

# **2018 OREGON TOURISM ENGAGEMENT SURVEY**

## **SOUTHERN OREGON**

This report summarizes findings from a 2018 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. Findings are presented for respondents from Southern Oregon with additional statewide results for context.

# 2018 OREGON TOURISM ENGAGEMENT SURVEY SOUTHERN OREGON

## SURVEY GOALS

The 2018 Oregon Tourism Engagement Survey was designed on behalf of Travel Oregon and regional tourism partners to elicit feedback from individuals and organizations linked to the tourism industry. The goal of the study was to obtain feedback and direction for Regional Destination Management Organizations (RDMOs). The survey built on a framework of past stakeholder surveys and was developed collaboratively by Driftline Consulting, Travel Oregon, and RDMOs.

## METHODOLOGY

The survey was conducted online and was distributed in September and October 2018 via emails and an open URL to Travel Oregon databases with additional distribution from RDMOs. A total of 1,512 valid responses were collected. Results presented in this report are segmented by the region in which the respondent indicated they live or work. That is, this report aggregates responses from Southern Oregon to provide relevant insights to the Southern Oregon RDMO. Where applicable, regional results are compared to an average of Oregon's seven regions. In addition, questions were asked in a way (prioritization ratings) that enables comparisons across tactical opportunity categories. The terms respondent and stakeholder are used interchangeably.

## SIGNIFICANCE

Because this survey was not conducted from a random sample it is not appropriate to perform typical statistical tests on the data. Therefore, confidence bands are not presented. The survey results should be viewed as an aggregation of relevant and thoughtful feedback from constituents. 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.

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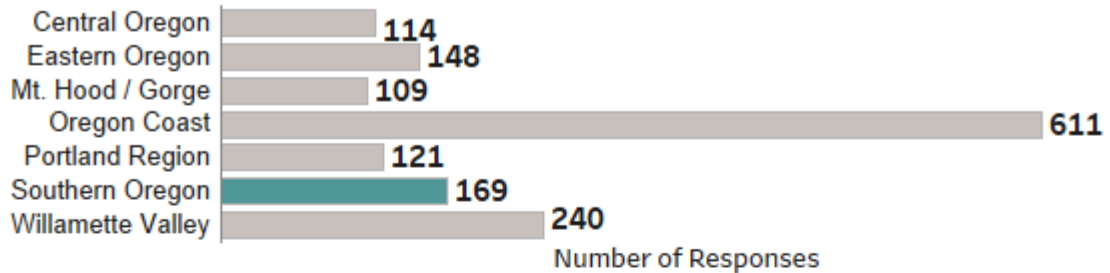
## KEY FINDINGS

- **High levels of engagement with the Oregon Tourism industry:** A greater percentage of Southern Oregon respondents indicated that they agree or strongly agree with the statement, “I am engaged with the Oregon tourism industry” relative to the statewide average. A smaller share, though still greater than the statewide, indicated agreement with the statement, “I understand the Oregon tourism partnering structure.”
- **Positive Views on Tourism and the Direction of the Industry:** Stakeholders view the direction of tourism positively in the state and the region, 75% and 68% agree that they are satisfied with the direction of the industry in the state and region respectively (relative to 70% and 60% respectively in 2017). In accordance with this positive assessment, the percentages of respondents agreeing with the statements are slightly higher than for other regions. That is, Southern Oregon respondents were generally more positive than respondents from elsewhere in the state (page 4).
- **Tactics Identified by Over 2/3 of Respondents as High or Very High Priority:** There were a handful of tactics across all categories (Marketing, Planning and Management, Product Development, Training and Capacity Building, and Public Affairs and Communications) that stood out for their importance to stakeholders. Listed below with the individual tactics are the percentages of respondents listing the tactic as a “high” or “very high” priority for the region to pursue. Southern Oregon respondents listed more tactics as “high” or “very high” priorities than did respondents from other regions. This may speak to a greater need in the region or unrealistically high expectations of what can be achieved with limited budgets and staff.
  - Marketing: Offer marketing and promotional training for smaller communities and businesses (71%).
  - Destination Development – Planning and Management: Increase visitation to the region during off-peak seasons (81%).
  - Destination Development – Product Development: Develop/improve infrastructure for visitors to experience outdoor recreation and nature-based tourism (71%).
  - Destination Development – Product Development: Provide more opportunities for visitors to experience locally grown and produced foods (71%).
  - Destination Development – Product Development: Improve curb appeal of main streets and city centers (71%).
  - Destination Development – Training and Capacity Building: Increase local capacity for tourism marketing (69%).
  - Destination Development – Training and Capacity Building: Educate community leaders and policymakers (local, county, state) on value of tourism and its viability as a long-term career (68%).
  - Public Affairs & Communications: Increase engagement with local and regional policymakers to ensure the value of tourism is clearly communicated (79%).
  - Public Affairs & Communications: Conduct familiarization tours of your region to highlight newsworthy areas for top-tier and/or niche media, giving them the story ideas they need to place articles or broadcast coverage in key media outlets (74%).
  - Public Affairs & Communications: Proactively engage with consumer media to garner coverage that will inspire travel to your region (70%).

## RESPONDENT PROFILE

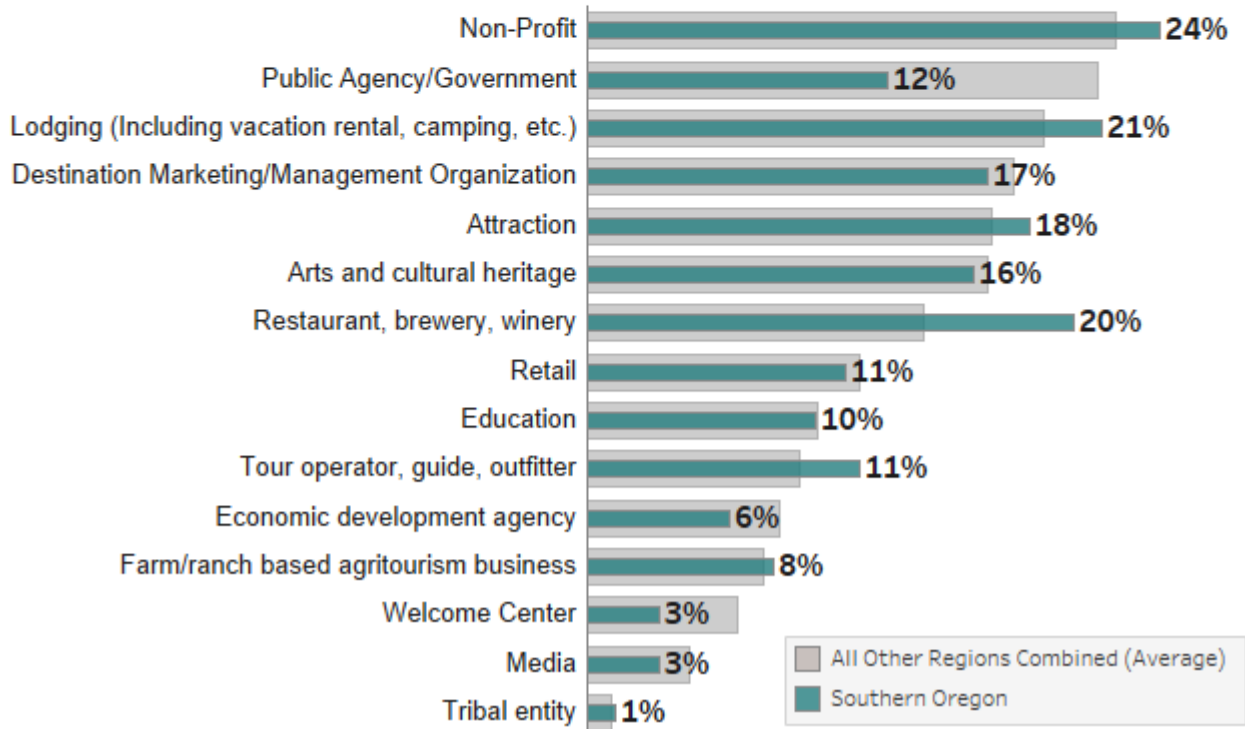
The figures below present the overall number of respondents as well as the industries in which respondents work. The question for Organization Type was a multiple response question, allowing respondents to select more than one industry or organization type. Thus, percentages will not sum to 100%. Relative to other regions, respondents from Southern Oregon were more likely to work at a “Restaurant, brewery, winery” (+6%), and less likely to work for a “Public Agency/Government” (-9%). Additional details can be found in the figures below.

### Number of Respondents



### Organization Type

*Q: Please indicate the sector of the tourism industry in which you work by checking all that apply:*

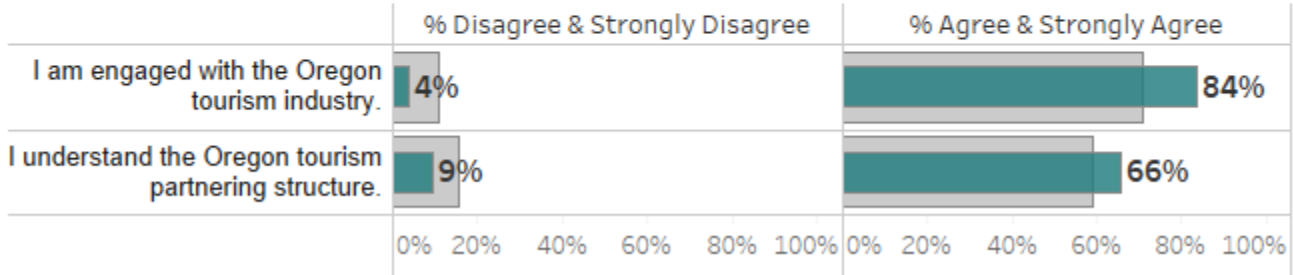


# TOURISM INDUSTRY ENGAGEMENT AND OVERALL HEALTH

Respondents from Southern Oregon indicate very high levels of industry engagement. Relative to the rest of the state, respondents are more engaged with the industry (+13% agree or strongly agree) and better understand the partnering structure (+7% agree or strongly agree).

## Industry Engagement

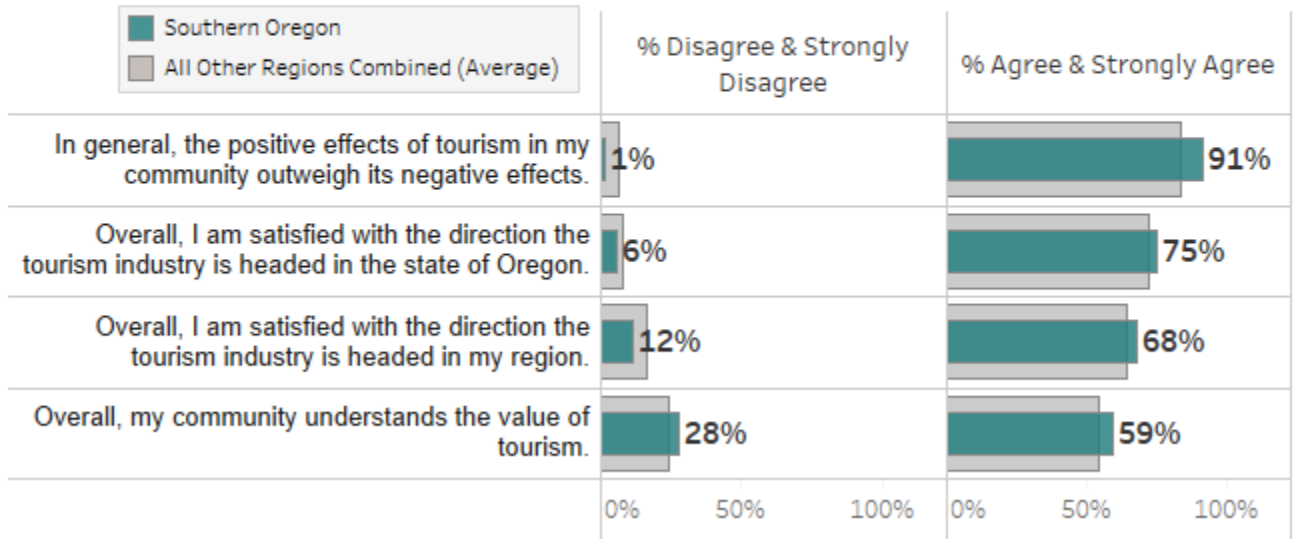
*Q: Please indicate the level to which you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.*



On measures of overall industry health, respondents from Southern Oregon indicate high levels of satisfaction. Relative to the rest of the state, they are more positive about the overall health of the tourism industry, with a higher percentage of respondents indicating “Agree” or “Strongly Agree” in each category. As in the rest of the state, respondents are most in agreement that the positive effects of tourism outweigh its negative effects, and they are least in agreement that their community understands the value of tourism.

## Overall Health of the Tourism Industry

*Q: Please indicate the level to which you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.*

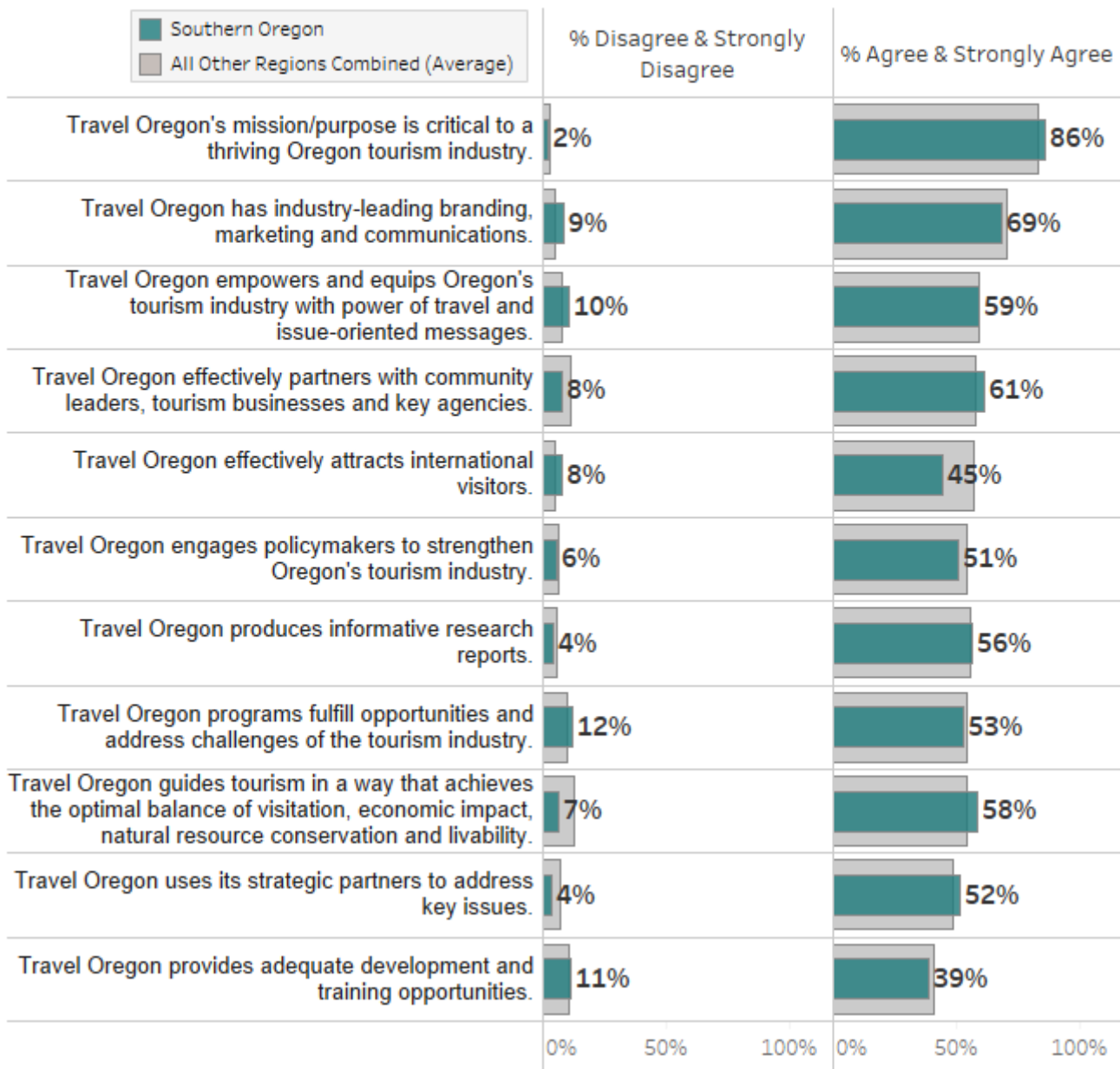


## TRAVEL OREGON PERFORMANCE

On measures of Travel Oregon performance, there is broad consensus that Travel Oregon’s mission/purpose is critical to a thriving Oregon tourism industry and that Travel Oregon has industry-leading branding, marketing and communications. There is the least amount of agreement about whether Travel Oregon provides adequate development and training opportunities. For most statements, respondents from Southern Oregon were more likely to agree or strongly agree, with the notable exception of “Travel Oregon effectively attracts international visitors.”

### Travel Oregon Performance

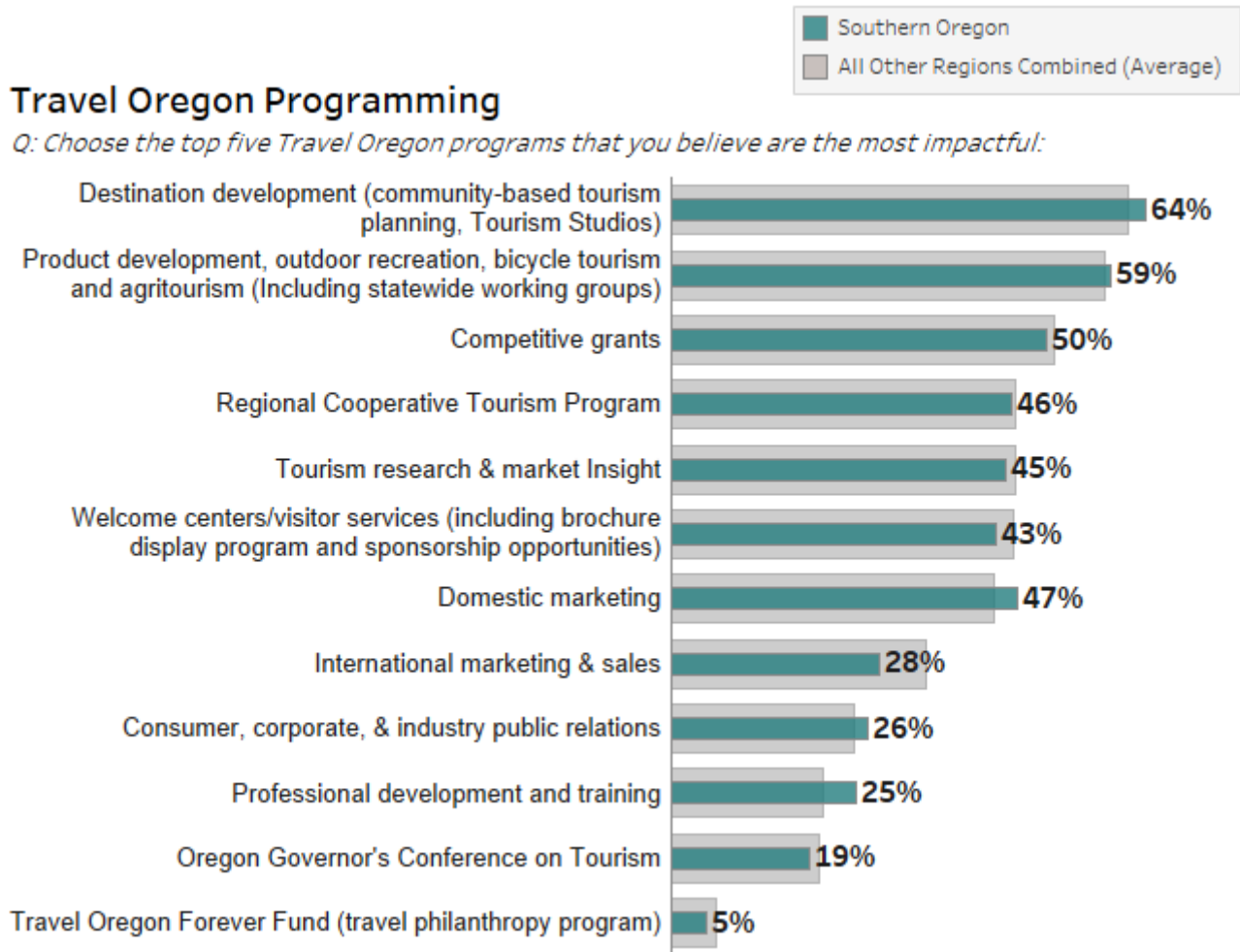
Q: To what extent do you agree or disagree with the following statements: Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.



Overall and in Southern Oregon, “Destination Development” was most cited among the top-five most impactful Travel Oregon programs, followed by “Product development, outdoor recreation, bicycle tourism and agritourism.” Respondents from Southern Oregon were more likely to cite “Professional development and training” (+5%) and less likely to cite “International marketing & sales” (-6%).

## Travel Oregon Programming

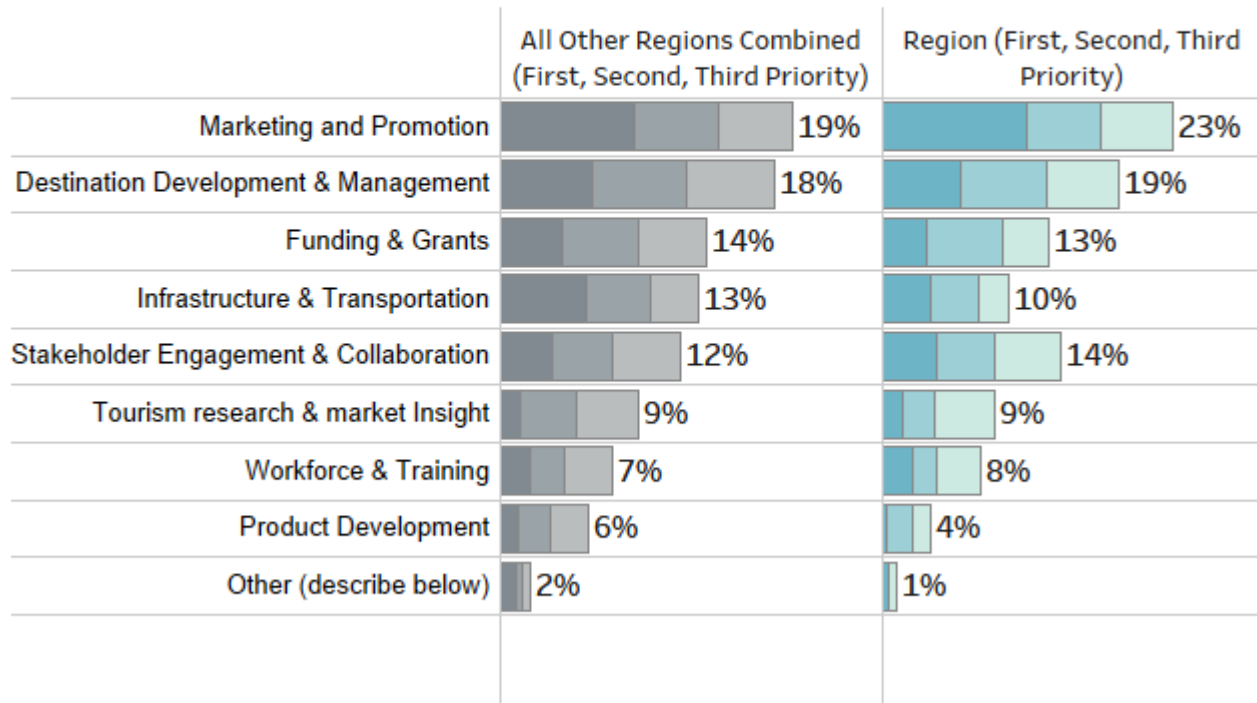
*Q: Choose the top five Travel Oregon programs that you believe are the most impactful:*



Looking ahead to 2019-2021 planning, 23% of Southern Oregon respondents indicated Marketing and Promotion as a first, second, or third highest priority. The rank order of priorities for Southern Oregon is the same as the statewide average except for “Stakeholder Engagement and Collaboration,” which Southern Oregon respondents prioritized over “Funding and Grants,” and “Infrastructure and Transportation.”

## Statewide Desired Tourism Priorities & Focus Areas

*Q: Given limited resources, what three priority areas do you believe are most important for 2019-2021 tourism planning?*

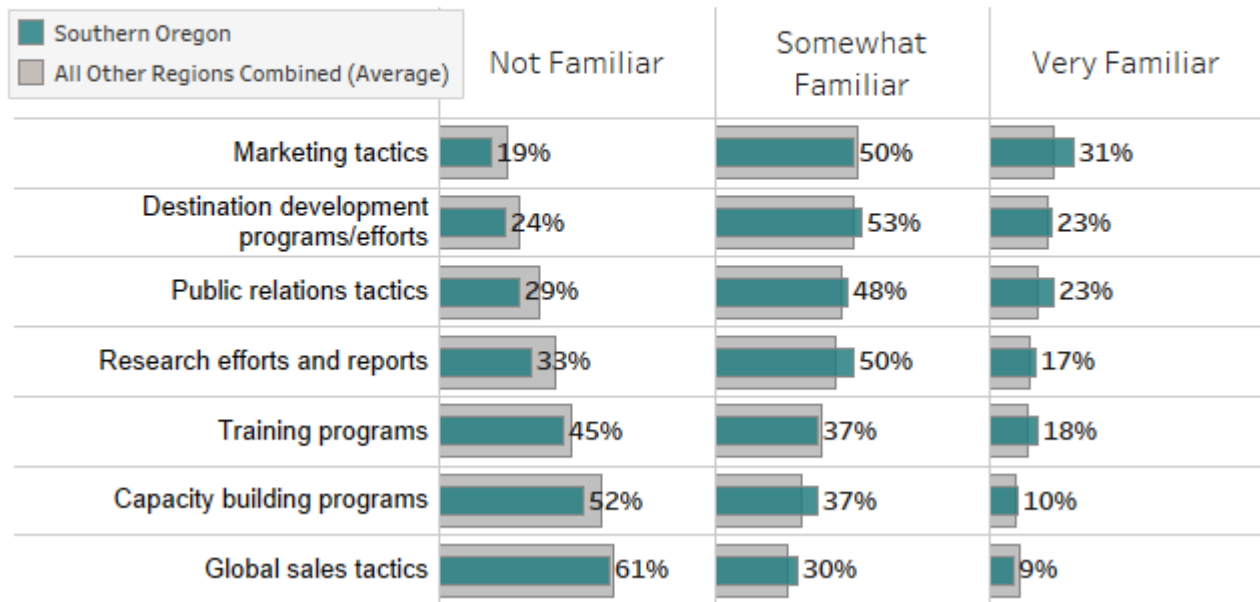




Respondents were asked to indicate their familiarity with regional initiatives engaged in by the RDMO over the past 12 months. Respondents, both overall and in Southern Oregon, were most familiar with the marketing tactics of the RDMO. This result may be a reflection of the priorities of the RDMO or it may reflect the priorities of the constituents. Additionally, future investments in capacity building, global sales, and training programs are likely to need additional communication and outreach efforts in order to be better recognized and understood by stakeholders. These categories receive notably lower ratings of familiarity than other initiatives that were rated. Respondents from Southern Oregon indicated higher levels of familiarity across all initiatives than the statewide average.

## Familiarity with Initiatives

*Q: Please indicate how familiar you are with the initiatives undertaken by your regional destination management organization in the following areas in the past 12 months:*

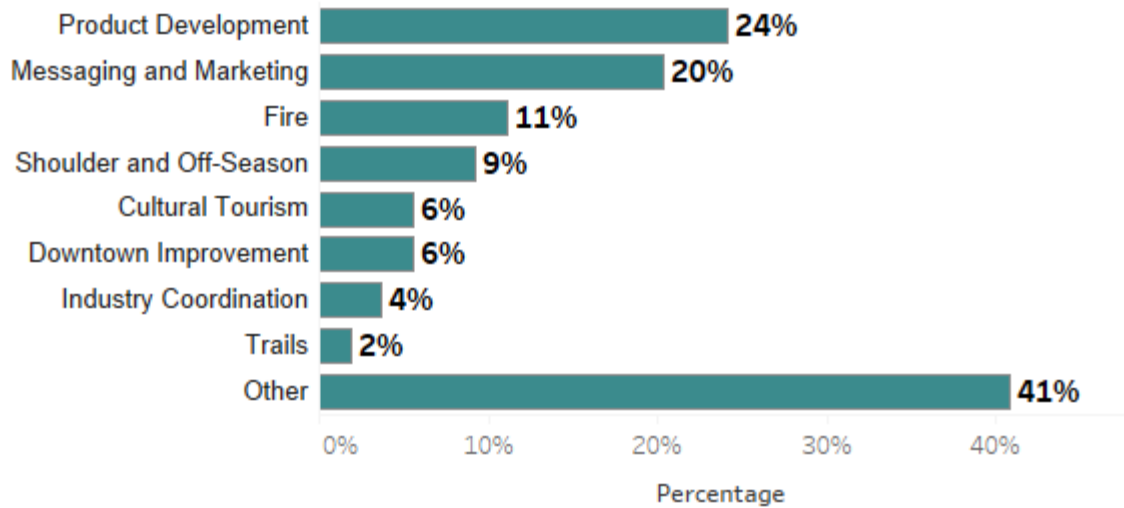


Repondents were also asked to describe a specific outcome they would like their region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of the destination. The table below summarizes the comments (presented in their entirety in the appendix). The comments span a wide range, though many focused on specific product development and messaging/marketing tactics. Respondents also expressed concern about the seemingly increasing frequency of forrest fires and their impact on tourism in the region.

## Open-Ended Regional Goals: Comments Categorized for Analysis

*Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.*

### Topics Addressed in Comments

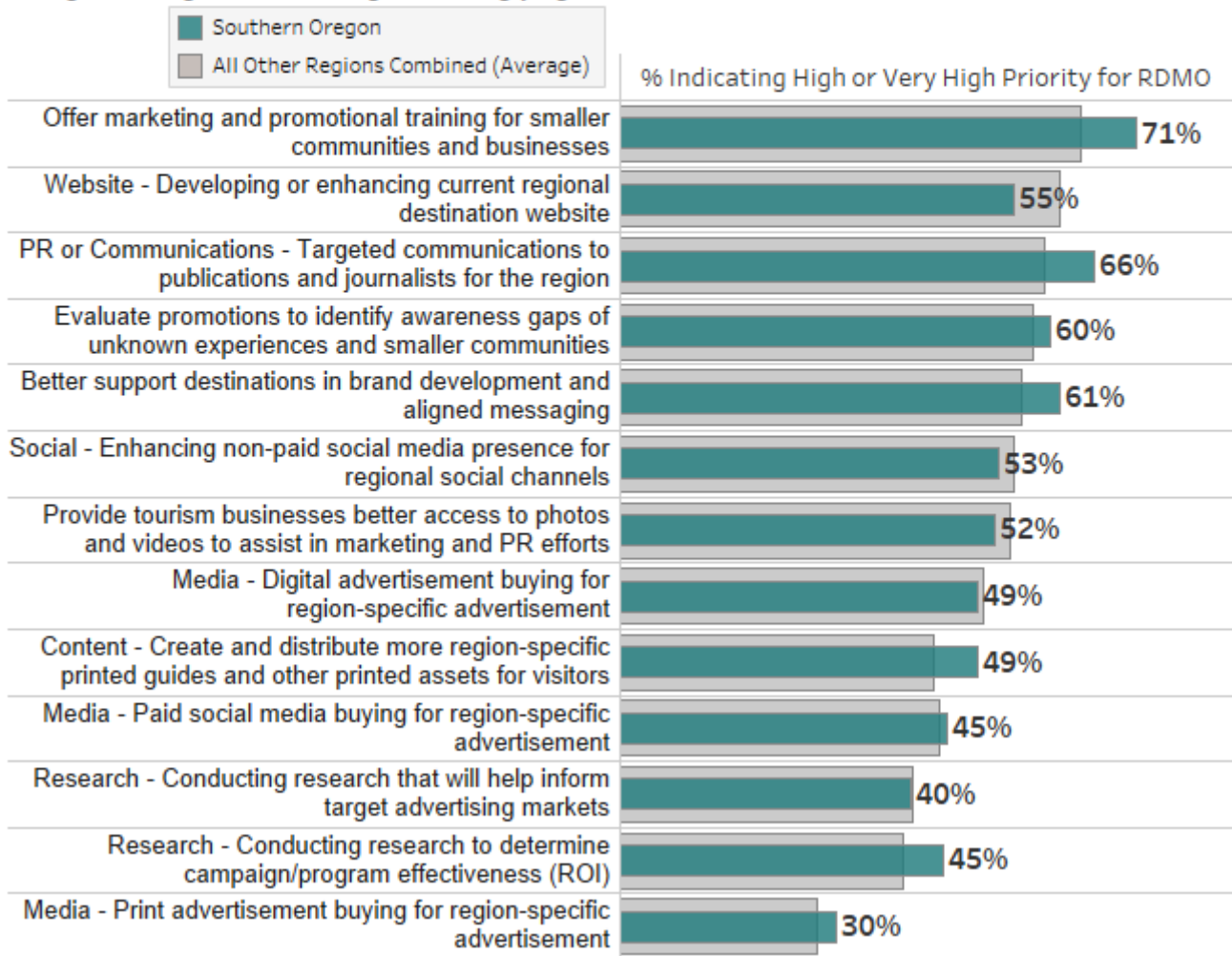


## MARKETING

Respondents were asked to prioritize a variety of marketing tactics for their region. Respondents could select from a scale of responses, including: “not a priority,” “low priority,” “moderate priority,” “high priority,” and “very high priority.” Both statewide and in Southern Oregon, the standout priority is “Offer marketing and promotional training for smaller communities and businesses.” Respondents from Southern Oregon were less likely to indicate that developing or enhancing the current regional destination website is a high or very high priority.

### Tactical Opportunities - Marketing


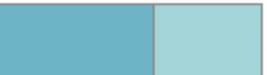

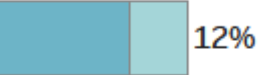



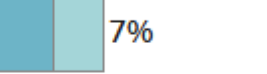
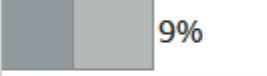

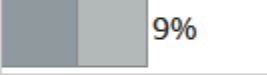
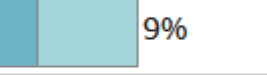
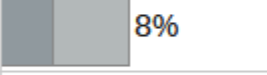
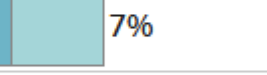
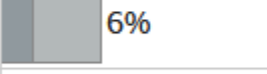


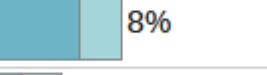

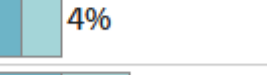

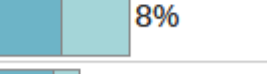
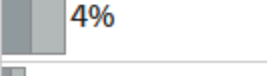



*Q: Please indicate how you would prioritize the following tactical MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available not all items should be considered to be an extremely high priority and some may not even be feasible given budget realities. Please differentiate between tactics which you believe deserve new/continued investment and those areas which you believe to be less important. Strongly Disagree, Disagree, Neutral, Agree, Strongly Agree.*



As a follow-up to rating marketing tactics, respondents were asked to identify their top-two marketing opportunities. This ranking affirms that both statewide and in Southern Oregon, offering marketing and promotional training for smaller communities and businesses is a top priority.

## Tactical Opportunities - Marketing

Q: From the list above, please identify your top two marketing opportunities:

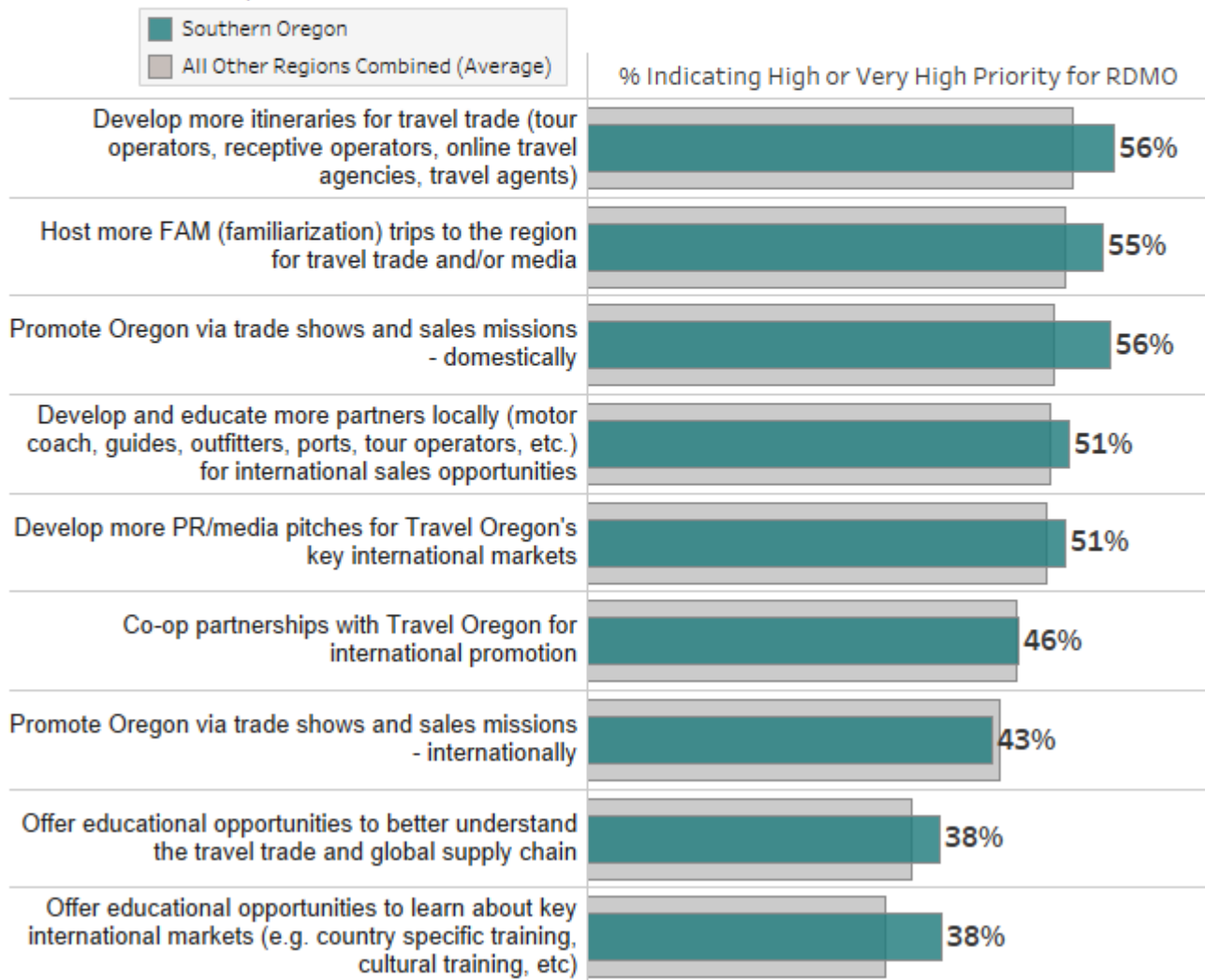
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Offer marketing and promotional training for smaller communities and businesses	 16%	 16%
Better support destinations in brand development and aligned messaging	 11%	 12%
Evaluate promotions to identify awareness gaps of unknown experiences and smaller communities	 11%	 10%
Website - Developing or enhancing current regional destination website	 10%	 7%
PR or Communications - Targeted communications to publications and journalists for the region	 9%	 10%
Content - Create and distribute more region-specific printed guides and other printed assets for visitors	 9%	 9%
Provide tourism businesses better access to photos and videos to assist in marketing and PR efforts	 8%	 7%
Social - Enhancing non-paid social media presence for regional social channels	 6%	 6%
Media - Digital Advertisement Buying for region-specific advertisement	 6%	 8%
Research - Conducting research that will help inform target advertising markets	 5%	 4%
Media - Paid Social Media Buying for region-specific advertisement	 5%	 8%
Research - Conducting research to determine campaign/program effectiveness (ROI).	 4%	 5%
Media - Print Advertisement Buying for region-specific advertisement	 1%	 1%

## GLOBAL SALES, PROMOTIONS, PR, MEDIA, & MARKETING

Using the same scale, respondents were asked to prioritize global sales, promotions, PR, media, and marketing tactics. Respondents from Southern Oregon rated, “Develop more itineraries for travel trade (tour operators, receptive operators, online travel agencies, travel agents)” as their highest priority. There is more demand for global sales, promotions, PR, media, and marketing in Southern Oregon with a higher percentage of respondents indicating high or very high priority across nearly all tactics.

### Tactical Opportunities - Global Sales, Promotions, PR, Media, & Marketing

*Q: Please indicate how you would prioritize the following tactical GLOBAL SALES, PROMOTIONS, PR, MEDIA, & MARKETING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may not even be feasible given budget realities. Please differentiate between tactics which you believe deserve new/continued investment and those areas which you believe to be less important.*



When asked to identify their top-two global sales, promotions, PR, media, and marketing opportunities, the rank order of results resembles the ratings and to the statewide results. Sixteen percent of

respondents chose to “develop and educate more partners locally for international sales opportunities” among their top-two highest priorities.

## Tactical Opportunities - Global Sales, Promotions, PR, Media, & Marketing

*Q: From the list above, please identify your top two opportunities for global promotions, sales, PR, media, & marketing:*

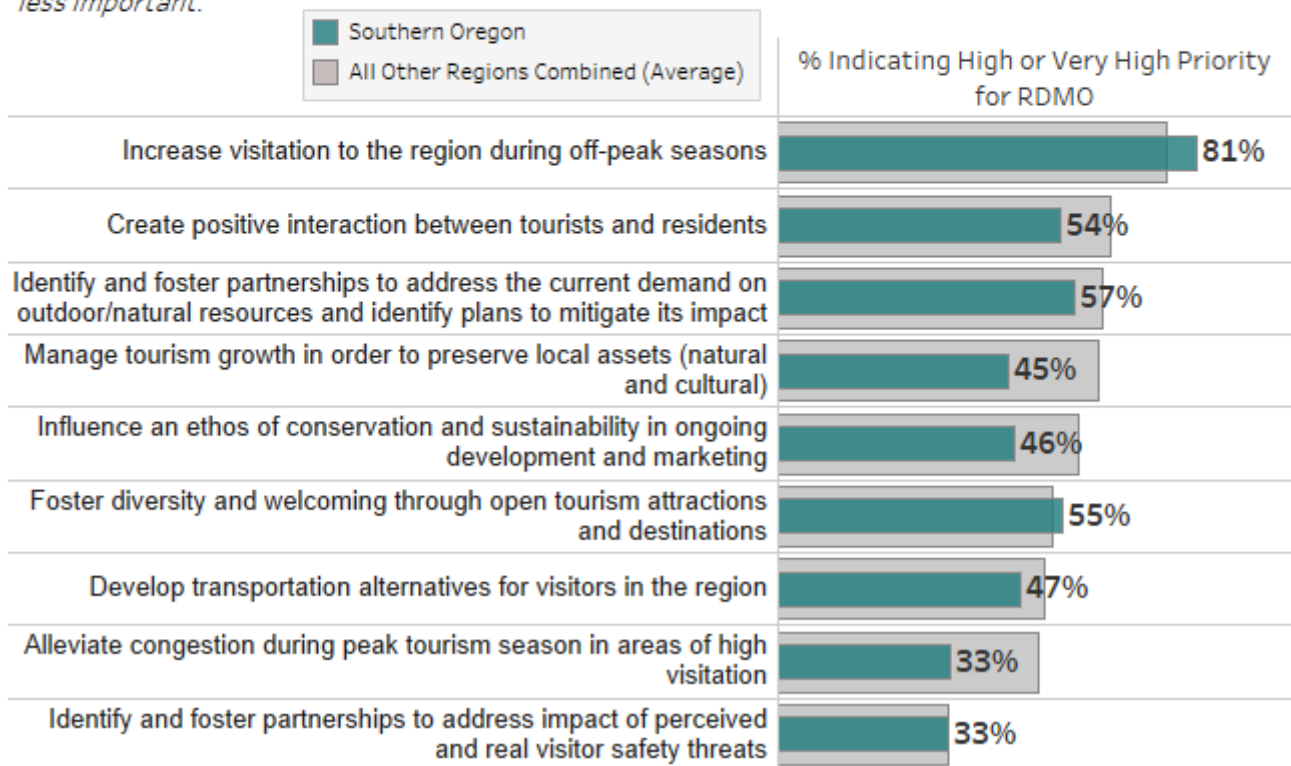
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Develop and educate more partners locally (motor coach, guides, outfitters, ports, tour operators, etc.) for international sales opportunities	16%	16%
Develop more itineraries for travel trade (tour operators, receptive operators, online travel agencies, travel agents)	14%	15%
Host more FAM (familiarization) trips to the region for travel trade and/or media	14%	14%
Promote Oregon via trade shows and sales missions - domestically	13%	14%
Co-op partnerships with Travel Oregon for international promotion	11%	12%
Develop more PR/media pitches for Travel Oregon's key international markets	10%	12%
Promote Oregon via trade shows and sales missions - internationally	7%	6%
Offer educational opportunities to better understand the travel trade and global supply chain	7%	4%
Offer educational opportunities to learn about key international markets (e.g. country specific training, cultural training, etc)	6%	7%

## DESTINATION DEVELOPMENT

Stakeholders in Southern Oregon were asked to prioritize destination development opportunities across three categories: Planning and Management, Product Development, and Training and Capacity Building. Across the three macro-categories (management, development, and capacity), there are seven priorities which more than two-thirds of respondents identified as a “very high priority” or a “high priority.” The most prioritized destination development tactic by a significant margin is “Increase visitation to the region during off-peak seasons.”

### Tactical Opportunities - Destination Development: Planning and Management

*Q: Please indicate how you would prioritize the following tactical PLANNING and MANAGEMENT OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may not even be feasible given budget realities. Please differentiate between tactics which you believe deserve new/continued investment and those areas which you believe to be less important.*



## Tactical Opportunities - Destination Development: Planning and Management

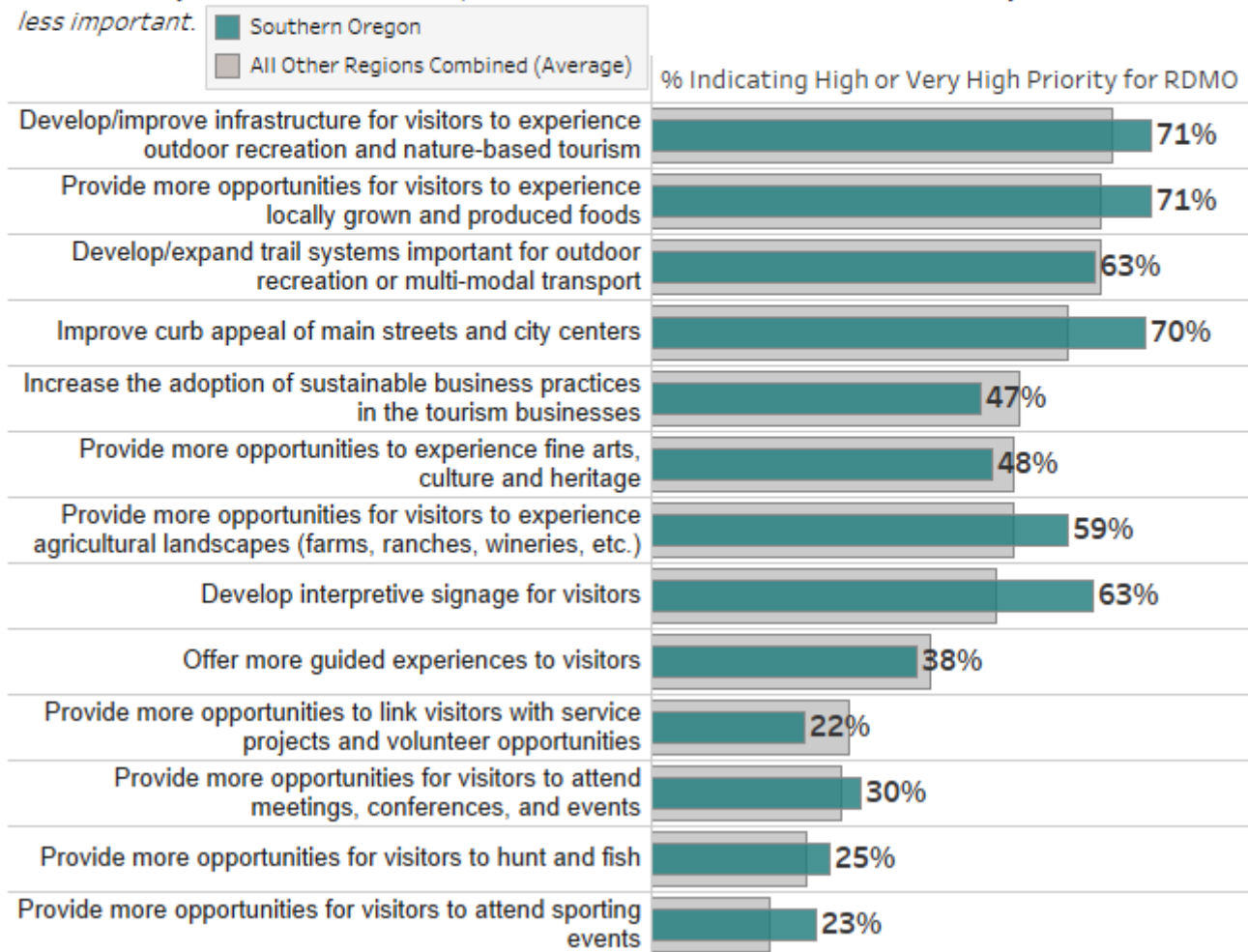
Q: From the list above, please identify your top two planning and management opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Work with partners to help increase visitation to the region during off-peak seasons	21%	27%
Manage tourism growth in order to preserve local assets (natural and cultural)	14%	9%
Identify and foster partnerships to address the current demand on outdoor/natural resources and identify plans to mitigate its impact	12%	6%
Develop transportation alternatives for visitors in the region	11%	12%
Create positive interaction between tourists and residents	10%	12%
Influence an ethos of conservation and sustainability in ongoing development and marketing	10%	10%
Foster diversity and welcoming through open tourism attractions and destinations	9%	13%
Work with partners to help alleviate congestion during peak tourism season in areas of high visitation	8%	4%
Identify and foster partnerships to address impact of perceived and real visitor safety threats including homeless	5%	7%



## Tactical Opportunities - Destination Development: Product Development

*Q: Please indicate how you would prioritize the following tactical PRODUCT DEVELOPMENT OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may not even be feasible given budget realities. Please differentiate between tactics which you believe deserve new/continued investment and those areas which you believe to be less important.*



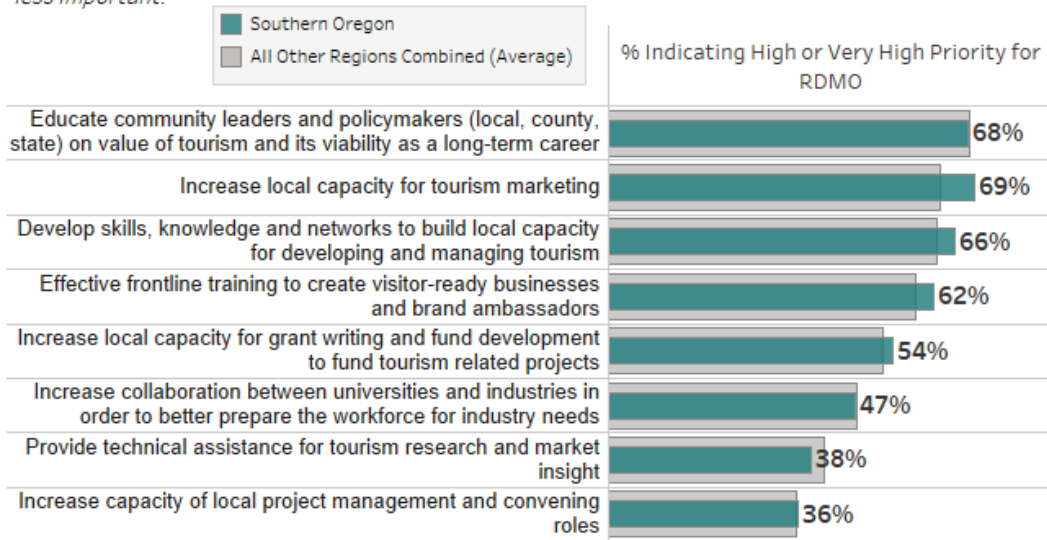
## Tactical Opportunities - Destination Development: Product Development

Q: From the list above, please identify your top two product development opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Develop/improve infrastructure for visitors to experience outdoor recreation and nature-based tourism	18%	19%
Improve curb appeal of main streets and city centers	16%	20%
Develop/expand trail systems important for outdoor recreation or multi-modal transport	14%	13%
Increase the adoption of sustainable business practices in the tourism business	9%	4%
Provide more opportunities for visitors to experience locally grown and produced foods	8%	6%
Provide more opportunities to experience fine arts, culture and heritage	7%	7%
Develop interpretive signage for visitors	7%	12%
Provide more opportunities for visitors to experience agricultural landscapes	6%	6%
Offer more guided experiences to visitors	4%	4%
Evaluate and focus product development opportunities to include more conferences	3%	5%
Provide more opportunities to link visitors with service projects and volunteer opportunities	3%	1%
Evaluate and focus product development opportunities to include more fishing and hunting	2%	2%
Evaluate and focus product development opportunities to include more sporting events	1%	1%

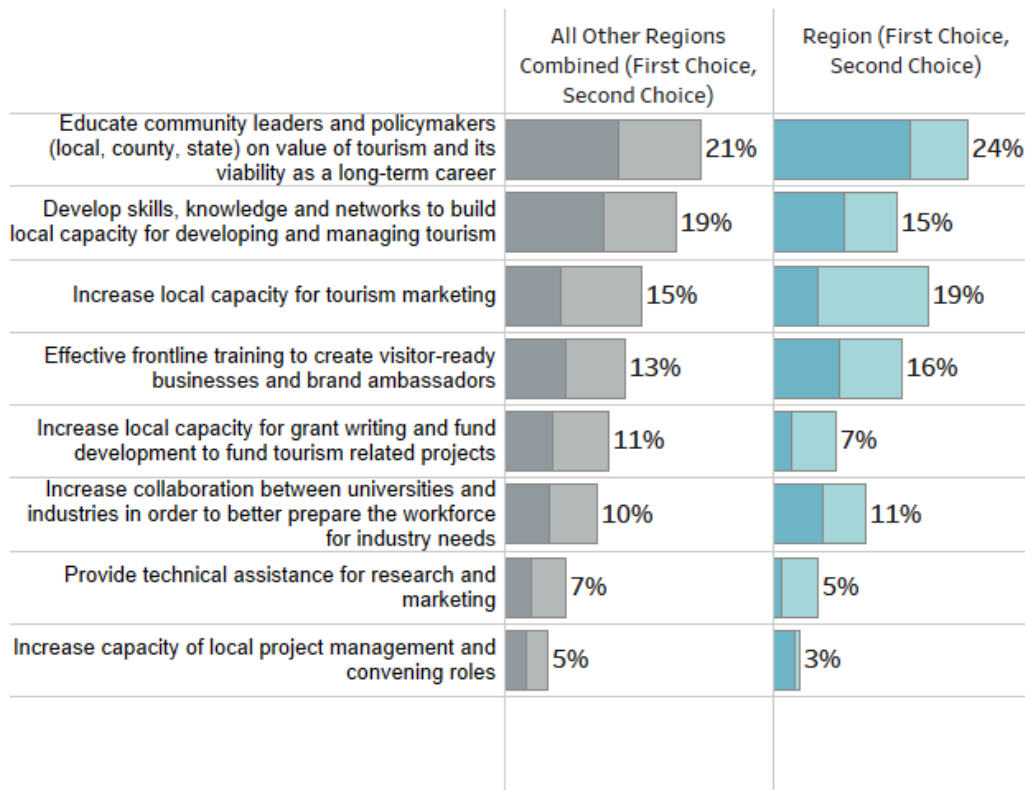
## Tactical Opportunities - Destination Development: Training and Capacity Building

*Q: Please indicate how you would prioritize the following tactical TRAINING and CAPACITY BUILDING OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may not even be feasible given budget realities. Please differentiate between tactics which you believe deserve new/continued investment and those areas which you believe to be less important.*



## Tactical Opportunities - Destination Development: Training and Capacity Building

*Q: From the list above, please identify your top two training and capacity building opportunities:*

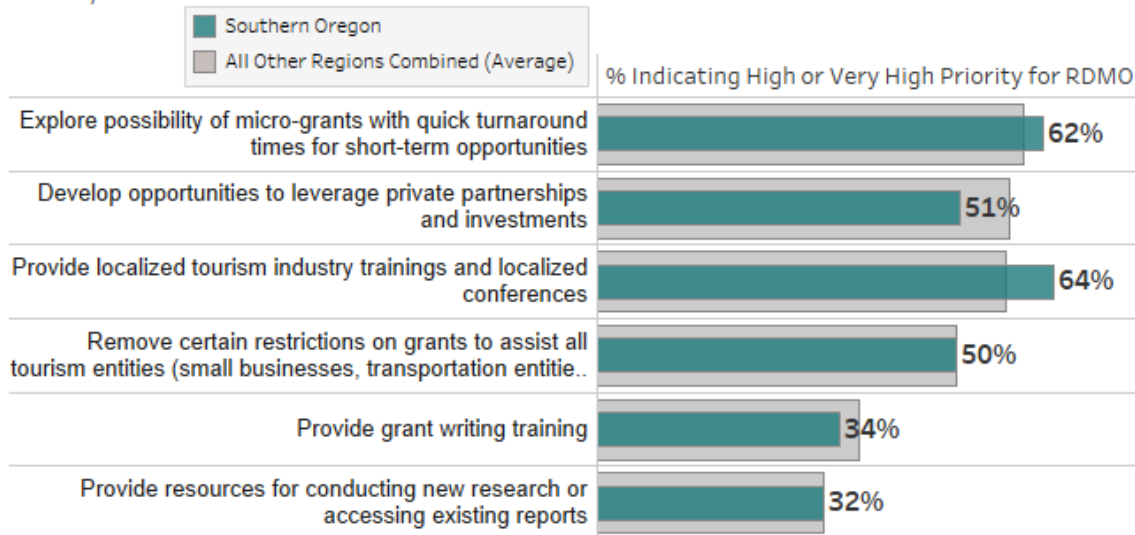


## GLOBAL STRATEGIC PARTNERSHIPS

Stakeholders used the same rating system as in previous sections to prioritize specific global strategic partnership initiatives. Though no specific activities were rated as a “very high priority” or a “high priority” by more than two-thirds of respondents (as in other sections), there are still clear initiatives which stakeholders have identified as relatively higher priorities. Providing localized tourism industry trainings/conferences and exploring the possibility of micro-grants and developing opportunities to leverage private partnerships and investments were both rated as a “very high priority” or a “high priority” by roughly two thirds of Southern Oregon stakeholders.

### Tactical Opportunities - Global Strategic Partnerships


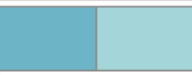

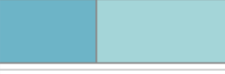








*Q: Please indicate how you would prioritize the following tactical STRATEGIC PARTNERSHIP OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability: With limited resources available not all areas should be considered to be an extremely high priority and some may not even be feasible given budget realities. Please differentiate between tactics which you believe deserve new/continued investment and those areas which you believe to be less important.*



When asked to identify their top two priorities, respondents from Central Oregon showed a preference for “Providing localized tourism industry trainings/conferences and exploring the possibility of micro-grants” followed closely by “Developing opportunities to leverage private partnerships and investments.” In both cases, nearly a quarter of Southern Oregon respondents chose them among their top-two highest priorities.

## Tactical Opportunities - Global Strategic Partnerships

Q: From the list above, please identify your top two strategic partnership opportunities:

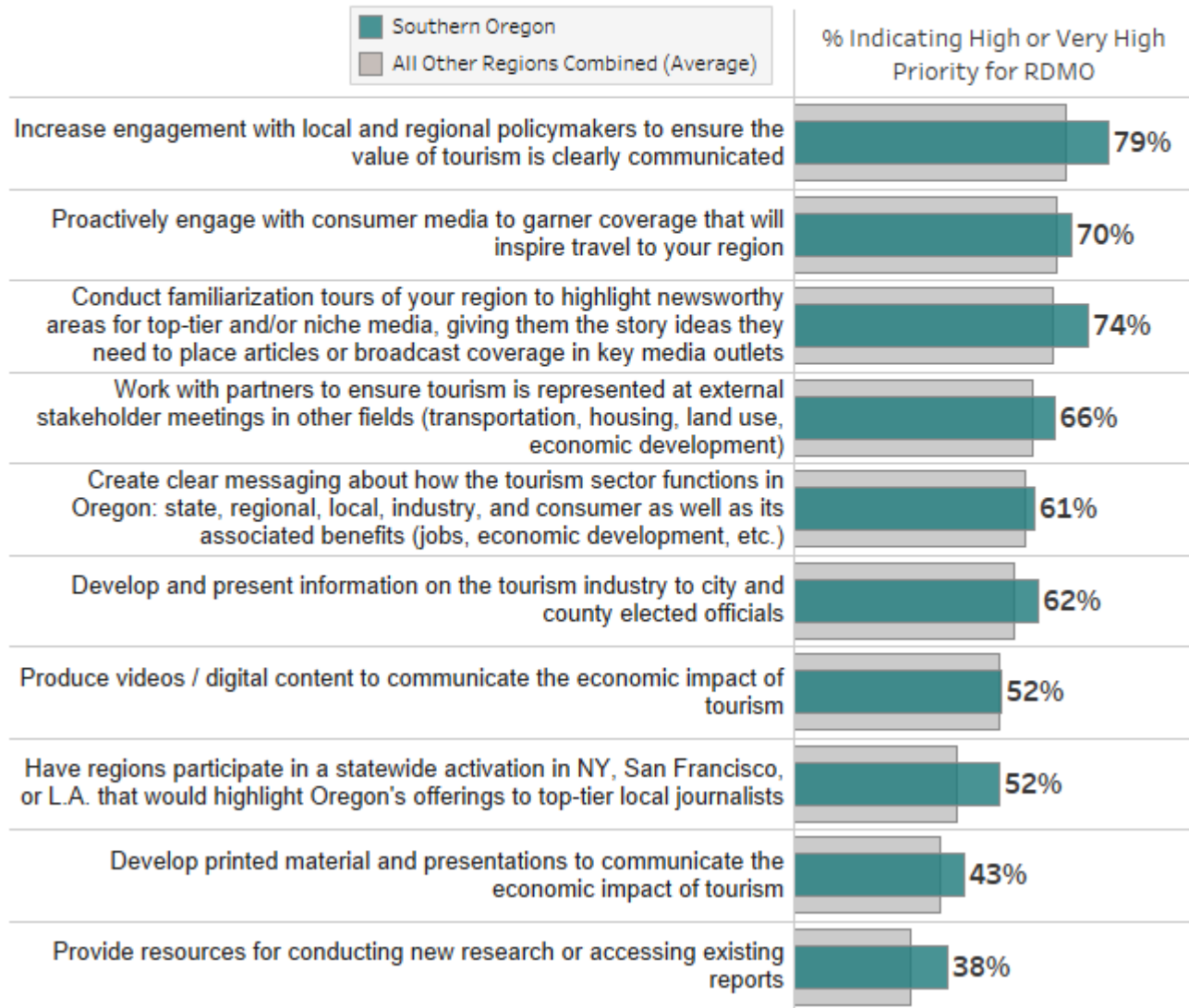
	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Explore possibility of micro-grants with quick turnaround times for short-term opportunities	 22%	 20%
Develop opportunities to leverage private partnerships and investments	 21%	 24%
Provide localized tourism industry trainings and localized conferences	 21%	 24%
Remove certain restrictions on grants to assist all tourism entities (small businesses, transportation entities, etc.)	 17%	 17%
Provide grant writing training	 10%	 7%
Provide resources for conducting new research or accessing existing research	 9%	 8%

## PUBLIC AFFAIRS AND COMMUNICATIONS

Using the same rating scale as in previous sections, Southern Oregon stakeholders evaluated several tactics related to public affairs and communications. Both statewide and in Southern Oregon, respondents prioritized “increase engagement with local and regional policymakers to ensure the value of tourism is clearly communicated” highest. Hosting more familiarization tours was also a highly rated tactic.

## Tactical Opportunities - Public Affairs and Communications

*Q: Thinking from the perspective of tourism marketing and management, please indicate how you would prioritize the following tactical PUBLIC AFFAIRS AND COMMUNICATION OPPORTUNITIES to advance the economic impact of tourism and ensure its vitality and sustainability. With limited resources available not all areas should be considered to be an extremely high priority and some may not even be feasible given budget realities. Please differentiate between tactics which you believe deserve new/continued investment and those areas which you believe to be less important.*



## Tactical Opportunities - Public Affairs and Communications

Q: From the list above, please identify your top two public affairs and communications opportunities:

	All Other Regions Combined (First Choice, Second Choice)	Region (First Choice, Second Choice)
Conduct familiarization tours of your region to highlight newsworthy areas for top-tier and/or niche media	17%	24%
Proactively engage with consumer media to garner coverage that will inspire travel to your region	16%	16%
Increase engagement with local and regional policymakers to ensure the value of tourism is clearly communicated	14%	16%
Work with partners to ensure tourism is represented at external stakeholder meetings in other fields	11%	8%
Create clear messaging about how the tourism sector functions in Oregon	11%	8%
Develop and present information on the tourism industry to city and county elected officials	10%	8%
Produce videos / digital content to communicate the economic impact of tourism	7%	5%
Have regions participate in a statewide activation in NY, San Francisco, or L.A. that would highlight Oregon's offerings to top-tier local journalists	6%	11%
Conduct more research to capture the economic impact of tourism	4%	3%
Develop printed material and presentations to communicate the economic impact of tourism	4%	2%

## Appendix – Coded Open-Ended Responses

<p><i>Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.</i></p>	Industry Coordination	Trails	Product Development	Messaging and Marketing	Downtown Improvement	Shoulder and Off-Season	Cultural Tourism	Other	Fire
<b>Southern Oregon</b>	■	■	■	■	■	■	■	■	■
<ul style="list-style-type: none"> <li>In Medford for instance, creating a destination hotel that meets the needs of visitors who expect high end accommodation. Including conference center, indoor and outdoor venue. Build it, they will come.</li> </ul>			■						
<ul style="list-style-type: none"> <li>Southern Oregon be represented as more than Ashland... Include whole region's diversity and unique assets big and small.</li> </ul>				■					
<ul style="list-style-type: none"> <li>I would like to see more promotions of the fairgrounds events in southern Oregon and help for local businesses to band together and promote our small towns that all have tourism opportunities</li> </ul>				■					
<ul style="list-style-type: none"> <li>Our shared vision is to have businesses available locally that create job opportunities and provide needed services, attract more business into each community, provide welcoming services for visitors and promote vibrant and revitalized communities once again.</li> </ul>							■		
<ul style="list-style-type: none"> <li>I would like our region to be included more frequently in the "marketing cycle". Much has been done to promote our region, but increasing economic activity has surpassed the stories that people know about our region. I would like TO to make sure there is an appropriate balance between print (static) and electronic (dynamic) media available to regions so that it can be used in a more agile way and so the material can be revised in real time to stretch limited dollars.</li> </ul>				■					
<ul style="list-style-type: none"> <li>Research to learn more about the market shift that is inevitably occurring due to smoke impact in July/August and possibly September.</li> </ul>							■		
<ul style="list-style-type: none"> <li>Improve the visual appearance of the downtown area, promote well what the area has to offer and draw more visitors to the area, work with others in the area to create a collaborative effort and take measures to protect the resources.</li> </ul>				■					
<ul style="list-style-type: none"> <li>Increase the development of wheelchair accessible recreation opportunities and opportunities for people of all abilities to enjoy local culture and landscapes. About 10% of the American public has a physical disability. Pay attention to development that appeals to younger travelers with limited incomes and time to travel. Providing our youth with high quality recreation increases activity that helps combat the obesity epidemic and reduce the demand on the state's health care system. High quality recreation and wheelchair accessible experiences also increases the attractiveness of Oregon communities to retirees and home-based entrepreneurs, both of which represent a source of income flowing into the state.</li> </ul>			■						
<ul style="list-style-type: none"> <li>Help us thru the smoke filled summers</li> </ul>							■	■	
<ul style="list-style-type: none"> <li>Specifically, we need a nice motel/hotel in Cave Junction. The Junction Inn is a dive, and the owner doesn't have the capital to build a new facility. The new hotel/motel should include RV parking space and a small conference/meeting center. The Oregon Caves will be closing for two years, for renovation, and there should be a nice motel/hotel available for tourists when the Caves opens again.</li> </ul>			■				■		
<ul style="list-style-type: none"> <li>Teach the bussiness to not under value there services and bussiness. We are a world class fishing destination with low class prices. Bussiness could offer a better quality product if they were taught how to compete without devaluing there service.</li> </ul>	■								
<ul style="list-style-type: none"> <li>Promoting "gateway" towns more to help them grown and benefit from tourism more.</li> </ul>							■		
<ul style="list-style-type: none"> <li>The state needs to put pressure on our National Forests to emphasize recreation infrastructure. Campgrounds. Overlooks. Trails. Trailheads. They're trashed, and as long as they are, nobody is going to like what Southwest Oregon has to offer. Lots of local politicians put pressure on the Forest Service for more commodity production. The state needs to put the same type of pressure on them to re invest in recreation.</li> </ul>			■						
<ul style="list-style-type: none"> <li>We need to drive more visitors to our area during the fall and winter months. Winter trails and winter travel experiences to Southern Oregon would positively impact our year round operational sustainability.</li> </ul>						■			
<ul style="list-style-type: none"> <li>Greater access and development of outdoor recreational trails and infrastructure</li> </ul>			■						



<p><i>Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.</i></p>	Industry Coordination	Trails	Product Development	Messaging and Marketing	Downtown Improvement	Shoulder and Off-Season	Cultural Tourism	Other	Fire
<b>Southern Oregon</b>	■	■	■	■	■	■	■	■	■
• Control the fires with better forest management. The smoke in the Rogue Valley crippled all industry for the past several years.								■	■
• Re-opening forest roads, creating roads to "nowhere" similar to Century Drive in Central Oregon. FS Road 20 would be a great start.								■	
• More local control and planning for using funds allocated to our area.	■								
• More local research, the statewide studies simply do not have enough local data to be very useful.								■	
• Tourism contributes ten percent of local economic activity								■	
• I'd like to see large growth in visitation to Southern Oregon in March, April, and May. These early tourism months are becoming increasingly important to our region as we experience year after year of smoke in August and even July.						■			
• More lodging off of the I5 corridor			■						
• We would like to see more tourism, domestically and internationally types to Southern Oregon and the Umpqua Valley.								■	
• Stretch out high season now that the high season is impacted by the wildfires, we need to get more visitors in early spring. Also, hoping for more PR and advertising campaigns focusing on Southern Oregon. thank you.				■		■			
• Support and improve the Crater Lake region's ability to serve tourists by supporting and improving infrastructure and livability in the Klamath County gateway communities (e.g., development/maintenance of sewer systems, parks, public restrooms, etc.), so that restaurants and other services can be provided.			■						
• It would be great to see the Illinois Valley recognize the importance of tourism, embrace it and start supporting it rather than falling back to natural resource extraction.								■	
• More funding for Southern Oregon to be able to promote out of state visitors as well as in-state visitors.								■	
• Help the "starving artists" who are displaying their art in small communities by helping galleries and gift shops who have local artworks by creating grants that will help in the operations. Direct these grants to non-profit, all volunteer (exception: paid Art Director) organization/businesses who have a history of activity to help local Artists and the community where they live.							■	■	
• Brand our region as an adventure/outdoor destination on par with Central Oregon but without the crowds.				■					
• I would like to see a revitalized downtown Medford, with wayfinder signage and consistent, updated branding.			■		■				
• Not just tourism. We have two colleges here, and an airbase that draws in students and airmen from all over the country. The new OIT college president is trying to create industry and connections to encourage graduating college students to help build Klamath up. We need to advertise the heck out of our city..to industry..not just tourism. Because better jobs bring better spending money, and better tourism as infrastructure improves.				■				■	
• Build more things to do in Oregon.			■						
• I'm involved in the Visual Arts. Southern Oregon has several great visual arts tourism opportunities that could grow including Schneider Museum of Art and Ashland Open Studio Tour (includes Talent and Phoenix). I am board President for Ashland Gallery Association and we are looking to broaden our organization to promote visual art in all of southern Oregon and would benefit from help in making that transition. We're also looking at sustainability in both using our print materials wisely and doing the best marketing for our members with our limited funds. We're looking at how we can best use social media too.							■		
• I would just like my region noticed.								■	

<p><i>Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.</i></p>	Industry Coordination	Trails	Product Development	Messaging and Marketing	Downtown Improvement	Shoulder and Off-Season	Cultural Tourism	Other	Fire
<b>Southern Oregon</b>									
<ul style="list-style-type: none"> <li>Diversify traveler's opportunities in the southwestern OR coastal region. Expand mountain biking infrastructure, support development of tree-house destinations, sky-walks in the canopy, etc.</li> </ul>									
<ul style="list-style-type: none"> <li>Position Southern Oregon as a place to come for the environment/recreation, culture/music/theatre, and culinary/wine.</li> </ul>									
<ul style="list-style-type: none"> <li>Promote Main Street development....revitalize rural main street and promote &amp; help attract &amp; sustain new businesses especially lodging and QUALITY food!</li> </ul>									
<ul style="list-style-type: none"> <li>Recreation signage in Lake and Klamath counties needs to be improved. Digital maps showing recreation opportunities need to be created and dispersed to the public. Lodging and dining opportunities need to be improved.</li> </ul>									
<ul style="list-style-type: none"> <li>reduce the fire risk</li> </ul>									
<ul style="list-style-type: none"> <li>Our region must become more focused on a year-round tourism business model. With more focus on the shoulder seasons and the off-season, our region will be less susceptible to the devastating impacts that smoke and wildfires have had here in 2017 and 2018.</li> </ul>									
<ul style="list-style-type: none"> <li>We need improved transportation options to our region, specifically shuttle from airports and train station to the Town of Lakeview. Must be capable of transporting bicycles as well as passengers.</li> </ul>									
<ul style="list-style-type: none"> <li>Response time to wildland fires to protect our communities and local commerce. The fires have affected every small business in proximity to the fires - This is our livelihood! Tourism and small business matter!</li> </ul>									
<ul style="list-style-type: none"> <li>Catch domestic travelers moving between Calif and NW communities for personal reasons to stop and take in local attractions along the way.</li> </ul>									
<ul style="list-style-type: none"> <li>Travel Oregon and it's partners should be doing whatever it takes to reach a high number of quality tourists who have money to spend in our State.</li> </ul>									
<ul style="list-style-type: none"> <li>I would like to see Southern Oregon successfully developing/promoting year-round visitation in the culinary, cultural, and outdoor rec sectors to create a steady flow of economic impact from tourism across the region.</li> </ul>									
<ul style="list-style-type: none"> <li>I feel like Southern Oregon is on the brink of establishing a thriving tourism industry but I am really concerned about two issues thwarting of efforts: wildfire smoke and homelessness in city centers. I would love to see Travel Oregon and our RDMO support and partner with other entities that are working to find solutions to these issues. Also, Travel Oregon could have a role in linking tourism with these 'threats' and advocating for solutions with elected officials and community leaders.</li> </ul>									
<ul style="list-style-type: none"> <li>Share with Roseburg and the northern part of Southern Oregon region. Roseburg is the largest city in Douglas county and we are constantly left out of marketing and promotion of Travel Oregon. Just look over the RDMO website - little is mentioned about Roseburg and OUR areas attractions. Money seems to be absorbed in Grants ass, Ashland and Medford with little to nothing for Roseburg. Only one individual sits on the board of Travel Southern Oregon and she also is our DMO - the other works at the casino in Canyonville. WE ARE NOT BEING REPRESENTED IN ROSEBURG - only little trickle down and silence</li> </ul>									
<ul style="list-style-type: none"> <li>Recognize that often what is good for residents is good for visitors too. Recognize visitors want to connect with people and communities in many ways.</li> </ul>									
<ul style="list-style-type: none"> <li>Put our area on the map. Describe how diverse Oregon is and the vast landscapes one can experience all over our state.</li> </ul>									
<ul style="list-style-type: none"> <li>Develop ideas for events that last for at least a weekend that all can share in the benefits of that event. The wineries seem to be able to do that.</li> </ul>									

<p><i>Q. In a sentence or two, please describe a specific outcome you would like your region to achieve in the next three to five years that would increase the economic impact of tourism or enhance the vitality and sustainability of your destination.</i></p>	Industry Coordination	Trails	Product Development	Messaging and Marketing	Downtown Improvement	Shoulder and Off-Season	Cultural Tourism	Other	Fire
<b>Southern Oregon</b>									
<ul style="list-style-type: none"> <li>We are in a rural area and it seems the "old ways" are in effect here. It would be great to see more embrace of diversity in our region. Southern Oregon is in a unique location due to its 6 hr distance from Silicon Valley &amp; Seattle (Microsoft &amp; Boeing). The majority of their workforce are millennial's which are looking to get outdoors but have progressive minds. They are not going out to shoot deer, They want to photograph them. I personally feel that our current regional manager sucks. As he only promotes the same rafting &amp; wineries that he has been affiliated/owned with in the past. Southern Oregon is a big area and its not fair to promote only where you have done business. It would be great to see a more capable leader with long term sights out for ALL of us.</li> </ul>									
<ul style="list-style-type: none"> <li>Develop more transportation options. Develop activities and attractions that are year round rather than summer season specific.</li> </ul>									
<ul style="list-style-type: none"> <li>We need to provide growth of the tourism industry in Southern Oregon through increased awareness domestically and internationally.</li> </ul>									
<ul style="list-style-type: none"> <li>Well trained staff that has a connection to our returning guests each and every year.</li> </ul>									

## Appendix, Continued – Open-Ended Responses

Choose the top five Travel Oregon programs that you believe are the most impactful: Other (please specify)

Educating the Front Line with local educational symposiums

I am not sure if any are that impactful, the survey forces 5 to be selected, so you're not getting the right information here

I don't know

I don't really know anything about any of these programs.

I miss the quirky branding that made the stories of Oregon stand out. Now it feels like we are presented very much like any other scenically beautiful state.

In our region, we need support restoring recreation infrastructure like trails and trailheads. Right now, the horse is in front of the carriage. Local Travel Southern Oregon team is amazing, but need more support from state to facilitate local programming.

wine industry

Given limited resources, what three priority areas do you believe are most important for 2019-2021 tourism planning? If you selected "Other" as a priority, please describe:

Business Development

Comprehensive RURAL business signage program

Defend traditional lodging against OTA such as Airbnb VRBO etc that have an unfair advantage against us

More autonomy/resources to the Regional and Local levels

Please indicate any other areas of marketing that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

Encourage smaller towns to clean up the downtown and train retail employees on hospitality to visitors.

Give tourism minded businesses and organizations who are helping with pictures and stories around their region and about their business/organization lots of website and magazine coverage.

Having just moved to Southern Oregon after 8 years of living in Central Oregon, I have really come to believe that Southern Oregon is relatively unknown to many who are new to Oregon or live outside of our region. I'd like to see emphasis on marketing efforts bringing awareness to our region (Southern) and the other lesser known regions of Oregon.

I'm sick of hearing about Bend, OR. Southwest Oregon has a lot of things Bend doesn't. We've got oceans, wild rivers, and truly wild places that you'll never find in Bend, or for that matter, anywhere west of the Cascades. We need to share what we've got.

Invest in apps, QR codes and on-the-fly/mobile access to area experiences and marketing of those experiences.

Many interesting and unique attractions in rural areas are ignored or lose importance because media most often emphasizes resources closely associated with communities where businesses pay for advertising.

Marketing and Promotion in Southern region should be focused on Roseburg and Douglas County, Oregon €"€" all Travel Oregon resource seems to go to RDMO :/

More visibility for rural area attractions.

Offer more subsidized marketing help for small businesses that may not have large budgets, that need to attract visitors

Older, smaller communities in a lot of cases are old businesses or second or third generation owners. These businesses are not up to speed on what is available. They also very rarely work with other like businesses in their area.

## Appendix, Continued – Open-Ended Responses

Run surveys of the public to find out 1) what means they use to find tourist destinations 2) what draws them to or appeals to them most and makes them want to visit 3) what they liked best about the destinations they have visited 4) what they liked least 5) what they were neutral about 5) did they find any unadvertised or "unknown" destinations while they were visiting another destination. From their answers, develop and strengthen the pr, communications and marketing. It is not what I think might work best or might draw public or my opinions of what I think is important for you to do as the overall in- charge of boosting Oregon tourism, but rather what the public wants and what they say draws them. Deliver what they need and want or encourage the tourism business to deliver those well. That would help to advance economic impact and sustainability.

Work with area councils to pinpoint ways cities themselves can advance the economic impact and sustainability of tourism

Please indicate any other areas of global sales and international travel trade and media that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

Do not count these answers, I'm just trying to get to the end so my earlier entries will be recorded

None- I dont see any if these working as long as we always get knocked out of the park by smoke!

Opportunity for rural community members to know their international audience and who their visitors are.

Promote Oregon via trade shows and sales missions- internationally

survey too long just clicking now

Wineries

Please indicate any other areas of planning, management, development, training, or capacity building that you believe should be an extremely high priority in order to advance the economic impact and sustainability of tourism:

Develop marketing for small businesses in a way that they want to work together and participate WITHOUT losing their individuality.

Developing Grants that would help non-profit organizations who are all volunteer with operational money. This is to keep the doors open and Art alive. Two Rivers Art Gallery in Chiloquin, OR is one of these galleries. We are holding our own and to get typical grants we would have to add to our already developed events and tourism outreaches for our community to get them. Difficult!

Hospitality workforce development for high volume destinations seeking qualified staff.

Identify top 5 tourism attractions in each region and market heavily

In our region it seems that the only activities promoted are rafting and wine. While i know these have been foundations to tourism, there is now so much more to share. I wish our team or ambassador promoted more local businesses. Instead it always seems like the same vineyards & rafting companies. It is getting old. If we want to be on the edge of millennial tourism we need to kick out the old thinking and back rubbing that is taking place and put in place progressive professionals that can relate more to the visitors.

Increase hospitality training in smaller towns

More training, development in rural areas.

Multi use center for local residents as well as tourists

RDMO & DMO should be engaging with local businesses and residents- not working quietly together to further their €œmembers€•benefit

Reduce Nimbyism by telling California retirees they need to be part of the solution to the perceived problem they created.

Sending out by email or webinars all this information. For those of us who provide these tourist opportunities from our own ranches, we have NO way to attend in person, so we get ignored as if we dont exist. We provide guided horse rides, but cannot leave here, or we miss rides that we depend on for income to do so, and no 'babysitter' can replace us.

## Appendix, Continued – Open-Ended Responses

We have to work with what we've got, not try and build something new into the natural environment. New marketing angles can be adopted, but the existing landscape and the infrastructure within it needs a landscape scale face lift. Through promotions and marketing, you might be able to get a lot of people to visit Southwest Oregon for camping, fishing, hiking, etc. But as long as the trailheads are dilapidated, the campgrounds are trashed, and the trails are impassable, they won't come back. And they'll blog about it and nobody will come after them. It's a real shit show down here.

Please indicate any other areas of industry services that you believe should be an extremely high priority in order to advance the economic impact of tourism:

As a small business we cannot make the same impact that a collective of like businesses can. We are powerful as a group.

Better roads (ie. capacity and realistic routes), fewer forest fires (smoke chokes off tourism), improve rural passenger rail options.

Co operative marketing programs between industries

Domestic Marketing- international travel down, maximize on strong domestic economy with highly engaging marketing campaign like the 7 Wonders Campaign

Engage with area residents and provide rural tourism management and rural tourism destinations management workshops and training with general public citizens

first line of defense training ie, customer service training for people that first come into contact with tourists

I don't subscribe to the whole private-public partnership thing. Industry does what's best for industry, and lots of time that's not what's actually best for the public. I think the nonprofit/public sector needs to take the lead. Industry will follow always follow with ways to make money off of public/nonprofit initiatives.

Marketing on your website which is up-dated through reaching out to small communities for photos and stories about their region and putting them on your website asap.

More local workshops/seminars/events that invite private partnerships and investors to participate with industry people. Accurate maps, info of areas in the state.

None of these activities appear to have anything to do with my bottom line. (Bad idea to force answer to questions than have no relevant answer, #12.)

Product diversification

Public transportation. Infrastructure Grants for small businesses (e.g., lodging, camping, food service, retail).

Ramp up development and promotion of tourism assets outside of the normal busy season. For Southern Oregon, that means fall, winter, and spring. This is increasingly important as we face an ever growing fire season.

Promotion you have well in hand. "Building it so they will come" will take lots of public/private collaboration. Then it is all about maintaining and enhancing those assets.

Rural tourism

Strategic planning is a good way to get partners together and pull in the same direction. There are many loosely affiliated partnership but they often achieve much because there is poor communication with community stake holders who need to be included in the planning process.

The fires of the last two years has had a huge impact on our local businesses and tourism! We need to work for forest management to PREVENT AND STOP fires!

Thus survey is too long

We are a ranch-based horse riding business & Tipi village. We cannot leave our property for training sessions, we would encourage financial assistance for smoke/fire prevention. Since that damage totally shuts down our business!

Wine tasting room employees and managers

Work with Klamath County to educate the commissioners on the benefit of making the County Fair Board more reasonable when it comes to tourism promotion. The good ole boy network is alive and well in Klamath County.

Please indicate any other areas of PUBLIC AFFAIRS AND COMMUNICATIONS that you believe should be an extremely high priority for in order to increase visitation in your area.

Emphasis on blending local branding with regional and state brands

## Appendix, Continued – Open-Ended Responses

Grants Pass City Council has approved a \$300,000 a year contract to a person, with no background in tourism or marketing, and there is no official accounting of how the money is being spent. This person is paid whether the area is conducive to tourism or not (fires, dead of winter, no events going on). There was not a valid bid proposal process and selection process for this contractor.

Just basically creation of the awareness of the importance of tourism to local areas and to Oregon as a whole. Marketing and visibility (increased public awareness of what destinations and activities the tourism segment has to offer)

More inclusive promotion of our region via social media platforms. It seems as though all featured locations, tours, wineries etc. are repeatedly cycled through with the same material with a different write up. There are tons of hip emerging businesses that are being overlooked, due to loyalty to old faces & places.

Offer grants for advertising for non-profit, rural attractions. And, promote media to visit and publicize for the same rural attractions.

Printed materials are great for those of us who are Information Centers. Keep them informational and not just a bunch of adds. See "Crater Lake's Backyard" newspaper for a great example.

RDMO and DMO should be openly engaging with participates of the community who are actively promoting through social media and word of mouth, including local leadership and policy makers

Stop the Forrest fires from decimating the tourism

survey too long...just clicking now

The resources that attract travelers also attract people to relocate to areas with high quality of life assets. Increasing tourism assets - natural and cultural - plays a role in the increase of in-migration of businesses and retirees, both of which add to the economy of Oregon. When showing the economic impacts of tourism don't forget to include the other sources of income that tourism assets attract. For example, a retiree household with an average retirement income supports half of a full time equivalent (FTE) job paying a living wage. One thousand retirees would support approximately 500 living wage jobs. Many retirees get their income from retirement funds in other states and bringing that money here is effectively bringing new money into the state. High quality travel resources also attract home-based entrepreneurs, telecommuters, and service providers, many of which work for businesses in other states and spend their pay checks in the local community. These people can live anywhere they want and the communities that offer the recreational, cultural, and natural resources they seek will essentially generate a steady income that supports businesses and jobs in the local community. The ability of Oregon to bring that economy into the state strongly hinges on developing outstanding travel resources. In other words, tourism development isn't just about attracting travel spending; its about a much larger strategy of developing a sustainable economy.

This survey is too long and i am getting tired of the circles.

Train DMO managers and staff to get the most benefit from fam tours and media influencers.

Work with ODOT, Oregon Travel Experience, Travel Oregon to develop a recognizable comprehensive RURAL signage program. These establishments cannot succeed unless the tourists can find them.

Southern Oregon: What is your greatest need from a regional and statewide management organization to encourage tourism in your area this year?

Access to information, I need people to know what we have to offer here in Southern Oregon

Access to resources to fix our crumbling recreation infrastructure.

advertising

Aligning the missions of multiple tourism industries (wineries, breweries, etc.), and providing clear opportunities for small businesses to jump on board with a cohesive regional brand.

All the great things to do in this area. The calendar for your regional partner is sadly not very maintained.

At the May 11 listening session in Medford, industry partners suggested FAM tours for DMO's within Southern Oregon. Connecting each other and in turn offering more information and travel suggestions for visitors.

Be accurate about our tourism opportunities and be inclusive on your website

better customer service

Better marketing for the region

## Appendix, Continued – Open-Ended Responses

building our brand identity as an award-winning wine destination. promotional support from travel oregon that it is not just about the Willamette valley Pinot!

Clear idea of what will be done to promote the region with on going/no end in sight future fire seasons

Conferences, workshops, community member and industry training/ customer service /promoting opportunities. Social media support and focus on identity of our city. Focus on Roseburg areas and our area specifically promoting through local advertising and social media presence

Continuing to create an awareness through the area of the economic and social importance of tourism. Perhaps for simple effective educational materials (in simple layman's terms) to be presented online to help local businesses and activities attract and bring more tourists in.

Coop advertising to get bigger exposure.

Coos Bay needs dollars to develop its hwy 101 waterfront.

Create/boost brand awareness.

Designation of a strong destination management organization (DMO) in Douglas County

Discover new opportunities in all communities not just the larger ones

Diversity of experiences offered.

Easy to google websites

Effective branding and advertising showing us as the unknown adventure destination of Oregon.

Every town in southern Oregon seems to be out on its own, there is no collective agreement to embrace and move forward with tourism.

Featuring the visual arts more clearly on your website would be great. The website you run is very attractive, but visual arts are buried under attractions instead of culture and I find that confusing.

Fix the fire management/response issues that affect the entire state. Lobby on behalf of the tourism industry and all small businesses that are affected by poor forest management. This is our livelihood!

Forrest management

Funding for local coordination.

getting a beautiful, well thought out narrative out to the country and world as to why Oregon should be the next MUST SEE place to visit: our safe, beautiful state with loads of delicious food and drinks and crafts and events and activities: golf, whitewater, fishing, camping, spas, wine tasting, gorgeous coastline, affordably priced.

Grants to promote and market our region.

Help find out why we have more catastrophic fires in our Southern region and work toward a strategic plan to help prevent the choking smoke we seem to be experiencing more and more each year.

Help foster and contribute to local marketing and tourism projects

How to cope with fire season and alternatives

How to deal with smoke issues

Increase awareness of the region

Infrastructure prior to the development and marketing of the area - we need trailheads, toilets, signs, ample parking and roadside amenities.

Less focus on international business from Travel Oregon. Much more focus needs to be made or more balance of effort on domestic travel. Much of the promotion of our region from Travel Oregon is focused on outdoor attractions. This needs to be expanded in a much more significant manner.

Lodging and food

More events to draw people from Northern California. An Outlet Mall would be good, near the new Welcome Center being built in Ashland.

More focus or promotion of off-season access and activities.

Off-season destination development

Off-Season/Winter Business

Please read answer to #30.

Promote or advertise more.

Promote spring in Southern Oregon. Get people here and we will take care of the rest.

Promote the visits of wine and travel writers



## Appendix, Continued – Open-Ended Responses

Promote the Wood River Valley

Promoting our growing trail network at Spence Mountain.

Realistic assessments.

Recovery from the past two seasons of smoke outs. Do what we can to help ensure that it isn't a long-term issue, but more importantly, focus on getting visitors back after being smoked out for two seasons.

reduce fire risk

Remember the eastern portion of the region is here, and has lots of unused capacity for outdoor recreation- hike, bike (any surface), ATV use, skiing.

Rural focus

Signage and electronic maps.

Smoke mitigation

smokeless summers

Southern Oregon has a specific culture that seems to differ from the rest of the State of Oregon. Development of specific strategies to care and steward that different way of thinking and life could go a long way to a more cohesive strategic position for all of Oregon. More specifically actionable would be consistent positive messaging for beautification and service training for small communities.

Stop allowing small fires to grow into catastrophic conflagrations that choke our communities with smoke and drive travelers out of Oregon. This is an intolerable issue that is destroying Oregon's travel-dependent businesses. The greatest need is for Travel Oregon to demand that Congress increase funding necessary for a firefighting force that can quickly respond to fires and put them out when they are small and easy to extinguish. We need to bring back rapid response capability. And don't let them tell you it will cost too much. Under current firefighting policy that allows fires to get out of control, tax payers are forking out billions to control fires while additional money is being lost by small business in Oregon communities because customers are driven out of Oregon by smoke, and billions of natural resources that the tourism needs to attract travelers are incinerated. The cost of current firefighting is killing our economy, costing us billions, and, if this is going to be the norm for the rest of this state's history, we can expect to pay the same every year into the foreseeable future. It makes more sense to pay a micro fraction of that cost to increase firefighting capability so crews can put fires out when they are small and inexpensive to extinguish.

Support beyond Euguen

That it can not only provide jobs and economic benefits from visits, but can also act as a recruitment tool for businesses and people who may want to move here.

The adverse impact of wildfires in our region has to be mitigated as to its impacts on tourism. Forest Management has to be a primary action item. "Smoke" is our least favorite word.

The current team is doing an outstanding job, no improvement needed.

To provide our region with proper representation. When searching through the TO website for wine regions, the Southern Oregon region wasn't even included!

To Put our region in the Central Oregon DMO. It is confusing for us and the visitors where we are located.

Understand our products and the needs that we have to increase visitation

Up-date Website. For example: Chiloquin Oregon has two pictures and a short write-up which is out-dated and needs major up-dating. Materials and pictures have been sent. The connecting staff members have been great and are apologizing for the delay in getting this done.

We are already seeing the benefits of our new ODOT highway signage. Increasing that kind of visibility would be a giant plus for us.

We need guests to come this off season to help us recover from summer of smoke.

We need recognition of our assets in the southern part of the state. It seems Travel Oregon only highlights the same things over and over in their enews letter

We need to continue to establish our community as a destination and address the threats to our tourism industry. I think both wildfire smoke and homelessness in our city centers threaten to thwart our tourism development efforts and that the RDMO should be involved in finding solutions to these threats.

## Appendix, Continued – Open-Ended Responses

We need to work better as a region to showcase Southern Oregon year-round. That means doing a better job of working together. So many of us view the tourist dollar as a zero-sum game: if you go there, you will not visit here so they are stealing valuable tourist dollars from us. Once we have a better working relationship, we will raise all boats.

With respect to strategic planning for your business or organization, what do you need to help your business grow over the next 3-5 years that Travel Oregon can help facilitate or develop?

Access to funds to allow me to expand my offerings for active outdoor recreation.

Accommodations like Airbnb's and opportunities to fund a campground in city limits and repair multiuse Pedestrian/Bikepaths. Spend more time influencing local and the value of rural tourism

advertise more

better communication as to each region and what they are doing and how to join in.

Better exposure for local visitor attractions in state advertising and marketing.

brand awareness

Bring tourist to my region.

Build capacity

Central Oregon gets all the spotlight, how about sharing some of that and passing along correct information about public lands.

Continue marketing to an adventurous and active demographic who would visit Southern Oregon not just for Shakespeare but to get outside!

continue partnership with travel southern oregon

Develop public transportation to this region.

Developing regional identities that add to those that are already exploited, IE Crater Lake. Something like regional trout fishing, or greatest sailing lake in . . . or bicycle tour heaven, etc.

Draw more people to the region and assist in increasing awareness of our business.

Educate domestic travelers of the beauty and attractions that can be found in S. Oregon (not just Portland, Bend and Willamette Valley)

Emphasis on national park unit advertising as anchor destinations with other opportunities in between.

Facilitation by a professional from the region.

Fix the fire and smoke issues!

Funding

funding for additional snowmobile parking at 1000 springs snowpark

Grant funding for trail development.

Grants for community development, specifically for downtown Medford

Grow our off season business

Help create a simple strategic plan that is achievable without staff.

I am heading up an effort to launch Rogue Film Festival in Grants Pass; some seed funding from Travel Oregon would really help get this off the ground. Please contact me: Toni Webb, Grants Pass. See Facebook Page: Rogue Film Festival

If T.O. could somehow educate the people they are trying to promote (any and all tourism related businesses) on why it's vital to advertise, that would be great. As sales manager for Southern Oregon Magazine and the Oregon Golf & Travel Guide, I have to not only be sales person but business 101 educator to so many of the small business owners I am soliciting. I know they totally expect T.O. to advertise on their behalf, while they themselves refuse to budget for advertising because "they can't afford it".... My job is way harder than it should be simply because people are ignorant. I realize you have a lot already expected of your organization, but this one piece could actually help your organization's mission by getting the people you're trying to help actually chip in and help themselves. Let me know if you're able to discuss this further or any co-op advertising opportunities we could create. (Southern Oregon Magazine is regional but the Oregon Golf & Travel Guide is a statewide publication with distribution all over the West Coast and beyond. We also personally exhibit at 11 golf shows throughout the US with promotional materials from our advertisers as well.) Thanks for all you do!!! Leslee Ryerson 541 840-4450 leslee@rogue5media.com

## Appendix, Continued – Open-Ended Responses

Improved roads.

Investment

Key partnerships between tourism industry segments; better partnerships within the industry; support and utilize local businesses to strengthen our local and regional tourism. (i.e., if there is a local business that can provide the product/service, choose them, rather than outsourcing needs.)

Letting people know we exist here in the Illinois Valley.

Main Street revitalization€” how do we encourage new start up business????

Make our region more of a destination and fix the wild fire problem.

Make tourism video and pictures readily available. We are interested in our community prospering as well!

Market southern Oregon in a positive way

money

More advertising dollars. More publicity of our area. Correct mapping. Most Oregonians don't know what/where we are, that the beauty of the high desert exists in our great state! (Fort Rock, Oregon and our areas, Christmas Valley, Silver Lake - Lake County)

More marketing by partners like Travel Southern Oregon using magazines, newspapers, social media, websites (with connections to specific websites) and the creation of itineraries that are subject specific for tourists to easily find and use as their guides.

more tourists

N/a

Nothing

Please read answer to #30.

Promote fairgrounds and event center activities especially those that are an annual event

Promote region

Proper and thorough information of existing tourism opportunities on your website

Public facilities in Fort Klamath commensurate with its status as the southern gateway to Crater Lake. See answer to question 30.

Quality restaurant and lodging facilities.

Relax laws a bit to promote local lodging

Same as above. Shoulder Season business

Strategic planning assistance for wine & outdoor recreation industries

The Wild and Scenic Rogue River is a destination on par with Crater Lake and yet it receives a fraction of the promotion. That should change.

Training

Travel Oregon has little presence "down here". You appear to be spread too thin.

We could use help with developing our business plan, accessing market data, and digital marketing.

We know our business best. We just need money.

We need help redesigning our marketing materials to maximize our impact as well as broadening our member base. We began as promoting visual arts in Ashland when Ashland was a smaller, more affordable place for artists to live. Now as the region grows, many artists have moved to more affordable towns surrounding Ashland and have brought their work and ideas with them. There are so many amazing visual arts experiences throughout Southern Oregon and the Ashland Gallery Association would like to represent this more broadly. Figuring out how to transition is challenging in a myriad of ways.

We need to develop a large loyal and reliable volunteer base of docents in order to serve and educate the ever increasing volume of visitors we have. If Travel Oregon has or has access to training materials for developing a strong volunteer base (in a rural area), that is something that could help.

We need to focus more on bringing domestic visitors to our region to grow return business.

We need to have more open discussion with management agencies like the Oregon state marine board on the effects of unlimited licensing of fishing guides. Overcapacity and pressure on fisheries resources. Their actions hurt the quality of our fishery.

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## **Appendix, Continued – Open-Ended Responses**

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We really need better signs. When I am a tourist, I check out and so signs are a huge help. This region would greatly benefit from a more comprehensive view of getting around and directing visitors--in addition to interpretive displays which showcase our rich history and world-class natural resources.

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We won't be able to develop strategic plans that have any hope of successfully growing our tourism economy if our state is choked by smoke that drives tourist traffic away from Oregon or travelers hesitate to go through the state because of communities being put on standby to evacuate. How will a strategic plan help if every summer our travel industry suffers when smoke as thick as a pea-soup fog discourages travel into the state because of health concerns or travelers avoid communities because of safety concerns. If this continues, our tourism economy is going to stall along with all the other economic development strategies we hope tourism development can bring to a community including retiree in-migration, home-based business development, and tech industries who seek high quality environments to help retain employees. The situation is dire and there is only one strategic goal - Travel Oregon needs to aggressively leverage our congressional representatives to channel a permanent budget increase that gives our firefighting agencies the funding they need to increase their ability to rapidly respond to fires and put them out when they are small. This will prevent small fires from becoming catastrophic fires that pour smoke into Oregon communities at the peak of the travel season.

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While our organization has seen unprecedented growth in the last 5 years, some of our major obstacles include; access to technology (both for presentation and measurement & analysis); access to more region specific news, research and information; additional cooperative + strategic partnership opportunities.

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Winter Visitor attraction. Help drive more winter destination marketing for Klamath County.

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