



2024 OREGON TOURISM INDUSTRY PARTNER SURVEY

SUMMARY OF RESULTS | SOUTHERN OREGON

March 2025



OVERVIEW

This report summarizes findings from a 2024 survey of tourism industry partners in Oregon. The survey sought feedback from partners 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 2024 Oregon Tourism Industry Survey was designed on behalf of the Oregon Tourism Commission, dba Travel Oregon, and the state's seven official regional destination management organizations (RDMOs) to elicit feedback from individuals and organizations linked to the tourism industry.

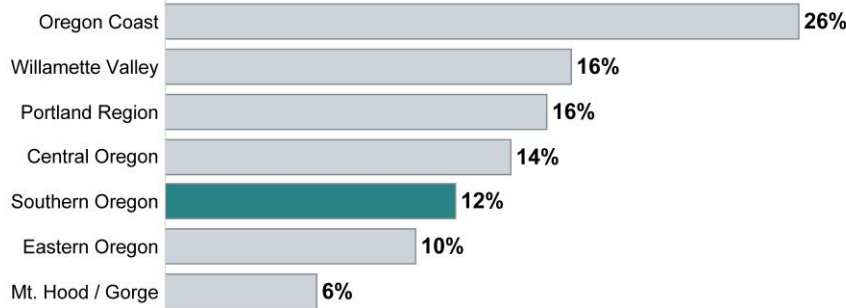
As Travel Oregon embarks on its 10-year strategic vision for tourism in the state, the results of the survey will help inform strategic direction for Travel Oregon and its regional partners to fulfill the strategic vision. The survey will also assist funding and programmatic decisions in marketing, grants, tourism-related infrastructure, visitor management, and more.

The survey built on a framework of past partner surveys conducted in 2018, 2020, and 2023. The survey was developed collaboratively by Travel Oregon, the seven RDMOs, and RRC Associates.

DATA COLLECTION

This study consisted of a digital survey that was fielded to Oregon tourism industry employees from September 12–October 14, 2024. The 2024 study is the fifth edition of the Industry Partner Survey, formerly known as the Stakeholder Survey. This year, the survey distribution methods included the Travel Oregon Industry Newsletter, partner and staff outreach, industry conferences, and social media.

The survey resulted in a total of 160 valid responses from Southern Oregon (up from 98 responses in 2023) and more than 1,300 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 Southern Oregon compared to the statewide survey results.

Number of Respondents

160
Southern Oregon
Responses

1,363
Overall Responses

Source: RRC

LIMITATIONS

The survey results should be viewed as an aggregation of relevant and thoughtful feedback from partners. The applicability of findings to real-life circumstances may depend on whether the feedback is from a broad enough (or representative) swath of partners and whether individual RDMOs believe they have engaged with enough partners to have a good gauge of the partners' priorities. An assessment of the industries represented, and the statewide response numbers, suggest a diverse and sufficient sample was collected from all regions, 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 partner 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 dashboard by going to: bit.ly/2024TOPartnersurvey

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KEY FINDINGS

TOURISM STRATEGIES

DESTINATION DEVELOPMENT

- **Satisfaction Levels:** 63% of Southern Oregon respondents are satisfied with the direction of tourism development, slightly higher than the statewide average of 62%. Many more respondents are "very satisfied" (27%) compared to the statewide sample (18%).
- **Focus Areas:** Key focus areas for improving the resident and visitor experience include public infrastructure (31%), outdoor recreation opportunities (27%) and downtown development (26%).
- **Perceived Strengths:** Respondents highlight outdoor recreation opportunities (75%), food and beverage (37%), and farm/ranch/fishery/agritourism business/activity (26%) as the region's strongest tourism assets.

PLANNING PRIORITIES

- **Top 3 Priorities for the Next 2–5 Years:**
 1. Grant and funding resources/opportunities (55%)
 2. Tourism-related infrastructure (39%)
 3. Marketing and promotion (37%)
- **Shift from 2023:** Marketing and promotion, which was a top priority in 2023 (58%), has dropped to 37% this year, showing a shift toward infrastructure and grants/funding.

ADVOCACY

- **Collaboration and Engagement:** Southern Oregon respondents feel confident collaborating with diverse groups to support tourism (4.5 out of 5).
- **Legislative Engagement:** Engagement with policymakers is low (3.2 out of 5), suggesting a need for stronger advocacy efforts.
- **Tourism Perception:** Respondents see the value tourism brings to their community (4.7 out of 5), however see room for improvement in access to data and information to better understand this value.

VISITATION AND SEASONALITY

- **Overcrowding in Summer:** 16% of Southern Oregon respondents say summer visitation feels very crowded, much lower than the statewide response.
- **Winter Visitation Concerns:** Only 1% of respondents feel winter is overcrowded—lower than the statewide average.
- **Growth opportunities:** Respondents in Southern Oregon could use more visitation in most seasons, a sentiment shared in only a few regions.

STRENGTHS AND CHALLENGES

- **Wildfires and Housing:**
 - An equal amount of respondents in Southern Oregon and statewide (74%) cite a lack of affordable housing as a high-risk, a challenge that has continued to rise in risk.
 - 58% report workforce housing shortages compared to 67% statewide. Similar to affordable housing, this issue has continued to rise in risk regionally and statewide.
 - 81% identify wildfires as a major threat—nearly double the statewide average (46%).
- **Workforce Recruitment Issues:**
 - 62% report inconsistent work hours and 51% struggle with seasonality as key barriers to recruitment and retention.

RESOURCES AND PROGRAMS

- **Most Needed Resources:**
 - Grant and funding opportunities (79%)—higher than the state average (72%).
 - Tools and training to improve business/organization communications and marketing (60%).
 - Resources to build tourism-related infrastructure (59%).
- **Lowest Priority Resources:**
 - Help complying with government regulations (10%) and support adapting business plan/model (14%) are less pressing concerns.

Southern Oregon's tourism industry faces workforce housing shortages and wildfire risks, yet its strengths in outdoor recreation and food and beverage planning provide a strong foundation for growth. Addressing funding, additional visitation during downtimes, and advocacy support will be essential for long-term success.

RESPONDENT PROFILE

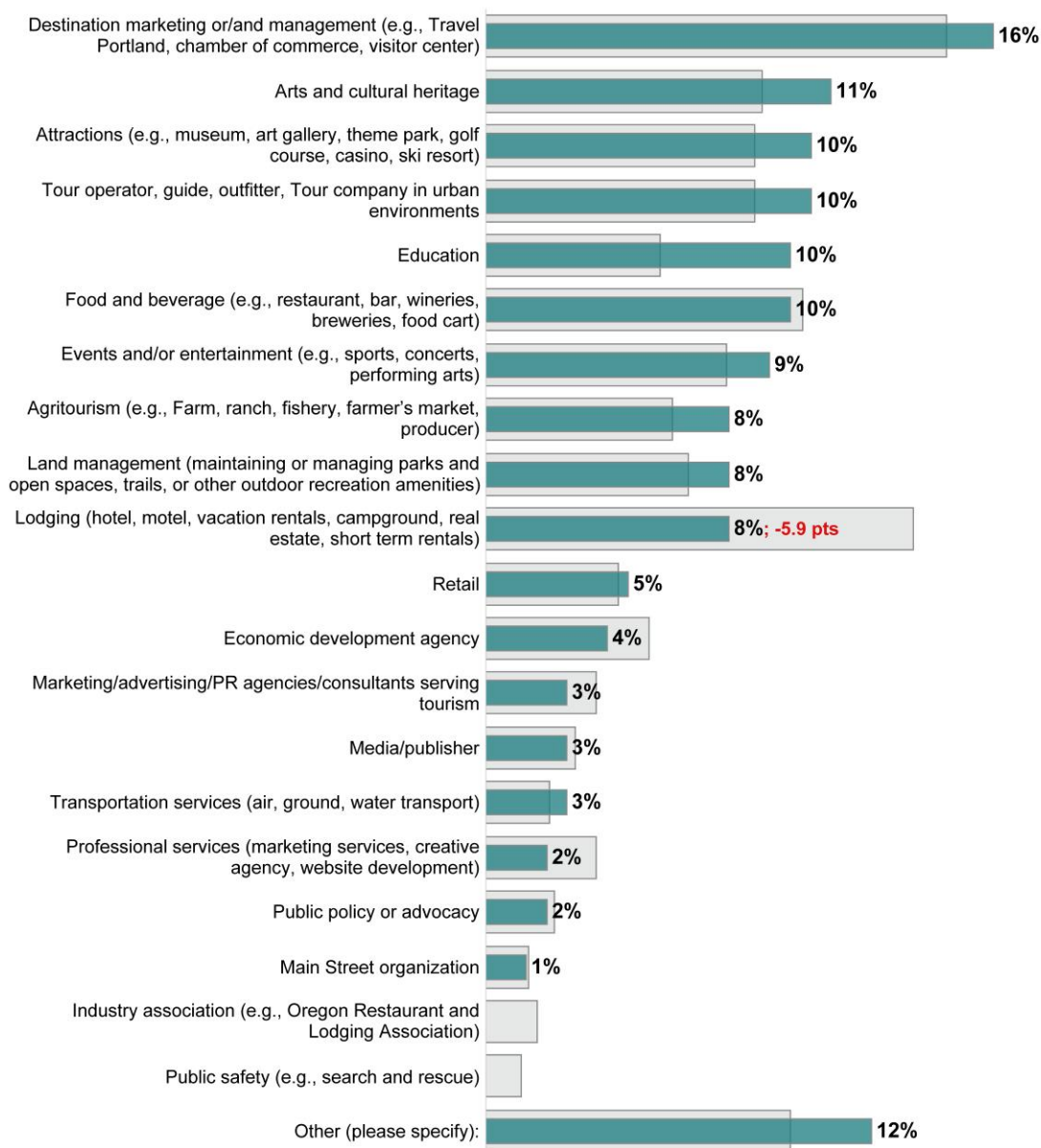
The survey received broad participation by the tourism industry sector. Statewide, destination marketing and/or management accounted for 15% of total respondents, followed by lodging (14%) and food and beverage (10%). The top represented organizations remain similar to 2023.

Respondents from Southern Oregon had a wide range of industry sectors selected. Most respondents are employed in destination marketing and/or management (16%) followed by arts and cultural heritage (11%), attractions (10%), tour operator/guide/outfitter/tour company (10%), education (10%), and food and beverage (10%). Respondents from Southern Oregon were more likely to work in destination marketing and/or management, arts and cultural heritage, and education than statewide respondents. However, they were much less likely to work in lodging. In fact, lodging decreased from 17% in 2023 to 8% in 2024. Those who identified their industry as "other" were most likely to be retired, in events, or in a variety of niche industries.

Industry Sector

■ Southern Oregon
■ Statewide

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



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

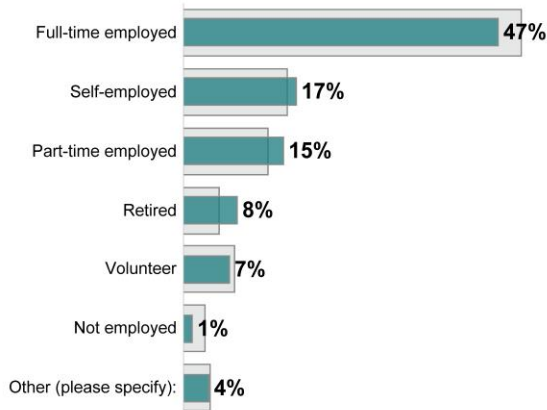
Source: RRC

The top employment statuses for the region were full-time employed (47%), self-employed (17%), and part-time employed (15%). Compared to the statewide responses, the Southern Oregon region had a higher proportion of retired individuals. Respondents were asked which entity type best describes their business or organization. In Southern Oregon, the top two response options were private or for-profit entities/organizations (42%) and non-profit entities/organizations (27%).

Those who responded in the "other" category for entity type highlighted being retired, real estate, workforce development, and many others in some of the open-ended comments.

Entity Type & Employment Status

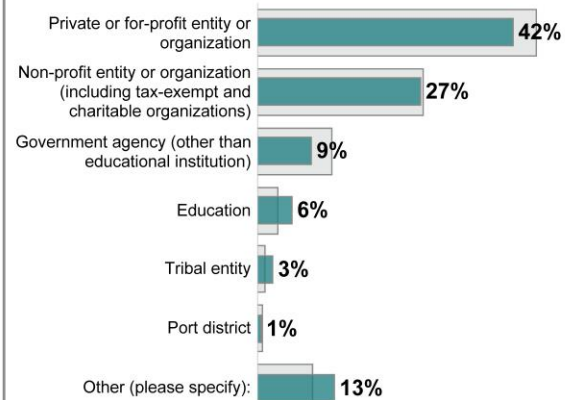
Q: Which of the following best describes your current employment status in the tourism industry?



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

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

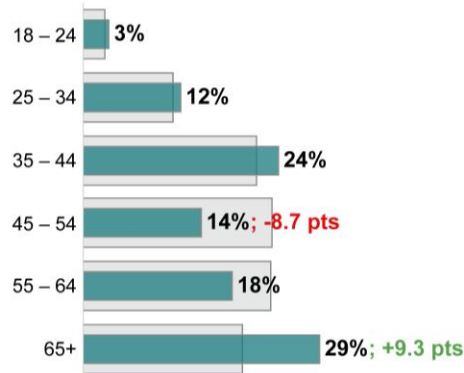


In Southern Oregon, respondents were most likely to be in the 65+ age range (29%), much higher than the statewide results within this category. In the statewide results, the largest share of respondents were in the 45-64 range. Additionally, respondents in Southern Oregon were slightly more likely to be in the age range of 25-44 compared to statewide respondents.

Southern Oregon respondents are likely to identify as female (63%) and less likely to identify as male (30%), comparable to the statewide results.

Age & Gender

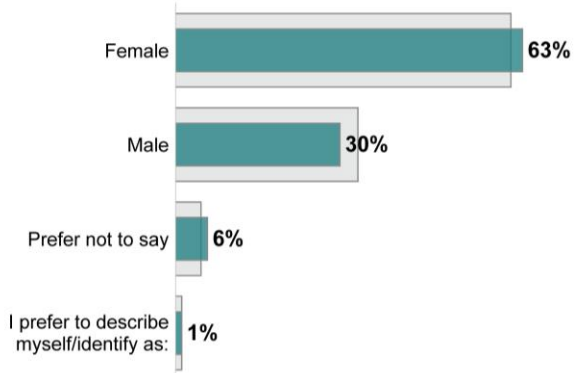
Q: *What is your age?*



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Q: *What is your identified gender?*

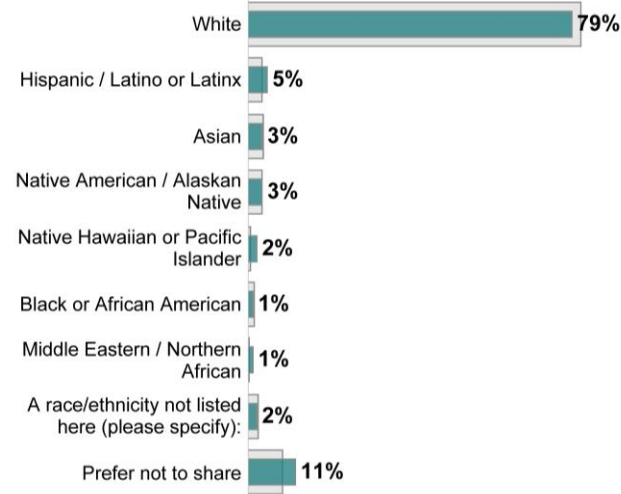


For race and ethnicity, 79% of Southern Oregon respondents identify as white. All other race and ethnicity options were close to statewide results.

Forty-three percent of survey respondents statewide indicated that they had annual household incomes of \$75,000 or more. Compared to the statewide results, the Southern Oregon region had a higher percentage of respondents in the \$50,000-\$74,999 range and those who preferred not to share.

Race & Household Income

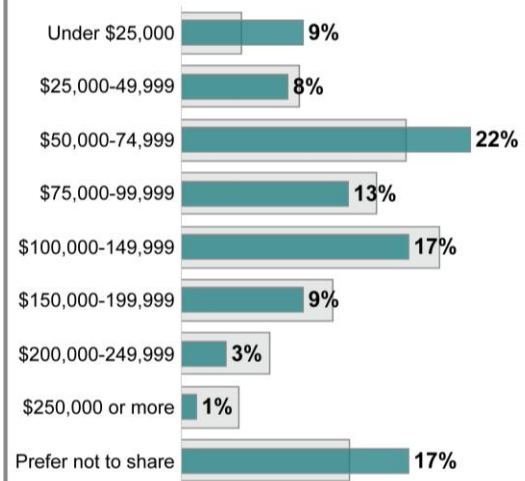
Q: *Which of the following best describes you?*



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

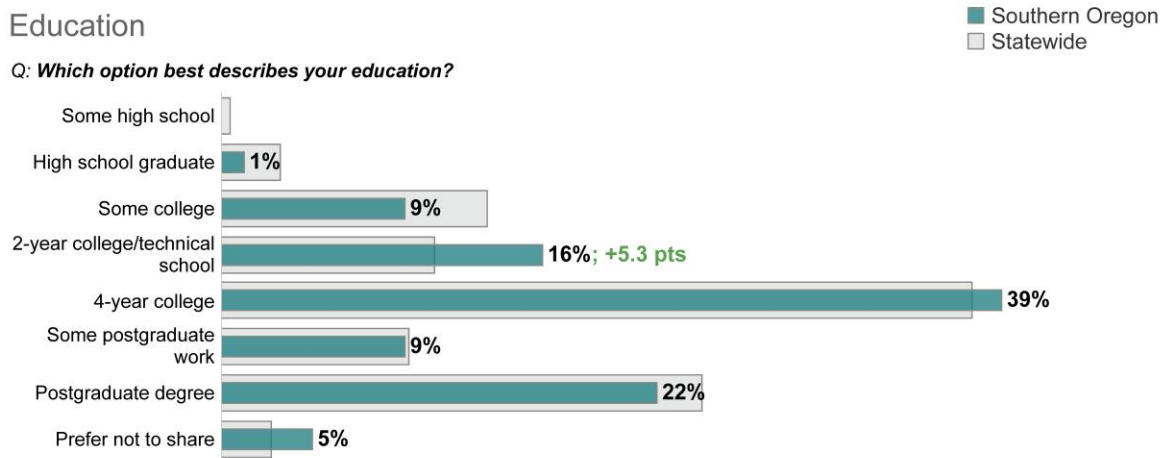
Q: *Which of these categories best describes the total gross annual income of your household (before taxes)?*



Southern Oregon respondents were similar in educational attainment compared to the statewide sample. A much larger share of respondents in Southern Oregon completed a 2-year college/technical school compared to the statewide sample (+5.3 pts). A slightly larger share of respondents in Southern Oregon obtained a 4-year college degree, with fewer completing only some college or a postgraduate degree compared to the statewide sample.

Education

Q: *Which option best describes your education?*



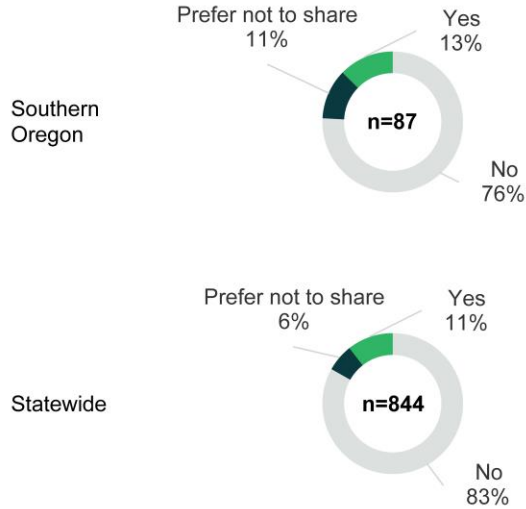
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

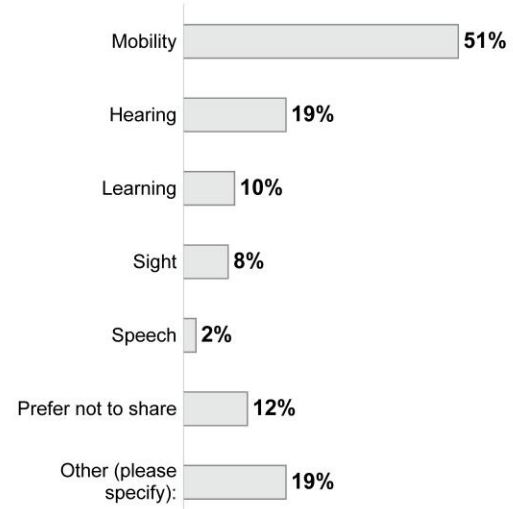
Thirteen percent of Southern Oregon respondents reported having a disability, compared to 11% of respondents statewide. Mobility was the most common disability mentioned statewide (51%). Other disabilities listed include mental health (including anxiety/depression, ADHD, and PTSD), autoimmune disease, and neurodivergence.

Presence of Disabilities

Q: *Do you have a disability?*



Q: *Which of the following best describes these disabilities?*



*Only displaying statewide sample due to insufficient sample size within regions.

Source: RRC

TOURISM STRATEGIES

As Travel Oregon continues their work on the 10-year strategic vision for tourism adopted in June 2022, these survey findings will play a crucial role in shaping strategic priorities for Travel Oregon and its regional partners. These insights will be a vital source of information in guiding Travel Oregon and RDMOs in funding and program decisions across key areas including marketing, grants, tourism-related infrastructure, and visitor management, ensuring alignment with the broader vision for sustainable tourism development in the state.

Respondents were asked to characterize their satisfaction with the general direction of tourism development in Oregon.

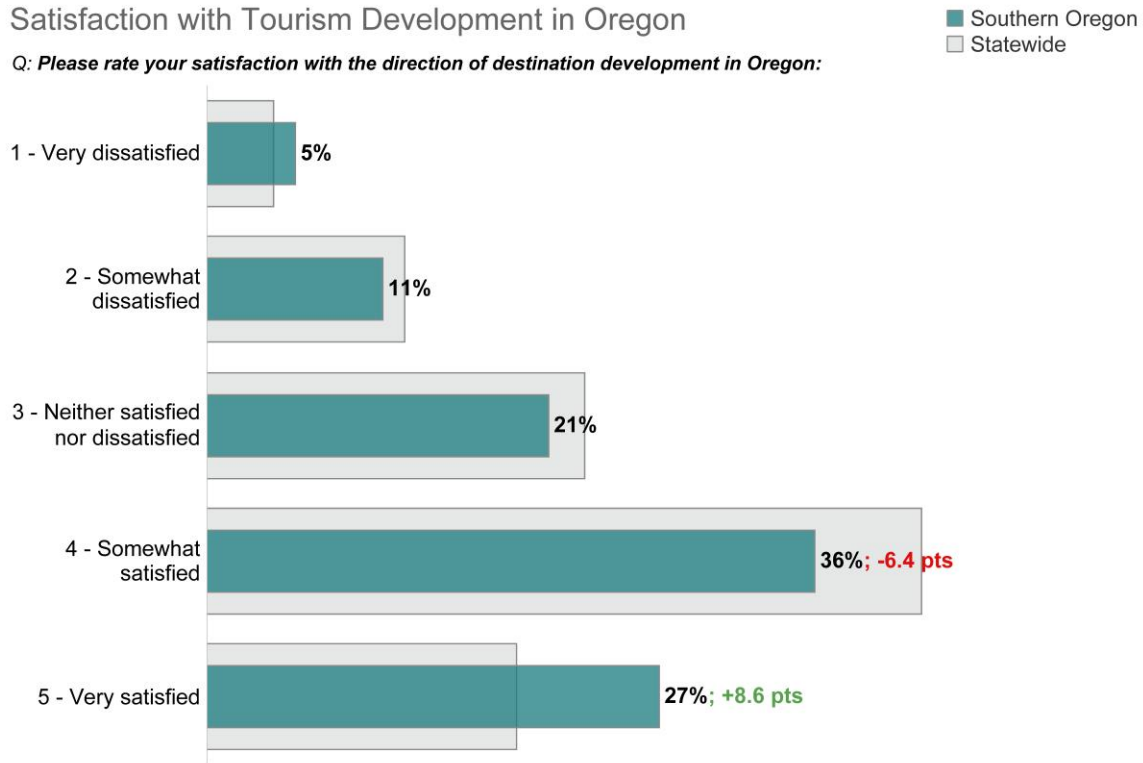
The following definition was provided to survey respondents:

"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."

Statewide, 62% of respondents were satisfied with the direction of tourism development in Oregon (selected 4 or 5 on a five-point scale), while 16% were unsatisfied (selected 1 or 2). Twenty-three percent were neutral (selected 3, neither unsatisfied nor satisfied). In Southern Oregon, 63% were satisfied, 16% were unsatisfied, and 21% were neither unsatisfied nor satisfied. The average among respondents in Southern Oregon was higher (3.7) than the average among respondents statewide (3.6). Overall, statewide (+0.2) and regional satisfaction (+0.1) has slightly increased since 2023.

Satisfaction with Tourism Development in Oregon

Q: Please rate your satisfaction with the direction of destination development in Oregon:



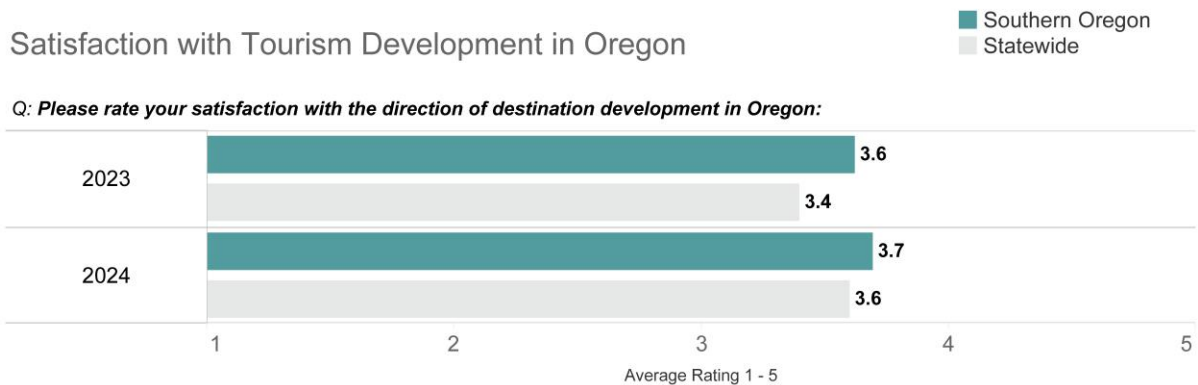
Note: "Destination Development" refers to overall tourism development in Oregon. The following definition was provided to survey respondents: "Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing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

Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Satisfaction with Tourism Development in Oregon

Q: Please rate your satisfaction with the direction of destination development in Oregon:



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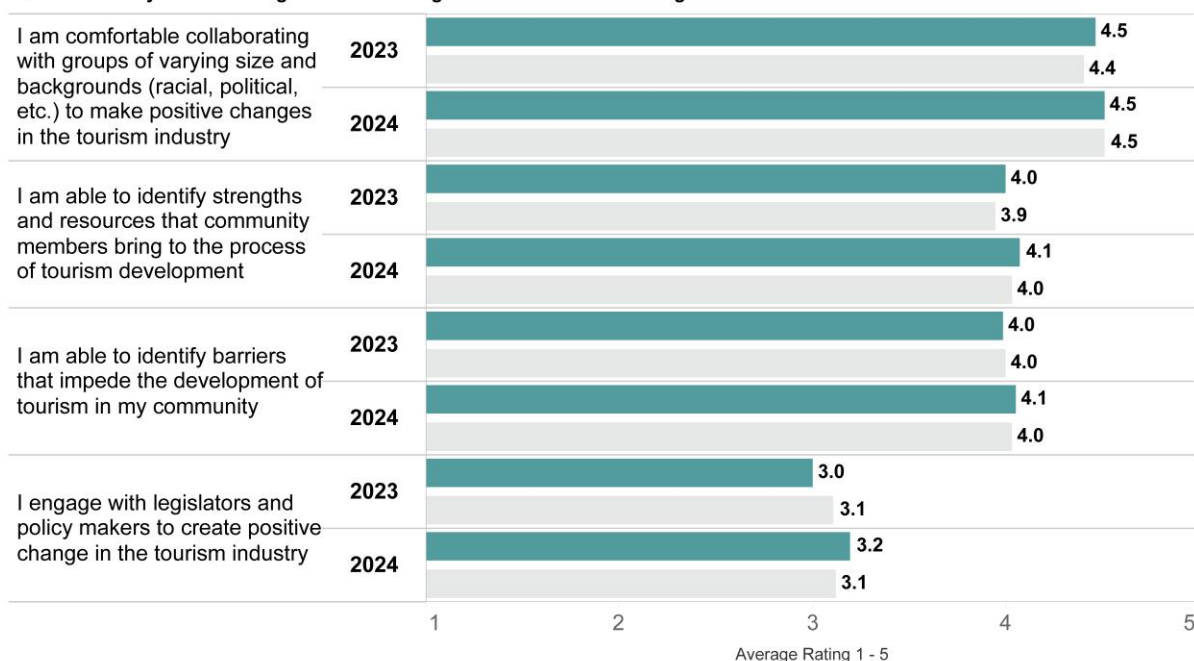
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Respondents were asked to rate their agreement with four statements that measured their advocacy for tourism. The statement with the greatest support among the statewide sample and respondents in Southern Oregon was, "I am comfortable collaborating with groups of varying size and backgrounds (racial, political, etc.) to make positive changes in the tourism industry," with an average rating of 4.5 on a five-point scale statewide and among respondents in Southern Oregon. Respondents, both statewide and in Southern Oregon, agreed least with the statement, "I engage with legislators and policy makers to create positive change in the tourism industry," with an average rating of 3.1 statewide and 3.2 for Southern Oregon respondents.

Advocacy for Tourism in Oregon

Q: Please rate your level of agreement or disagreement with the following statements:

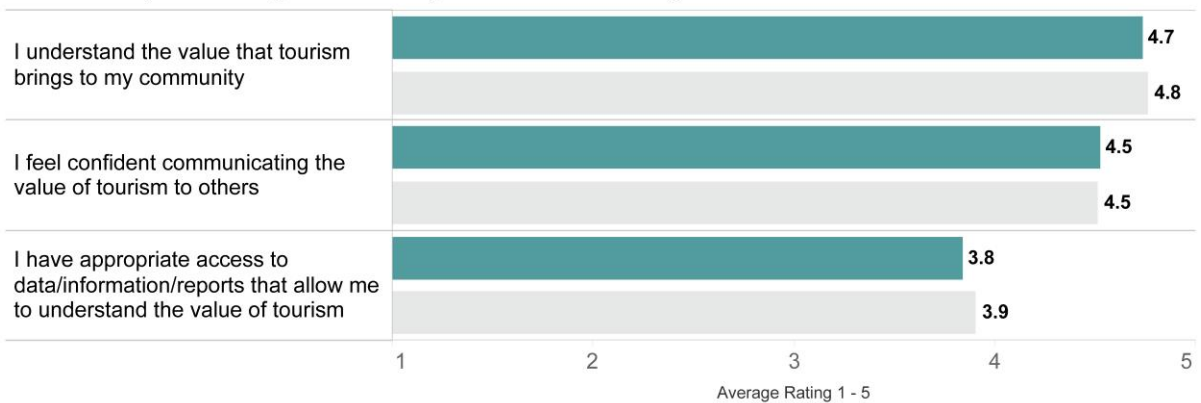


Source: RRC

Respondents were also asked to rate their level of agreement with three statements that measured perceived value of tourism. The average rating of the value of tourism differed only slightly between the statewide sample and Southern Oregon. Both rated all three statements highly, with "I have appropriate access to data/information/reports that allow me to understand the value of tourism" the lowest rated at 3.9 statewide and at 3.8 for Southern Oregon. The highest rated statement reflects an understanding that tourism benefits Oregon as a whole, at a 4.8 on a five-point scale: "I understand the value that tourism brings to my community" for the statewide sample and 4.7 for Southern Oregon.

Value of Tourism in Oregon

Q: Please rate your level of agreement or disagreement with the following statements:



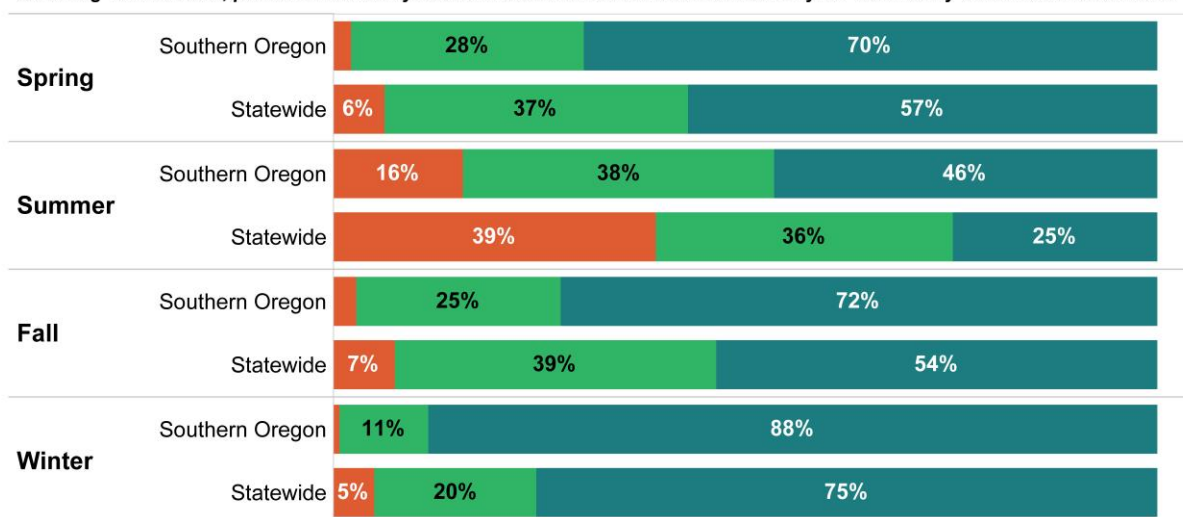
Source: RRC

Respondents were asked to characterize the number of visitors their community receives during each of the four seasons. Statewide, 6% of respondents said there were too many visitors in the spring, followed by 39% in summer, 7% in fall, and 5% in winter. Compared to the statewide sample, a lower proportion of respondents in Southern Oregon indicated that there are too many visitors in the summer (16%) and too many visitors in the winter (1%). Across all seasons, respondents in Southern Oregon were most likely to say that they could use more visitation. Compared to 2023 results, Southern Oregon respondents were more likely to indicate that their community was "very crowded" in summer increasing from 9% saying very crowded in 2023 to 16% in 2024. In general, Southern Oregon is a region with some of the least concerns for crowding.

Visitation Levels by Season

■ We could use more visitation
■ Just the right amount
■ Very crowded

Q: During each season, please select how you would describe the level of visitation in your community as it relates to tourism:

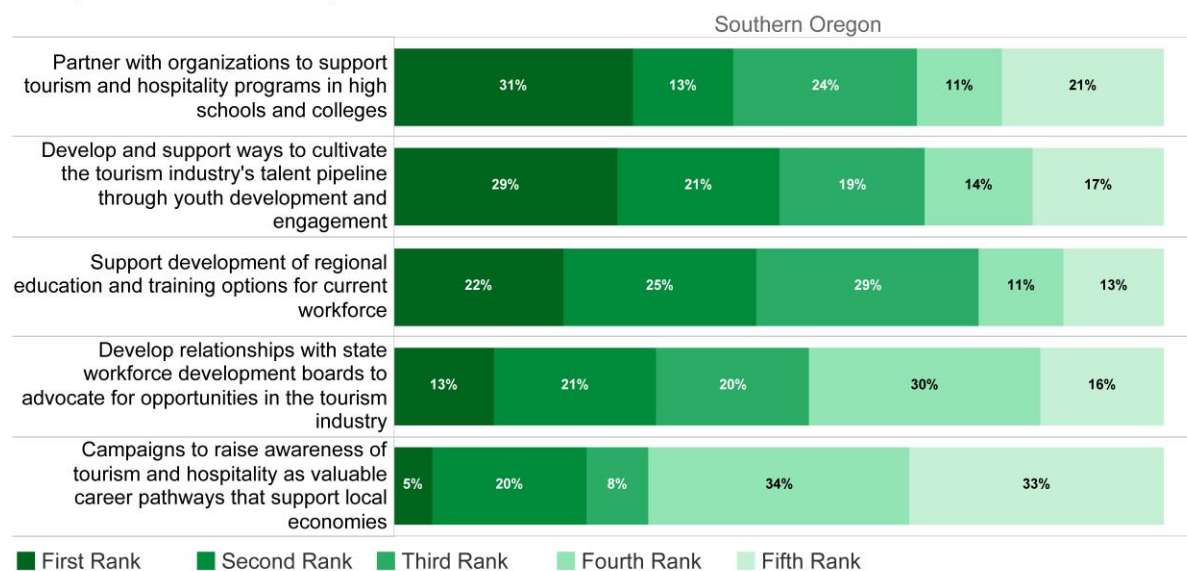


Source: RRC

Respondents were asked to rank, from highest to lowest priority, various educational and career opportunities designed to help develop, attract, and retain industry workforce. Southern Oregon respondents placed "Partner with organizations to support tourism and hospitality programs in high schools and colleges" as their top priority, with 31% ranking it first among the five options. The next top-ranked priority for Southern Oregon was "Develop and support ways to cultivate the tourism industry's talent pipeline through youth development and engagement" at 29%.

Educational and Career Opportunities (Regional)

Q: Please rank (from highest priority to lowest priority) the following educational and career opportunities designed to help develop, attract and retain industry workforce.



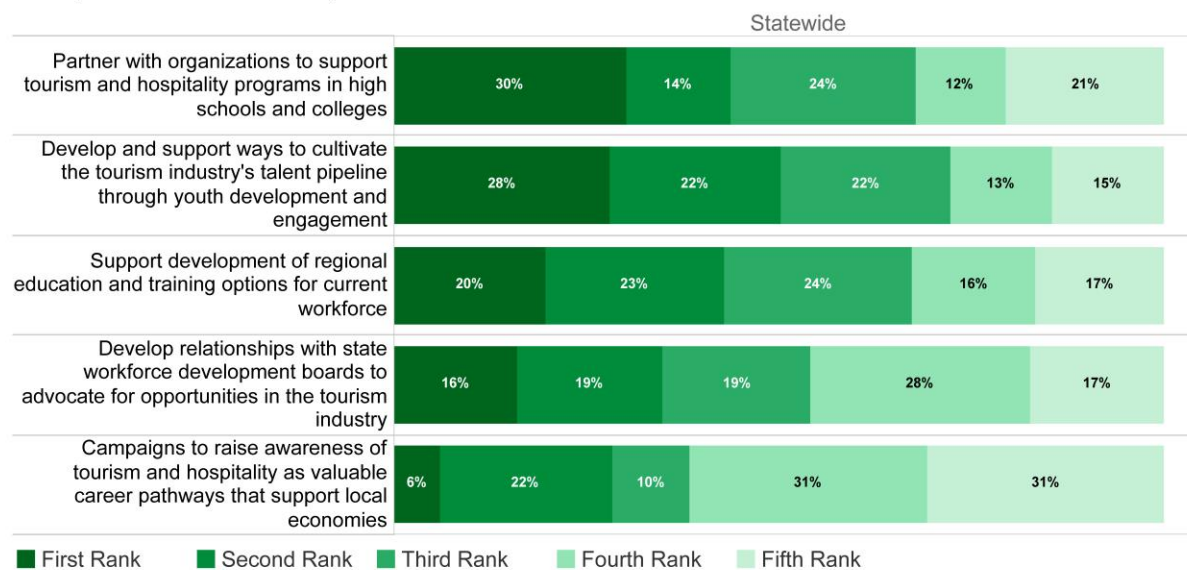
Note: Responses sorted in descending order by "First Rank".

Source: RRC

The statewide sample ranked "Partner with organizations to support tourism and hospitality programs in high schools and colleges" and "Develop and support ways to cultivate the tourism industry's talent pipeline through youth development and engagement" as their first-ranked priorities at 30% and 28%, respectively.

Educational and Career Opportunities (Statewide)

Q: Please rank (from highest priority to lowest priority) the following educational and career opportunities designed to help develop, attract and retain industry workforce.



Note: Responses sorted in descending order by "First Rank".

Source: RRC

AREAS OF FOCUS

The top areas that the statewide sample said their community needs to focus on to improve the resident and visitor experience were public infrastructure (37%), destination marketing and promotion (21%), downtown development (21%), and outdoor recreation opportunities (19%). In comparison, Southern Oregon respondents identified similar priorities in general. Southern Oregon respondents identified public infrastructure (31%); outdoor recreation opportunities (27%); downtown development (26%); and destination marketing and promotion (25%).

Areas of Focus

■ Southern Oregon
■ Statewide

Q: Please identify three areas that your community needs to focus on to improve the resident and visitor experience. (Select up to three)



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

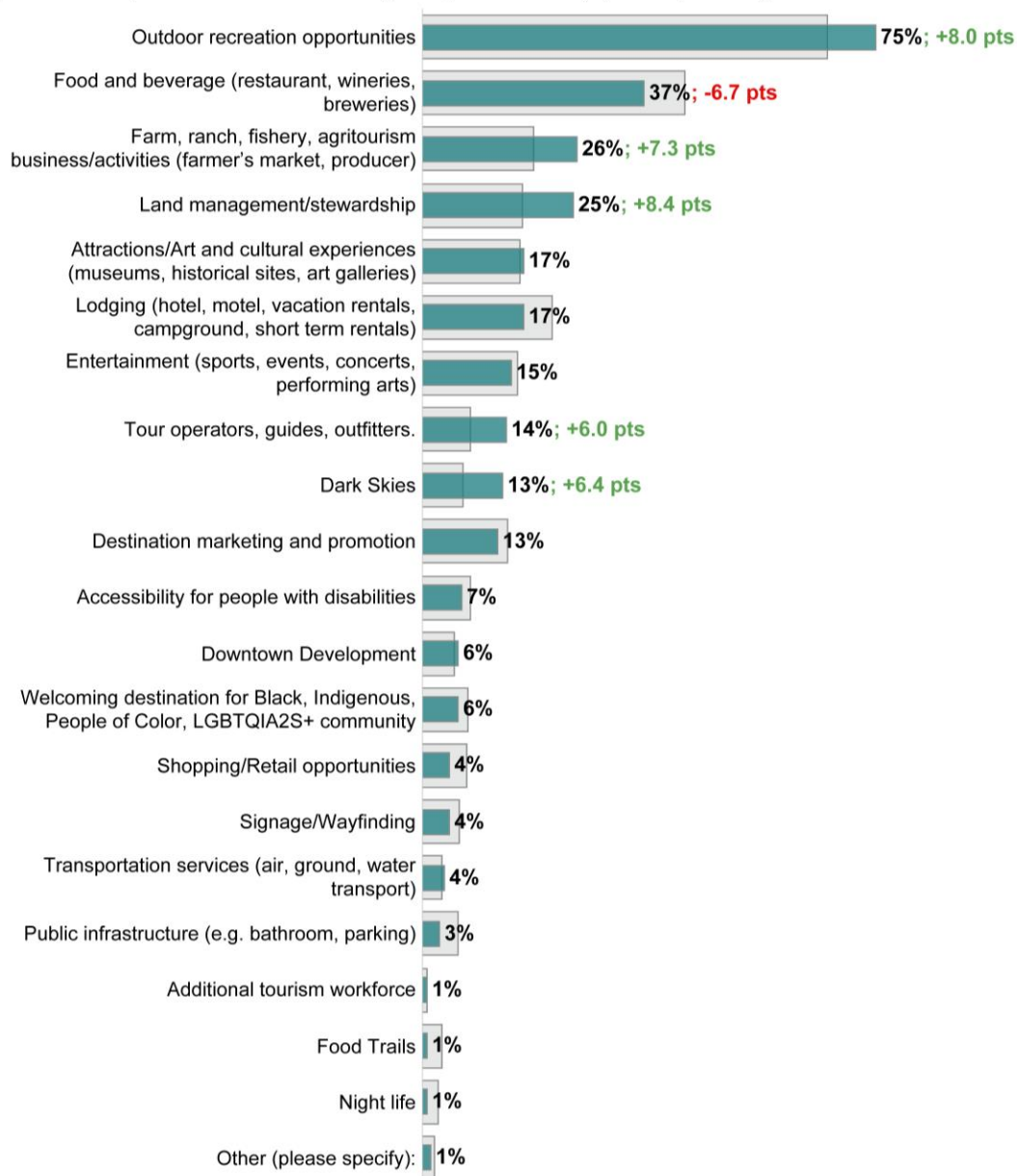
Source: RRC

Using the same set of answer options to those immediately above, the following figure portrays areas that respondents felt are strengths in their community. The top three areas that respondents from Southern Oregon consider as strengths in their community are outdoor recreation opportunities (75%), food and beverage (37%), and farm/ranch/fishery/agritourism (26%). Respondents in Southern Oregon were more likely to rate outdoor recreation, tour operators/guides/outfitters, and dark skies as strengths than statewide results indicated.

Community Strengths

■ Southern Oregon
■ Statewide

Q: Please identify three areas that are a strength for your community. (Select up to three)



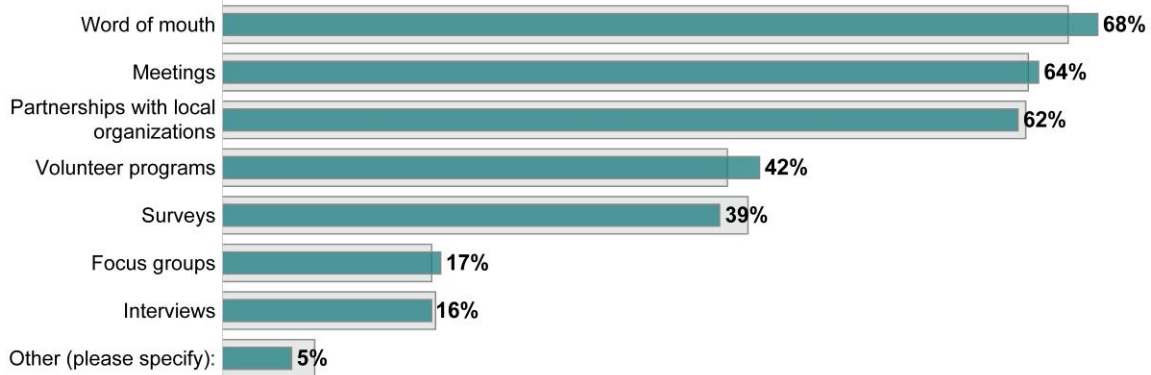
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

When communicating and engaging with the local community, Southern Oregon is largely consistent with the statewide sample using word of mouth (68%), meetings (64%), and partnerships with local organizations (62%) to reach out to the community. Overall, results did not differ in any meaningful way from statewide results.

Local Community Engagement

Q: What methods have you used to engage with your local communities in the past 12 months?



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

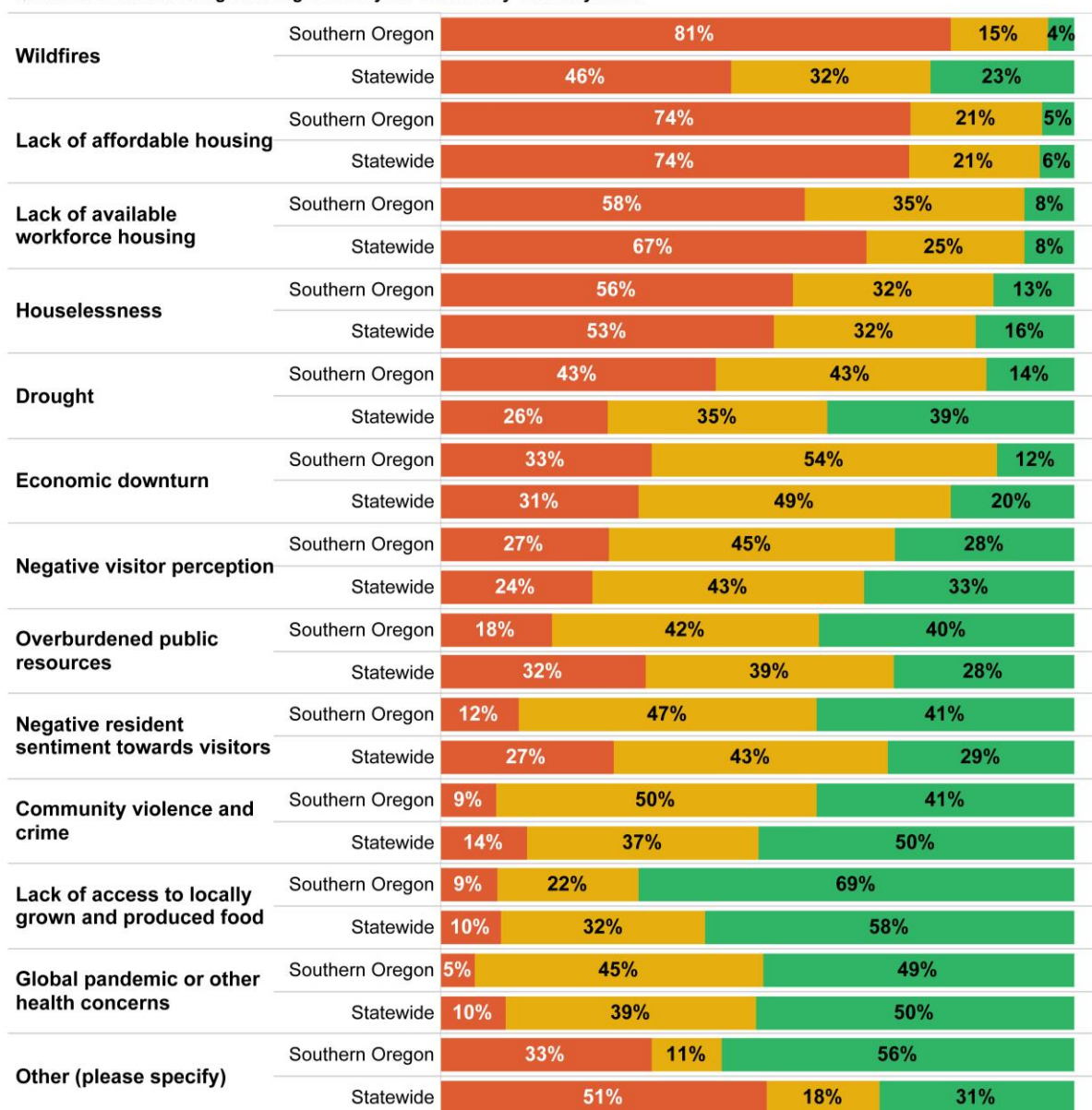
Source: RRC

The survey asked respondents to rate the challenges the community currently faces, and the level of risk associated with each challenge. The top three challenges statewide were identified by respondents as a lack of affordable housing (74%; "high risk"), a lack available workforce housing (67%), and houselessness (53%). Much of the response from Southern Oregon identified similar challenges. While lack of available workforce housing (58%) and lack of affordable housing (74%) were in line with statewide results, nearly twice as many respondents in the Southern Oregon sample cited wildfires (81%) as a high-risk challenge compared to only 46% in the statewide sample.

Risks to Tourism in Your Community

Response
■ Low risk
■ Medium risk
■ High risk

Q: Which of the following challenges does your community currently face?



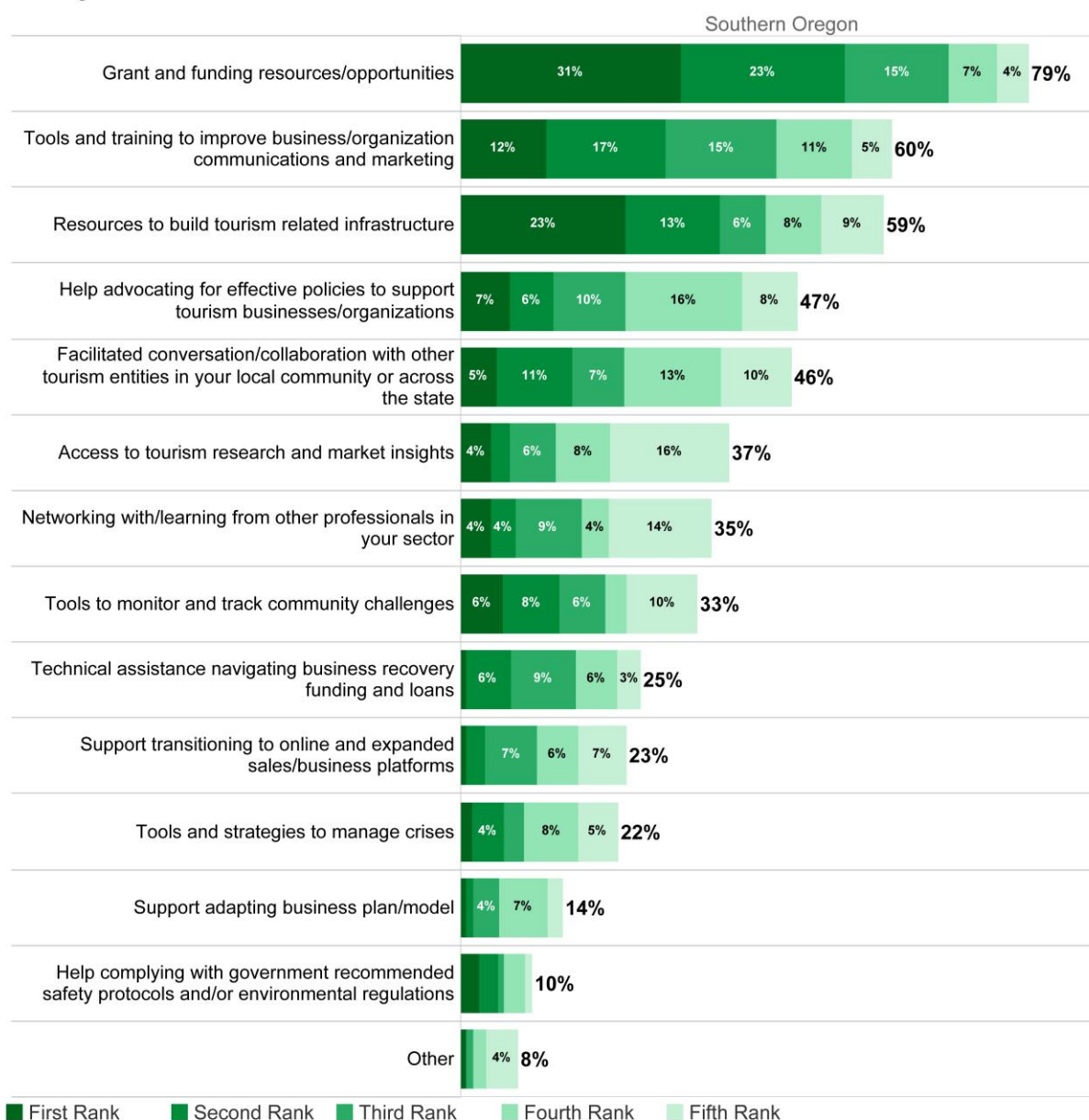
Note: Categories sorted in descending order by the percent of regional respondents selecting "High risk".

Source: RRC

The highest rated strategy statewide and in Southern Oregon was grant and funding resources/opportunities (72% and 79%, respectively, identified this among their top five resources or programs). Tools and training to improve business/organization communications and marketing (60%) and resources to build tourism related infrastructure (59%) were among the next highest rated for Southern Oregon. The resources or programs that was identified as the lowest for Southern Oregon was help complying with government recommended safety protocols/environmental regulations

Resources & Programs (Regional)

Q: Which of the following resources or programs would best assist your business/organization or community in the face of the challenges identified above?



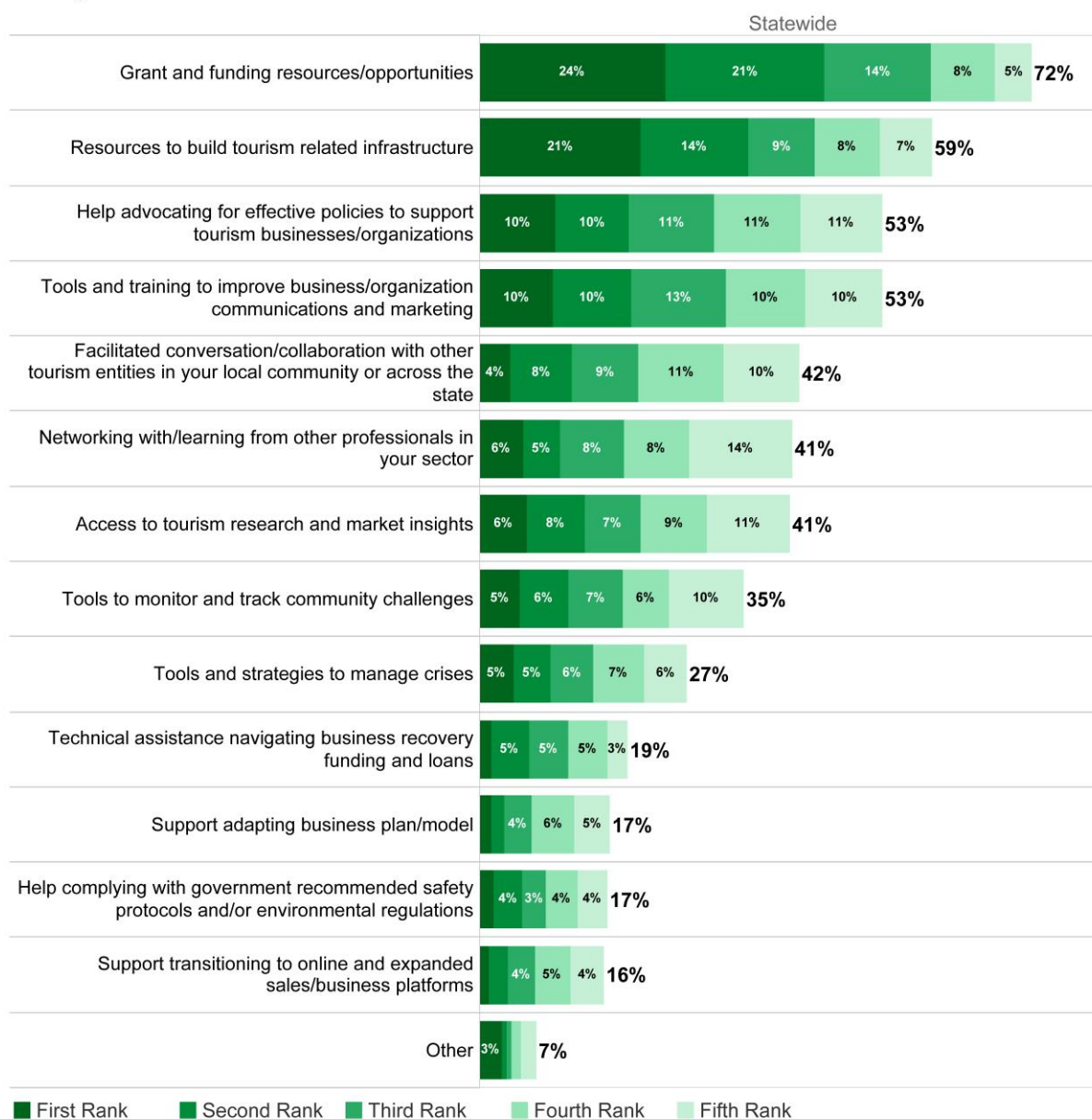
Note: Responses were recorded for the top five resources or programs respondents identified, with the sum of these five choices noted on the far right.

Source: RRC

Across the statewide sample, grant and funding resources/opportunities was the highest rated, with 72% of respondents identifying this among their top five resources or programs. Following were resources to build tourism-related infrastructure (59%), help advocating for effective policies to support tourism businesses/organizations (53%), and tools and training to improve business/organizations' communications and marketing (53%).

Resources & Programs (Statewide)

Q: Which of the following resources or programs would best assist your business/organization or community in the face of the challenges identified above?



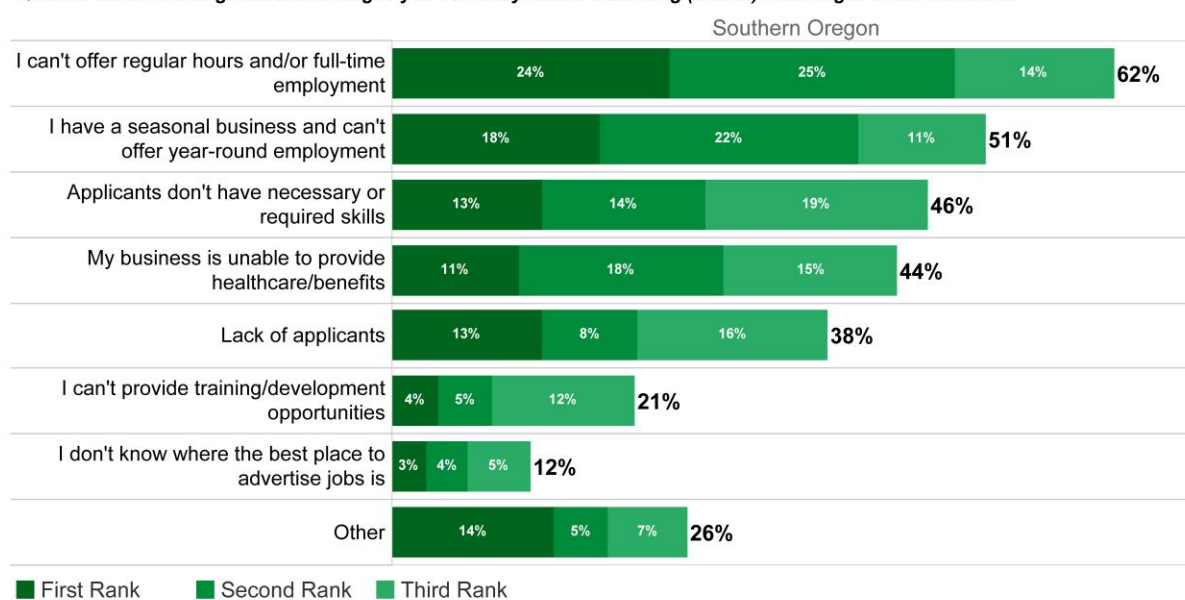
Note: Responses were recorded for the top five resources or programs respondents identified, with the sum of these five choices noted on the far right.

Source: RRC

Respondents were asked to identify the three greatest challenges they faced in attracting and/or retaining tourism workforce in the area. More than half of Southern Oregon respondents ranked "I can't offer regular hours and/or full-time employment" (62%) and "I have a seasonal business and can't offer year-round employment" (51%) among their top three challenges in the area. The lowest rated challenge by Southern Oregon was "I don't know where the best place to advertise jobs is" at 12%. Examples of challenges related to workforce housing mentioned in the "other" category primarily include affordable/lack of housing and lack of ability to pay competitive salaries.

Tourism Workforce Challenges (Regional)

Q: *What are the three greatest challenges you currently face in attracting (and/or) retaining tourism workforce?*



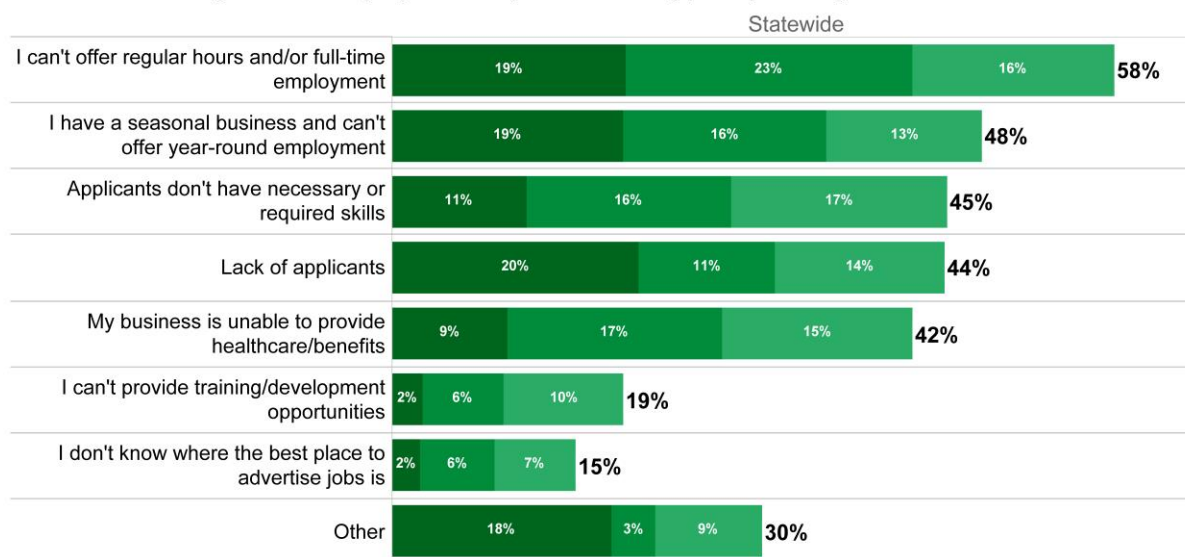
Note: Responses were recorded for the top three challenges respondents identified, with the sum of these three choices noted on the far right.

Source: RRC

The statewide sample was similar to regional findings, with the greatest share of respondents ranking "I can't offer regular hours and/or full-time employment" (58%) and "I have a seasonal business and can't offer year-round employment" (48%) among their greatest challenges. Similarly, "I don't know where the best place to advertise jobs is" (15%) was seen as relatively minimal in terms of tourism workforce challenges.

Tourism Workforce Challenges (Statewide)

Q: What are the three greatest challenges you currently face in attracting (and/or) retaining tourism workforce?



■ First Rank ■ Second Rank ■ Third Rank

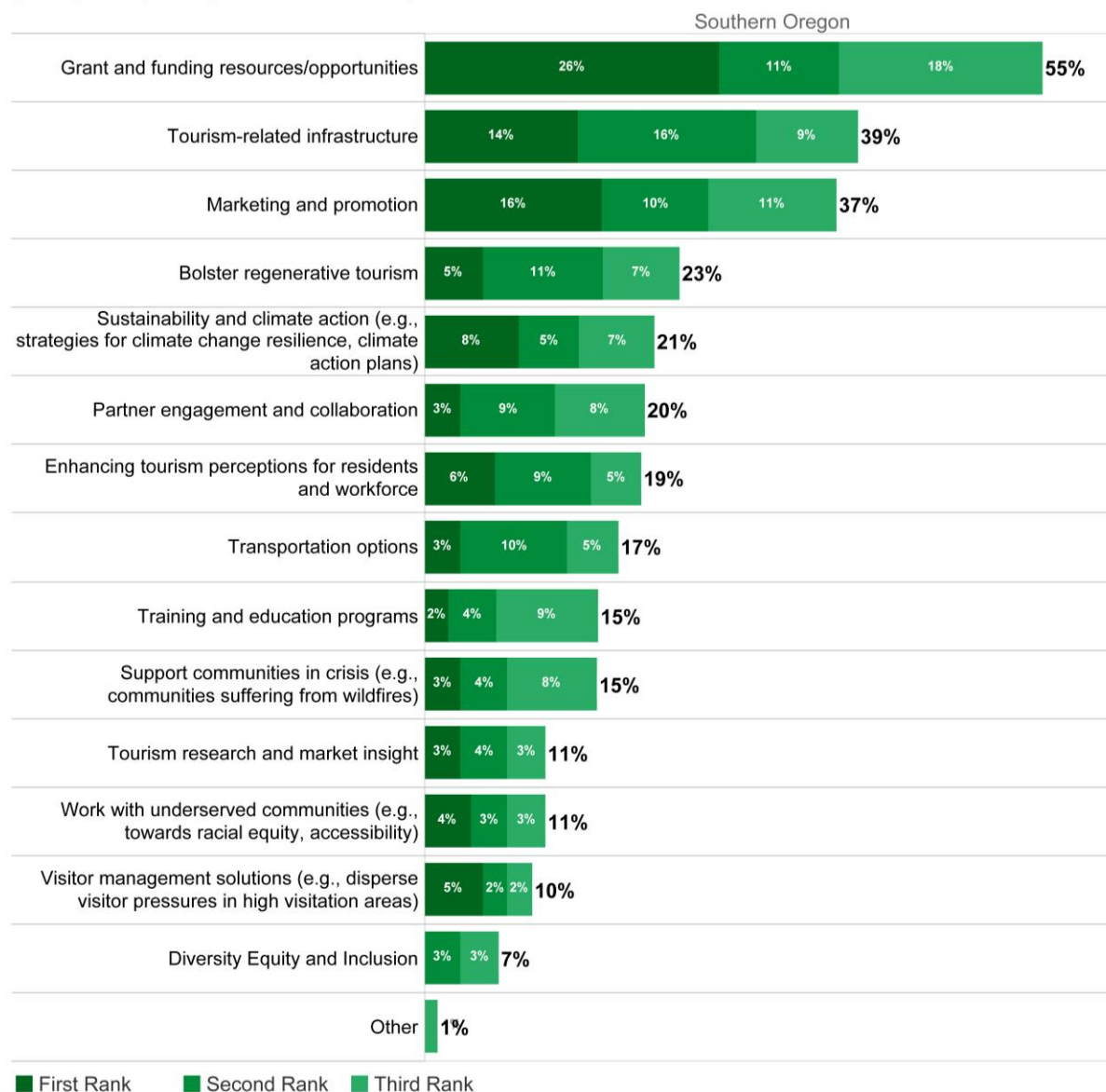
Note: Responses were recorded for the top three challenges respondents identified, with the sum of these three choices noted on the far right.

Source: RRC

As in prior iterations of the Oregon Tourism Industry Partner Survey, respondents were asked to identify the three areas that should be emphasized for tourism planning over the next 2-5 years. Southern Oregon respondents identified grant and funding resources/opportunities (55%) as their top combined priority. Tourism-related infrastructure was the second most identified priority (39%), followed by marketing and promotion (37%). Compared to 2023, marketing and promotion fell from 58% to 37%, the most major change.

Long-Term Tourism Planning (Regional)

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years. (Rank top three priorities within this list)



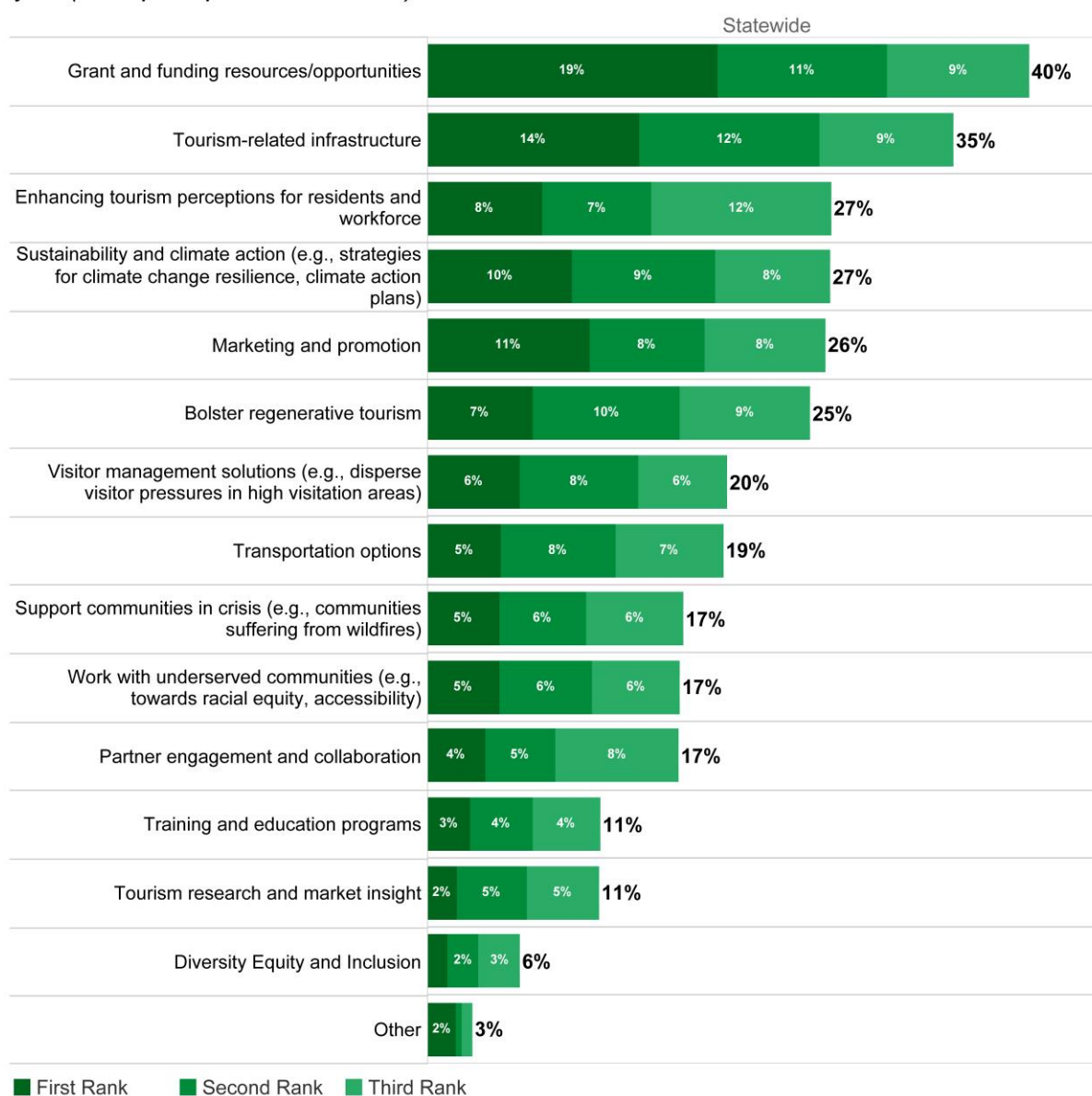
Note: Responses were recorded for the top three plans respondents identified, with the sum of these three choices noted on the far right.

Source: RRC

The top priorities identified in the statewide sample were grant and funding resources/opportunities (40%), tourism-related infrastructure (35%), and sustainability and climate action (27%). Relative to 2023, many of the same areas of focus were among the top priorities for respondents, with the exception of marketing and promotion, which was cited as a priority for 45% of the respondents in 2023 (down to 26% this year).

Long-Term Tourism Planning (Statewide)

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years. (Rank top three priorities within this list)



Note: Responses were recorded for the top three plans respondents identified, with the sum of these three choices noted on the far right.

Source: RRC

REPRESENTATION OF AND COMMUNICATION WITH UNDERSERVED COMMUNITIES

Historically and currently underserved and under-resourced communities, including Oregonians who identify as:

- Native American, members of Oregon's nine federally recognized tribes, American Indian, Alaska Natives
- Black, African, African American
- Latina, Latino, Latinx, Hispanic
- Asian
- Pacific Islander (including Compact of Free Association Citizens)
- Immigrants, Refugees, Asylum-Seekers, Deferred Status Holders, Temporary Protected Status
- Undocumented, Deferred Action for Childhood Arrivals (DACA), "Dreamers", Non-Immigrant Visa Holders
- Linguistically diverse, English language learners (ELL)
- Economically Disadvantaged
- People with disabilities
- LGBTQIA2S+
- Farmworkers, Migrant Seasonal Workers

Definition provided by State of Oregon

(https://www.oregon.gov/das/Docs/DEI_Action_Plan_2021.pdf)

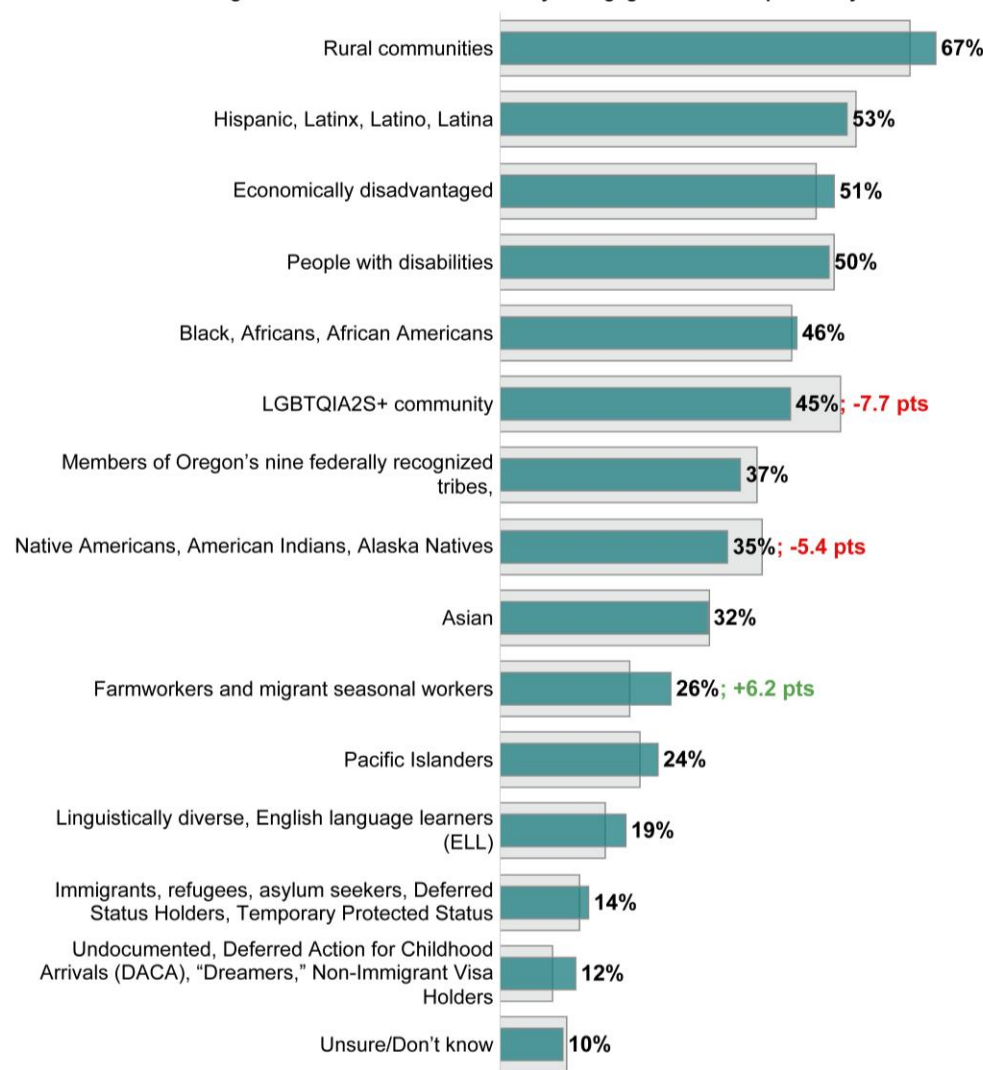
Of those underserved and under-resourced communities, Southern Oregon respondents self-reported having the most engagement with rural communities (67%); Hispanic, Latinx, Latino, Latina (53%); economically disadvantaged (51%); and people with disabilities (50%).

Conversely, the lowest self-reported underserved and under-resourced communities were undocumented, Deferred Action for Childhood Arrivals (DACA), "Dreamers," non-immigrant visa holders (12%); immigrants, refugees, asylum-seekers, deferred status holders, temporary protected status (14%); and linguistically diverse, English language learners (ELL) (19%).

Engaging with Underserved Communities

■ Southern Oregon
■ Statewide

Q: Which of the following underserved communities have you engaged with in the past two years?



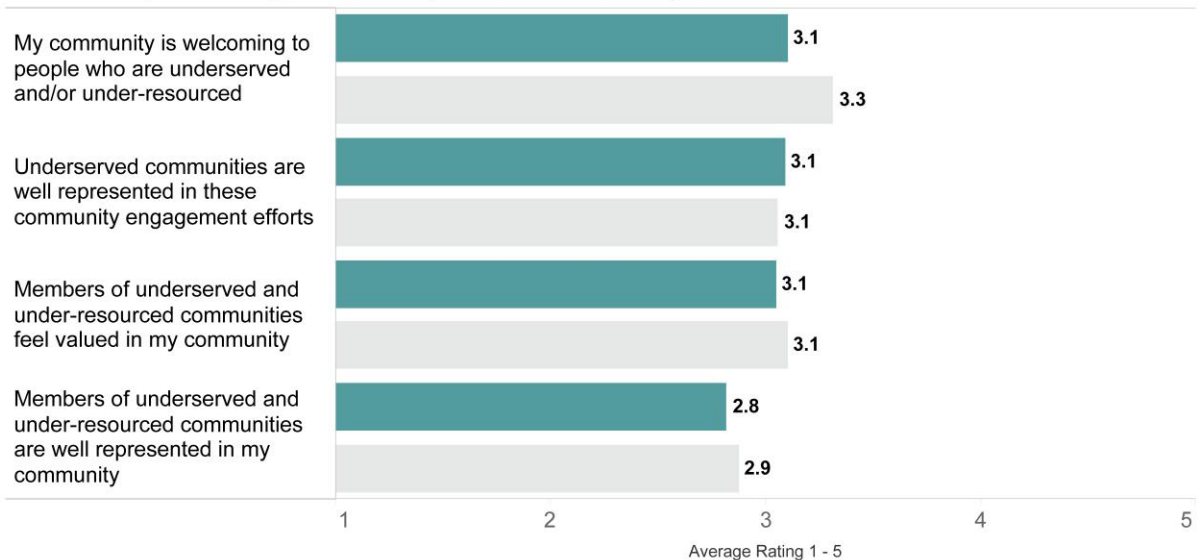
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Respondents were asked to rate their agreement with four statements that measured their representation of underserved communities in the area. There was little shift observed in the average ratings between Southern Oregon and the statewide sample. The highest rated statement for both samples was "My community is welcoming to people who are underserved and/or under-resourced," at 3.3 on a five-point scale for the statewide sample and 3.1 for Southern Oregon. The top three statements had the same average rating of 3.1 for Southern Oregon, however. The lowest rated for both samples was the statement "Members of underserved and under-resourced communities are well represented in my community," at an average rating of 2.8 and 2.9 for Southern Oregon and the statewide sample, respectively.

Representation of Underserved Communities

Q: Please rate your level of agreement or disagreement with the following statements:

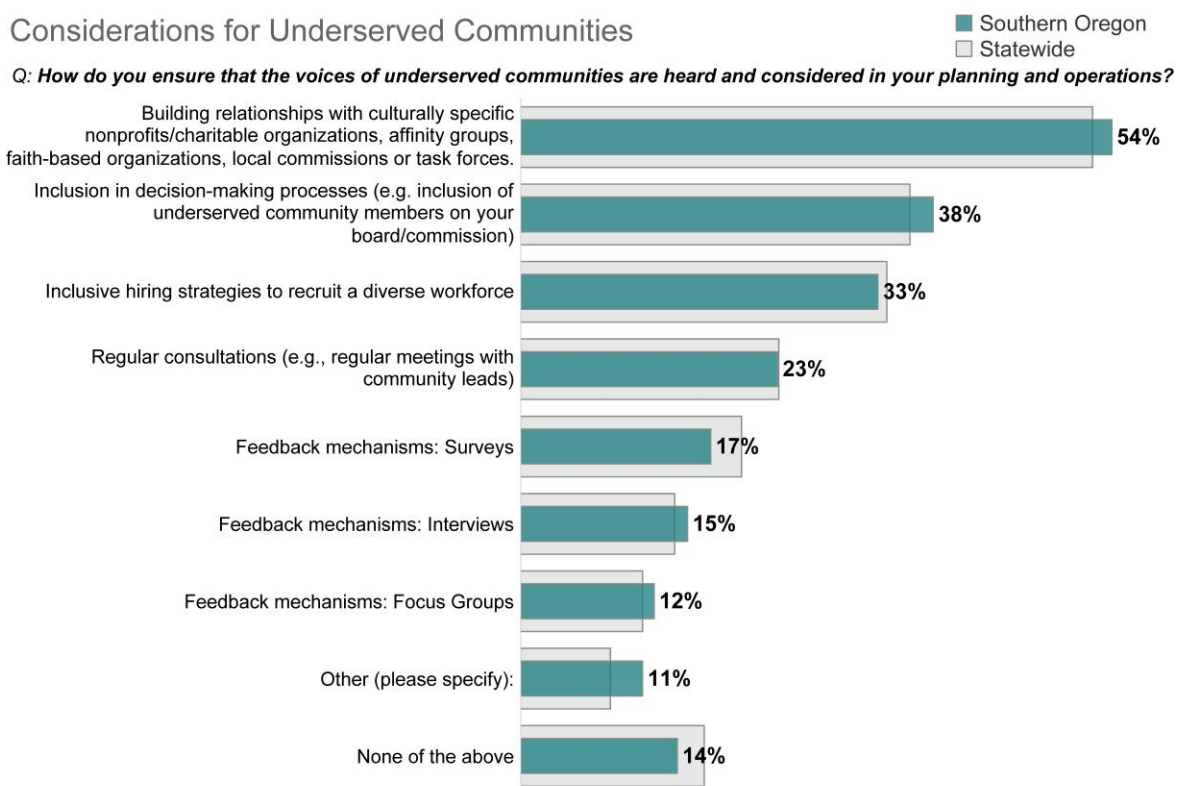


Source: RRC

When asked what considerations respondents make to ensure that the voices of underserved and under-resourced communities are heard, more than half of Southern Oregon respondents cited building relationships with culturally specific nonprofits/charitable organizations, affinity groups, faith-based organizations, local commissions or task forces (54%). Over one-third of Southern Oregon respondents also included these communities in the decision-making process (38%) and used inclusive hiring strategies to recruit a diverse workforce (33%).

Responses from Southern Oregon were largely in line with the statewide sample.

Considerations for Underserved Communities



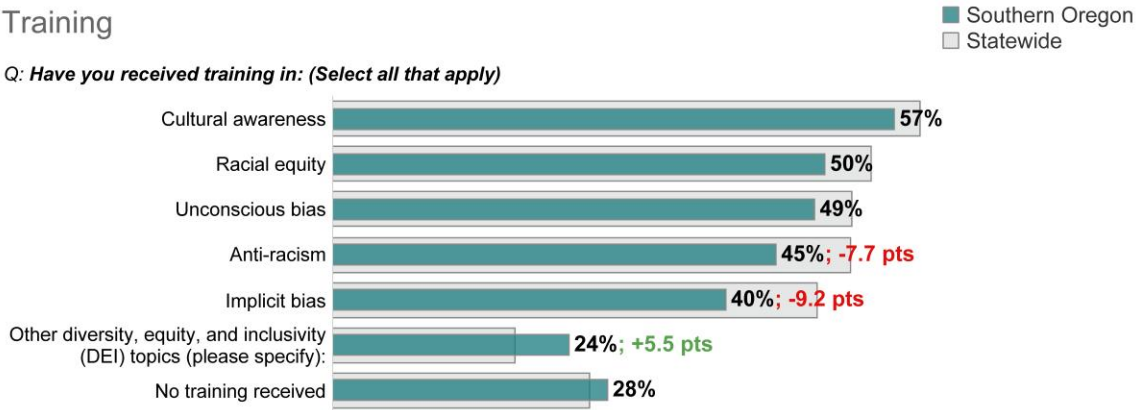
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Many of Southern Oregon respondents reported having training in cultural awareness (57%), racial equity (50%), and unconscious bias (49%), with most of these trainings not provided by their current employer.

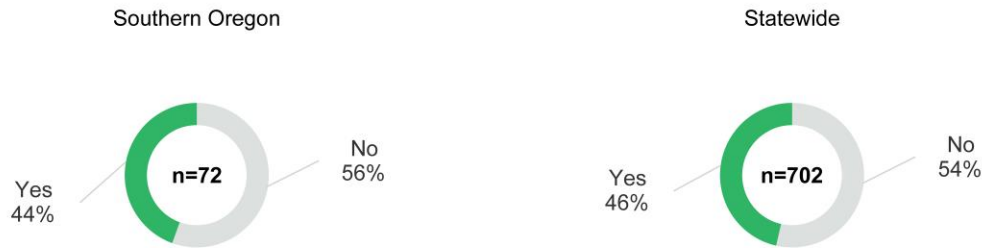
Training

Q: Have you received training in: (Select all that apply)



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Q: Was this training provided by your current employer?

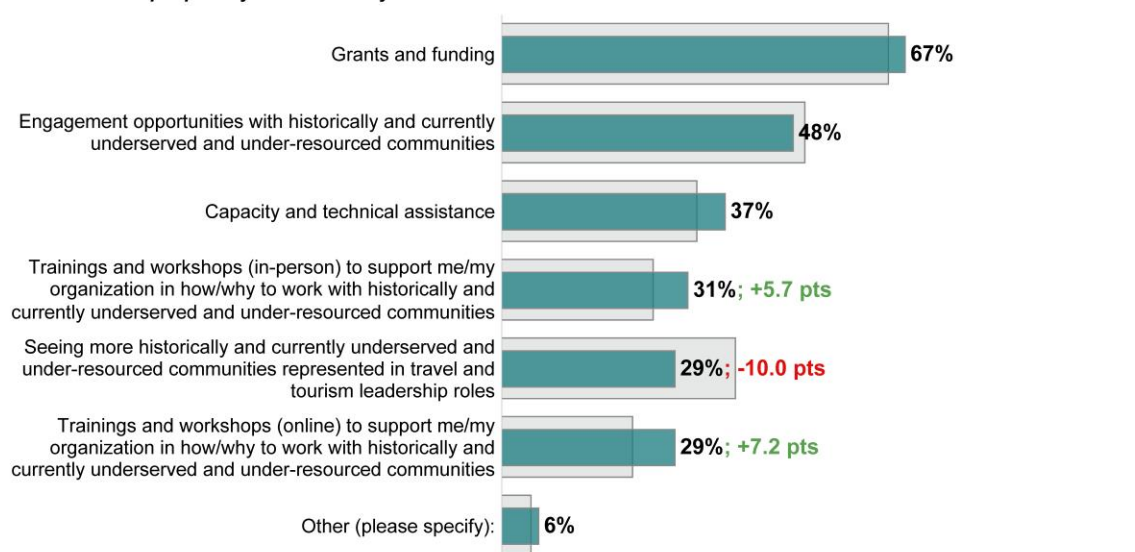


Source: RRC

When asked what type of resources would be most helpful in developing tourism-related facilities and products for underserved and under-resourced people, Southern Oregon respondents cited grants and funding (67%) and engagement opportunities with historically and currently underserved and under-resourced communities (48%). Trainings and workshops to support me/my organization in how/why to work with historically and currently underserved and under-resourced communities both online (+7.2 pts) and in-person (+5.7 pts) were higher in Southern Oregon compared to the statewide sample. However, seeing more historically and currently underserved and under-resourced communities represented in travel and tourism leadership roles (-10 pts) was much lower than the statewide sample.

Development of Tourism Resources

Q: Which of the following would be most helpful in developing tourism related facilities and products for underserved and under-resourced people in your community?



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

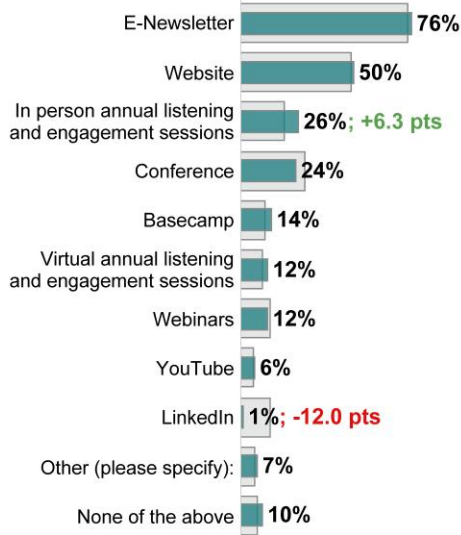
INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Seventy-six percent of Southern Oregon respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter, followed by their website (50%). By a large margin, e-newsletters (monthly or quarterly) are considered the best way for respondents to receive information.

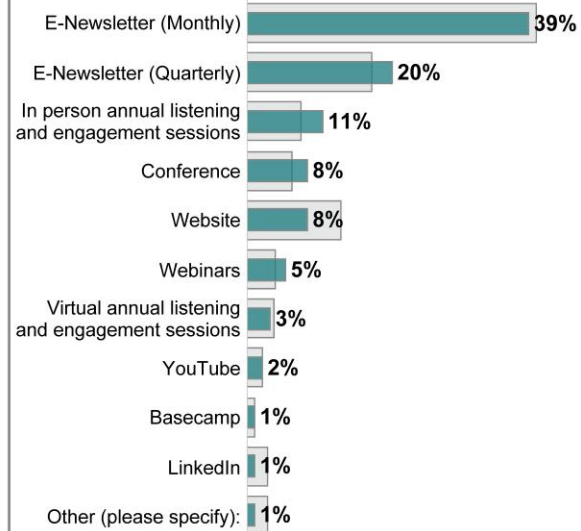
Tourism Communication Methods

■ Southern Oregon
■ Statewide

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



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



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

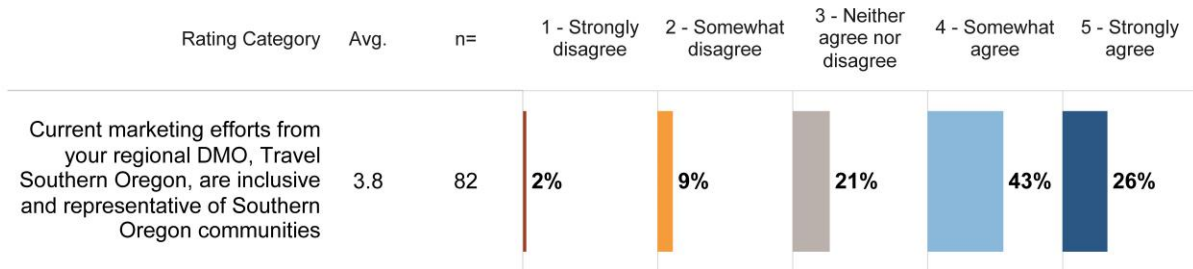
Source: RRC

SOUTHERN OREGON QUESTIONS

Each Regional Destination Management Organization (RDMO) had the opportunity to ask a series of custom questions of specific interest to their partners. 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.

Southern Oregon - Marketing Effort Inclusivity

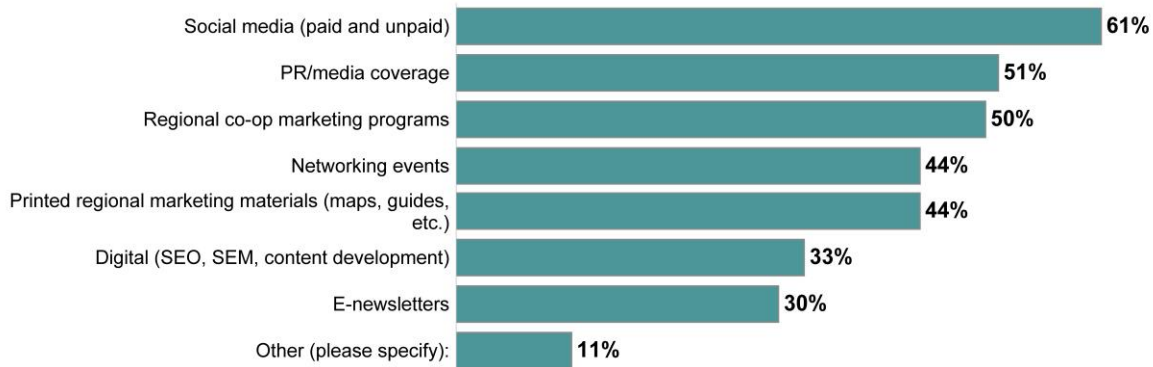
Q: Please rate your level of agreement or disagreement with the following statement:



Source: RRC

Southern Oregon - Marketing Efforts

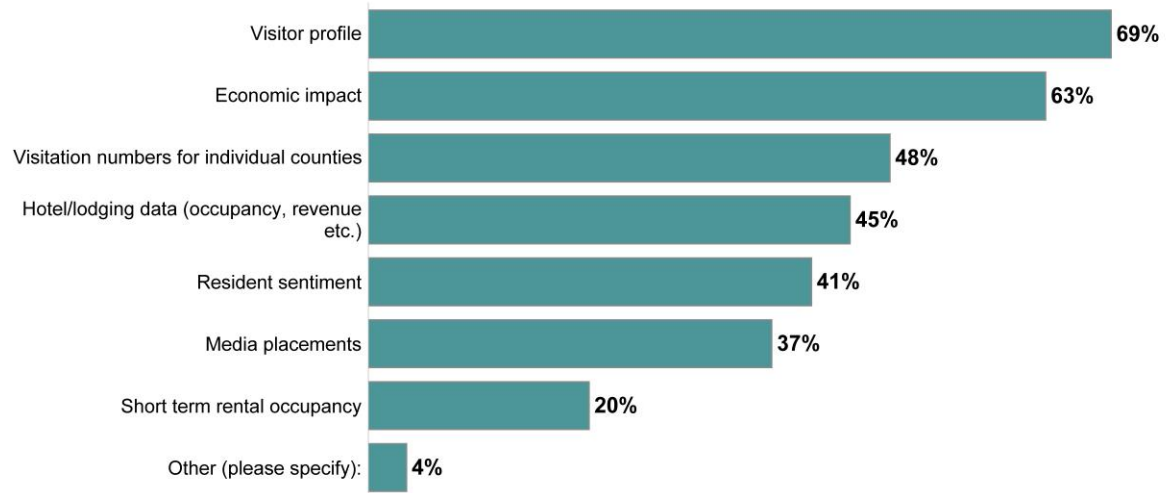
Q: What marketing efforts would you like to see Travel Southern Oregon increase?



Source: RRC

Southern Oregon - Research and Data

Q: *What research and data reports from Travel Southern Oregon are most important to your business?*



Source: RRC

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 Southern Oregon questions follow:

- *Where can Travel Southern Oregon offer more support in the work you are engaged in?*
- *What does that support look like? (In-region engagements, advocacy, marketing support etc.)*
- *What marketing efforts would you like to see Travel Southern Oregon increase? Other (please specify):*
- *What research and data reports from Travel Southern Oregon are most important to your business? 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.

<i>Where can Travel Southern Oregon offer more support in the work you are engaged in?</i>
Advertising & Marketing Travel Groups to destination
Ashland, SOU, and surrounding area
Better promotion of Saturday Farmer's Markets in summer and small town collection of "mom & pop" shops from a time gone by.
Better promotion of the recreational opportunities
Childcare help
Closer communication with Travel Southern Oregon regarding current projects and new material.
Conferences to keep the industry engaged in networking and current in the tourism industry: Statistics, technology, state and local policies, trainings and educational offerings.
continue the outreach in our community
continue with information
Continue to support/bolster the rural areas that don't have a local lodging tax to support their work.
Continued support and resources
Downtown revitalization
Educating businesses on current campaigns so that we may coordinate efforts. Passing along traveler demographics/data that we can use to make marketing decisions, too.

Encourage our DMO to do a better job. Training for our DMO on how to be a DMO and what DMOs are supposed to do.
Engagement,
engaging with our organization and identifying and helping to find funding for projects that benefit the region's tourism goals.
grant options, trainings, marketing
Having a better understanding of the needs specific to our local community.
Help Fishing Guides get their name out with marketing strategies specific to this industry as well as start up funding.
Help get our message out nationally
Help the homeless
Help us in reminding the rest of the state that we are here! I5 goes South just as well as it goes North and we have some of the best facilities, community, and environment to offer in the state.
Helping spread awareness of unique and more niche businesses
Highlight heritage work more frequently; I can help with this
Highlight smaller businesses in the area when they do a feature story or article, not just the heavy hitters (Morrisons, Hellgate)
I am not sure,
I think TSO is doing a great job.
idk
including underserved communities and making eco-conscious switches
Increase marketing efforts to rural communities of Josephine County.
Influencing perceptions
It would help if they just knew what we do to bring people into our community.
Lake County
Make recreational opportunities more affordable for tourists so more people can engage in it
marketing
Marketings
More affordable print marketing in TSO
More collaborative meetings for each department for each city like a mini governor's conference. There are challenges unique to our region that would be nice to discuss with our region specifically. Also collaboration of resources such as photo/video assets.
More opportunities to promote my business through their channels.
More practical operations guidance on how to work in the accessibility space Practical guidance and resources for marketing
More publicity and focus
N/A Already fully engaged

Offering workshops on cultural competency to ensure that tourism practices are inclusive and respectful of local communities, especially Indigenous groups and other marginalized populations.
Partner with us for marketing events and/or activities, help recruit professionals to our industry, etc.
Public Relations and connecting partners for support. Marketing campaigns and co-ops.
Small town events
Sponsorship, Grants, In-person listening sessions.
Starting a Chamber of Commerce
Sustainable and regenerative tourism; accessible tourism
The in person listening session and specific community engagement activities. Partnerships for underemployed who struggle with housing and employment barriers.
The Rogue Valley
They are already doing a fantastic job, but we could really use help/training regarding our location's branding and marketing
To offer more diversified options regarding ages, interests, etc.
Training sessions
Training, partnership collaboration, marketing support
Trainings, Seminars etc.
Transportation - need more options to get overseas travelers to the Umpqua Valley
Travel Oregon is helping our region be recognized as a destination vacation getaway. We appreciate that.
Travel Southern Oregon can support by promoting sustainable tourism, offering marketing resources, and providing educational workshops. Additionally, enhancing accessibility and promoting lesser-known destinations would strengthen community engagement.
TSO does really well supporting the work I do.
TSO has been a wonderful partner to work with. Deeper understanding of how they can help us in the Applegate's unincorporated communities and how they would be willing to work with us would be helpful.
TSO has been as helpful as they can be. We have a good relationship with them and several other of the DMO's in our region. We have talked about funding with them several times and they are limited in what they can do/ offer.
Visit and highlight Mildred Kanipe Memorial Park in your promotional materials for our area.
We currently get a lot of support from Discover Klamath in tourist literature. We could use help by having articles about Chiloquin and Klamath Falls in your magazine.
Work force tourism education.

What does that support look like? (In-region engagements, advocacy, marketing support etc.)

2x yearly in person meetings as well as recreation industrywide get togethers.

A one day, all member symposium. Or quarterly meetings with the region's marketing teams.

acting as a voice for local businesses, workers, and communities by advocating for infrastructure improvements, funding for rural tourism projects, and policies that promote sustainable development.

Advocacy and linking partnerships to address the issue. Especially internships and short-term housing while doing this and assistance with understanding career opportunities in tourism in the region.

Advocacy to agencies and organizations who Southernize their efforts only North of Salem. Fund them to travel outside of their own area and look for ways to partner with the different communities across the state.

advocacy, grant opportunities

Advocacy, grants, personal involvement in tourism related projects I have suggested.

Advocate for programs for homeless

All of that — but most of all advocate and communicate to Douglas county government the value of Mikdred Kanipe Memorial Park as a place for outdoor recreation for visitors and locals alike.

Apprenticeship classes

Attend our quarterly Destination Management Working Group meetings, help share our materials/ posts, offer advice when asked.

Being engaged with local businesses and an understanding of what most businesses are needing when it comes to finding solutions to better that business and marketing.

Continuing education classes and offerings in our communities, Colleges, High Schools, chambers, etc. Field trips in middle/high school focused on the tourism industry. Maybe a campaign that focuses on nature and nurture and kids learning/exploring what is in their own backyard (area) of Oregon and then visiting a different school/area of Oregon and the amazement that they have in learning the differences and sharing them with each other. This could also focus on the aspect of the humans themselves being different but showing how similar we all are. I would love to come up with a creative and catchy name for this campaign. :) Sign me up!

Direct engagement with DMO management.

Event sponsorship, marketing support, and in-region engagements.

Everything listed above.

Funding

Grant opportunities, training and resources

Grants

How to get started and what needs to be done in a "to do list" platform, with resources
I'm not sure
In-region engagements and advocacy events.
In-region engagements, advocacy, and marketing support would all be great.
It could start with online workshops to define a plan then move to in-region events-in order to garner community/local business input to refine and solidify the plan; possible marketing support in the form of funding- capacity and technical assistance as well as things like published literature
Lacking
marketing support
marketing support
marketing support- partnering with us on events (I know Travel Southern Oregon is doing this in 2024 with us), introduce us to other organizations we can partner with.
Marketing and advocacy.
Marketing and maybe in person community discussions
Marketing and networking opportunities. Help with trade shows and featuring up and coming guides. Step by step guides on marketing strategies
Marketing and support of local government to help facilitate these events
Marketing support
Marketing support and new business or first-time business rates for advertising or using TSO resources.
Marketing support to get groups of women (friends, families) to consider Southern Oregon towns as safe spaces for travel adventures. Focus on spas, wine, shopping, dining, retreats, easy activities, collaborative activities.
Marketing Support
Marketing support, advocacy
Marketing support, advocacy.
Marketing support, regional in-person events (maybe even industry specific like wine, beer, arts, etc).
Marketing, advocacy, grants/investments
Marketing, collaboration with local and regional marketing organizations
More options for private tours.
Most of our clients have been passing through on their way north or south from California or Washington.
not sure
Opportunities for tourism grants in smaller communities; increase marketing of local area attractions, food scene, and hidden gems.
our area has good support
possible once monthly conversation for updates.

Resources and training to become accessible friendly Training and resources for marketing small business.
Some marketing to tourists would be super helpful.
Strong media presence
That support includes in-region engagements, advocacy, and marketing support to promote tourism, strengthen partnerships, and enhance local experiences.
town hall meetings, face to face gatherings at local attractions
training workforce in front line jobs how to accommodate/treat/be hospitable and informative to tourists
Training - email notifications of programs, collaboration - regularly scheduled collaborative meetings and/or reports, opportunities. Marketing - collaborative opportunities, data access
Transportation
TSO has provided marketing support and in-region engagement; would appreciate more frequent learning opportunities and marketing insights
Visitor Center information
We can always use marketing help

What marketing efforts would you like to see Travel Southern Oregon increase? Other (please specify):

appreciate current work
conferences
highlight specific connections: transportation; internships; highlighting public service outcomes of those who have received assistance to work in the industry and overcome barriers.
Maybe respond to people when they reach out to you.
More collaboration of social media assets. Not collaboration posts but just the sharing of assets in general.
More engagement with the Umpqua Valley. (We're far away from the rest of the region.)
not sure
Small Town Shopping Passport
Symposium/Development for the region

What research and data reports from Travel Southern Oregon are most important to your business? Other (please specify):

not sure
transportation data
Visitation per tourism industry per region if applicable