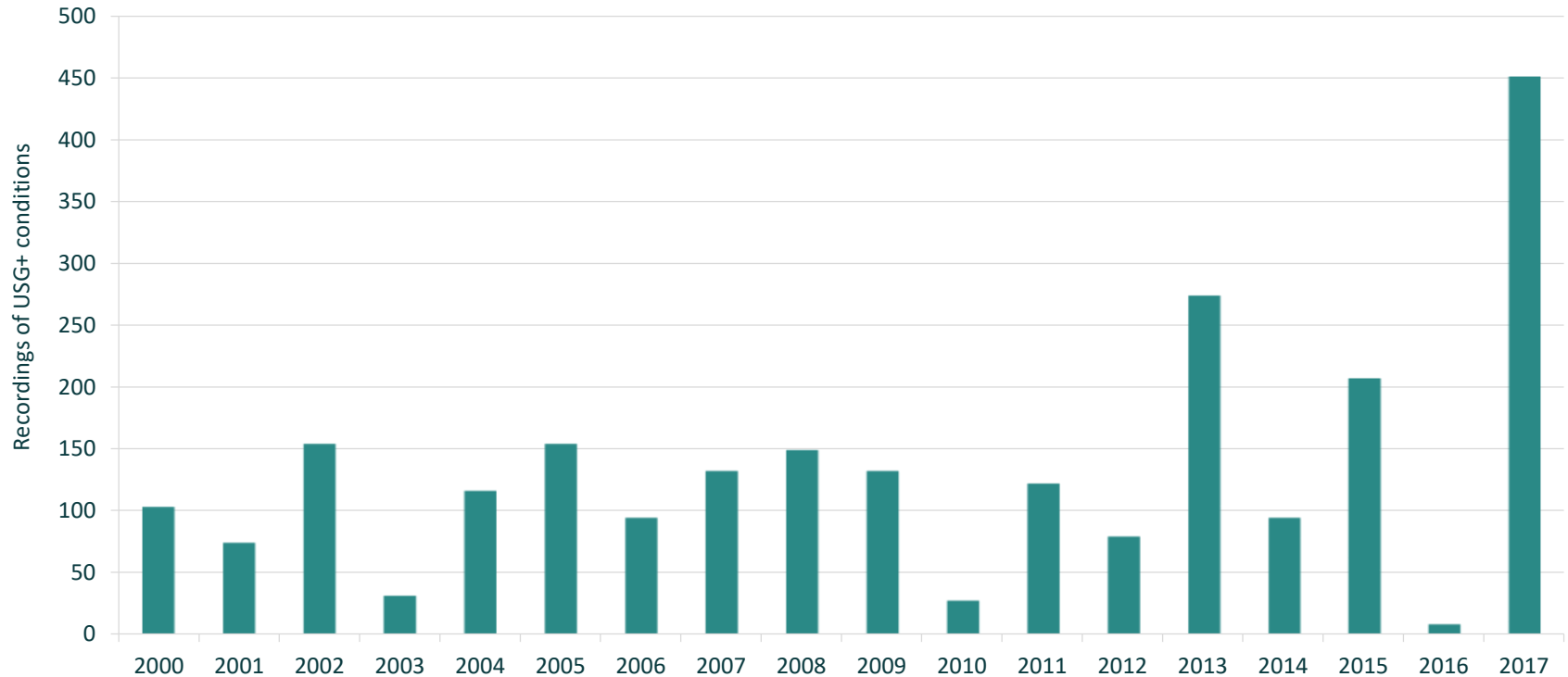


# SELECTED WILDFIRES IN OREGON 2017



Source: Northwest Interagency Coordination Center

# AIR QUALITY READINGS OF USG\* OR GREATER STATEWIDE, 2000—2017

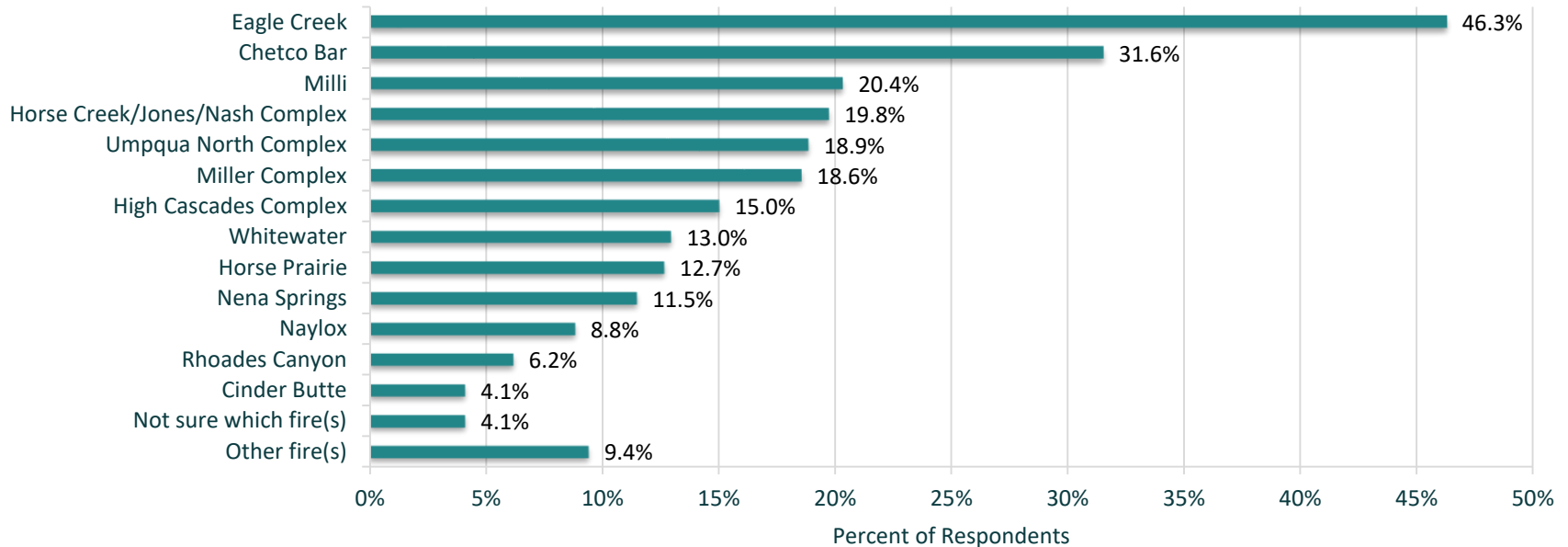


\*Unhealthy for Sensitive Groups

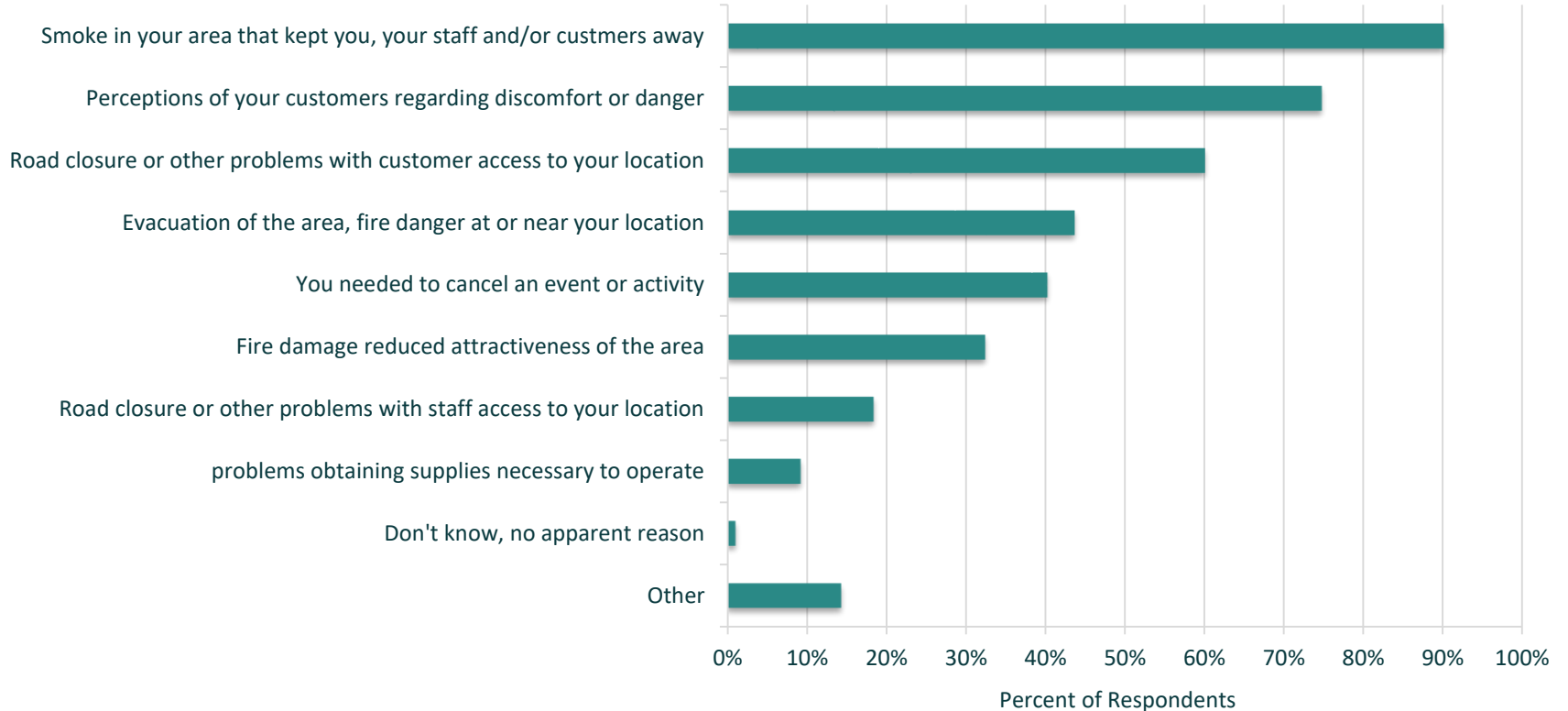
Source: Environmental Protection Agency

# DAMAGING FIRE RESPONDENT PERCEPTION

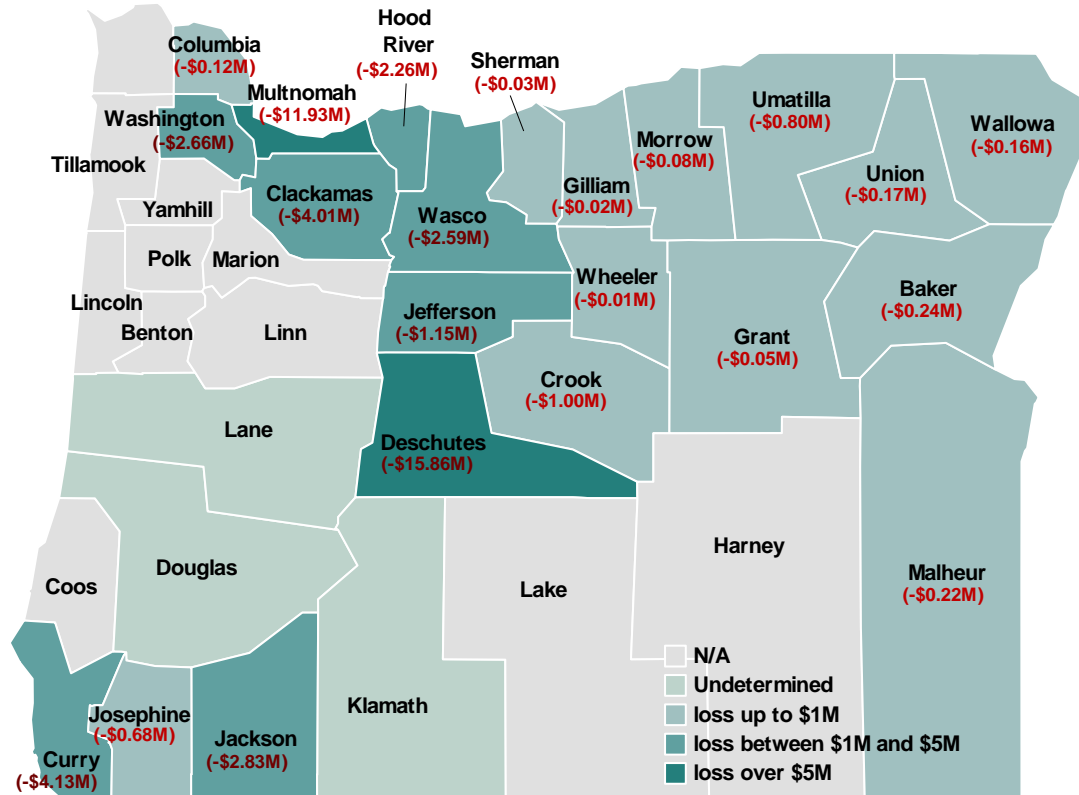
*Which 2017 Oregon wildfires had an impact on your business or organization's operations/performance?*



# REVENUE LOSS DUE TO FIRE PERCEIVED CAUSE



# WILDFIRE RELATED VISITOR SPENDING LOSS 2017 BY COUNTY, TOTAL = \$51.1 MILLION



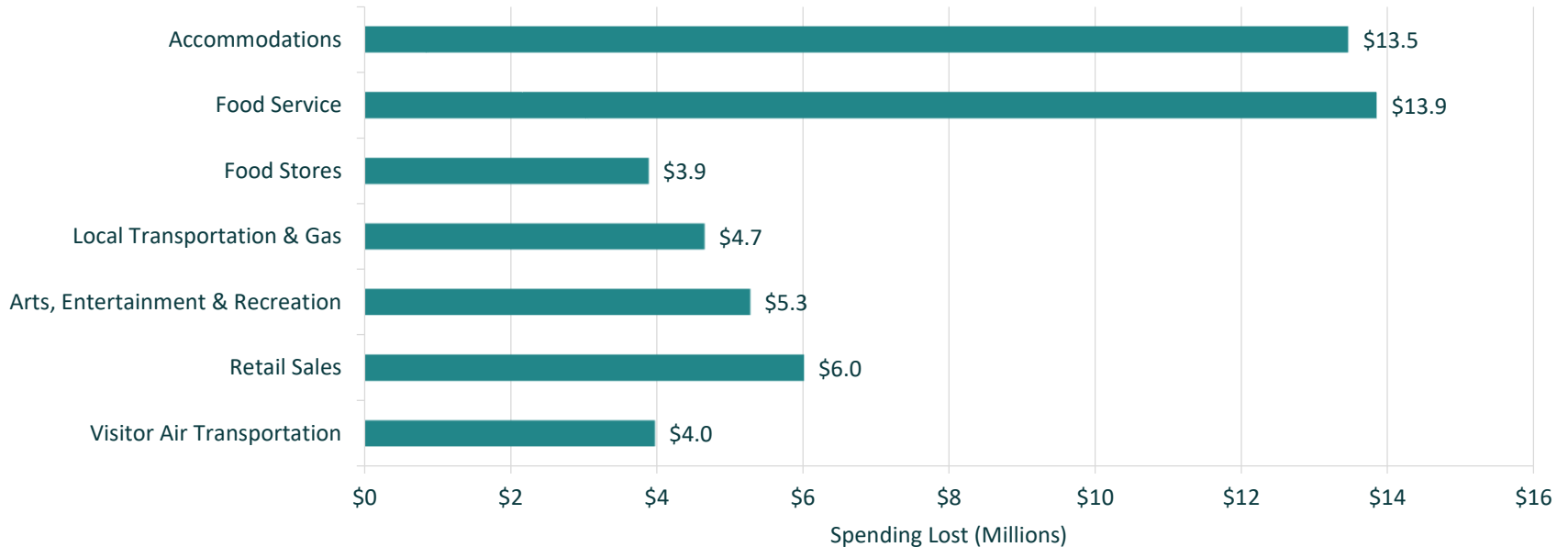
Source: Dean Runyan Associates



# OREGON WILDFIRE TRAVEL IMPACT, 2017

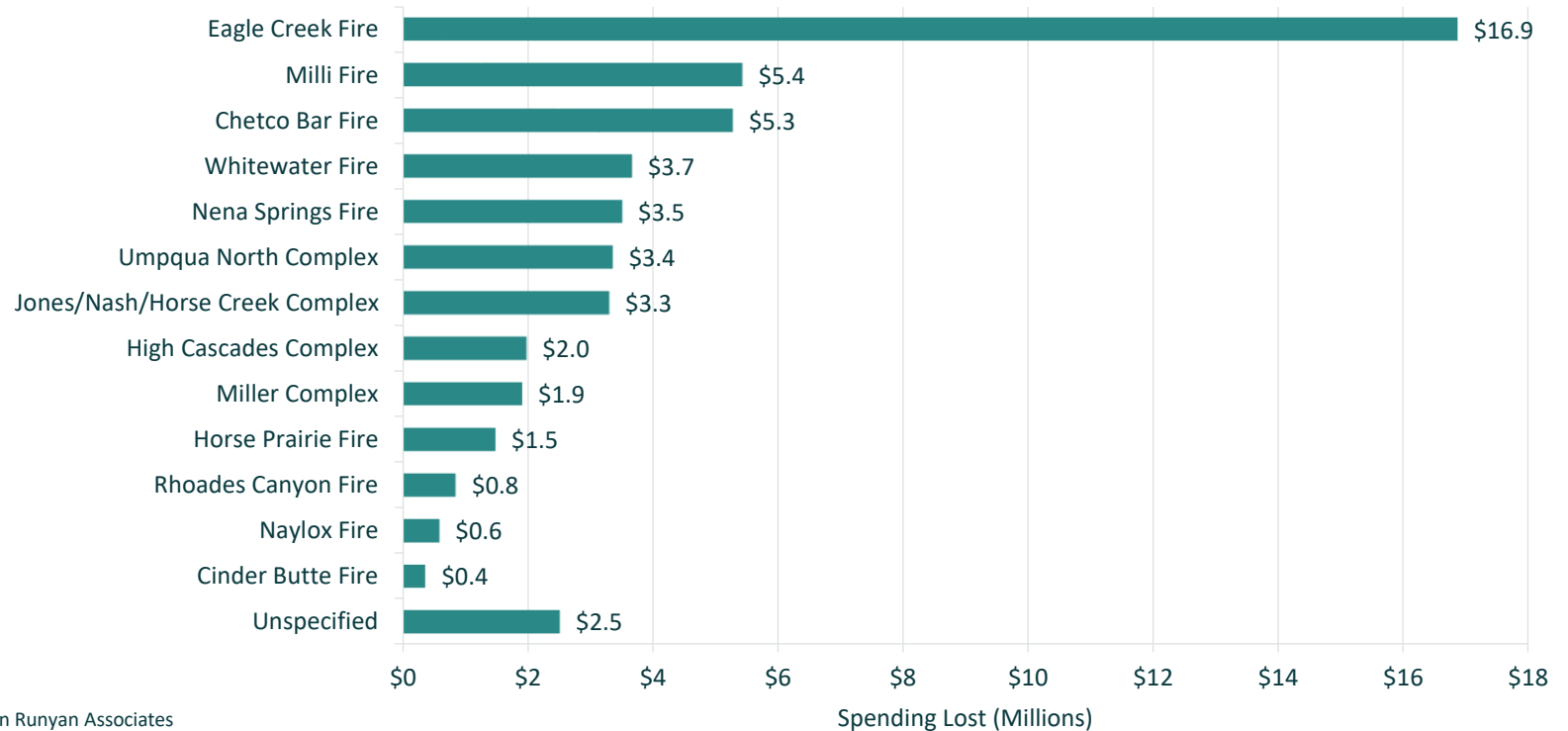
## \$51.1 MILLION

### *Destination Spending Loss by Industry (Millions)*



Source: Dean Runyan Associates

# IMPACTS BY FIRE



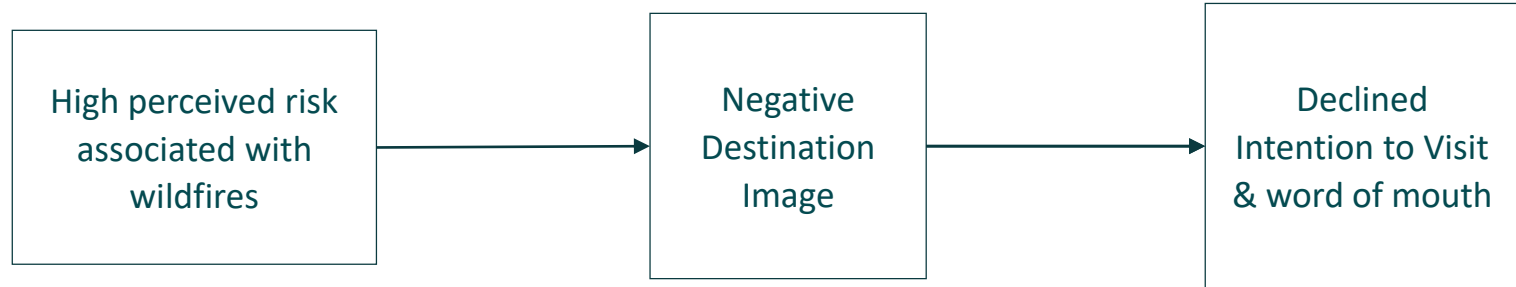
Source: Dean Runyan Associates

# 2017 ADDITIONAL ECONOMIC IMPACTS

- Employment & Economy
- Transportation
- Events:
  - Oregon Shakespeare Festival
  - Sisters Folk Festival
  - Cycle Oregon
- Outdoor Recreation:
  - Mt. Jefferson Wilderness
  - Columbia Gorge Trails
  - North Umpqua River Trail System



# 2017 STUDY FINDINGS





## 2018 STUDY OBJECTIVES & METHODOLOGY

Understanding the impact(s) of wildfires on travelers during the event and the potential long-term impacts.

Fielded online surveys: 2/21/2019 – 3/7/2019

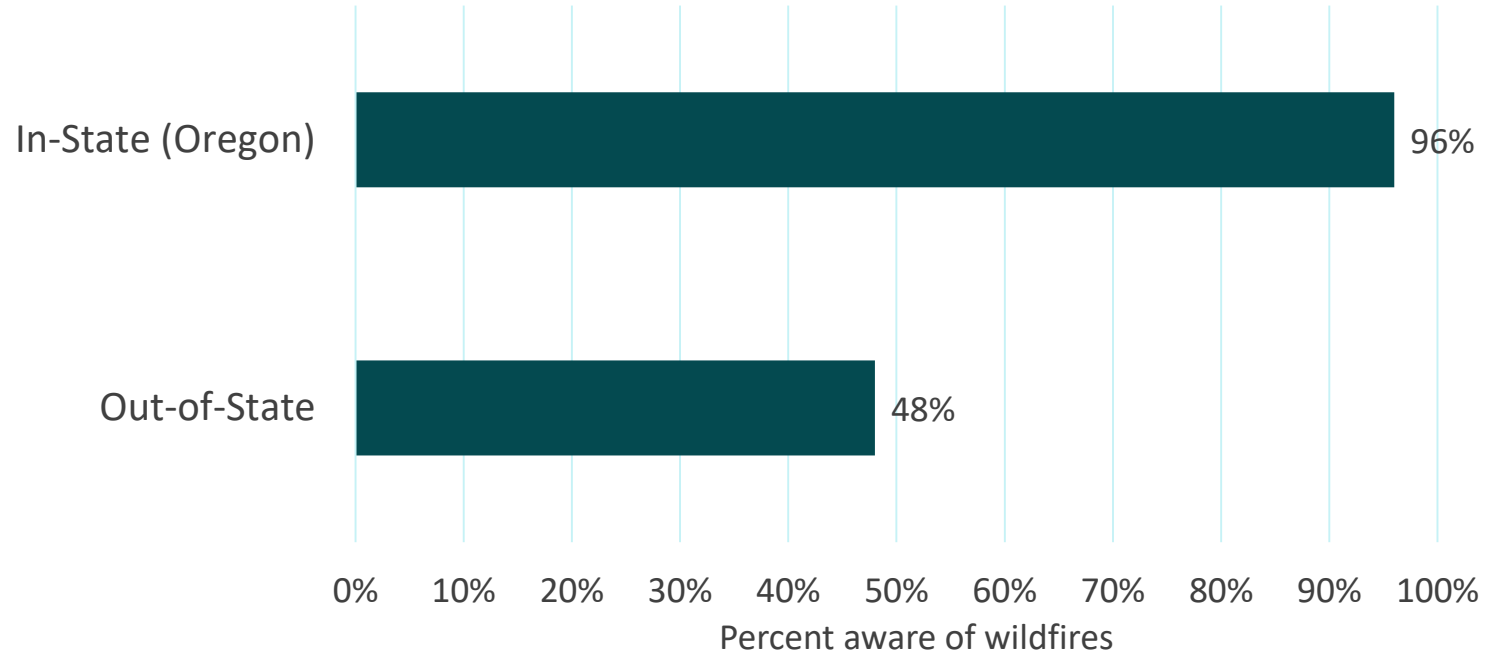
Longwoods International's panel

2,846 responses :

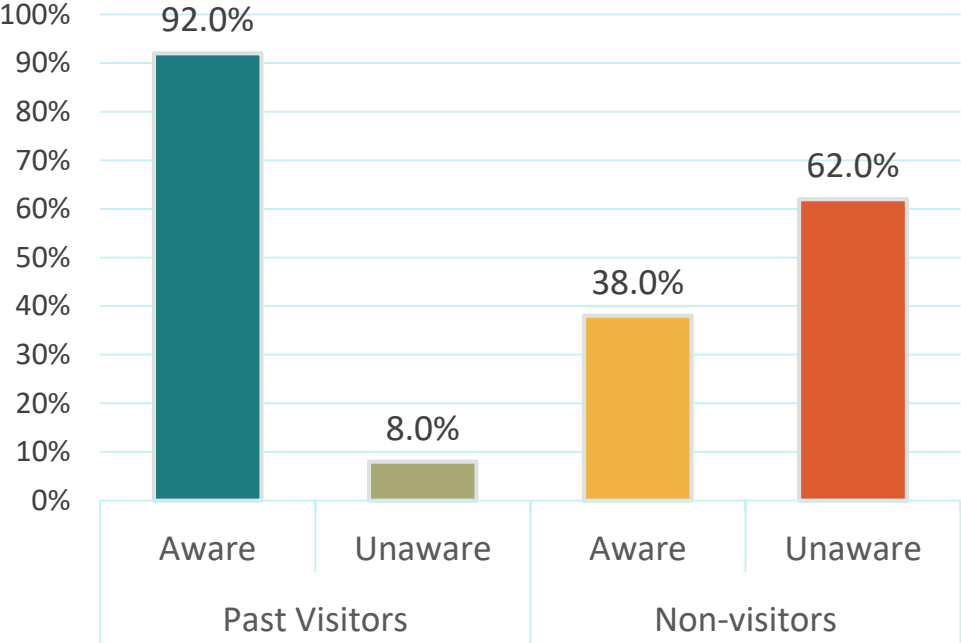
- 65% Oregon past visitors (2017-2019)
- 35% Oregon non-visitors

# AWARENESS OF WILDFIRES

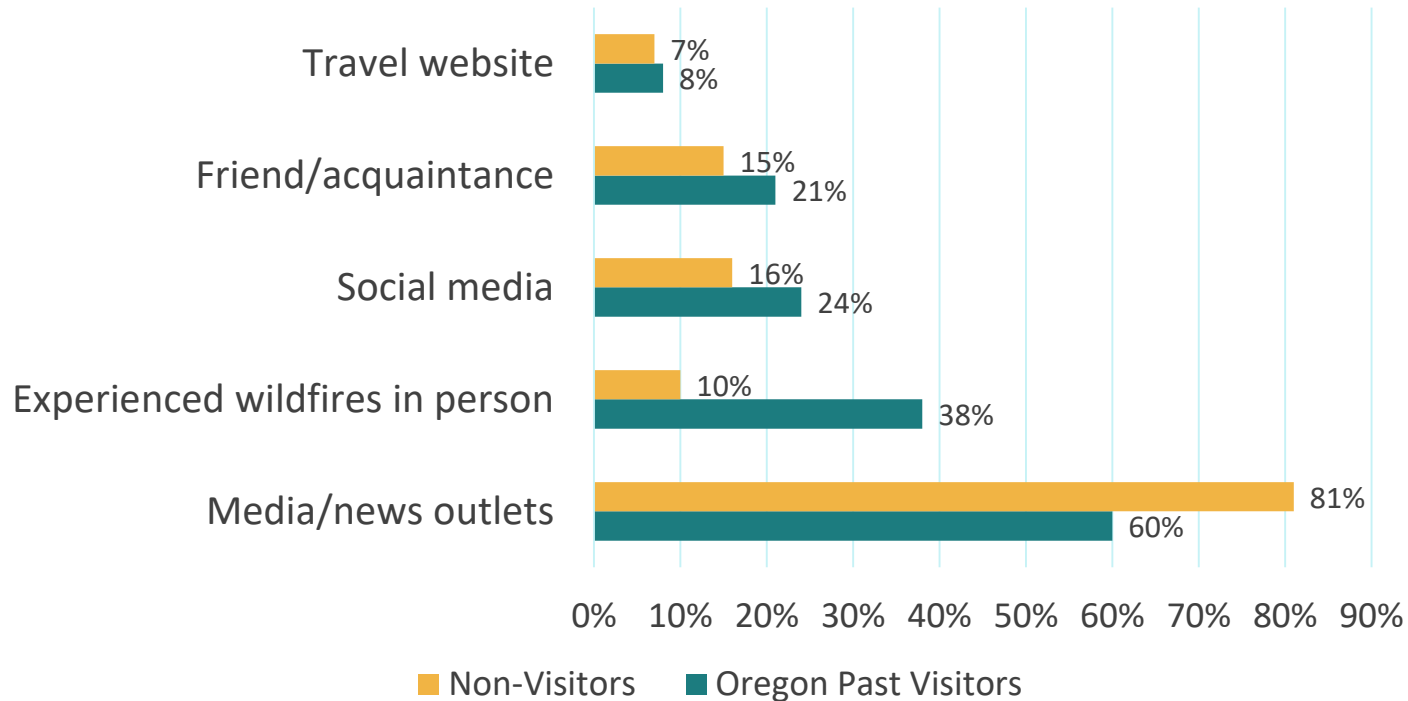
## IN-STATE VS. OUT-OF-STATE RESPONDENTS



# KNOWLEDGE OF WILDFIRES VISITORS VS. NON-VISITORS



# KNOWLEDGE OF WILDFIRES: SOURCES OF INFORMATION





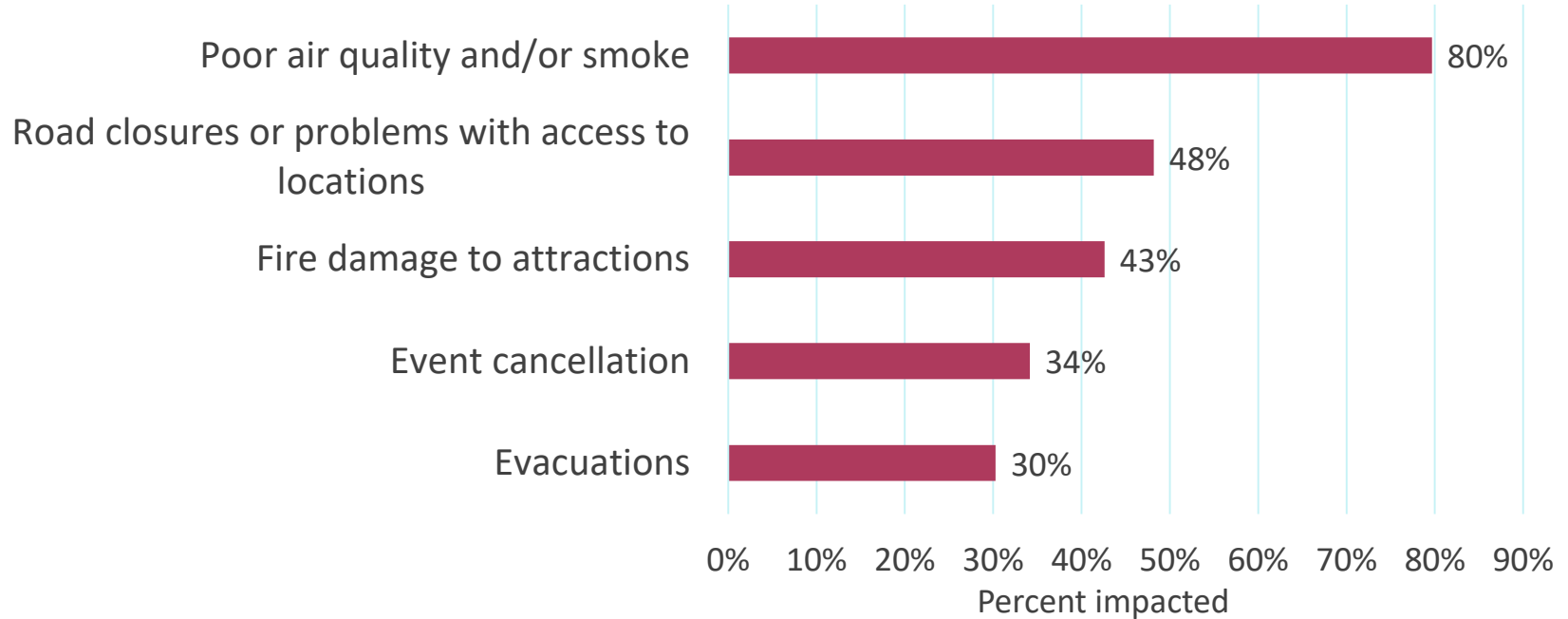
# WILDFIRES IMPACT ON VACATIONS BY REGION

	SHARE OF TRIPS	% OF IMPACTED TRIPS
<i>Coast Region</i>	30%	21%
<i>Portland Region</i>	29%	19%
<i>Willamette Valley</i>	15%	17%
<i>Central Region</i>	9%	36%
<i>Southern Region</i>	8%	29%
<i>Eastern Region</i>	5%	24%
<i>Mt. Hood Columbia River Gorge Region</i>	5%	25%

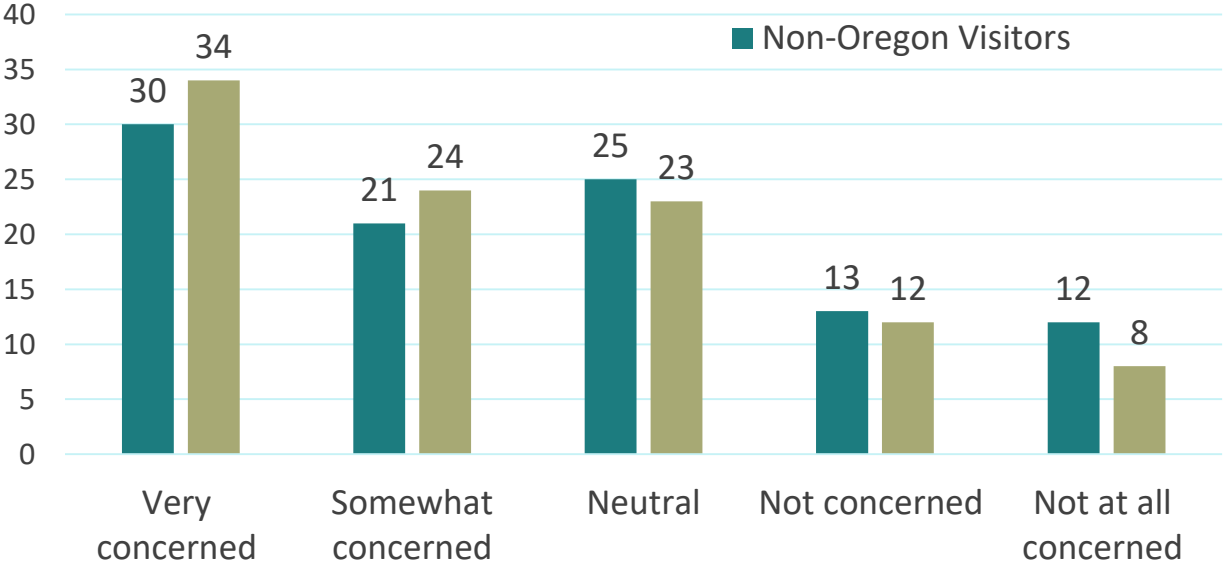
# WILDFIRE IMPACTS ON TRIP PLANNING AND VISITOR EXPERIENCE

WILDFIRE IMPACTS	% OF IMPACTED VISITORS
<i>Visited but experience hampered by smoke</i>	60%
<i>Changed trip to a non-impacted area of Oregon</i>	28%
<i>Postponed travel</i>	17%
<i>Shortened stay</i>	16%
<i>Cancelled travel</i>	9%

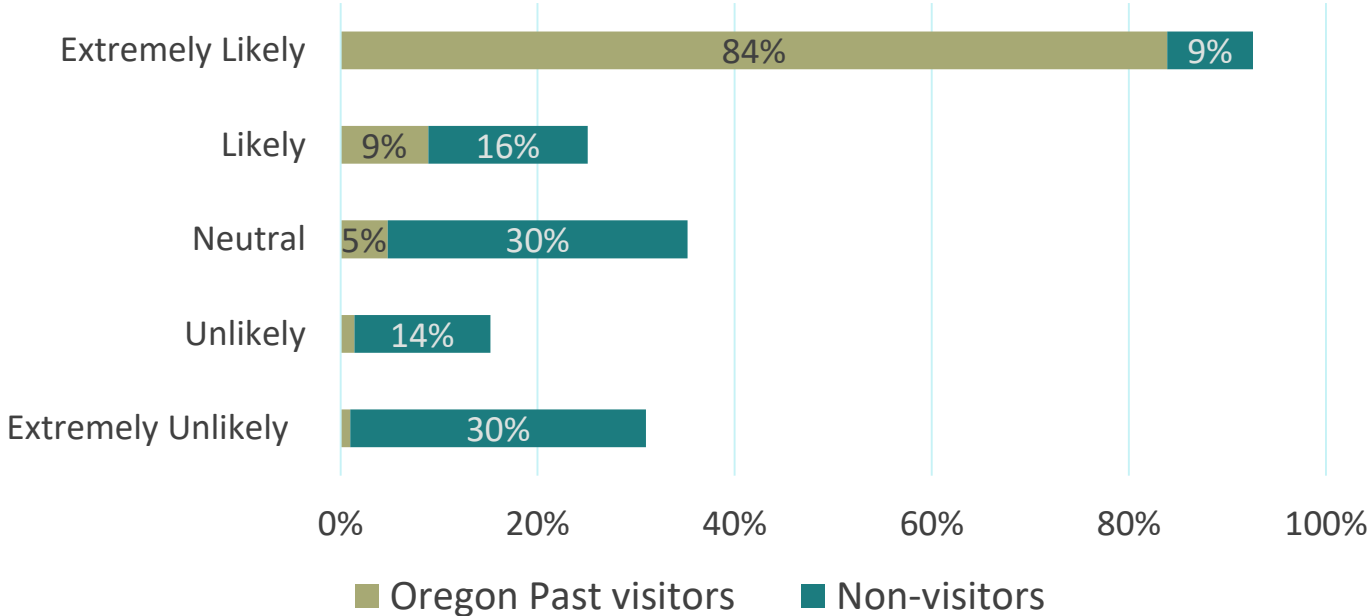
# DRIVING FACTORS BEHINDE CHANGES IN TRAVEL PLANNING AND VISITOR EXPERIENCE



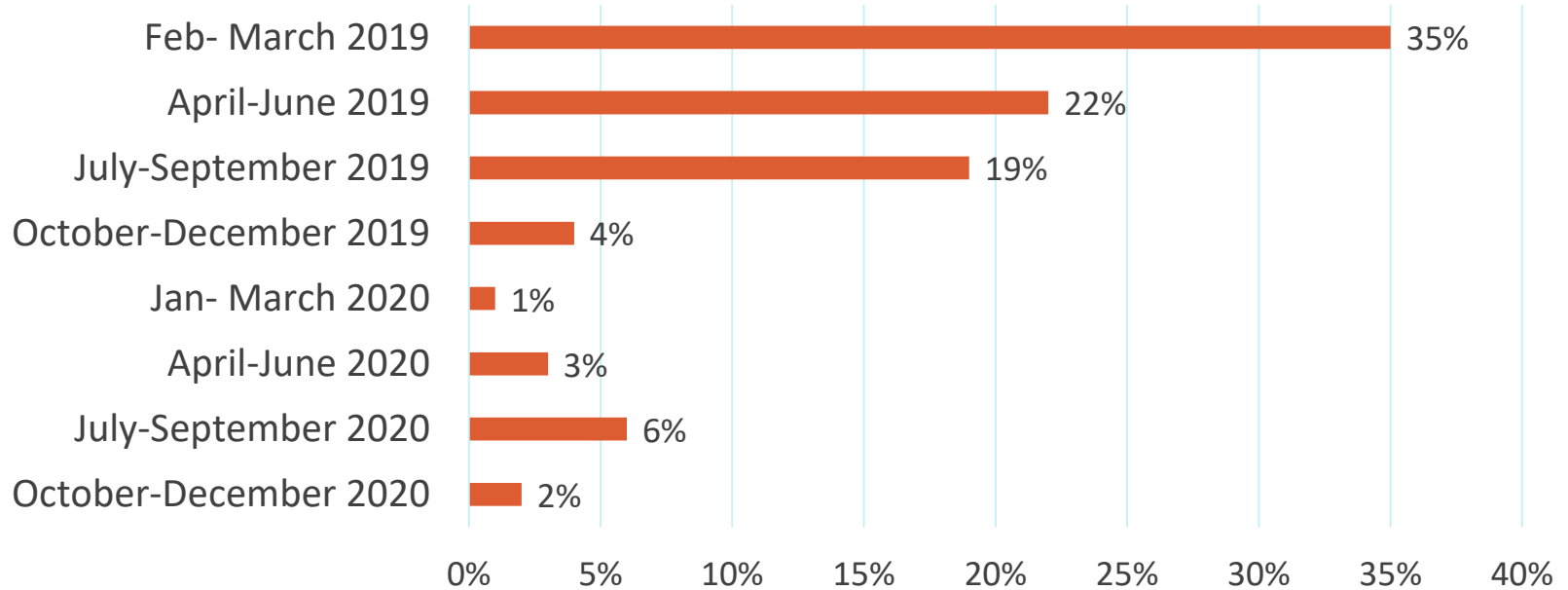
# PERCEIVED RISK ASSOCIATED WITH WILDFIRES WHEN TRAVELING (%)



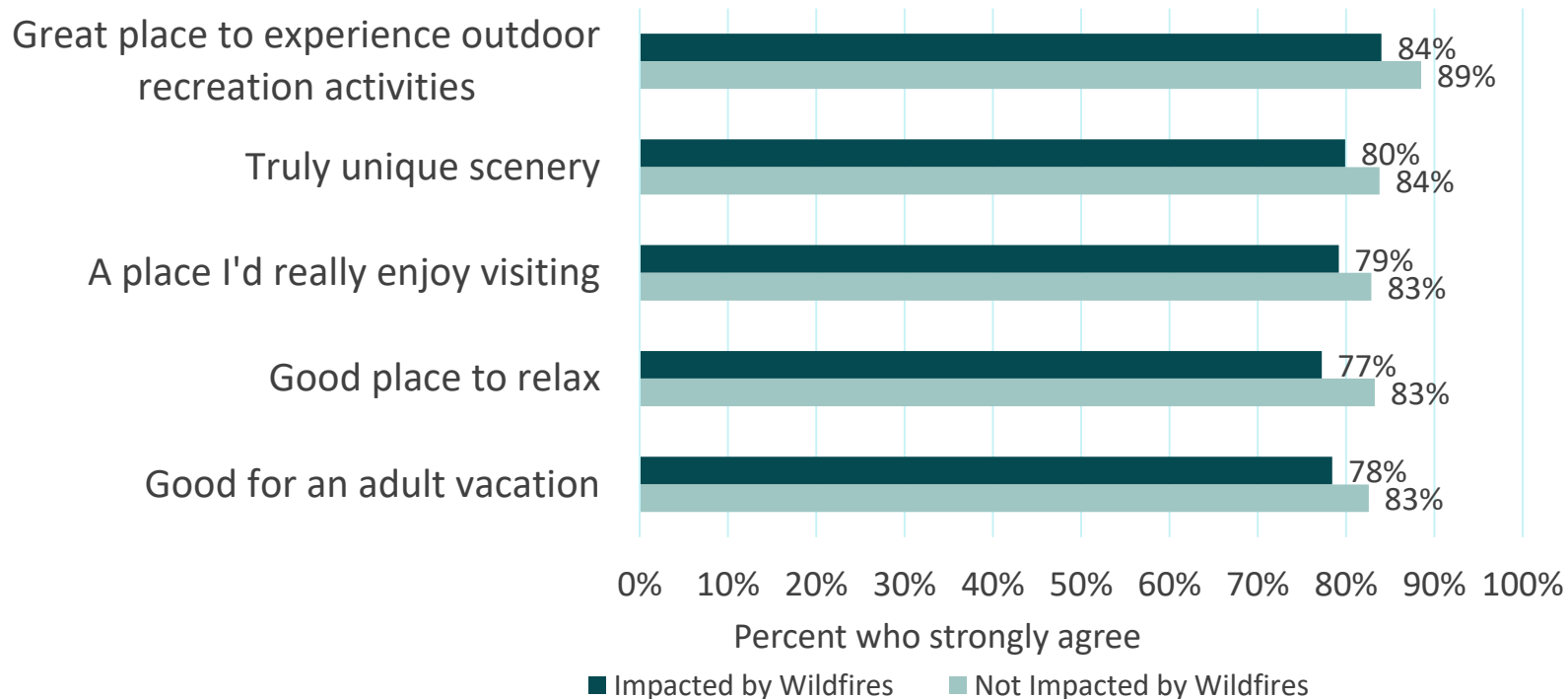
# How likely are you to travel within or to Oregon? Next two years



# Please give your best estimate on when you plan to travel to or within Oregon?

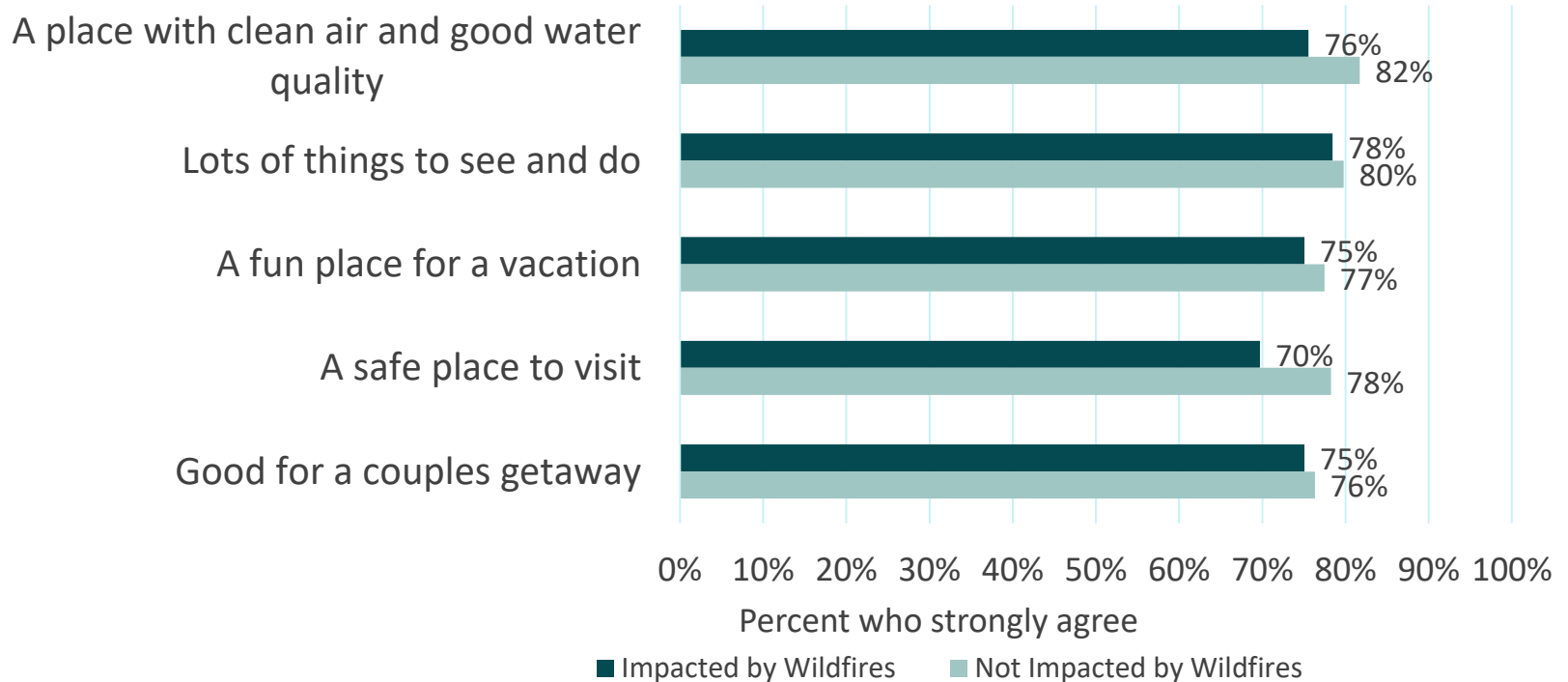


# DESTINATION IMAGE IMPACTED BY WILDFIRE



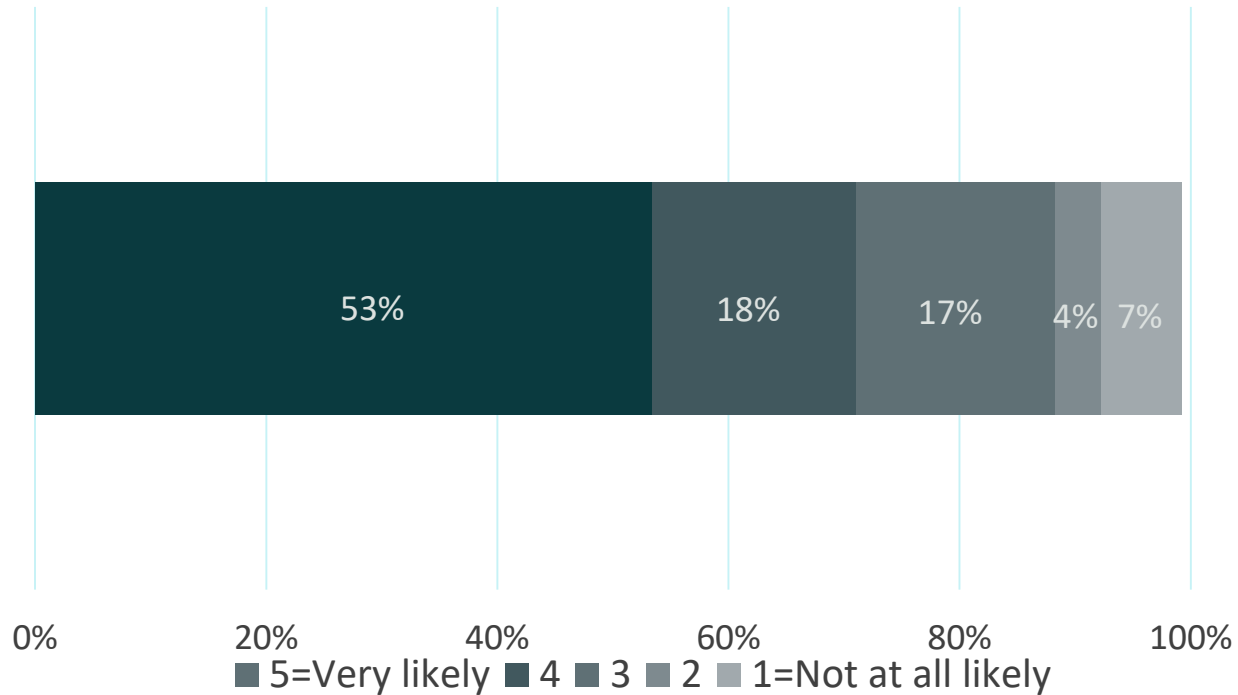
# DESTINATION RATINGS

## IMPACTED BY WILDFIRE (Cont'd)

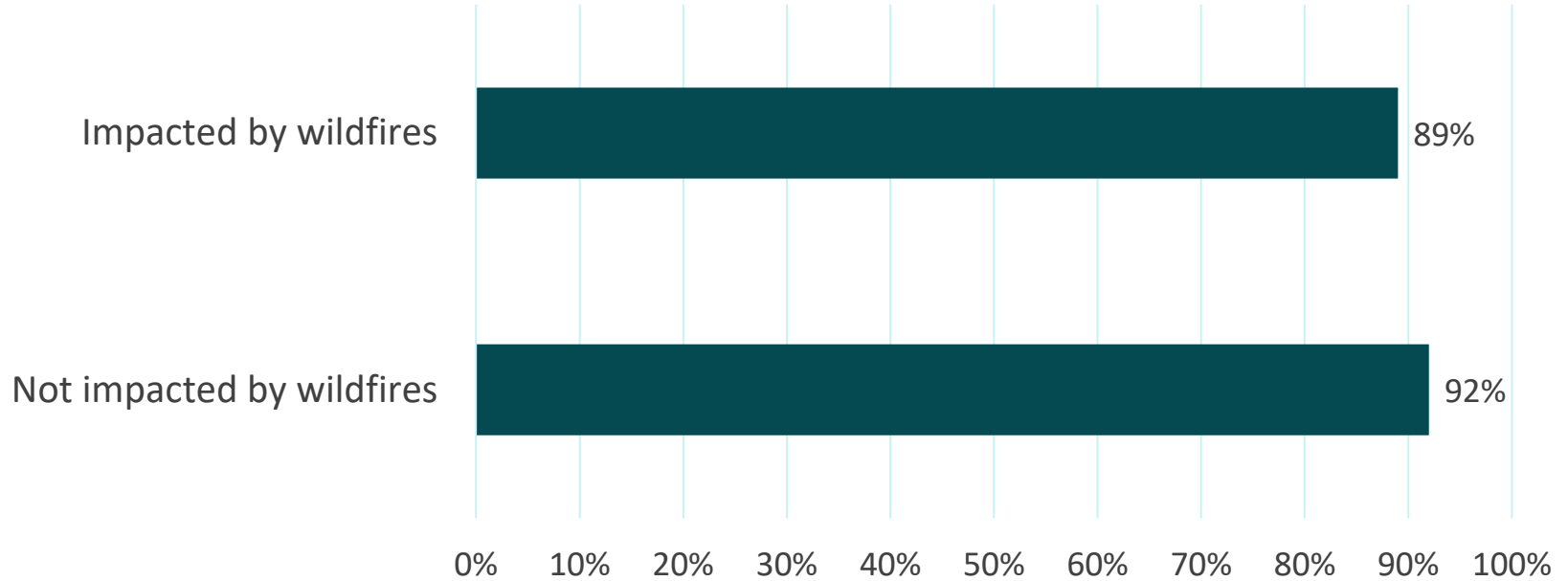




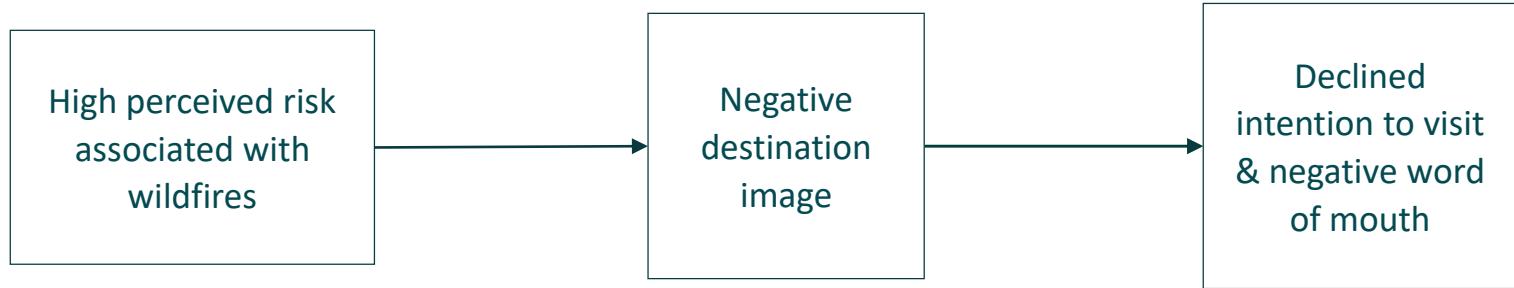
# How likely are you to recommend Oregon as a travel destination to others?



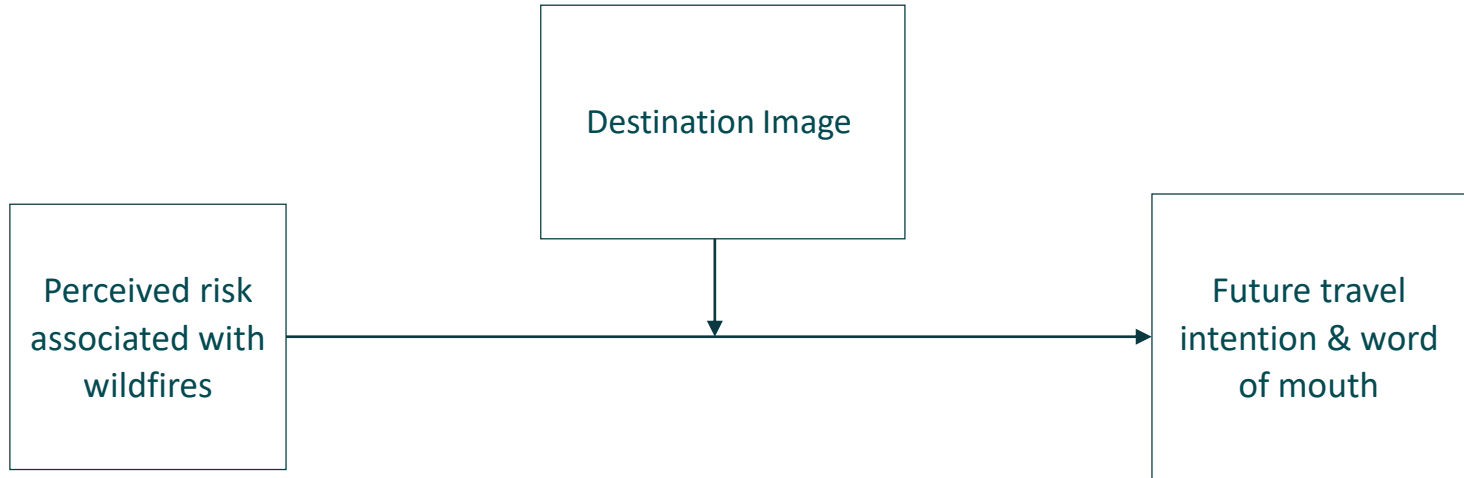
# LIKELIHOOD TO RECOMMEND OREGON IMPACTED BY WILDFIRE



# ORIGINAL ASSUMPTIONS



# THE MEDIATOR EFFECT OF DESTINATION IMAGE



## DESTINATION IMAGE MATTERS

Perceived risk associated with wildfires may not diminish travelers' desire to visit Oregon if they have a positive image of Oregon as a destination.

# TRAVEL SOUTHERN OREGON WILDFIRE PERCEPTION STUDY RESULTS

## What are your concerns or experiences related to smoke from wildfires in Southern Oregon?\*

Lack of certainty about how wildfires or smoke will impact my trip	70.2%	n = 43
Potential health effects from wildfire smoke	73.8%	n = 45
Negative experience with smoke during a previous visit	68%	n = 41
*Cases weighted (see Table A-2).		

All of the above concerns are approximately equal in importance to the respondents.

# SUPPORTING OUR PARTNERS/REGIONS AFFECTED BY WILDFIRES

## PREVENTION

### Wildfire Video

- Travel Oregon has put together a PSA wildfire video for Oregon residents and visitors.
- <https://traveloregon.com/wildfire>

### Public Agency Wildfire Prevention Messaging

- Travel Oregon works with its agency partners, including ODF, ODOT, USFS and others, to distribute targeted messaging to the public around fire prevention.
- We are preparing for May Wildfire Awareness Month

### Wildfire Toolkit

- The safety of our residents and visitors is our first priority and it's important we're all providing consistent messaging regarding wildfires, closures and air quality.

This toolkit is developed for Travel Oregon's industry site:

<http://industry.traveloregon.com/industry-resources/toolkits/oregon-wildfire-information/>

# SUPPORTING OUR PARTNERS/REGIONS AFFECTED BY WILDFIRES

## **DURING**

Travel Oregon Cross-Functional Wildfire Team

- Daily wildfire condition updates internally to staff, leadership and welcome centers.
- Travel Alerts page provides up-to-date information for visitors in Oregon as well as WA and CA.
- [www.WestCoastTravelFacts.org](http://www.WestCoastTravelFacts.org) – Washington Tourism Alliance & Visit California
- Work with Regional Destination Management Organizations to receive timely and on-the-ground information about how natural disaster is impacting local communities.

## **RECOVERY**

- Natural Disaster Marketing Co-op
- Regional Destination Management Organization – 5% annual budget dedicated to natural disaster response.





An aerial photograph of a winding river flowing through a vast, green, grassy landscape. The river is dark blue and meanders across the terrain, which is dotted with small, dark green shrubs and patches of lighter green grass. The text "Thank you" is overlaid in the center of the image in a white, sans-serif font.

Thank you