TRAVEL OREGON & OREGON
WILDFIRE IMPACTS – 2017 & 2018

July 2019
• 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

Burned Acres (Thousands)

Source: Northwest Interagency Coordination Center
AIR QUALITY READINGS OF USG* OR GREATER STATEWIDE, 2000—2017

*Unhealthy for Sensitive Groups
Source: Environmental Protection Agency
**Which 2017 Oregon wildfires had an impact on your business or organization's operations/performance?**

<table>
<thead>
<tr>
<th>Wildfire</th>
<th>Percent of Respondents</th>
</tr>
</thead>
<tbody>
<tr>
<td>Eagle Creek</td>
<td>46.3%</td>
</tr>
<tr>
<td>Chetco Bar</td>
<td>31.6%</td>
</tr>
<tr>
<td>Milli</td>
<td>20.4%</td>
</tr>
<tr>
<td>Horse Creek/Jones/Nash Complex</td>
<td>19.8%</td>
</tr>
<tr>
<td>Umpqua North Complex</td>
<td>18.9%</td>
</tr>
<tr>
<td>Miller Complex</td>
<td>18.6%</td>
</tr>
<tr>
<td>High Cascades Complex</td>
<td>15.0%</td>
</tr>
<tr>
<td>Whitewater</td>
<td>13.0%</td>
</tr>
<tr>
<td>Horse Prairie</td>
<td>12.7%</td>
</tr>
<tr>
<td>Nena Springs</td>
<td>11.5%</td>
</tr>
<tr>
<td>Naylox</td>
<td>8.8%</td>
</tr>
<tr>
<td>Rhoades Canyon</td>
<td>6.2%</td>
</tr>
<tr>
<td>Cinder Butte</td>
<td>4.1%</td>
</tr>
<tr>
<td>Not sure which fire(s)</td>
<td>9.4%</td>
</tr>
<tr>
<td>Other fire(s)</td>
<td>4.1%</td>
</tr>
</tbody>
</table>

Source: Dean Runyan Associates
REVENUE LOSS DUE TO FIRE
PERCEIVED CAUSE

Source: Dean Runyan Associates
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)

- Accommodations: $13.5 million
- Food Service: $13.9 million
- Food Stores: $3.9 million
- Local Transportation & Gas: $4.7 million
- Arts, Entertainment & Recreation: $5.3 million
- Retail Sales: $6.0 million
- Visitor Air Transportation: $4.0 million

Source: Dean Runyan Associates
**IMPAIRS**
**BY FIRE**

- Eagle Creek Fire: $16.9M
- Milli Fire: $5.4M
- Chetco Bar Fire: $5.3M
- Whitewater Fire: $3.7M
- Nena Springs Fire: $3.5M
- Umpqua North Complex: $3.4M
- Jones/Nash/Horse Creek Complex: $3.3M
- High Cascades Complex: $2.0M
- Miller Complex: $1.9M
- Horse Prairie Fire: $1.5M
- Rhoades Canyon Fire: $0.8M
- Naylox Fire: $0.6M
- Cinder Butte Fire: $0.4M
- Unspecified: $2.5M

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

High perceived risk associated with wildfires → Negative Destination Image → Declined Intention to Visit & word of mouth
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-visitor
AWARENESS OF WILDFIRES
IN-STATE VS. OUT-OF-STATE RESPONDENTS

In-State (Oregon) 96%
Out-of-State 48%

Percent aware of wildfires
0% 10% 20% 30% 40% 50% 60% 70% 80% 90% 100%
KNOWLEDGE OF WILDFIRES
VISITORS VS. NON-VISITORS

<table>
<thead>
<tr>
<th></th>
<th>Aware</th>
<th>Unaware</th>
<th>Aware</th>
<th>Unaware</th>
</tr>
</thead>
<tbody>
<tr>
<td>Past Visitors</td>
<td>92.0%</td>
<td>8.0%</td>
<td>38.0%</td>
<td>62.0%</td>
</tr>
<tr>
<td>Non-visitors</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
KNOWLEDGE OF WILDFIRES:
SOURCES OF INFORMATION

Travel website
- Non-Visitors: 7%
- Oregon Past Visitors: 8%

Friend/acquaintance
- Non-Visitors: 15%
- Oregon Past Visitors: 21%

Social media
- Non-Visitors: 16%
- Oregon Past Visitors: 24%

Experienced wildfires in person
- Non-Visitors: 10%
- Oregon Past Visitors: 38%

Media/news outlets
- Non-Visitors: 81%
- Oregon Past Visitors: 60%

Legend:
- Orange: Non-Visitors
- Green: Oregon Past Visitors
## Wildfires Impact on Vacations by Region

<table>
<thead>
<tr>
<th>Region</th>
<th>Share of Trips</th>
<th>% of Impacted Trips</th>
</tr>
</thead>
<tbody>
<tr>
<td>Coast Region</td>
<td>30%</td>
<td>21%</td>
</tr>
<tr>
<td>Portland Region</td>
<td>29%</td>
<td>19%</td>
</tr>
<tr>
<td>Willamette Valley</td>
<td>15%</td>
<td>17%</td>
</tr>
<tr>
<td>Central Region</td>
<td>9%</td>
<td>36%</td>
</tr>
<tr>
<td>Southern Region</td>
<td>8%</td>
<td>29%</td>
</tr>
<tr>
<td>Eastern Region</td>
<td>5%</td>
<td>24%</td>
</tr>
<tr>
<td>Mt. Hood Columbia River Gorge Region</td>
<td>5%</td>
<td>25%</td>
</tr>
</tbody>
</table>
# Wildfire Impacts on Trip Planning and Visitor Experience

<table>
<thead>
<tr>
<th>Wildfire Impacts</th>
<th>% of Impacted Visitors</th>
</tr>
</thead>
<tbody>
<tr>
<td>Visited but experience hampered by smoke</td>
<td>60%</td>
</tr>
<tr>
<td>Changed trip to a non-impacted area of Oregon</td>
<td>28%</td>
</tr>
<tr>
<td>Postponed travel</td>
<td>17%</td>
</tr>
<tr>
<td>Shortened stay</td>
<td>16%</td>
</tr>
<tr>
<td>Cancelled travel</td>
<td>9%</td>
</tr>
</tbody>
</table>
DRIVING FACTORS BEHIND CHANGES IN TRAVEL PLANNING AND VISITOR EXPERIENCE

- Poor air quality and/or smoke: 80%
- Road closures or problems with access to locations: 48%
- Fire damage to attractions: 43%
- Event cancellation: 34%
- Evacuations: 30%
PERCEIVED RISK ASSOCIATED WITH WILDFIRES WHEN TRAVELING (%)

- Very concerned (Non-Oregon Visitors): 30%
- Somewhat concerned (Non-Oregon Visitors): 21%
- Neutral (Non-Oregon Visitors): 25%
- Not concerned (Non-Oregon Visitors): 13%
- Not at all concerned (Non-Oregon Visitors): 12%
How likely are you to travel within or to Oregon? Next two years

- Extremely Likely: 84% (Oregon Past visitors) 9% (Non-visitors)
- Likely: 9% (Oregon Past visitors) 16% (Non-visitors)
- Neutral: 5% (Oregon Past visitors) 30% (Non-visitors)
- Unlikely: 14% (Oregon Past visitors)
- Extremely Unlikely: 30% (Non-visitors)
Please give your best estimate on when you plan to travel to or within Oregon?

- **Feb-March 2019**: 35%
- **April-June 2019**: 22%
- **July-September 2019**: 19%
- **October-December 2019**: 4%
- **Jan-March 2020**: 1%
- **April-June 2020**: 3%
- **July-September 2020**: 6%
- **October-December 2020**: 2%
Great place to experience outdoor recreation activities
Truly unique scenery
A place I’d really enjoy visiting
Good place to relax
Good for an adult vacation

Percent who strongly agree

- Impacted by Wildfires
- Not Impacted by Wildfires
A place with clean air and good water quality

Lots of things to see and do

A fun place for a vacation

A safe place to visit

Good for a couples getaway

- **Impacted by Wildfires**
  - 76%
  - 78%
  - 75%
  - 70%
  - 75%

- **Not Impacted by Wildfires**
  - 82%
  - 80%
  - 77%
  - 78%
  - 76%
How likely are you to recommend Oregon as a travel destination to others?

53% Very likely
18% Likely
17% Neutral
4% Slightly unlikely
7% Not at all likely
LIKELIHOOD TO RECOMMEND OREGON IMPACTED BY WILDFIRE

Impacted by wildfires: 89%
Not impacted by wildfires: 92%
High perceived risk associated with wildfires → Negative destination image → Declined intention to visit & negative word of mouth
THE MEDIATOR EFFECT OF DESTINATION IMAGE

Perceived risk associated with wildfires → Destination Image → Future travel intention & word of mouth
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?

<table>
<thead>
<tr>
<th>Concern</th>
<th>Percentage</th>
<th>Sample Size (n)</th>
</tr>
</thead>
<tbody>
<tr>
<td>Lack of certainty about how wildfires or smoke will impact my trip</td>
<td>70.2%</td>
<td>43</td>
</tr>
<tr>
<td>Potential health effects from wildfire smoke</td>
<td>73.8%</td>
<td>45</td>
</tr>
<tr>
<td>Negative experience with smoke during a previous visit</td>
<td>68%</td>
<td>41</td>
</tr>
</tbody>
</table>

*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.
Thank you