2023 OREGON TOURISM INDUSTRY STAKEHOLDER SURVEY

SUMMARY OF RESULTS | CENTRAL OREGON

March 2023

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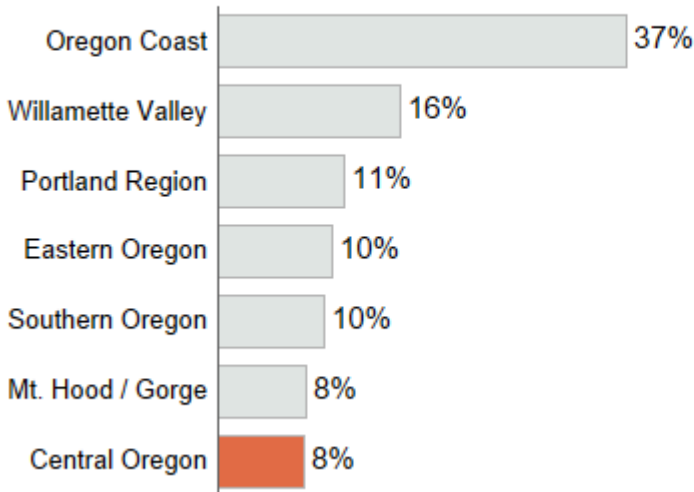
OBJECTIVES

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 79 valid responses from Central Oregon and 1,018 responses statewide. 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 Central Oregon compared to the statewide survey results (referred to as the "overall" in figures).

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
- Two-thirds of respondents (64%) in Central 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 25% were neutral.
- Most respondents in Central Oregon agreed or strongly agreed with statements related to what Oregon should do to promote tourism, including promote responsible visitor behavior (83% agreed or strongly agreed), consider tourism as a primary priority for economic development (78%), encourage tourism development in their community (73%), and advertise tourism/attract more visitors (72%).
- Respondents in Central Oregon were most in agreement that they are comfortable collaborating with groups of varying size and backgrounds to make positive changes in the tourism industry (89% agreed or strongly disagreed), and they were least in agreement that they are able to lobby legislators and policy makers to create positive change within the industry (20% agreed or strongly agreed).

STRENGTHS AND AREAS FOR IMPROVEMENT
- The top three areas that respondents from Central Oregon considered as strengths in their community were outdoor recreation opportunities (89%), food and beverage (45%), and events and/or entertainment (33%).
- The top areas that Central Oregon respondents said their community needs to focus on to improve residents' and visitors' experiences were workforce availability (45%), transportation services (31%), being a welcoming destination for Black, Indigenous, People of Color, LGBTQIA+ community (30%), and public infrastructure (e.g., bathroom, parking) (25%).

ADDRESSING RISKS TO TOURISM
- The top three challenges that respondents in the Central Oregon region identified as high risks to tourism were lack of affordable housing (75%), wildfires (73%) and drought (48%).
- The top two strategies that respondents in Central Oregon 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 (60%) and resources to build tourism related infrastructure (45%).

WORKFORCE
- To develop, attract and retain the local workforce to the tourism industry, over two-thirds of respondents (69%) in Central Oregon selected the strategy, "Hospitality & tourism career programs in local high schools and colleges" as their first or second priorities, followed by "Campaigns to raise awareness of hospitality and tourism career options locally" (49%).

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-three percent of Central Oregon respondents selected

tourism-related infrastructure among their top-three priorities, followed by 42% who selected marketing and promotion and 41% 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 ope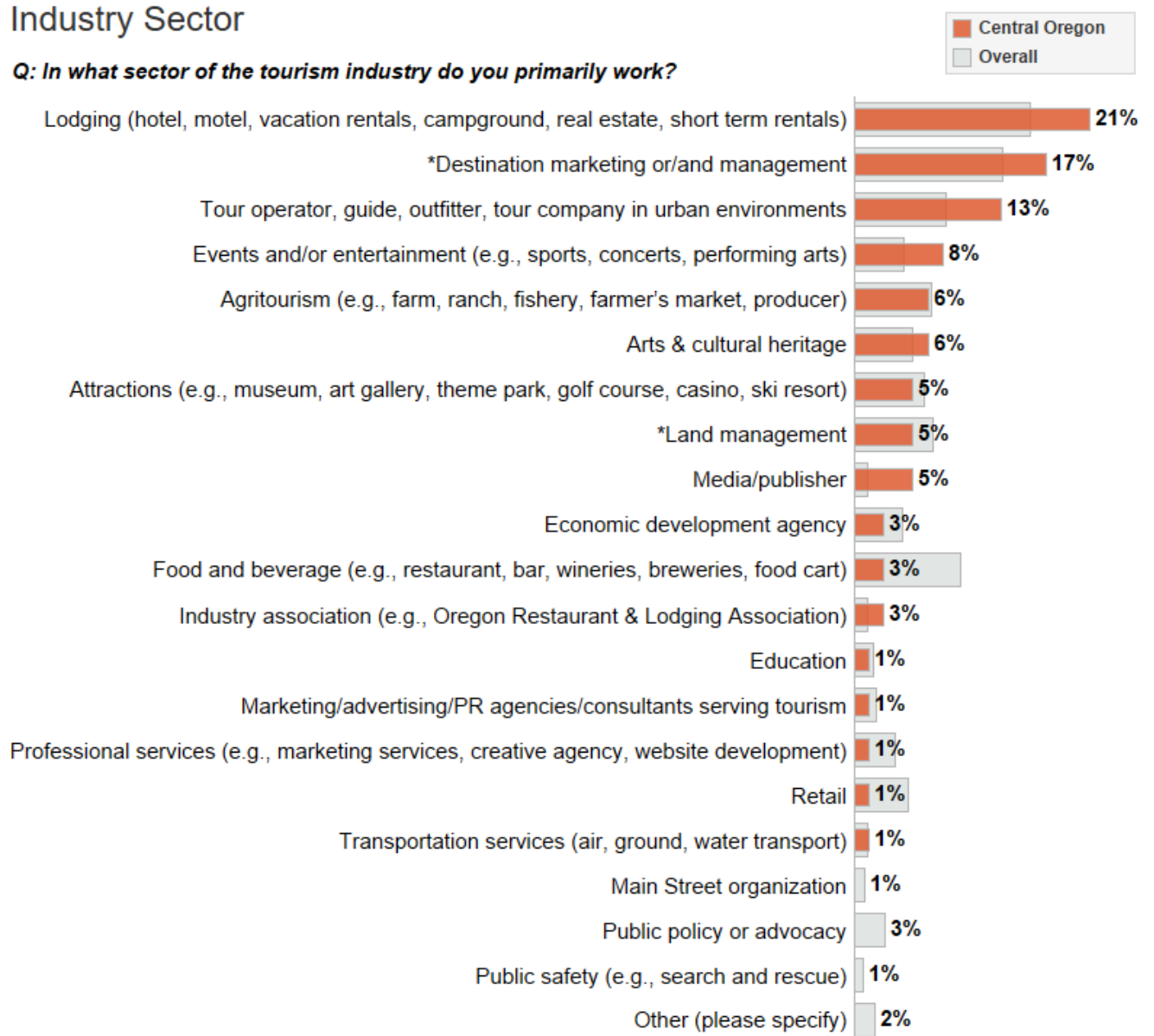rator, guide, outfitter, tour company in urban environments" (8%). "Other" write-in responses, comprising 14% of the overall responses, were diverse and reflected the broad reach of the survey. Members from the Travel Oregon and Driftline Consulting teams collaborated to re-code the "Other" responses to fit into the provided response options, where applicable. Like respondents overall, respondents from Central Oregon were most often employed in the lodging industry, followed by destination marketing and/or management, and as a tour operator, guide, outfitter, or tour company. Respondents from Central Oregon were less likely to be employed in food and beverage, land management or attractions compared to respondents overall.

Industry Sector

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

Legend: Central Oregon, Overall

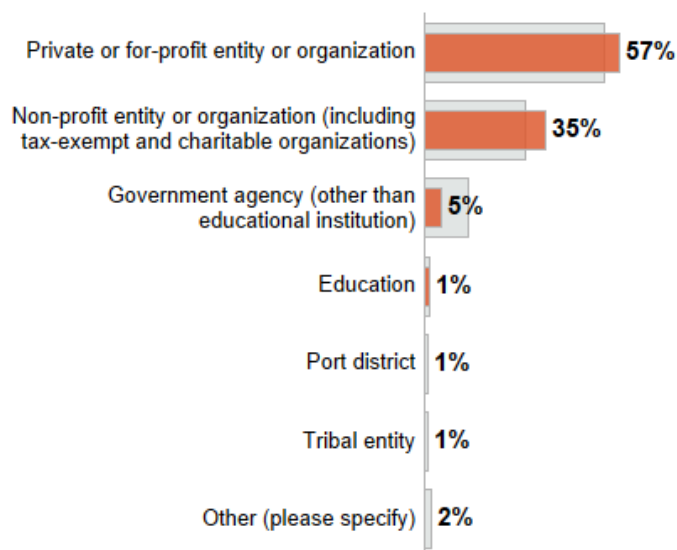| Sector	Central Oregon
Lodging (hotel, motel, vacation rentals, campground, real estate, short term rentals)	21%
*Destination marketing or/and management	17%
Tour operator, guide, outfitter, tour company in urban environments	13%
Events and/or entertainment (e.g., sports, concerts, performing arts)	8%
Agritourism (e.g., farm, ranch, fishery, farmer's market, producer)	6%
Arts & cultural heritage	6%
Attractions (e.g., museum, art gallery, theme park, golf course, casino, ski resort)	5%
*Land management	5%
Media/publisher	5%
Economic development agency	3%
Food and beverage (e.g., restaurant, bar, wineries, breweries, food cart)	3%
Industry association (e.g., Oregon Restaurant & Lodging Association)	3%
Education	1%
Marketing/advertising/PR agencies/consultants serving tourism	1%
Professional services (e.g., marketing services, creative agency, website development)	1%
Retail	1%
Transportation services (air, ground, water transport)	1%
Main Street organization	1%
Public policy or advocacy	3%
Public safety (e.g., search and rescue)	1%
Other (please specify)	2%

*Answer option abbreviated in reporting.

Respondents were asked which entity type best describes their business or organization. In Central Oregon, the top two response options were private or for-profit entities/organizations (57%) and non-profit entities/organizations (35%). The major difference relative to the overall was that the government agency response option had a lower percentage in Central Oregon (5%) compared to the overall (13%).

The top employment statuses for the region were full-time employed (69%), self-employed (13%), and part-time employed (8%). Compared to the overall responses, the Central Oregon region had a higher proportion of full-time employed individuals and a lower proportion of self-employed individuals. The proportion of part-time employment status is relatively similar across the region and overall responses.

Entity Type, & Employment Status

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

Entity Type	Percent
Private or for-profit entity or organization	57%
Non-profit entity or organization (including tax-exempt and charitable organizations)	35%
Government agency (other than educational institution)	5%
Education	1%
Port district	1%
Tribal entity	1%
Other (please specify)	2%

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

Employment Status	Percent
Full-time employed	69%
Self-employed	13%
Part-time employed	8%
Volunteer	4%
Not employed	2%
Retired	3%
Other (please specify)	6%
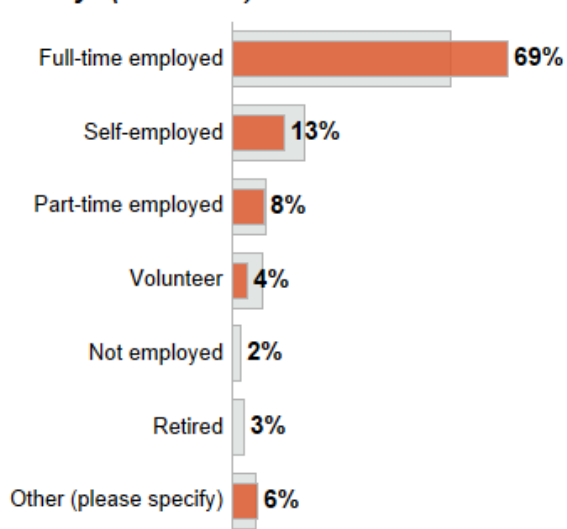
*For both questions, where applicable, "Other" write-in responses were recoded to appropriate categories.

In Central Oregon, the majority of respondents fell into the 35-64 age range, with 29% aged 35-44, 23% aged 45-54, and 23% aged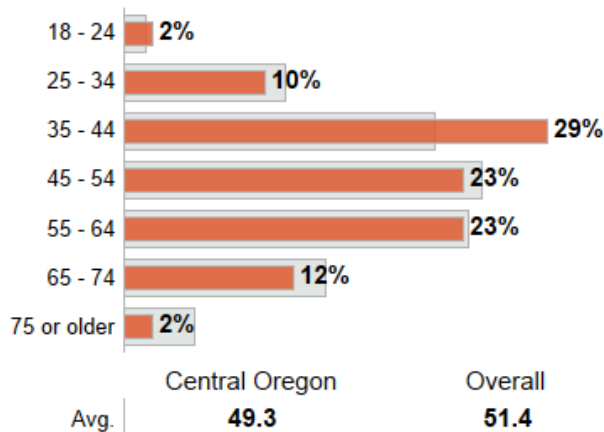 55-64. In the overall results, the largest age group was 45-54, followed by 55-64. The proportion of respondents aged 65 and older was also smaller in Central Oregon compared to the overall results.

Statewide, 56% of respondents identified as female and 37% identified as male. Central Oregon respondents skewed slightly more female at 63%.

Age & Gender

Legend: ■ Central Oregon □ Overall

Q: Respondent Age

Age	Central Oregon
18 - 24	2%
25 - 34	10%
35 - 44	29%
45 - 54	23%
55 - 64	23%
65 - 74	12%
75 or older	2%

	Central Oregon	Overall
Avg.	49.3	51.4

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

Gender	Central Oregon
Female	63%
Male	35%
Gender non-conforming	4%
Genderqueer	2%
I identify as:	1%
Prefer not to answer	2%
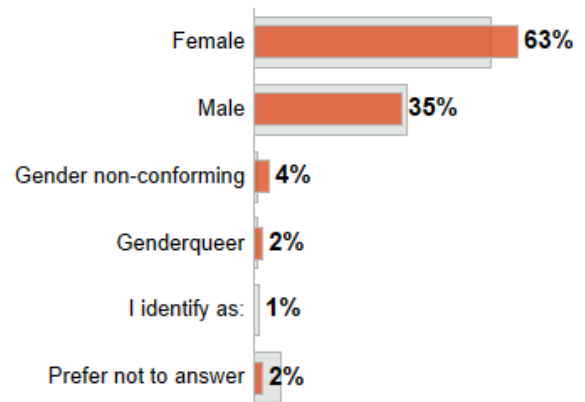
Statewide, 78% of respondents described themselves as white, compared to 89% of Central Oregon respondents. After that, 5% of respondents overall and 7% of Central Oregon respondents described themselves as multi-racial.

Forty-four percent of survey respondents overall indicated that they had annual household incomes of $75,000 or more. In the Central Oregon region, the most common response options were $100,000-149,999 (26%) and $75,000-99,999 (17%). Compared to the overall, the Central Oregon region had a higher percentage of respondents in the $100,000-149,999 range (26% vs 20%) and a lower percentage in the $250,000 or more range (4% vs 8%).

Race & Household Income

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

White	89%
I identify with more than one racial background/multi-racial	7%
Asian	2%
Black or African American	1%
Hispanic / Latino or Latinx	2%
Middle Eastern / Northern African	0%
Native American / Alaskan Native	1%
Unknown	0%
A race/ethnicity not listed here, please specify:	2%
Prefer not to share	2%
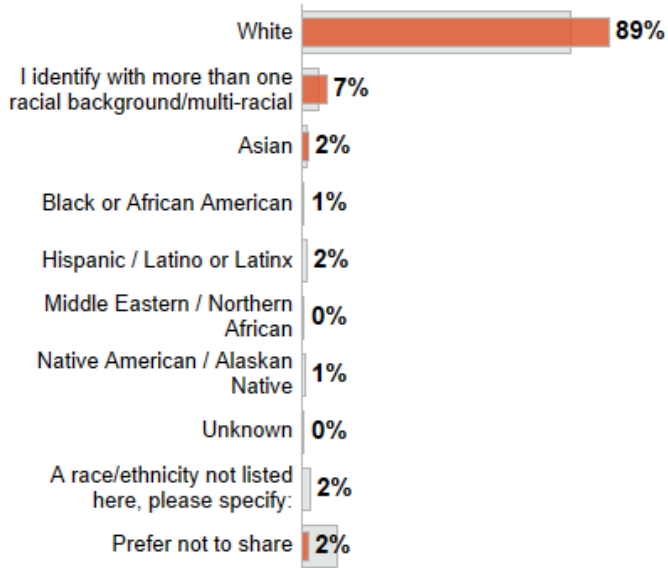
Q: Which of these categories best describes the total gross annual income of your household (before taxes)?

Under $25,000	4%
$25,000-49,999	11%
$50,000-74,999	13%
$75,000-99,999	17%
$100,000-149,999	26%
$150,000-199,999	11%
$200,000-249,999	4%
$250,000 or more	4%
Prefer not to respond	9%
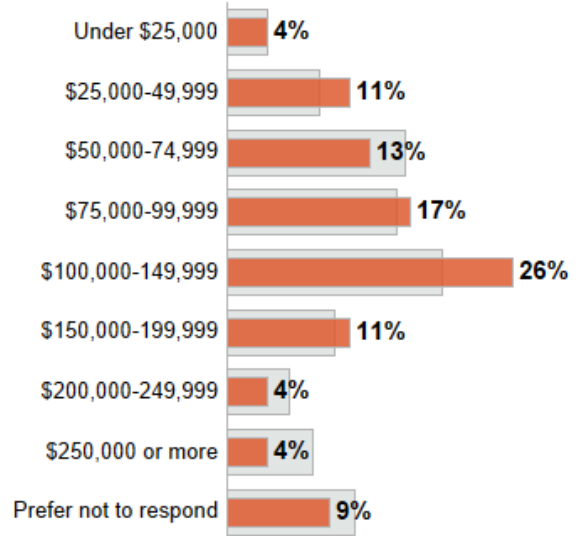
Central Oregon respondents had a higher level of education compared to the overall respondents. Specifically, a larger percentage of Central Oregon respondents completed a 4-year college degree (44%) and a postgraduate degree (31%) compared to the overall respondents (36% and 27%, respectively).
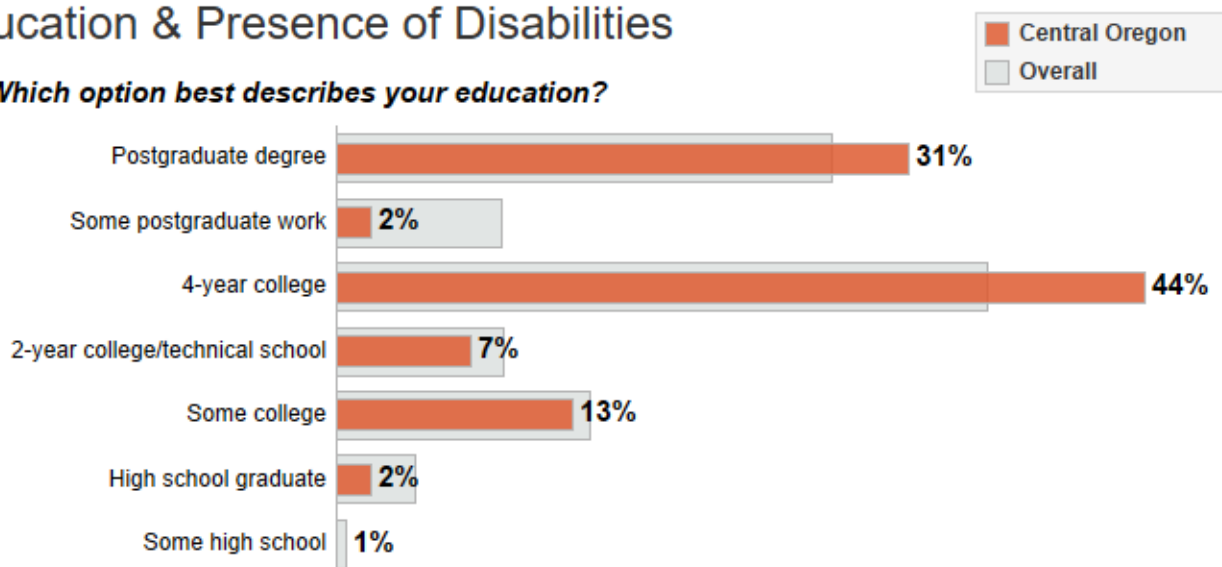
Six percent of Central Oregon respondents reported having a disability, compared to 9% of overall respondents.

Education & Presence of Disabilities

Central Oregon
Overall

Q: Which option best describes your education?

Education	Central Oregon
Postgraduate degree	31%
Some postgraduate work	2%
4-year college	44%
2-year college/technical school	7%
Some college	13%
High school graduate	2%
Some high school	1%

Q: Do you have a disability? ■ Yes ■ No

Central Oregon — Yes: 6% / No: 94%

Overall — Yes: 9% / No: 91%
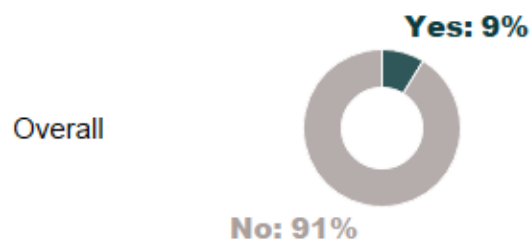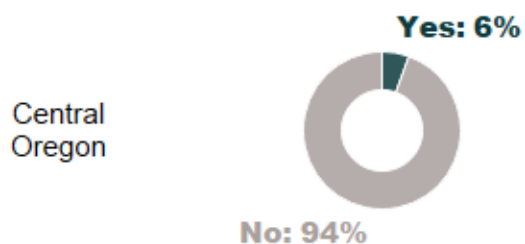
Q: [If yes] What are these disabilities? (Select all that apply)

Disability	Percent
Hearing	30%
Mobility	23%
Learning	5%
Sight	5%
Speech	2%
Other (please specify)	21%
Prefer not to say	32%
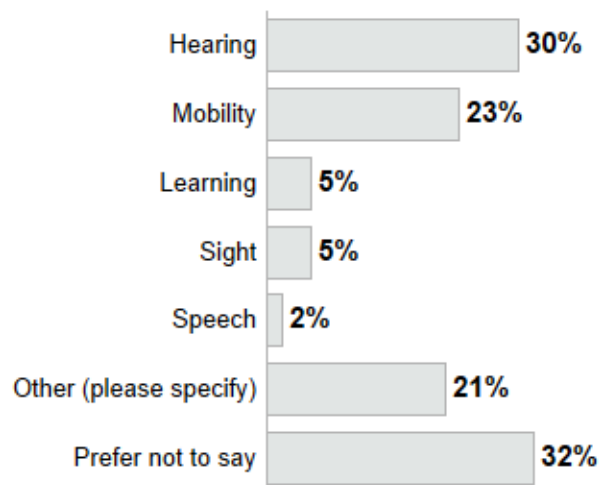
*Overall only due to insufficient sample size within regions.

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 35% of Central Oregon respondents identifying it as their top priority and 60% 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 33% of Central Oregon respondents identifying it as their top priority and 51% 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

	Central Oregon		Overall	
	First Rank	Second Rank	First Rank	Second Rank
STRATEGY 1: Improve perception of the value of tourism and increase advocacy among industry workforce, residents and policymakers.	35%	25% **60%**	36%	21% **56%**
STRATEGY 3: Reduce high visitation pressures and increase community livability by investing in the development of niche tourism product that is based on growing visitor demand and Oregon's competitive advantage (e.g., outdoor recreation, culinary, agritourism, arts and culture).	33%	18% **51%**	29%	21% **50%**
STRATEGY 4: Provide 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).	13%	22% **35%**	16%	21% **37%**
STRATEGY 2: Ensure diversity, equity and inclusion (DEI) is emphasized and integrated agencywide, from programming and procurement to employee recruitment and training.	15%	16% **31%**	8%	16% **24%**
STRATEGY 5: Utilize partnerships to advance educational and career opportunities to develop, attract and retain Oregon's tourism workforce.		18% **24%**	11%	20% **32%**

Respondents were 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 Central Oregon, 64% were satisfied, 12% were unsatisfied, and 25% were neither unsatisfied nor satisfied. The average among respondents in Central Oregon was higher (3.7) than the average among respondents overall (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).
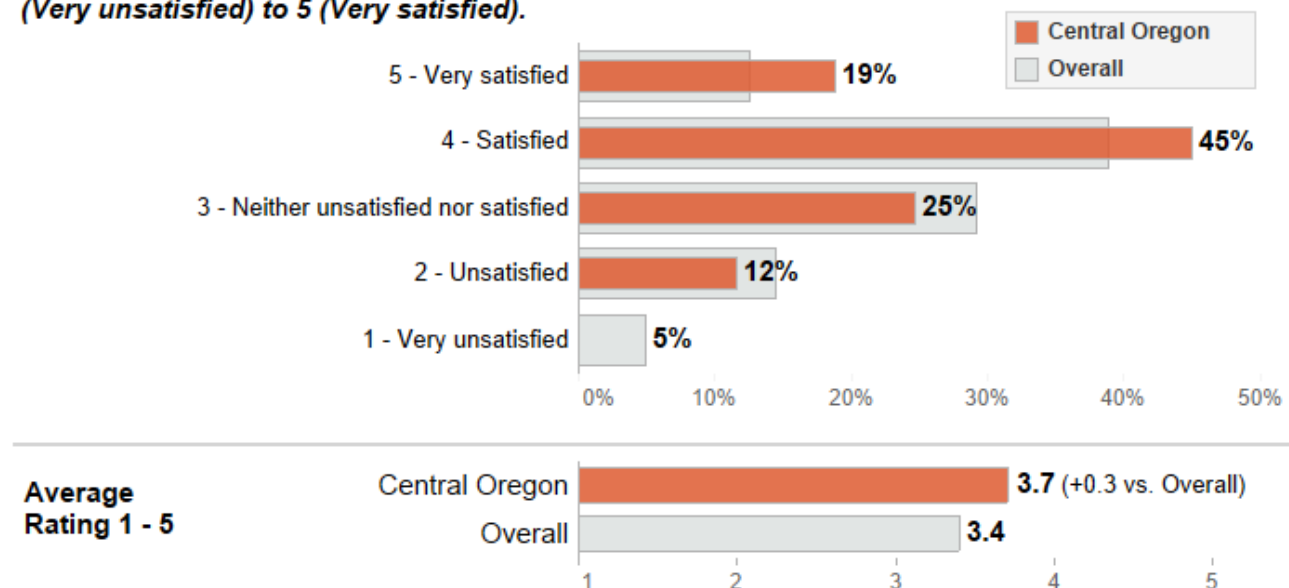

Note that "Destination Development" refers to overall tourism development in Oregon. The following definition was provided to survey respondents: "Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets."
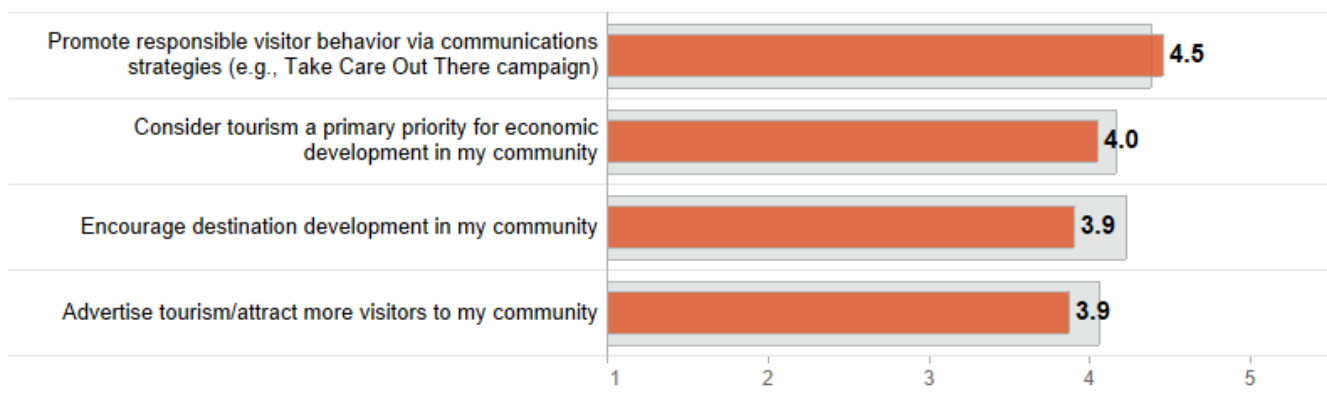
Respondents were asked to rate their agreement with four statements related to their support for tourism development. The statement with the greatest support among the overall sample and respondents in Central Oregon was, "I believe Oregon should promote responsible visitor behavior via communications strategies" with an average rating of 4.4 on a five-point scale (overall) and 4.5 among respondents in Central Oregon. Compared to the overall sample, respondents in Central Oregon indicated less support for statements related to how Oregon should consider tourism a primary priority for economic development, encourage tourism development, and advertise tourism to attract more visitors.

Respondents were also asked to rate their level of agreement with four statements that measured their advocacy for tourism. Both overall and in Central Oregon, respondents were most in agreement that they are comfortable collaborating with group of varying size and backgrounds to make positive changes in the tourism industry and least in agreement that they lobby legislators and policy makers to create positive change in the tourism industry.

Tourism Development in Oregon
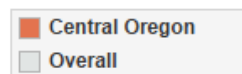
Legend: Central Oregon, Overall

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

Statement	Central Oregon
Promote responsible visitor behavior via communications strategies (e.g., Take Care Out There campaign)	4.5
Consider tourism a primary priority for economic development in my community	4.0
Encourage destination development in my community	3.9
Advertise tourism/attract more visitors to my community	3.9

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

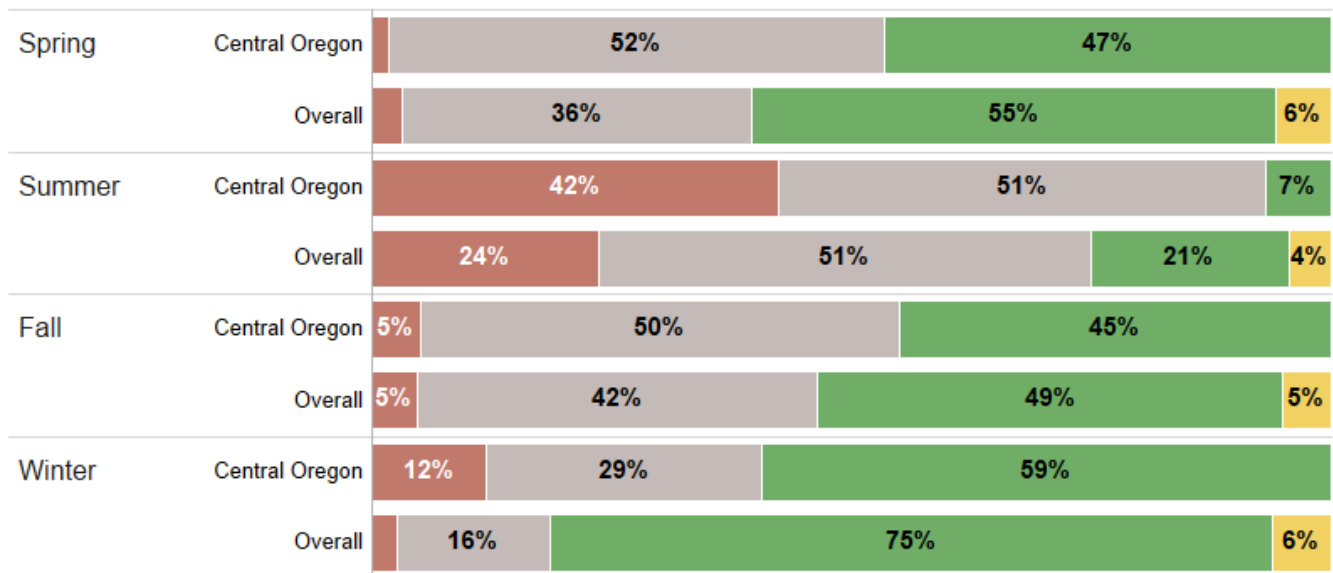| Statement	Central Oregon
I am comfortable collaborating with groups of varying size and backgrounds (racial, political, etc.) to make positive changes in the tourism industry.	4.4
I am able to identify barriers that impede the development of tourism in my community.	3.8
I am able to identify strengths and resources that community members bring to the process of tourism development.	3.8
I lobby legislators and policy makers to create positive change in the tourism industry.	2.8

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. Compared to the overall sample, a higher proportion of respondents in Central Oregon indicated that there are too many visitors in the summer (42%) and too many visitors in the winter (12%). Across all seasons, respondents in Central Oregon were less likely to say that there were too few visitors.

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

		Too many	About the right number	Too few	Don't know
Spring	Central Oregon		52%	47%	
	Overall		36%	55%	6%
Summer	Central Oregon	42%	51%		7%
	Overall	24%	51%	21%	4%
Fall	Central Oregon	5%	50%	45%	
	Overall	5%	42%	49%	5%
Winter	Central Oregon	12%	29%	59%	
	Overall		16%	75%	6%

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 Central Oregon consider as strengths in their community are outdoor recreation opportunities (89%), food and beverage (45%), and events and/or entertainment (33%). In comparison to the overall responses, respondents in the Central Oregon region were more likely to identify outdoor recreation opportunities, food and beverage and events and/or entertainment as strengths and were less likely to identify lodging, attractions/art and cultural experiences, and agritourism as strengths.

The top areas that Central Oregon respondents said their community needs to focus on to improve residents' and visitors' experiences were workforce availability (45%), transportation services (31%), being a welcoming destination for Black, Indigenous, People of Color, LGBTQIA+ community (30%), and public infrastructure (e.g., bathroom, parking) (25%). 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

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:

	Strengths	Areas That Need Focus
Outdoor recreation opportunities	89%	14%
Food and beverage (e.g., restaurant, bar, wineries, breweries, food cart)	45%	8%
Events and/or entertainment (e.g., sports, events, concerts, performing arts)	33%	2%
Lodging (hotels, motels, vacation rentals, campgrounds, short term rentals)	17%	20%
Destination marketing and promotion	17%	9%
Tour operator, guide, outfitter	14%	13%
Attractions/Art and cultural experiences (e.g., museums, historical sites, art galleries)	14%	5%
Main Street	13%	5%
Safe environment for travelers	13%	6%
*Land management	9%	14%
Welcoming destination for Black, Indigenous, People of Color, LGBTQIA+ community	6%	30%
Public infrastructure (e.g., bathroom, parking)	5%	25%
Shopping/Retail opportunities	5%	5%
Agritourism (e.g., farms, ranches, fisheries, farmer's markets, producers)	5%	5%
Night life	3%	9%
Accessibility for people with disabilities	3%	17%
Signage/Wayfinding	3%	13%
Workforce availability		45%
Transportation services (air, ground, water transport)		31%
Others (please specify)	2%	11%

*Answer option has been abbreviated

The survey asked respondents to rate the extent to which challenges pose a risk to tourism in their communities. The top three challenges that respondents in the Central Oregon region identified as high risk were lack of affordable housing (75%), wildfires (73%) and drought (48%); a greater proportion of respondents in Central Oregon rated these risks as high risk compared to respondents overall. Respondents in both Central Oregon and overall also rated houselessness as a high risk (44% and 42%, respectively).

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
Lack of affordable housing	Central Oregon	75%	19%	6%
	Overall	65%	24%	10%
Wildfires	Central Oregon	73%	24%	
	Overall	33%	35%	32%
Drought	Central Oregon	48%	35%	16%
	Overall	18%	29%	54%
Houselessness	Central Oregon	44%	33%	22%
	Overall	42%	33%	25%
Increasing negative resident sentiment towards visitors	Central Oregon	32%	44%	24%
	Overall	25%	42%	33%
Overburdened public resources	Central Oregon	32%	44%	24%
	Overall	33%	35%	32%
Economic downturn	Central Oregon	26%	66%	8%
	Overall	33%	50%	17%
Increasing negative visitor perception	Central Oregon	21%	29%	50%
	Overall	22%	40%	39%
Global pandemic or other health concerns	Central Oregon	8%	45%	47%
	Overall	15%	36%	49%
Community violence and crime	Central Oregon	6%	29%	65%
	Overall	13%	30%	57%
Flooding	Central Oregon	11%		89%
	Overall	7%	27%	66%
Other	Central Oregon	46%	15%	38%
	Overall	45%	19%	35%

*Categories sorted in descending order by the percent of Central 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. The highest rated strategy overall and in Central Oregon was grant and funding resources/opportunities (64% and 60%, respectively). After that, the highest rated strategy was resources to build tourism related infrastructure, although that was rated higher among overall respondents (64%), compared to respondents in Central Oregon (45%). In addition, having access to tourism research and market insights was rated higher among respondents in Central Oregon (44%) compared to respondents overall (31%), and tools and training to help a business/organization learn how to incorporate the voices and perspectives of BIPOC communities was rated higher among respondents in Central Oregon (35%) compared to respondents overall (23%).

Resources & Programs (1 of 2)

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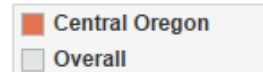
Q: Please select up to five resources or programs that would best assist your business/organization or community if faced with the challenges listed in the previous question.

Resource/Program	Central Oregon
Grant and funding resources/opportunities	60%
Resources to build tourism related infrastructure	45%
Access to tourism research & market insights	44%
Help advocating for effective policies to support tourism businesses/organizations	39%
*Tools and training to help a business/organization learn how to incorporate the voices and perspectives of BIPOC	35%
Facilitated conversation/collaboration with other tourism entities in your local community or across the state	34%
Tools and training to improve business/organization communications and marketing	29%
Networking with/learning from other professionals in your sector	19%
Tools to monitor and track community challenges	19%
Support transitioning to online and expanded sales/business platforms	13%
Technical assistance navigating business recovery funding and loans	11%
Tools and strategies to manage crises	11%
Help complying with government recommended safety protocols and/or environmental restrictions	8%
Support adapting business plan/model	6%
Other (please specify)	5%

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 the top priorities overall and among Central Oregon respondents.

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

	Central Oregon			Overall		
	First Rank	Second Rank	Total	First Rank	Second Rank	Total
Grant and funding resources/opportunities	28%	14%	42%	30%	20%	50%
Resources to build tourism related infrastructure	16%	13%	28%	25%	20%	44%
Access to tourism research & market insights	12%	11%	23%	7%		13%
Help advocating for effective policies to support tourism businesses/organizations	7%	16%	23%	8%	11%	18%
Tools and training to help a business/organization learn how to incorporate the voices and perspectives of BIPOC communities	14%	9%	23%	6%		9%
Tools and training to improve business/organization communications and marketing	7%	9%	16%		9%	13%
Tools to monitor and track community challenges	5%	5%	11%		5%	10%
Facilitated conversation/collaboration with other tourism entities in your local community or across the state	5%		7%		5%	9%
Help complying with government recommended safety protocols and/or environmental restrictions	7%		7%			4%
Technical assistance navigating business recovery funding and loans	5%		7%			4%
Tools and strategies to manage crises			4%			4%
Networking with/learning from other professionals in your sector	2%		2%			6%
Support transitioning to online and expanded sales/business platforms	2%		2%			3%
Support adapting business plan/model						3%
Other	5%		5%	8%		11%

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 69% in Central Oregon). After that, campaigns to raise awareness of hospitality and tourism career options locally was ranked first or second priority by 49% of respondents in Central Oregon. Short-term training options for upskilling of
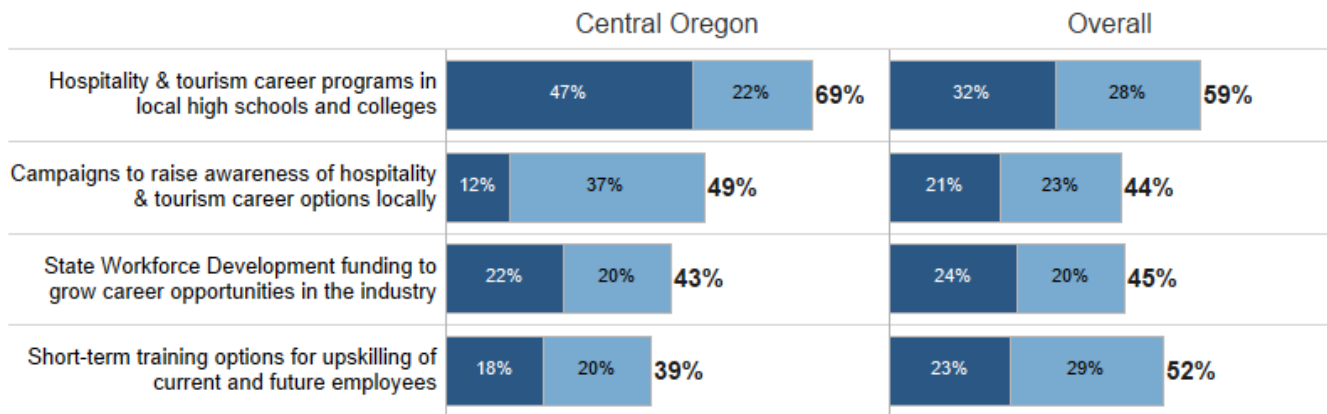
current and future employees was ranked the first or second priority among 52% of respondents overall, compared to 39% of respondents in Central Oregon.

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

	Central Oregon			Overall		
	First Rank	Second Rank	Total	First Rank	Second Rank	Total
Hospitality & tourism career programs in local high schools and colleges	47%	22%	**69%**	32%	28%	**59%**
Campaigns to raise awareness of hospitality & tourism career options locally	12%	37%	**49%**	21%	23%	**44%**
State Workforce Development funding to grow career opportunities in the industry	22%	20%	**43%**	24%	20%	**45%**
Short-term training options for upskilling of current and future employees	18%	20%	**39%**	23%	29%	**52%**

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. Central Oregon respondents also rated tourism-related infrastructure highest across their top-three priorities (53%), followed by marketing and promotion (42%) and grant and funding resources/opportunities (41%).

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

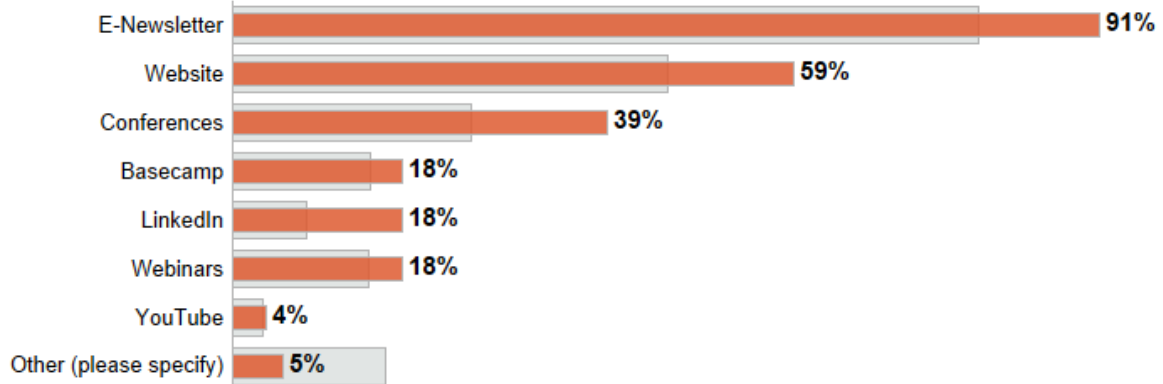|	Central Oregon				Overall			
	First Rank	Second Rank	Third Rank	Total	First Rank	Second Rank	Third Rank	Total
Tourism-related infrastructure	16%	23%	14%	53%	20%	20%	12%	53%
Marketing and promotion	12%	9%	21%	42%	16%	14%	15%	45%
Grant and funding resources/opportunities	23%	9%	9%	41%	22%	14%	11%	47%
Visitor management solutions	19%	9%	11%	39%	8%	11%	10%	28%
Tourism strategies for climate change resilience	11%	14%	5%	30%	7%	8%	8%	22%
Stakeholder engagement & collaboration		9%	16%	28%	6%	9%	10%	26%
Transportation options	11%	9%	9%	28%	6%	8%	10%	23%
Tourism research & market insight		14%	5%	19%		8%	10%	21%
Training and education programs	5%	5%		11%	6%	7%	10%	24%
COVID-friendly visitor experience development	4%			4%				4%
Other (specify below)	5%			5%	6%			9%

INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Ninety-one percent of Central Oregon respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter, followed by website (59%). By a large margin, e-newsletters are considered the best way for respondents to receive information.
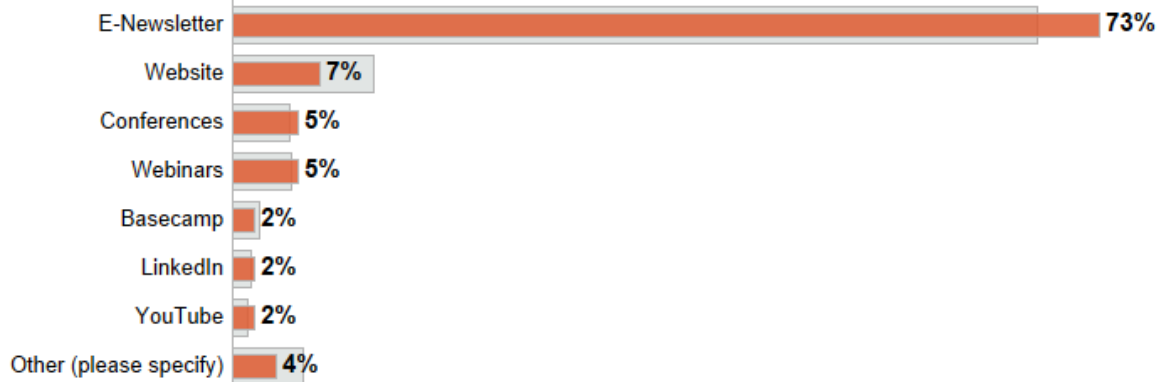
Communications

Central Oregon
Overall
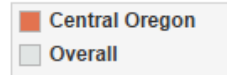
Q: How do you _currently_ receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization? (Select all that apply)
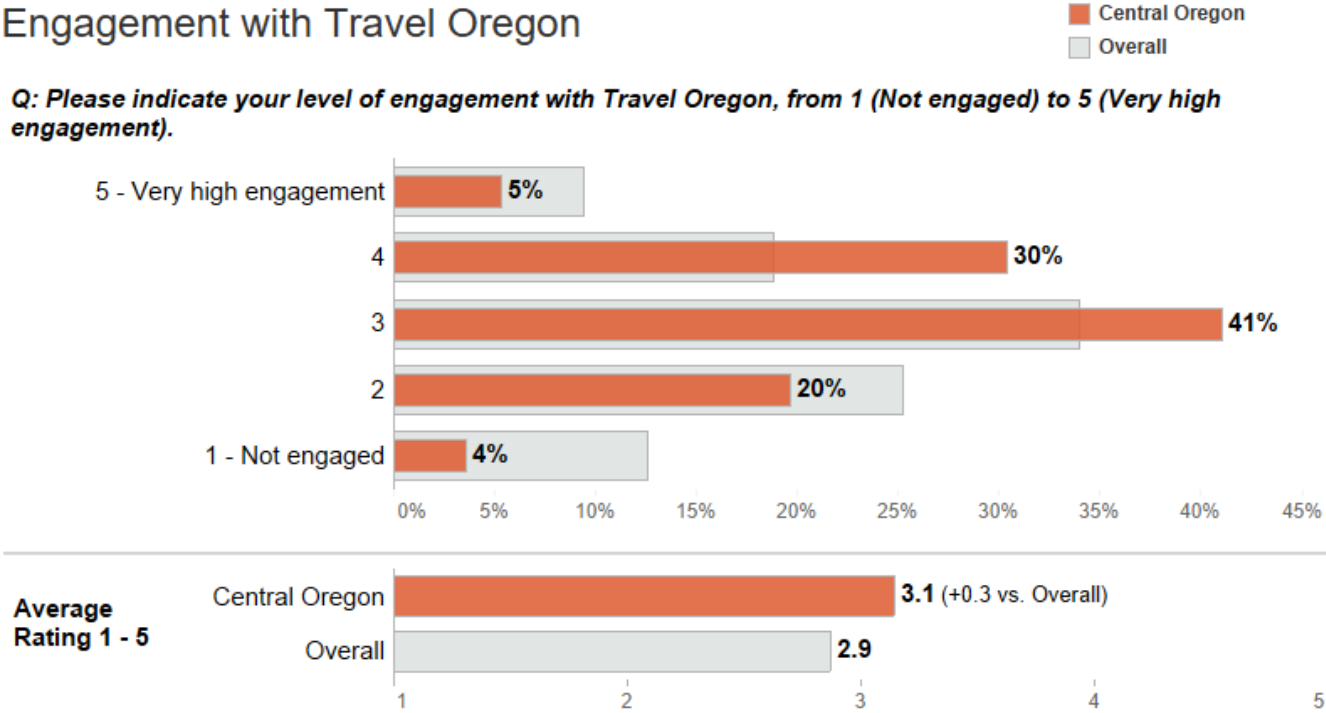
- E-Newsletter **91%**
- Website **59%**
- Conferences **39%**
- Basecamp **18%**
- LinkedIn **18%**
- Webinars **18%**
- YouTube **4%**
- Other (please specify) **5%**

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

- E-Newsletter **73%**
- Website **7%**
- Conferences **5%**
- Webinars **5%**
- Basecamp **2%**
- LinkedIn **2%**
- YouTube **2%**
- Other (please specify) **4%**

Respondents were asked to rate their engagement with Travel Oregon, from 1 (not engaged) to 5 (very high engagement). Thirty-five percent of respondents in Central Oregon rated this question a 4 or 5, compared to 28% in the overall sample. The average rating was higher among respondents in Central Oregon (3.1) compared to respondents overall (2.9).

Engagement with Travel Oregon

Legend: ■ Central Oregon □ Overall

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

Rating	Central Oregon
5 - Very high engagement	5%
4	30%
3	41%
2	20%
1 - Not engaged	4%

Average Rating 1 - 5

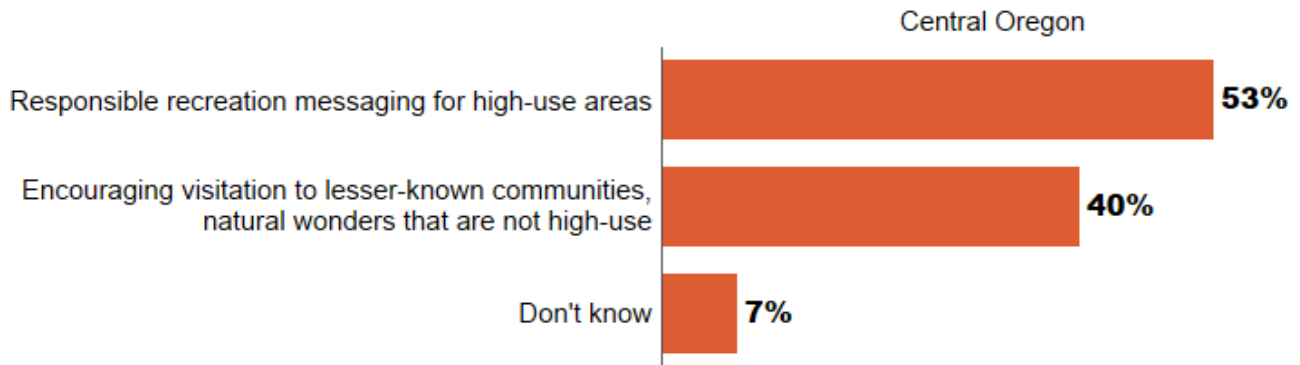|	
Central Oregon	3.1 (+0.3 vs. Overall)
Overall	2.9

CENTRAL OREGON 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: Would you like the Regional Destination Management Organization (RDMO) to be your main source on how to promote the region through a Diversity, Equity, and Inclusion (DEI) lens (e.g. sharing creative assets, best-practices for social media, financial support, etc.)?
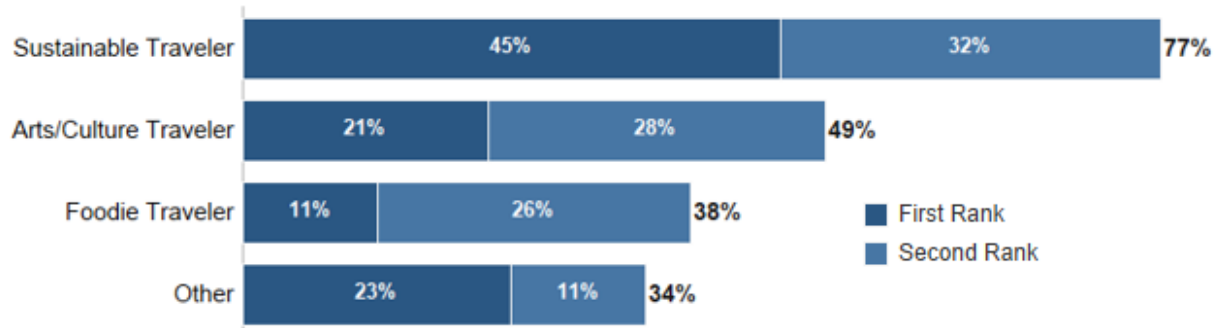
Central Oregon

Yes	38%
No	16%
Don't know	45%
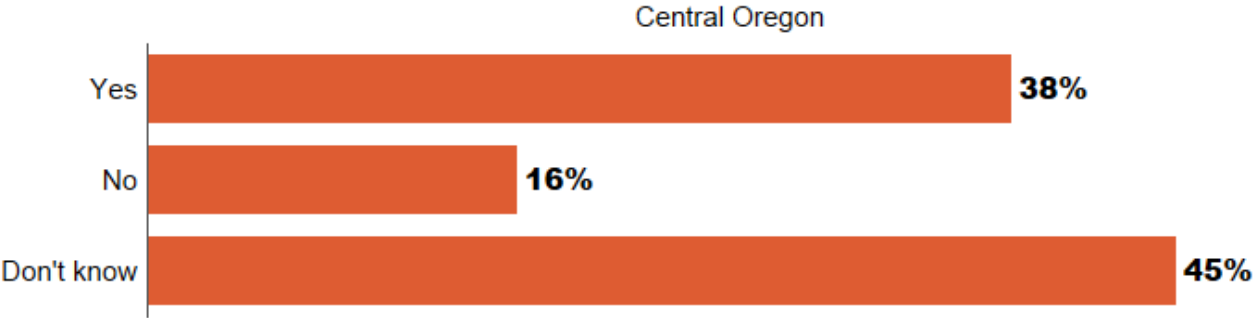
Source: 2023 Oregon Tourism Stakeholder Survey

Q: To help reduce high visitation pressures and increase community livability in Central Oregon, please identify in which of the following you would you prefer that your RDMO invests in more heavily (financially and/or through creative projects):

Central Oregon

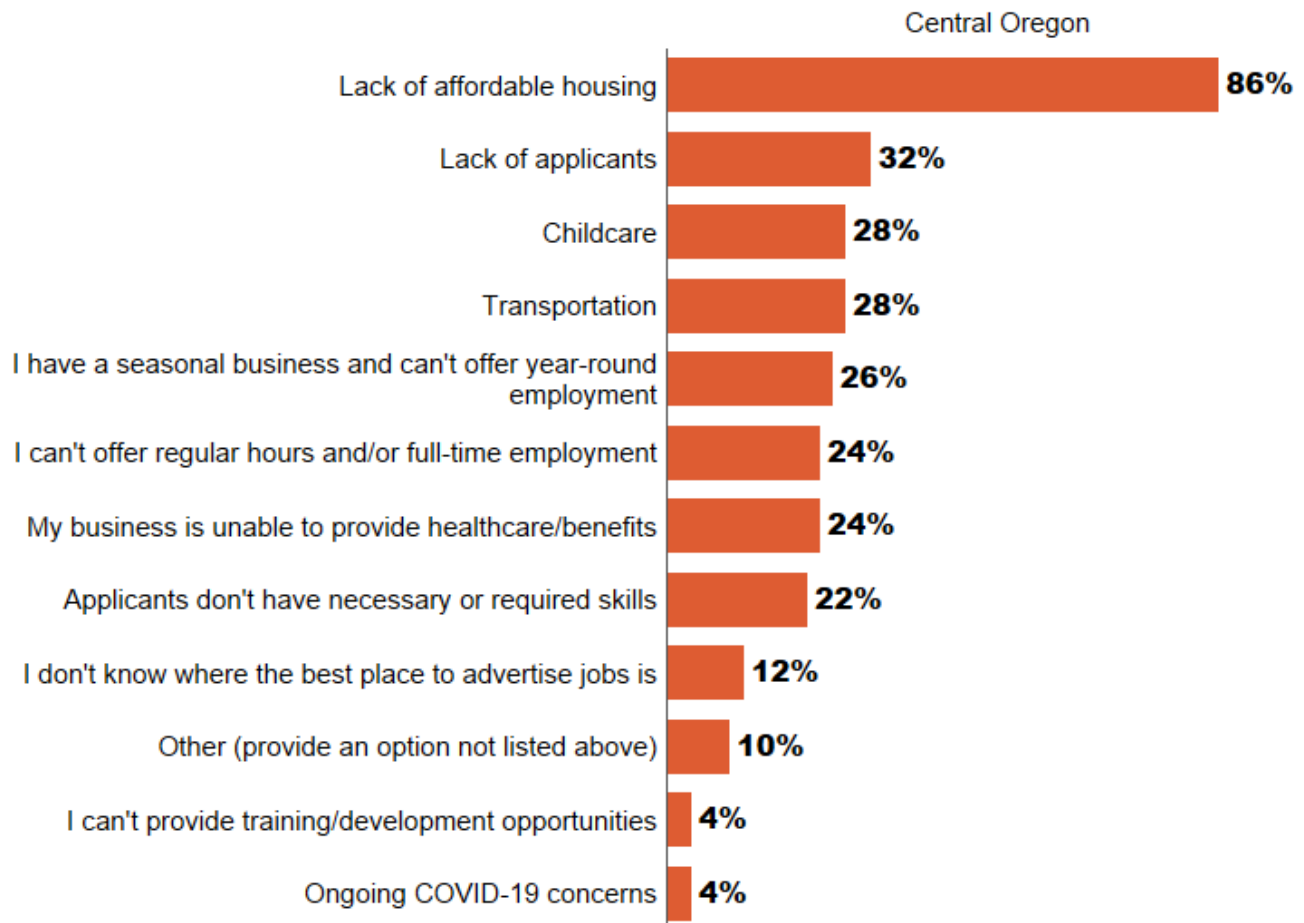|	
Responsible recreation messaging for high-use areas	53%
Encouraging visitation to lesser-known communities, natural wonders that are not high-use	40%
Don't know	7%

Source: 2023 Oregon Tourism Stakeholder Survey

Q: The regional DMO, Visit Central Oregon, is committed to attracting new visitors to the region. Please rate these niche travelers in order of who your business would be most (#1) to least (#4) interested in attracting.
Top 2 Highest Priorities:

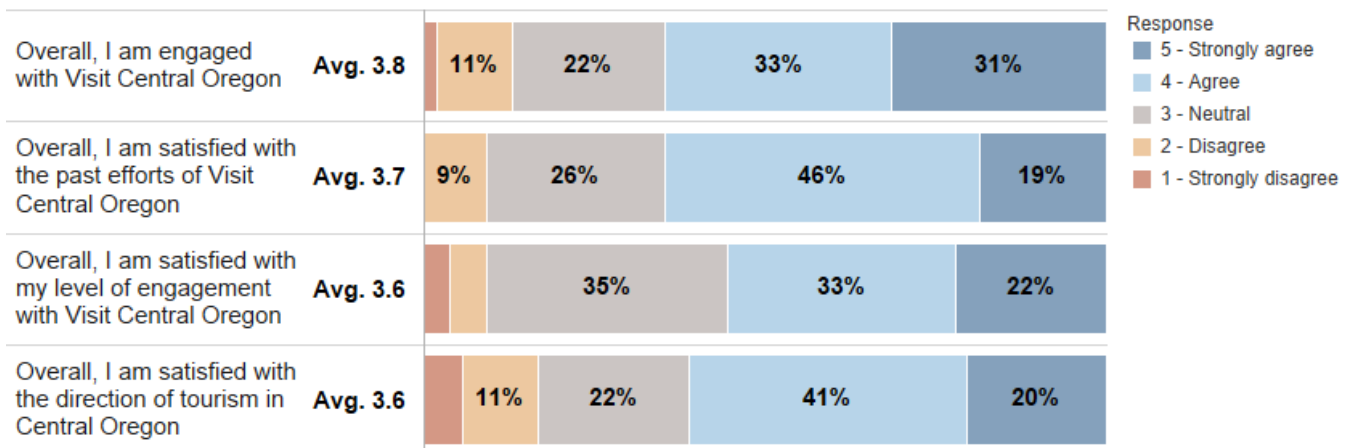|	First Rank	Second Rank	Total
Sustainable Traveler	45%	32%	77%
Arts/Culture Traveler	21%	28%	49%
Foodie Traveler	11%	26%	38%
Other	23%	11%	34%

Source: 2023 Oregon Tourism Stakeholder Survey

Q: What are some of the greatest challenges you currently face in attracting (and/or) retaining tourism workforce? (Select all that apply)

Central Oregon

Challenge	Percentage
Lack of affordable housing	86%
Lack of applicants	32%
Childcare	28%
Transportation	28%
I have a seasonal business and can't offer year-round employment	26%
I can't offer regular hours and/or full-time employment	24%
My business is unable to provide healthcare/benefits	24%
Applicants don't have necessary or required skills	22%
I don't know where the best place to advertise jobs is	12%
Other (provide an option not listed above)	10%
I can't provide training/development opportunities	4%
Ongoing COVID-19 concerns	4%

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)?

Statement	Avg.	1 - Strongly disagree / 2 - Disagree	3 - Neutral	4 - Agree	5 - Strongly agree
Overall, I am engaged with Visit Central Oregon	Avg. 3.8	11%	22%	33%	31%
Overall, I am satisfied with the past efforts of Visit Central Oregon	Avg. 3.7	9%	26%	46%	19%
Overall, I am satisfied with my level of engagement with Visit Central Oregon	Avg. 3.6		35%	33%	22%
Overall, I am satisfied with the direction of tourism in Central Oregon	Avg. 3.6	11%	22%	41%	20%

Response
- 5 - Strongly agree
- 4 - Agree
- 3 - Neutral
- 2 - Disagree
- 1 - Strongly disagree

*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 Central Oregon questions follow:

- *The regional DMO, Visit Central Oregon, is committed to attracting new visitors to the region. Please rate these niche travelers in order of who your business would be most (#1) to least (#4) interested in attracting. If you selected "Other" above, please describe the niche travelers that you ranked.*
- *What are some of the greatest challenges you currently face in attracting (and/or) retaining tourism workforce? Other (please specify)*

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.

The regional DMO, Visit Central Oregon, is committed to attracting new visitors to the region. Please rate these niche travelers in order of who your business would be most (#1) to least (#4) interested in attracting. If you selected "Other" above, please describe the niche travelers that you ranked.
Adventure Enthusiast
Adventure tourist: People who are looking to explore the lesser know areas and travel on the forgotten roads.
Adventurers with mobility challenges
Agritourism (maybe falls under "foodie" but is more niche, on-farm experience)
Corporate retreats; conventions.
Cycling & hiking
Cyclist
Families
Non Peek visitation travelor, especially ski vacation and winter travelors.
outdoor recreation travellers, interested in doing outdoor recreation tours & activities
Outdoor Enthusiast
Outdoor enthusiasts
Outdoor recreationist who values the privilege of travel and respects the destination.
Recreation Traveler
sports program participants: Softball, pickleball, hiking, biking and camping
The community traveler. One who is seeking a nice, small-town feel and friendly people. Foodies are also nice, but my community (Sisters) mostly doesn't have good enough food for a serious Portland-type foodie, other than at the Farmers Market and The Barn.
Those looking for an affordable alternative to high-end resorts
travelers wanting a destination that is unknown.
Travelers who are primarily visiting for outdoor recreation.
Unique experience traveller

Weddings
Women travelers, BIPOC and LGBTQ+ travelers.

What are some of the greatest challenges you currently face in attracting (and/or) retaining tourism workforce? Other (please specify)
employees call in "sick" for no reason, are much less dependent than they used to be
Funding
Lack of travel in the winter. Revenue tanks in the winter.
Low wages
We are looking for people to attend our events.