



2023 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY

SUMMARY OF RESULTS | SOUTHERN OREGON

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 Southern Oregon with additional statewide results provided for context.

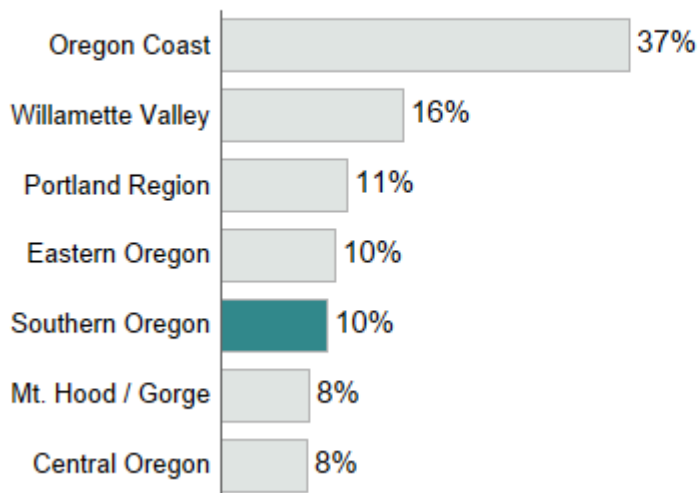
OBJECTIVES

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 98 valid responses from Southern Oregon 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 Southern Oregon compared to the statewide survey results (referred to as the “overall” in figures).

Number of Respondents



98

Southern Oregon
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

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KEY FINDINGS

TOURISM DEVELOPMENT

- Sixty percent of respondents in Southern Oregon said they were satisfied with the direction of tourism development in Oregon (selected 4 or 5 on a five-point scale), while 12% were unsatisfied (selected 1 or 2) and 28% were neutral.
- Most respondents in Southern Oregon agreed or strongly agreed with statements related to what Oregon should do to promote tourism, including encourage tourism development in their community (93% agreed or strongly agreed), advertise tourism/attract more visitors (92%), promote responsible visitor behavior (86%), and consider tourism as a primary priority for economic development (76%).
- Respondents in Southern Oregon were most in agreement that they are comfortable collaborating with groups of varying sizes and backgrounds to make positive changes in the tourism industry (91% 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 (36%).

STRENGTHS AND AREAS FOR IMPROVEMENT

- The top three areas that respondents from Southern Oregon considered strengths in their community were outdoor recreation opportunities (96%), food and beverage (37%), and agritourism (33%).
- The top areas that Southern Oregon respondents said their community needs to focus on to improve residents' and visitors' experiences were lodging (25%), public infrastructure (e.g., bathroom, parking) (25%), food and beverage (23%), signage/wayfinding (23%), and being a welcoming destination for Black, Indigenous, People of Color, LGBTQIA+ community (23%).

ADDRESSING RISKS TO TOURISM

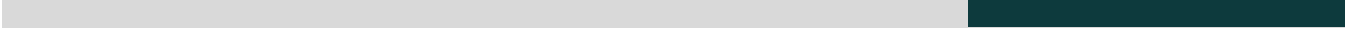
- The top three challenges that respondents in Southern Oregon identified as high risks to tourism were wildfires (77%), drought (48%), and lack of affordable housing (48%).
- The top two strategies that respondents in Southern Oregon selected to best assist their business/organization or community if faced with the challenges listed in the previous question were resources to build tourism related infrastructure (82%) and grant and funding resources/opportunities (72%).

WORKFORCE

- To develop, attract and retain the local workforce associated with the tourism industry, 68% of respondents in Southern Oregon selected the strategy, "Hospitality and tourism career programs in local high schools and colleges", followed by "Short-term training options for upskilling of current and future employees" (47%).

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-eight percent of Southern Oregon respondents selected



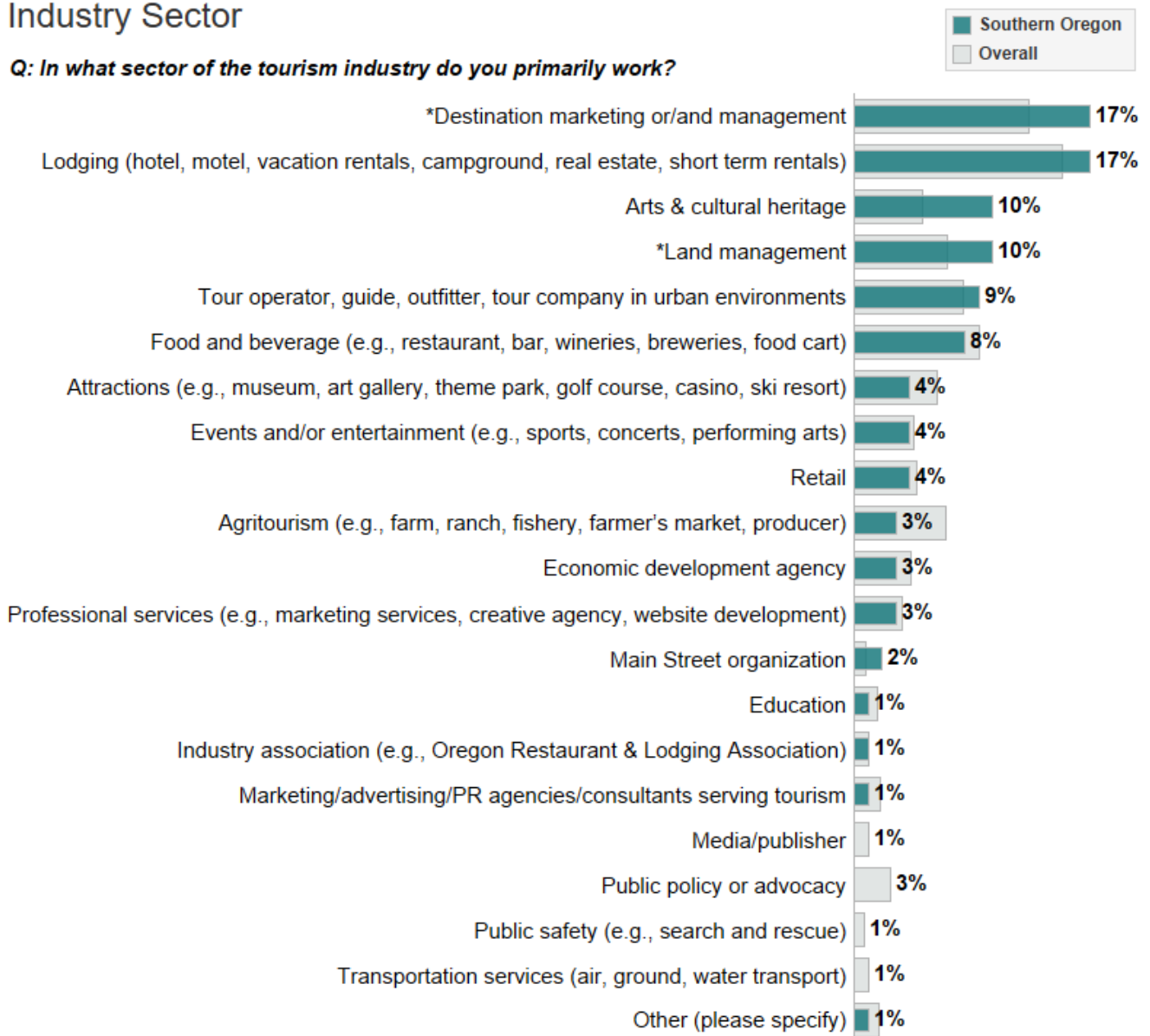
marketing and promotion among their top-three priorities, followed by tourism-related infrastructure (47%), and grant and funding resources/opportunities (46%).

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 Southern Oregon were more likely to be employed in destination marketing or/and management, lodging, arts and cultural heritage, and land management. Respondents from Southern Oregon had a smaller share of respondents employed in agritourism.

Industry Sector

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



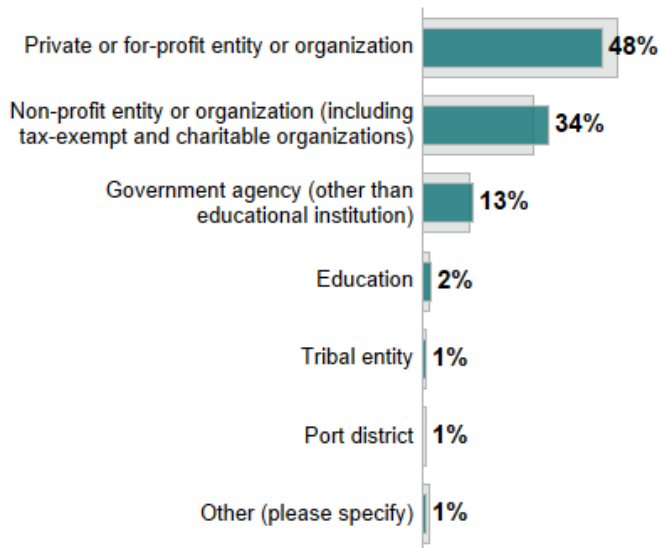
*Answer option abbreviated in reporting.

Respondents were asked which entity type best describes their business or organization. In Southern Oregon and the overall, the top two response options were private or for-profit entities/organizations (48% in Southern Oregon and 52% in the overall) and non-profit entities/organizations (34% in Southern Oregon and 30% in the overall).

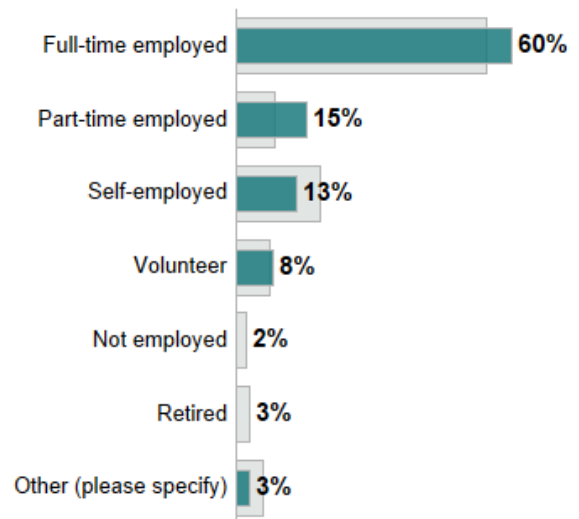
The top employment statuses for the region were full-time employed (58%), self-employed (22%), and volunteer (8%). Compared to the overall responses, Southern Oregon had a higher proportion of full-time employed individuals, a higher proportion of part-time employed individuals, and a smaller proportion of self-employed individuals.

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)



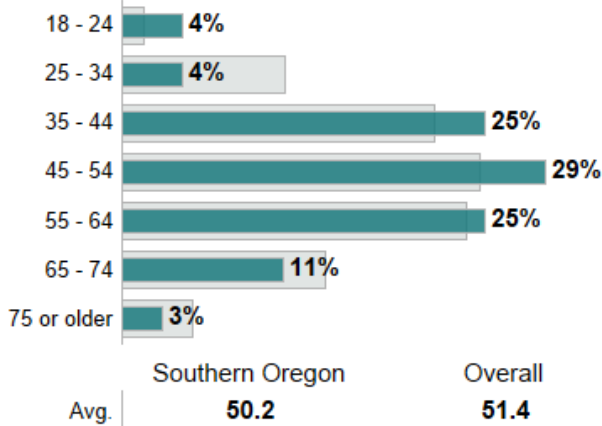
*For both questions, where applicable, "Other" write-in responses were recoded to appropriate categories.

In Southern Oregon, the majority of respondents fell into the 35-64 age range, with 25% aged 35-44, 29% aged 45-54, and 25% aged 55-64. This was different from the overall results, where the largest age group was 45-54, followed by 55-64. Southern Oregon also had fewer respondents in the 25-45 range (4% vs 17% in the overall). The average age of Southern Oregon respondents was slightly younger (50.2 years) compared to the average age of the overall sample (51.4 years).

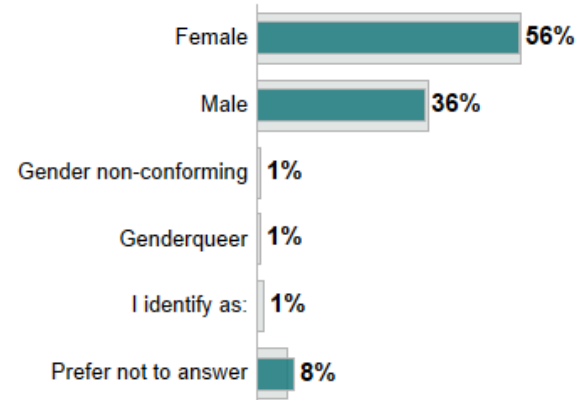
Statewide and in Southern Oregon, 56% of respondents identified as female. Thirty-six percent of respondents in Southern Oregon and 37% of respondents in the overall identified as male.

Age & Gender

Q: Respondent Age



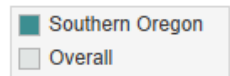
Q: To which gender identity do you most identify? Please check all that apply.



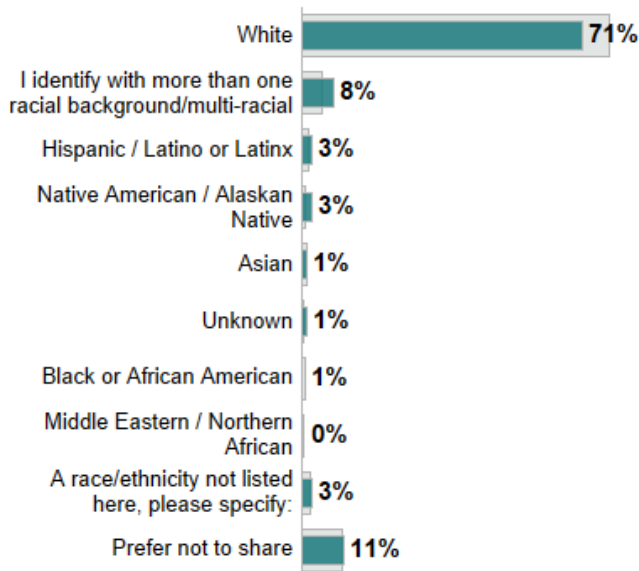
Statewide, just over three quarters of respondents (78%) described themselves as white, and 5% identified as multi-racial. In Southern Oregon, 71% of respondents were white, and 8% were multi-racial.

Forty-four percent of survey respondents overall indicated that they had annual household incomes of \$75,000 or more. In Southern Oregon, the most common response options were \$50,000-74,999 (22%) and \$100,000-149,999 (21%). Compared to the overall, Southern Oregon had a higher proportion of respondents who had an annual income under \$25,000 (7% compared to 4% in the overall), a lower proportion of respondents with an income of \$25,000-49,999 (6% vs 9% in the overall), and a higher percentage of respondents in the \$50,000-74,999 category (22% vs 17% in the overall).

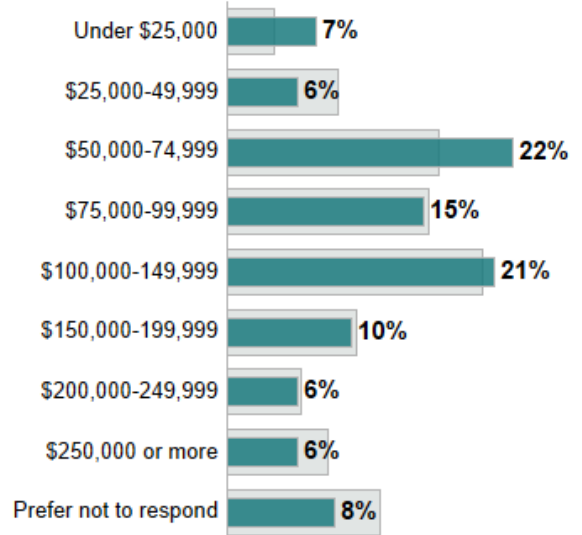
Race & Household Income



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



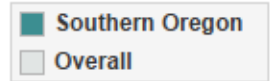
Q: Which of these categories best describes the total gross annual income of your household (before taxes)?



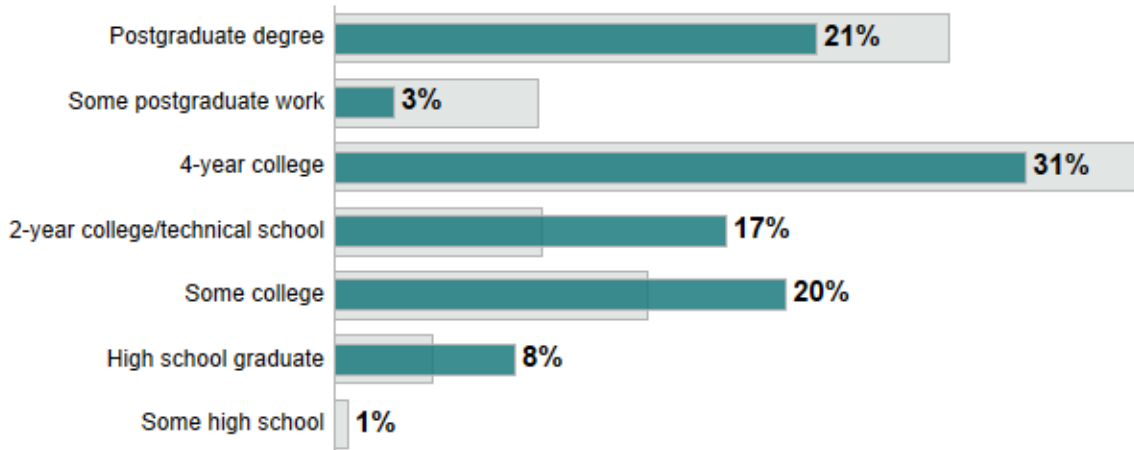
Compared to the overall, a smaller proportion of respondents in Southern Oregon completed a graduate degree (21% vs 27% of the overall), some postgraduate work (3% vs 9% of the overall) or a 4-year college degree (31% vs 36% of the overall).

Seven percent of Southern Oregon respondents reported having a disability, compared to 9% among respondents overall.

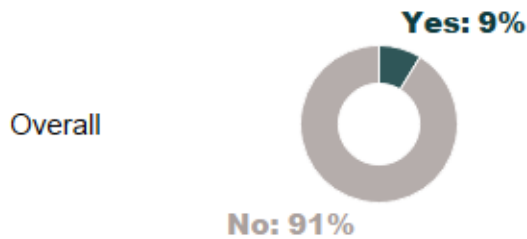
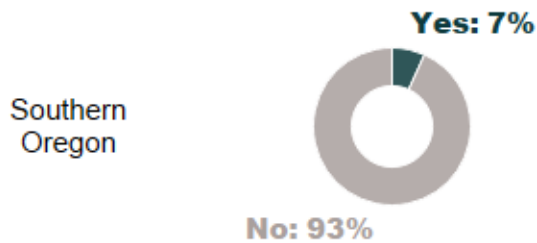
Education & Presence of Disabilities



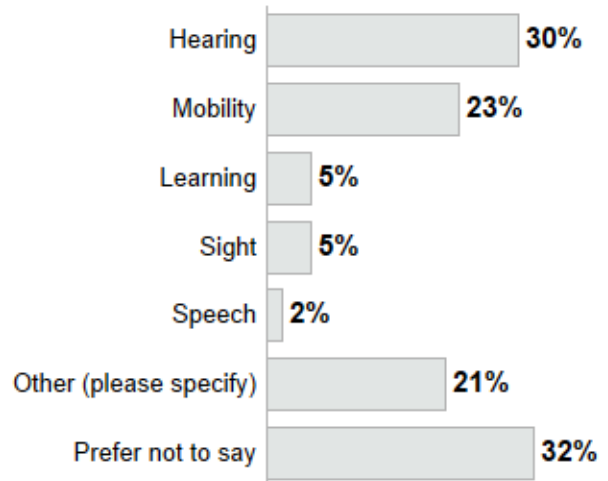
Q: Which option best describes your education?



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

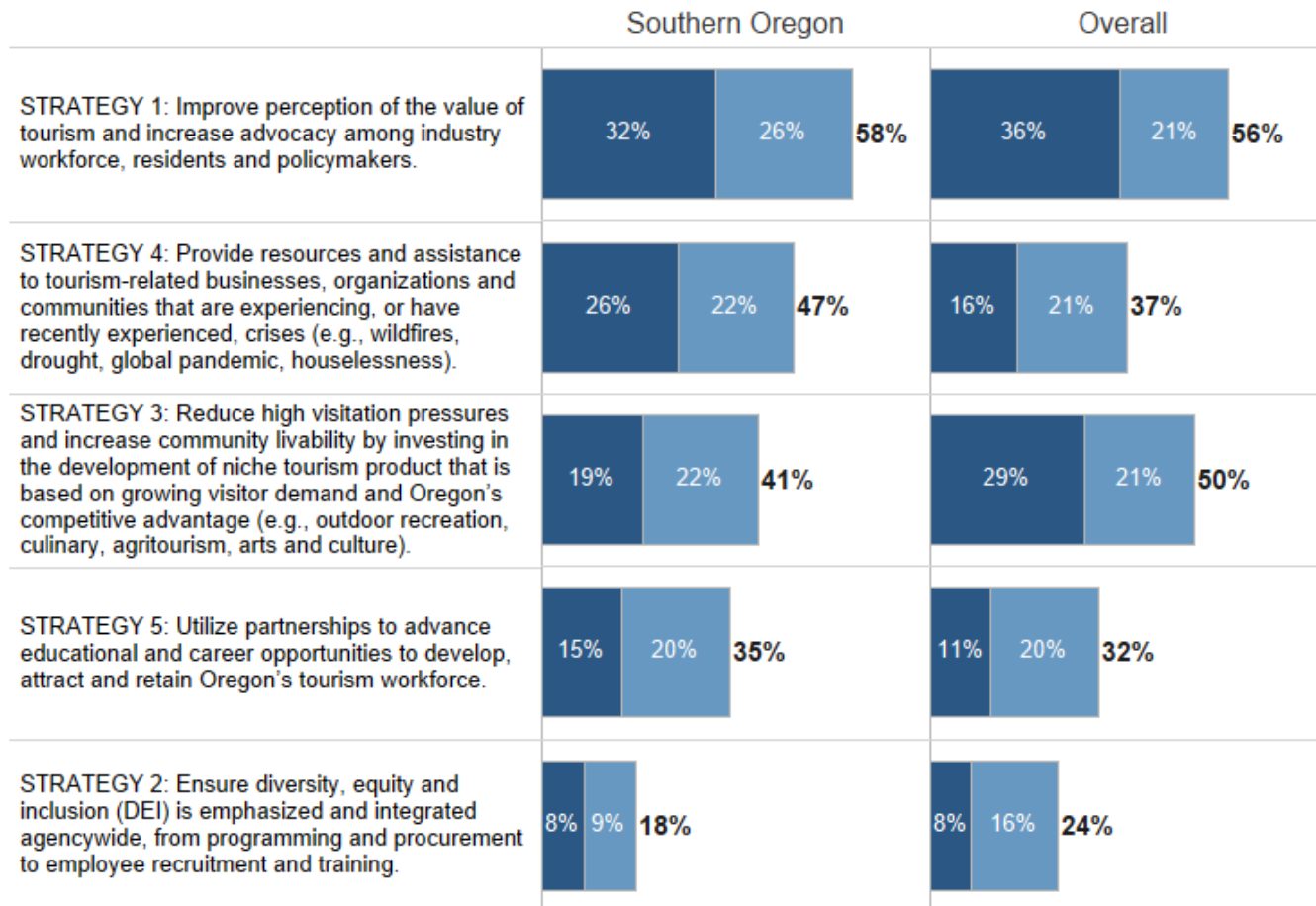
Travel Oregon has embarked on its 10-year strategic vision for tourism in the state, focusing on a destination stewardship approach that aims to maximize the economic potential of Oregon's economy while protecting the environment and promoting cultural diversity. A series of questions were identified 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 32% of Southern Oregon respondents identifying it as their top priority and 58% identifying it among their top-two highest priorities. Strategy 4, providing resources and assistance to tourism-related businesses, organizations and communities that are experiencing, or have recently experienced, crises (e.g., wildfires, drought, global pandemic, houselessness), was identified as the second most-favored strategy, with 26% of Southern Oregon respondents identifying it as their top priority and 47% identifying it among their top-two highest priorities. Overall, Strategy 1 was rated as the first or second priority among 56% of respondents, followed by Strategy 3, which was rated 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

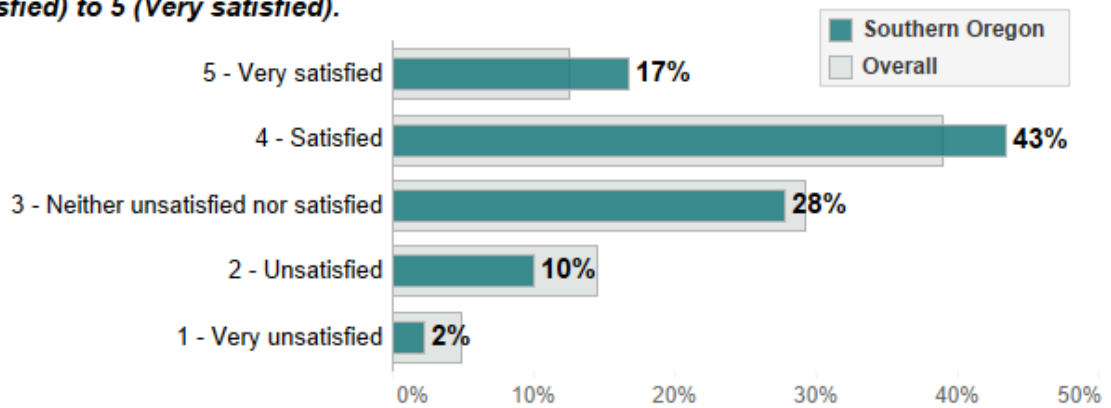


Respondents were also asked to characterize their satisfaction with the general direction of tourism development in Oregon. Note that “tourism development” refers to overall tourism development in Oregon. The following definition was provided to survey respondents: “Tourism development refers to the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

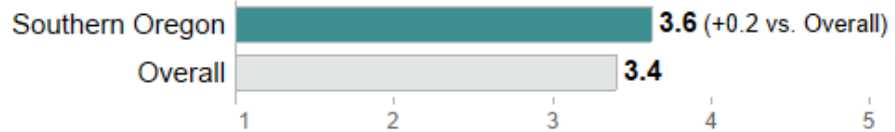
Overall, 52% of respondents were satisfied with the direction of tourism development in Oregon (selected 4 or 5 on a five-point scale), while 19% were unsatisfied (selected 1 or 2). Twenty-nine percent were neutral (selected 3, neither unsatisfied nor satisfied). In Southern Oregon, there was a higher proportion of respondents who indicated they are satisfied or very satisfied with tourism development (60%), and the average was higher (3.6) than the overall average (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).



Average Rating 1 - 5

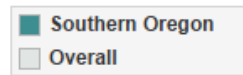


Note that “Destination Development” refers to overall tourism development in Oregon. The following definition was provided to survey respondents: “Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving,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

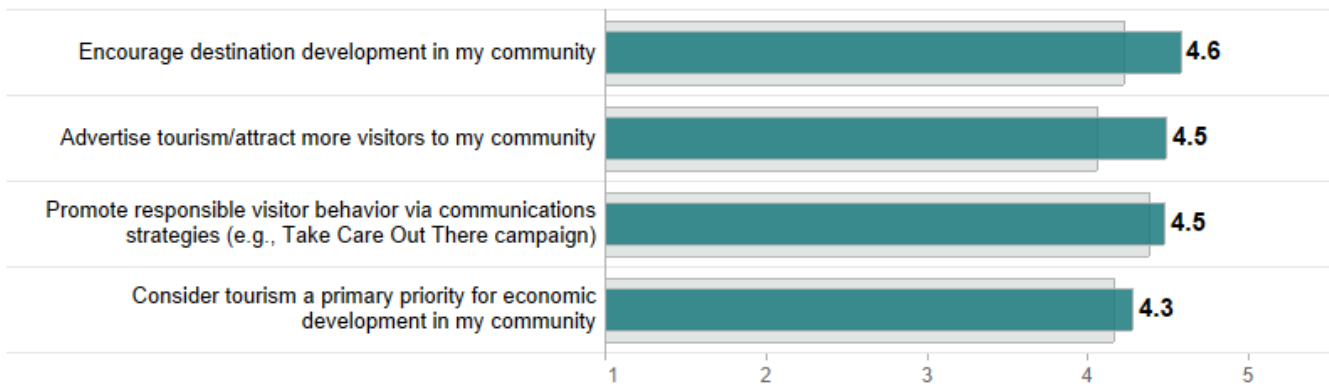
Both overall and in Southern Oregon, a majority of respondents agreed or strongly agreed with each statement related to their support for tourism development, including encouraging tourism development in their community, advertising tourism/attracting more visitors, promoting responsible visitor behavior, and considering tourism as a primary priority for economic development. The statement with the greatest support among Southern Oregon respondents was, "I believe Oregon should encourage tourism development in my community" with an average rating of 4.6 on a five-point scale.

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 Southern Oregon, 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 respondents overall and those in Southern Oregon.

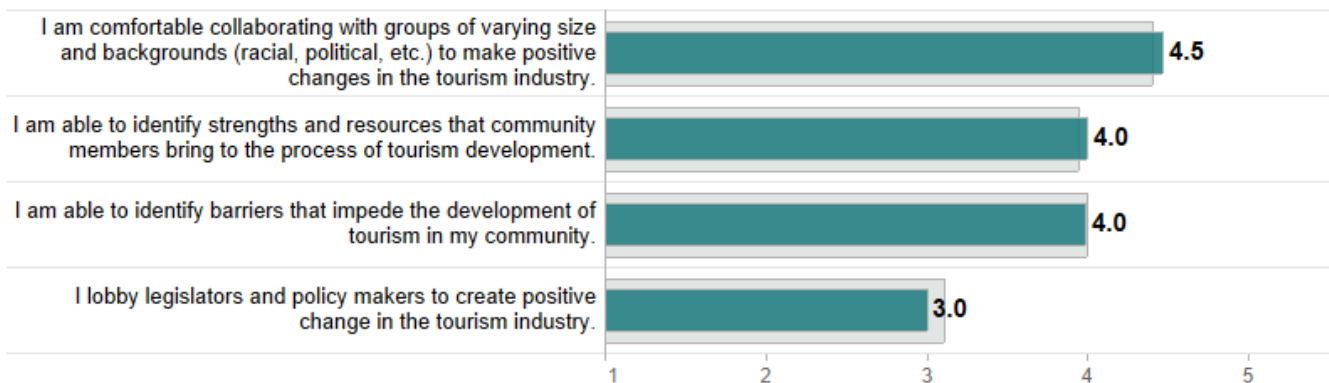
Tourism Development in Oregon



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



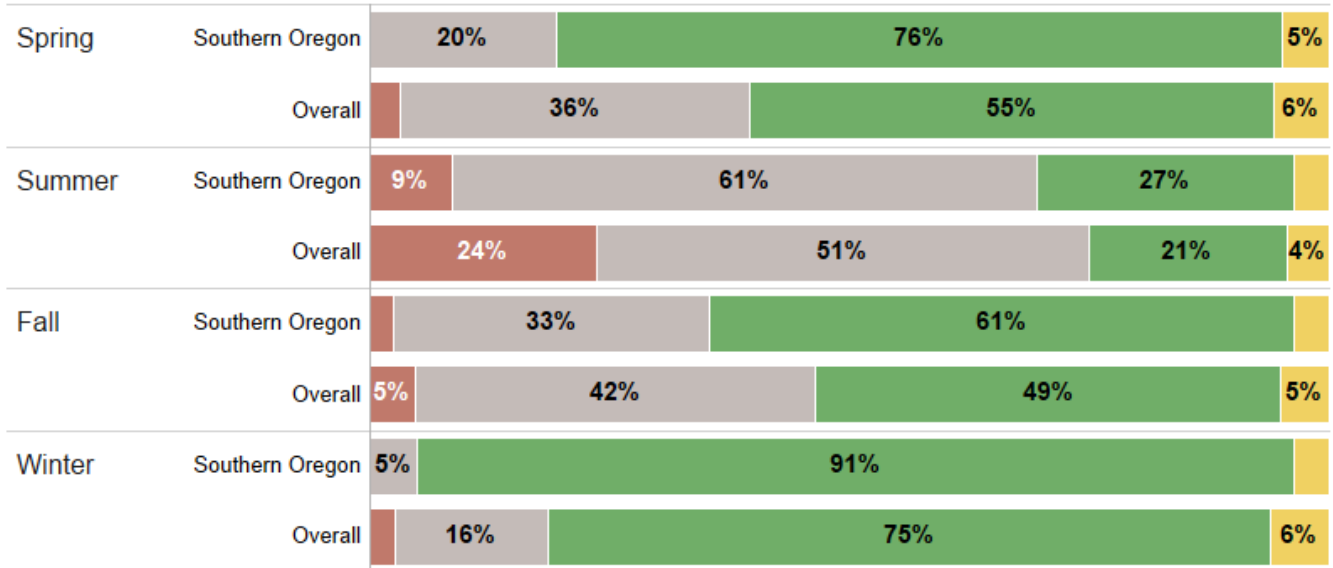
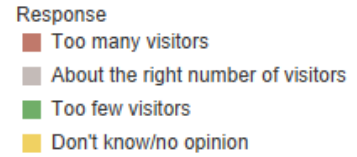
Q: Please rate your level of agreement with the statements below, from 1 (Strongly Disagree) to 5 (Strongly Agree).



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, Southern Oregon respondents were less likely to respond that visitation levels were too high and more likely to indicate that there were too few visitors, when compared to the overall sample.

Visitation Levels by Season

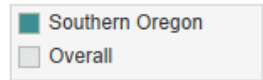
Q: With respect to the number of visitors that your community receives each season, would you say there are:



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 Southern Oregon considered as strengths in their community were outdoor recreation opportunities (96%), food and beverage (37%), and agritourism (33%). In comparison to the overall responses, respondents Southern Oregon were more likely to identify outdoor recreation opportunities and agritourism as strengths and less likely to identify lodging, safe environment for travelers, and attractions/art and cultural experiences as strengths.

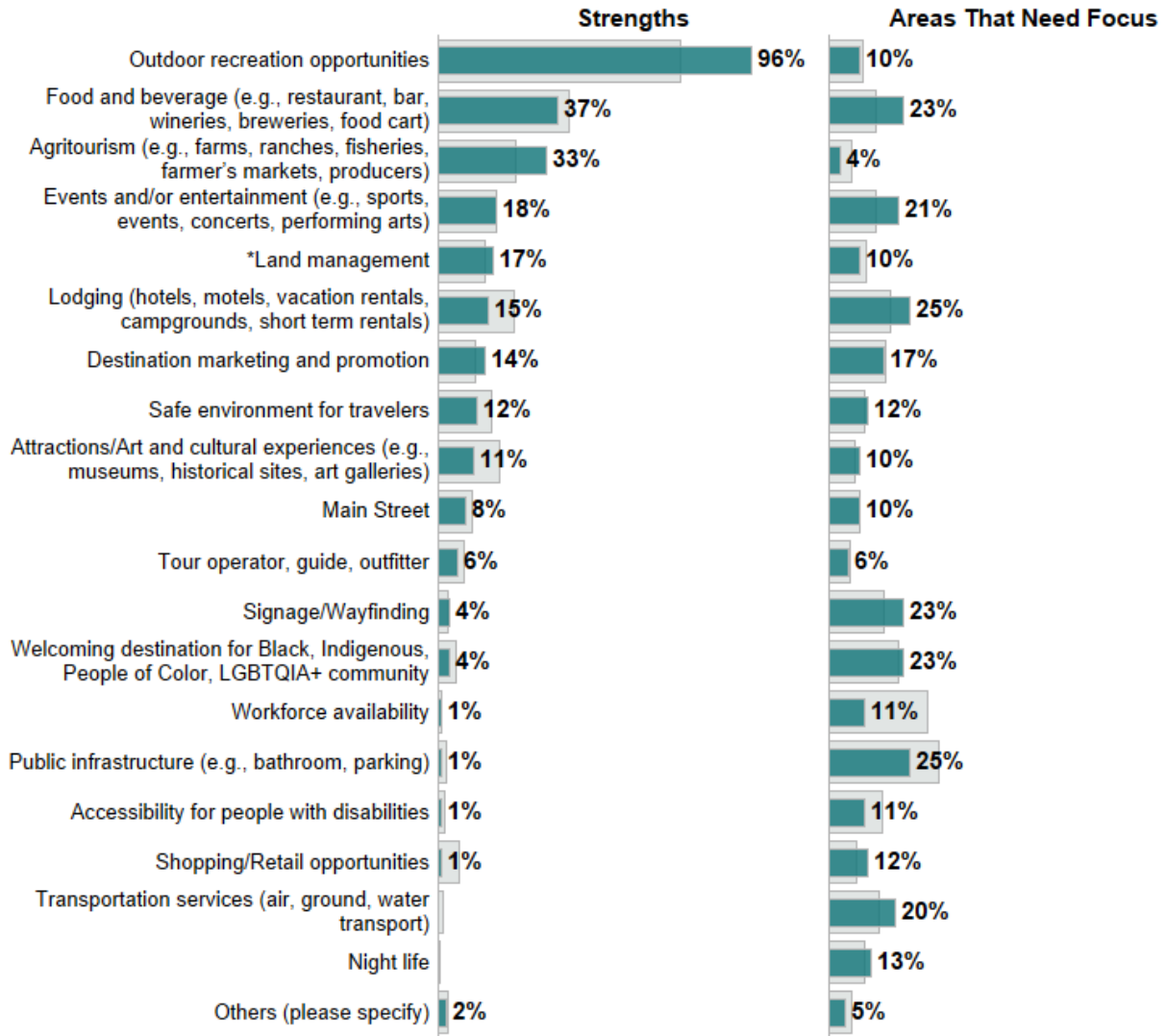
The top areas that Southern Oregon respondents said their community needs to focus on to improve residents' and visitors' experiences were lodging (25%), public infrastructure (e.g., bathroom, parking) (25%), food and beverage (23%), signage/wayfinding (23%), and being a welcoming destination for Black, Indigenous, People of Color, LGBTQIA+ community (23%). 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



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 Southern Oregon identified as high risks were wildfires (77%), drought (48%), and lack of affordable housing (48%). The percentage of respondents who rated wildfires and drought as high risks was lower in the overall sample (33% and 18%, respectively) compared to Southern Oregon. In addition, the percentage of respondents who rated lack of affordable housing as a high risk was higher among respondents overall (65%) compared to those in Southern Oregon.

Risks to Tourism in Your Community

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

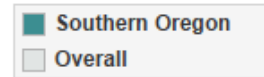
Response
■ High risk
■ Medium risk
■ Low risk

Challenge	Region	High risk	Medium risk	Low risk
Wildfires	Southern Oregon	77%	14%	8%
	Overall	33%	35%	32%
Drought	Southern Oregon	48%	36%	16%
	Overall	18%	29%	54%
Lack of affordable housing	Southern Oregon	48%	34%	18%
	Overall	65%	24%	10%
Houselessness	Southern Oregon	45%	30%	24%
	Overall	42%	33%	25%
Economic downturn	Southern Oregon	32%	58%	10%
	Overall	33%	50%	17%
Increasing negative visitor perception	Southern Oregon	22%	48%	30%
	Overall	22%	40%	39%
Overburdened public resources	Southern Oregon	20%	33%	47%
	Overall	33%	35%	32%
Increasing negative resident sentiment towards visitors	Southern Oregon	19%	43%	39%
	Overall	25%	42%	33%
Community violence and crime	Southern Oregon	15%	33%	53%
	Overall	13%	30%	57%
Global pandemic or other health concerns	Southern Oregon	15%	23%	63%
	Overall	15%	36%	49%
Flooding	Southern Oregon	18%	0%	81%
	Overall	7%	27%	66%
Other	Southern Oregon	50%	10%	40%
	Overall	45%	19%	35%

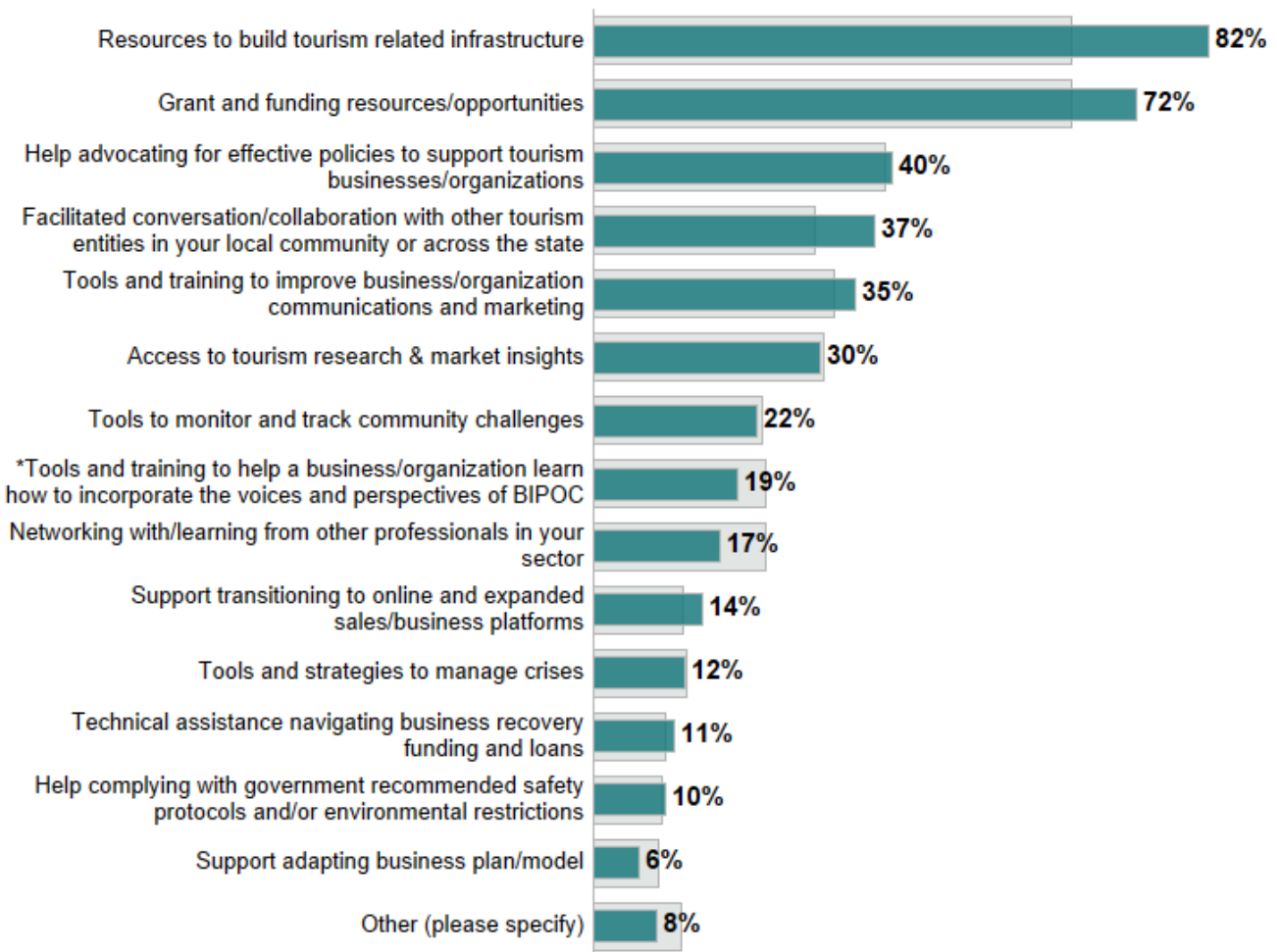
*Categories sorted in descending order by the percent of Southern Oregon respondents selecting "High risk."

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 Southern Oregon: resources to build tourism related infrastructure (64% in the overall and 82% among respondents in Southern Oregon) and grant and funding resources/opportunities (64% in the overall and 72% among respondents in Southern Oregon). Compared to the overall, respondents in Southern Oregon were more likely to select facilitated conversation/collaboration with other tourism entities in your local community or across the state (37% vs 30%, 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.

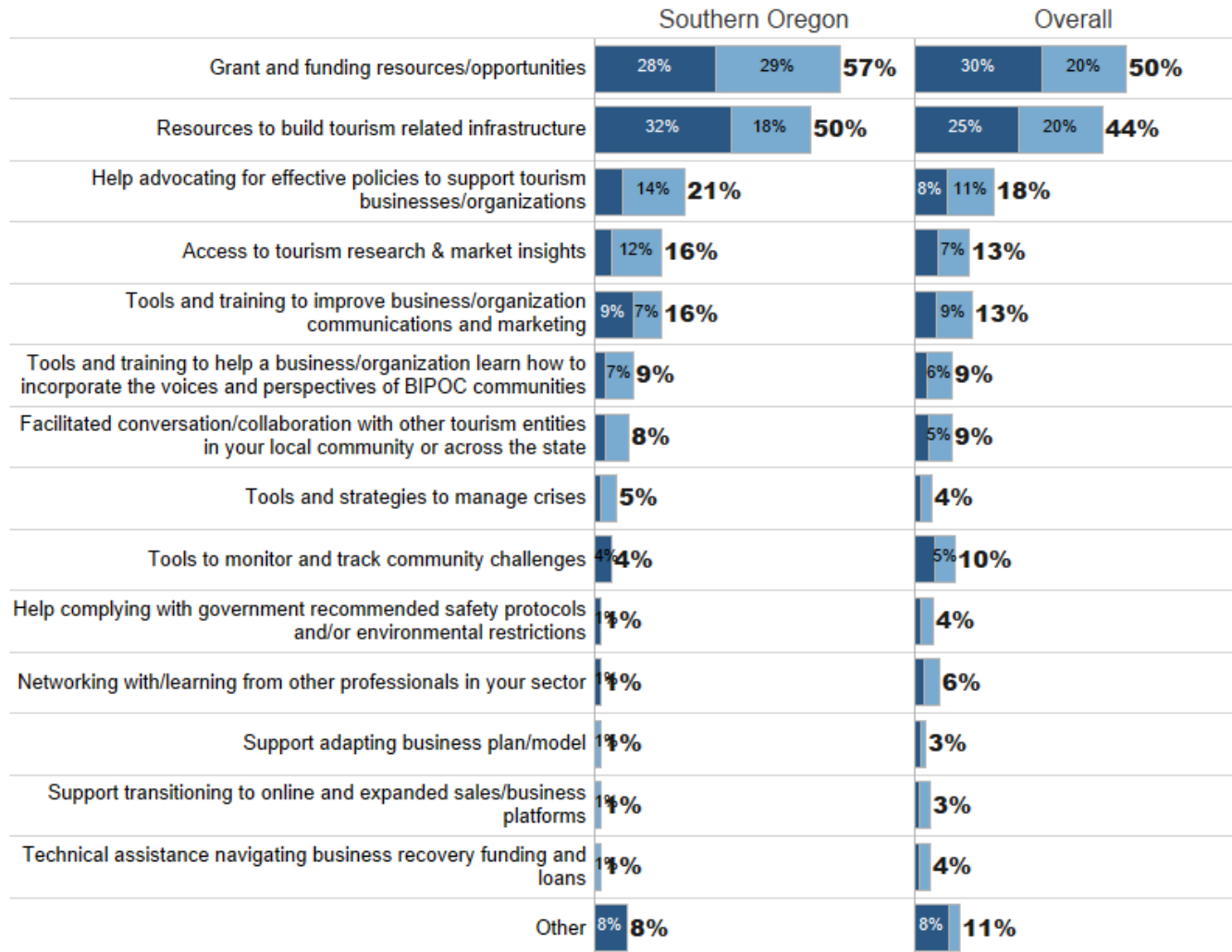


Respondents were then asked to specifically rank the programs or resources that they selected from the previous question from highest to lowest priority. Again, grant and funding resources/opportunities and resources to build tourism-related infrastructure emerged as clear top priorities among both respondents overall and those in Southern Oregon.

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



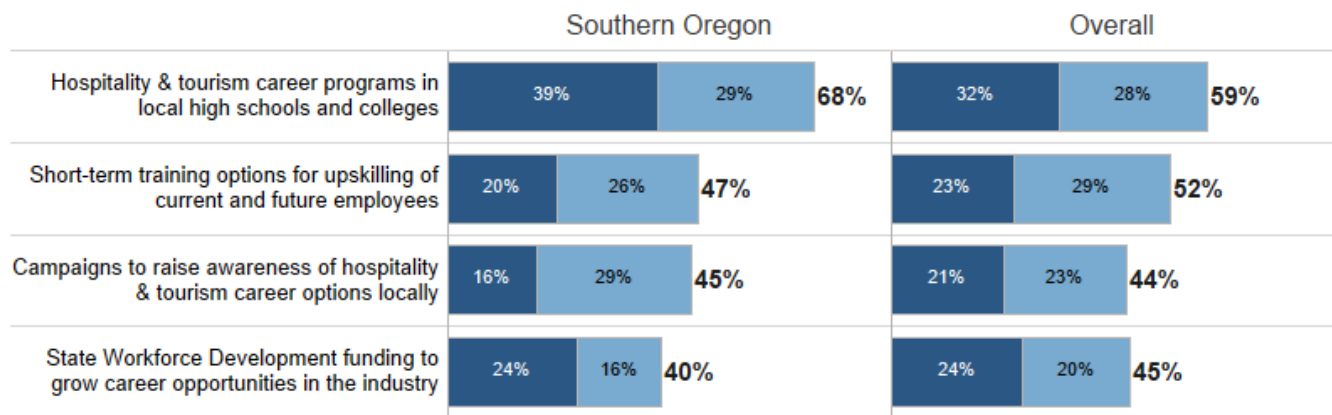
In order to rebuild the local workforce, the survey asked respondents to rank educational and career opportunities from highest to lowest priority in order to develop, attract and retain the local workforce to the industry. The following figure shows the share of respondents that rated each category 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 68% in Southern Oregon), followed by "Short-term training options for upskilling of current and future employees" (52% overall and 47% in Southern Oregon).

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

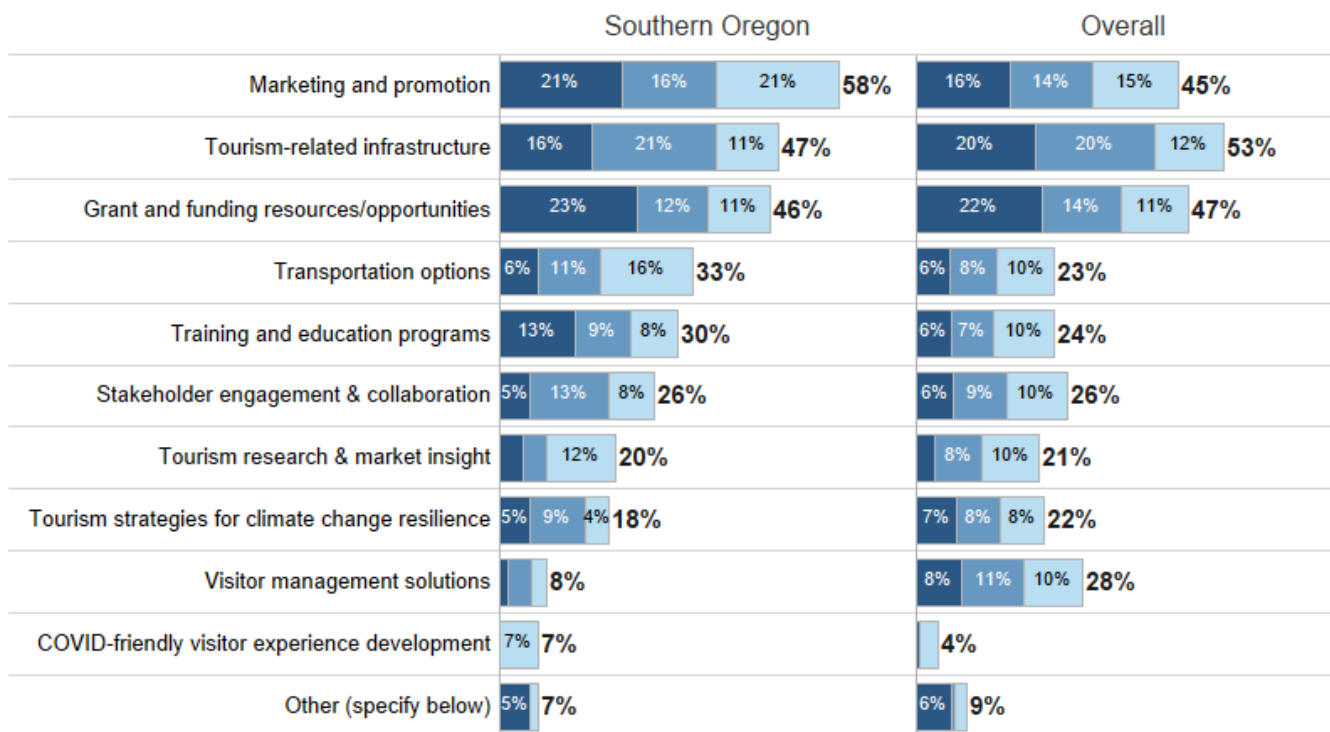
■ First Rank ■ Second Rank



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. Southern Oregon respondents, however, were more likely to favor marketing and promotion with 58% identifying it among their top-three priorities. Although not a favored priority, Southern Oregon respondents were more likely to select transportation options as a priority (33% vs. 23% among respondents overall).

Tourism Priorities & Focus Areas

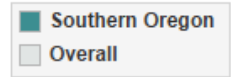
Q: Please identify the three areas that you believe should be emphasized for tourism planning over the next 2 to 5 years in Oregon: ■ First Rank ■ Second Rank ■ Third Rank



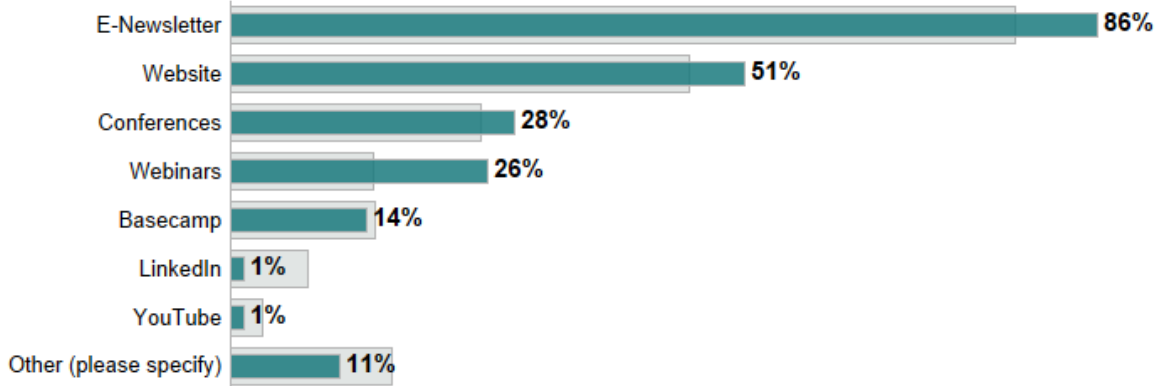
INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Eighty-six percent of Southern Oregon respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter, followed by website (51%). By a large margin, e-newsletters are considered the best way for respondents to receive information.

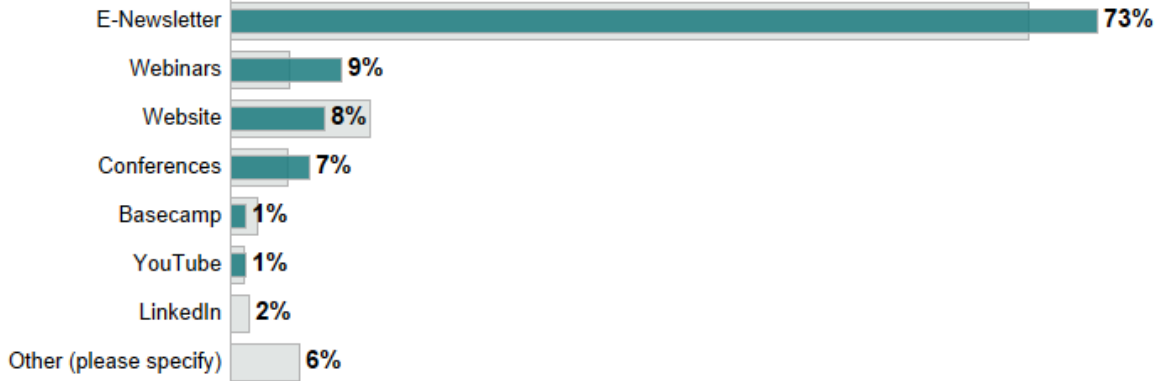
Communications



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?

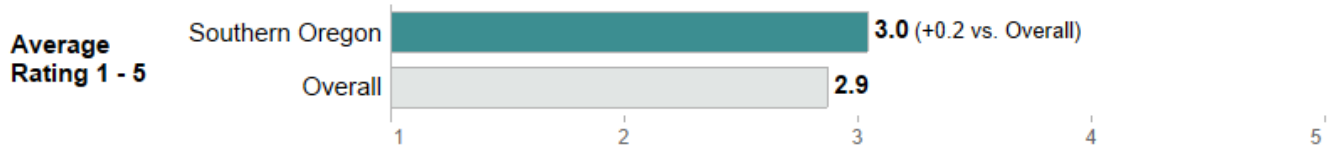
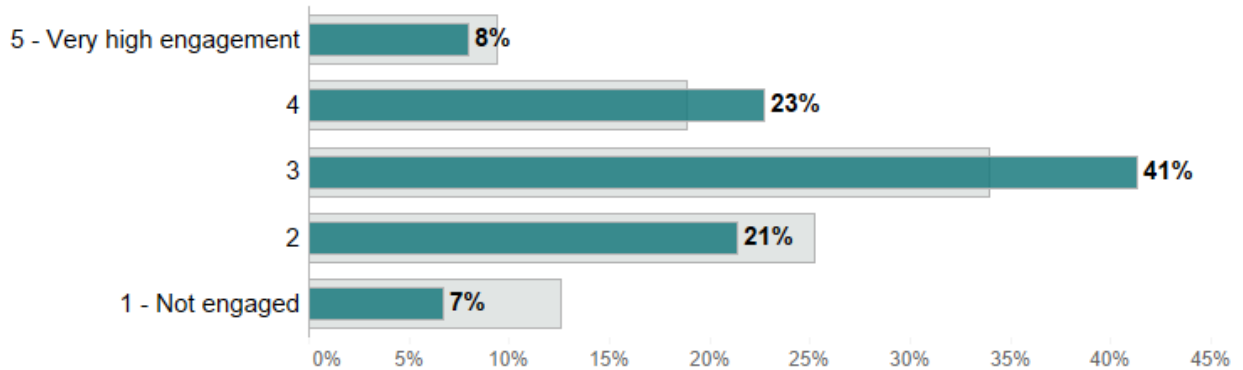


Respondents were asked to rate their engagement with Travel Oregon, from 1 (not engaged) to 5 (very high engagement). Thirty-one percent of respondents in Southern Oregon rated this question a 4 or 5, compared to 28% in the overall sample. The average rating was slightly higher among Southern Oregon respondents (3.0) compared to the overall average (2.9).

Engagement with Travel Oregon

■ Southern Oregon
 ■ Overall

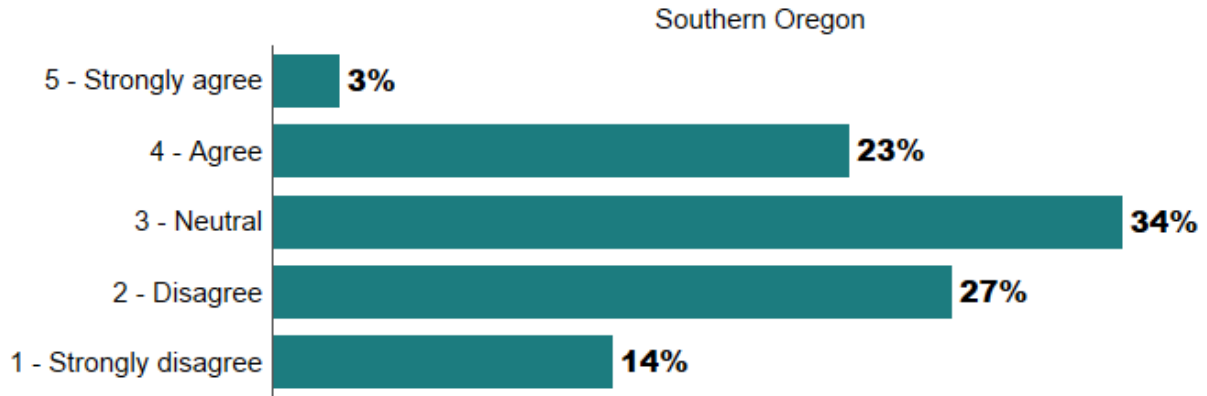
Q: Please indicate your level of engagement with Travel Oregon, from 1 (Not engaged) to 5 (Very high engagement).



SOUTHERN OREGON QUESTIONS

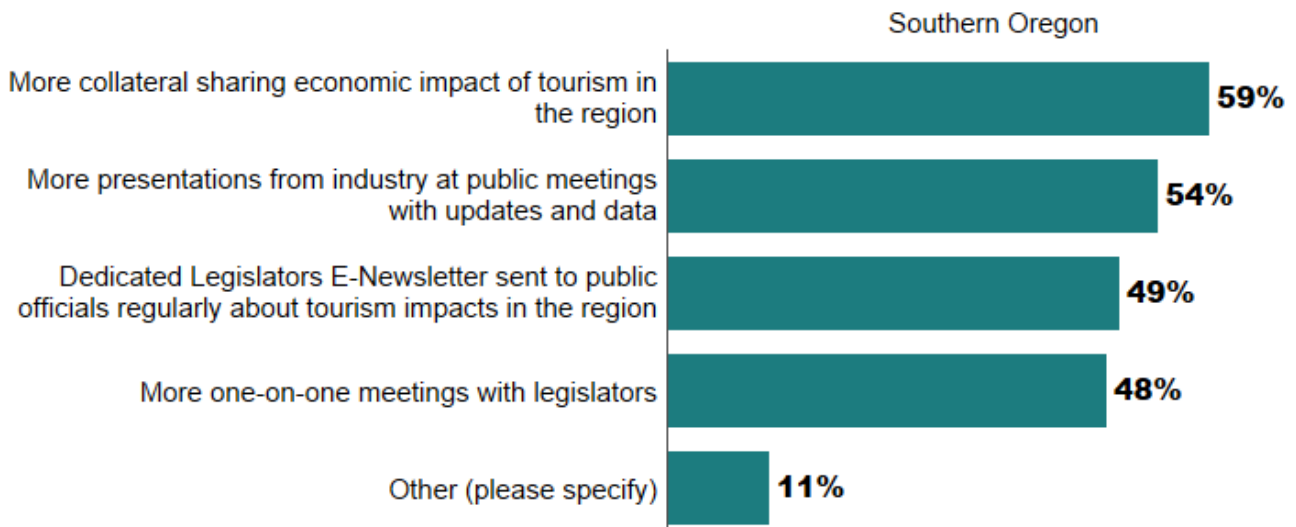
Each region had the opportunity to ask a series of custom questions of specific interest to their stakeholders, challenges, and opportunities. The findings from these custom questions are presented below. The survey resulted in an extensive number of open-ended responses. All open-ended responses are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

Q: How would you rate your agreement with the statement below, on a scale from 1 (Strongly disagree) to 5 (Strongly agree)? Legislators and public officials understand the value of tourism in my community.



Source: 2023 Oregon Tourism Stakeholder Survey

Q: To help educate public officials about the value of tourism in our community we would like to see more (check all that apply):



Source: 2023 Oregon Tourism Stakeholder Survey