

Southern Oregon Wildfire and Visitor Perception Study

APRIL 2019



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Southern Oregon Wildfire and Visitor Perception Study

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Introduction

The Southern Oregon Wildfire & Visitor Perception Study, funded by Business Oregon and the Oregon Governor's Office with a Local Economic Opportunity Fund (LEOF) grant, was born out of Travel Southern Oregon's desire to measure the impact of the 2017 and 2018 wildfire seasons on visitors to our region and their perception of Southern Oregon as a future travel destination.

The scale of economic impact from smoke during the 2018 wildfire season was devastating. From 26 cancelled or impacted outdoor performances at the Oregon Shakespeare Festival, resulting in \$2 million of revenue loss, to Crater Lake National Park seeing a 14% drop in July and August visitations, the economic impact of 2018's smoke event spread across the entire region as visitors sought out other parts of Oregon with clearer air.

In partnership with regional tourism offices (Travel Ashland, Travel Medford, Discover Klamath, and Travel Grants Pass) and a coalition of nine regional attractions and hotels (Running Y Ranch, Wildlife Safari, the Historic Prospect Hotel & Dining House, Country House Inns, Oregon Shakespeare Festival, the Peerless Hotel and the Neuman Hotel Group), research staff at Southern Oregon University Research Center (SOURCE) created the Southern Oregon Visitor Smoke Survey. This online survey was administered to people who visited Southern Oregon during the summer of 2017 or 2018, with the goal of understanding the impacts of wildfire smoke on visitor perception of Southern Oregon as a travel destination.

This survey was undertaken to help regional businesses develop a strategic response to the prospect of continued wildfires in our future based on actual visitor data. We also worked with the Coraggio Group to conduct focus groups with visitors in Portland and San Francisco to further understand these online survey findings with more qualitative analysis that can serve as additional visitor feedback. The goal of the overall study is to help our tourism partners make the best decisions for new seasonal projects and other strategic efforts to sustain a vibrant tourism economy in the face of continued uncertainty about the impact of wildfire smoke in Southern Oregon.

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Travel Southern Oregon

Southern Oregon Visitor Smoke Survey

APRIL, 2019

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Executive Summary

The Southern Oregon Visitor Smoke Survey was developed by the Southern Oregon University Research Center (SOURCE) in collaboration with Travel Southern Oregon, in response to concerns about visitor experiences with wildfire smoke in the summers of 2017 and 2018. The survey was fielded online by SOURCE in January 2019, and emailed to 8449 potential respondents, randomly sampled from the 22992 visitor email addresses submitted to us by twelve host organizations located in Southern Oregon. We received 1905 usable surveys, for an effective response rate of 22.5 percent.

The report first highlights some key findings based on the full sample of respondents to this survey. For the remainder of the report, we divide the data into two quite different regions, based on geographical location within Southern Oregon and also on the most common activities of the respondents during their Southern Oregon visit. These locations are the Medford/Ashland region and the Klamath Basin/Middle and Upper Rogue/Umpqua Valley region. For each of these two regions, we give comprehensive and in-depth analyses of all the survey responses.

The key findings for the full sample involve future plans to visit Southern Oregon and how smoke issues impact those plans. About 85 percent of all respondents do plan to visit Southern Oregon in the future, and of those, about 72 percent reported that wildfire smoke is a factor in deciding when they will visit. For those 72 percent, there were a variety of decisions people reported they would make in response to the possibility of smoke. The majority indicated they will not visit Southern Oregon while there are wildfires or smoke from wildfires. Following that, the most common response was to avoid coming in August, but only 21 percent stated this intention. In response to another question, considerable interest was expressed in visiting during seasons other than summer; only 16 percent said they were only interested in visiting during the summer.

For the 15 percent of the full sample who said they do not plan to visit Southern Oregon in the future, or are unsure if they would, “concerns or experience related to smoke from wildfires” was cited as a reason by 40 percent, while “I want to visit other areas” was cited by 48 percent. For the 40 percent who expressed concern about smoke, lack of certainty, potential health effects, and previous negative experiences with smoke were all indicated as important concerns.

The two regional reports give generally similar but nuanced patterns of results for these key questions, with supplemental information from all the survey questions. The open-ended comments at the end of the survey provide greater insight into the visitor experience and how people coped with and responded to smoke from wildfires during their trip.



Background Information About the Survey

The Southern Oregon Visitor Smoke Survey was fielded online, using Qualtrics survey software, to 8449 potential respondents, randomly sampled from the 22992 visitor names and emails submitted to us by twelve host organizations. Those host organizations are the Ashland Hills Hotel, Ashland Springs Hotel, Inn at the Commons, Lithia Springs Hotel, Oregon Shakespeare Festival, Peerless Hotel, Prospect Hotel, Running Y Ranch Resort, The Lodge at Riverside, Weasku Inn, Wildlife Safari, and the Wine Country Inn. The exact questions as asked of respondents online, along with other technical information, are given in the Appendix to the survey report.

We opened the survey on January 7, 2019, and closed it on January 25, 2019. Within this period respondents received up to three reminder emails after the initial one, bringing our total response number to 2412, a response rate of 28.5 percent. From these 2412 responses, we eliminated respondents who did not meet the criteria of the study: those who live in Southern Oregon and thus were not technically visitors, and those who did not visit or plan to visit from July to September of 2017 or 2018. This process resulted in 1905 usable surveys. The response rate for the surveys used in this analysis is thus 22.5 percent.

The next section of this report highlights some key findings based on the full sample of respondents to this survey. In the two sections after that, we divide the data into two quite different regions, based on geographical location within Southern Oregon and also on the most common activities of the respondents during their Southern Oregon visit. These regions are the Medford/Ashland region and the Klamath Basin/Middle and Upper Rogue/Umpqua Valley region. For each region, we give comprehensive and in-depth analyses of the survey responses.



Selected Key Findings for Full Survey Sample

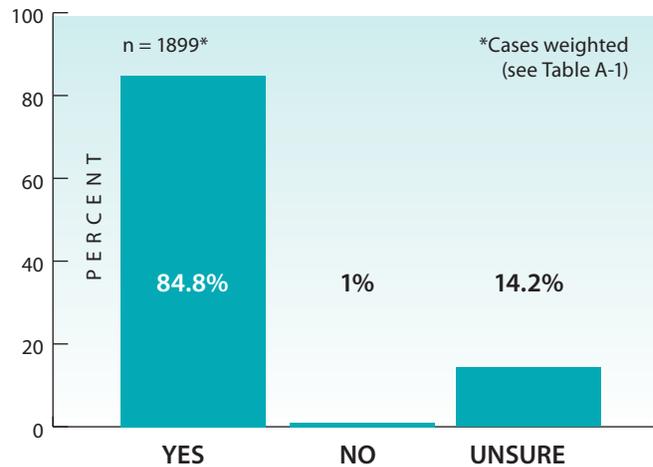
The purpose of this section is to highlight some key findings based on the full sample of respondents to this survey. These are findings that we shall explore in greater depth in the following sections of the report as we look at each region separately.

There are 1905 cases in the full sample. This sample size yields a conservative confidence interval at the 95 percent level of +/-2.25 percentage points. This means that we can be 95 percent confident that estimates of proportions with our sample size are within this interval. Note, however, that when questions are filtered to smaller numbers of respondents, confidence intervals will widen.

The organizations that provided us with respondent contact information are the Oregon Shakespeare Festival, Ashland Hills Hotel, Ashland Springs Hotel, Inn at the Commons, Lithia Springs Hotel, Peerless Hotel, Running Y Ranch Resort, Wildlife Safari, Prospect Hotel, The Lodge at Riverside, Weasku Inn, and the Wine Country Inn. We weighted the cases in our sample so that the proportion of cases from each organizational entity was equivalent to their proportion in the population of names and emails originally provided to us. For example, the Inn at the Commons provided us 8.9 percent of our original respondent pool, so we adjusted the weight of the cases in our sample from the Inn at the Commons so that their proportion of our total (N=1905) was also 8.9 percent. Note that the weighting procedure may introduce very slight discrepancies in total frequencies and percentages, due to rounding. Full information for all host organizations is given in Table A-1 in the Appendix.

The following question was asked of all respondents (see graph below):

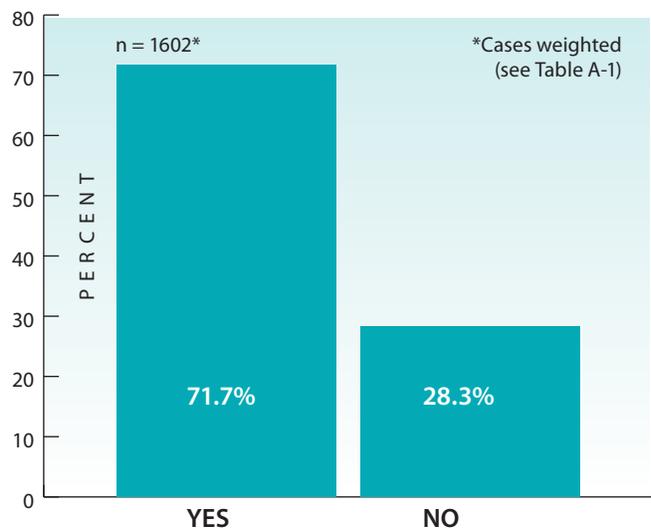
Do you plan on visiting Southern Oregon in the future?



The above results are obviously heartening: about 85 percent (n=1609) plan to visit again, 14 percent (n=270) are unsure, and only one percent (n=20) do NOT plan to visit Southern Oregon in the future.

The following question was asked of the respondents who answered yes, they plan on visiting Southern Oregon in the future.

Is the possibility of smoke from wildfires a factor in deciding when you will visit?



The above results show that about 72 percent (1148) of the respondents reported that wildfire smoke is a factor in deciding when they will visit. This is not surprising, but perhaps it is more surprising that fully 28 percent (454) of respondents do not see smoke as a factor in deciding when they will visit.

For the 1148 respondents who answered yes, the possibility of smoke from wildfires is a factor in deciding when they will visit, the following question was asked (multiple responses allowed):

How will the possibility of smoke have an impact on your planned visit?*

| | | |
|---|-------|---------|
| I will not visit when there are active wildfires | 53.7% | n = 604 |
| I will not visit when there is smoke from wildfires | 59.2% | n = 667 |
| I will not visit in July | 12.6% | n = 141 |
| I will not visit in August | 20.9% | n = 236 |
| I will visit in April | 5.9% | n = 66 |
| I will visit in May | 9.2% | n = 103 |
| I will visit in June | 9.8% | n = 111 |
| I will visit in September | 10.6% | n = 119 |
| I will visit in October | 10.6% | n = 120 |
| *Cases weighted (see Table A-1). | | |

The above results show the variety of responses people may make in the face of the possibility of smoke. Other than trying to avoid active wildfires or smoke, the most common response is to avoid visiting in August, but this intention was expressed by only 20.9%.

For the 290 respondents who said they do not plan to visit Southern Oregon in the future, or were unsure, the following question was asked (multiple responses allowed):

Indicate the reasons why you do not plan on visiting Southern Oregon or are unsure about visiting Southern Oregon again.*

| | | |
|--|-------|---------|
| Cost of the trip | 4.5% | n = 13 |
| I want to visit other areas | 47.9% | n = 138 |
| I have done everything I want to do in Southern Oregon | 5.5% | n = 16 |
| This was a one-time visit | 18.2% | n = 53 |
| Concerns or experience related to smoke from wildfires | 39.7% | n = 114 |
| *Cases weighted (see Table A-1). | | |

The largest proportion of these respondents (47.9%, n=138) mentioned their desire to visit other areas, whereas "concerns or experience related to smoke from wildfires" was cited as a reason by 39.7% (n=114). Thus, smoke is not necessarily the paramount factor in our respondents' decisions with respect to revisiting Southern Oregon.

The following question was asked of the 114 respondents who did say that concerns or experiences related to smoke from wildfires was a reason for being negative or unsure about visiting Southern Oregon again (multiple responses allowed).

What are your concerns or experiences related to smoke from wildfires in Southern Oregon?*

| | | |
|--|-------|--------|
| Lack of certainty about how wildfires or smoke will impact my trip | 71.1% | n = 81 |
| Potential health effects from wildfire smoke | 72.2% | n = 82 |
| Negative experience with smoke during a previous visit | 68.4% | n = 78 |

*Cases weighted (see Table A-1).

All of the above concerns are evidently approximately equal in importance to the respondents with concerns or experiences related to smoke.

A final set of questions in this report asked respondents about interest in visiting Southern Oregon in the spring, fall, or winter, or whether they were interested only in visiting during the summer. Our results are shown in the table below:

Are you interested in visiting Southern Oregon in the future during the spring, fall, or winter?*

| | | |
|--|-------|---------|
| I am interested in visiting in the spring | 46.0% | n = 848 |
| I am interested in visiting in the fall | 48.0% | n = 884 |
| I am interested in visiting in the winter | 14.3% | n = 263 |
| No, I am only interested in visiting in the summer | 16.4% | n = 288 |
| Not sure | 22.3% | n = 411 |

*Cases weighted (see Table A-1).

The above table shows that there is considerable interest in visiting in seasons other than summer, in particular fall and spring, and a fairly small percentage (16.4 percent) are committed solely to summer. Twenty-two percent of respondents indicated they were not sure which season(s) they were interested in, which may also indicate some flexibility in their thinking.

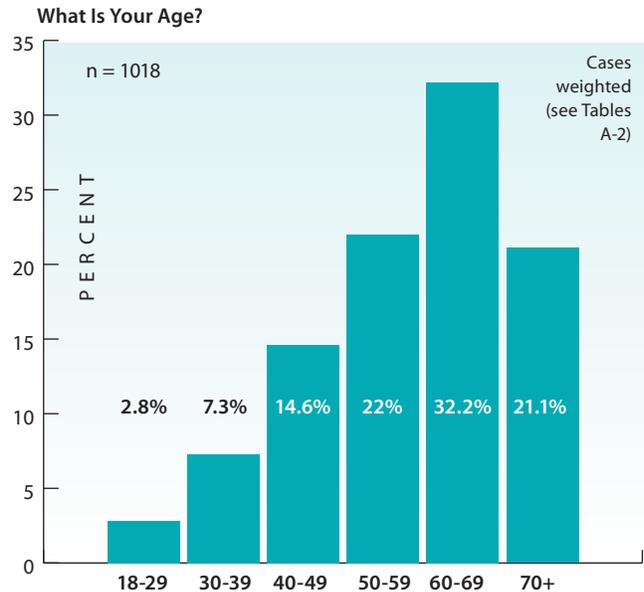


Survey Findings for the Medford/Ashland Region

There are 1016 cases, comprised of visitors to the Medford/Ashland region. This sample size yields a conservative confidence interval at the 95 percent level of +/-3.07 percentage points. This means that we can be 95 percent confident that estimates of proportions with our sample size are within this interval. Note, however, that when questions are filtered to smaller numbers of respondents, confidence intervals will widen. The organizations in this region who provided us visitor contact information are the Ashland Hills Hotel, Ashland Springs Hotel, Inn at the Commons, Lithia Springs Hotel, Peerless Hotel, and the Oregon Shakespeare Festival. We weighted the cases in our sample so that the proportion of cases from each organizational entity was equivalent to their proportion in the population of names and emails originally provided to us. For example, the Inn at the Commons provided us 10.4 percent of our original respondent pool for this region, so we adjusted the weight of the cases in our sample from the Inn at the Commons so that their proportion of our total (N=1016) was also 10.4 percent. Note that the weighting procedure may introduce very slight discrepancies in total frequencies and percentages, due to rounding. Details for all host organizations in this region are shown in the Appendix, Table A-2.

Findings

Respondents were first asked about their age. The resulting age distribution is shown in the graph below:



It is clear from the graph that the age distribution is skewed toward the later years, with 60-69 the most common category (32.2%, n=327).

Respondents were then asked to provide their zip code. We grouped zip codes into regions as shown in the table below.

Region of residence*

| | | |
|---------------------------|-------|---------|
| East of the Rockies | 10.7% | n = 106 |
| Rocky Mountains | 2.2% | n = 22 |
| Nevada/Arizona/Idaho | 2.3% | n = 23 |
| Southern California | 7.3% | n = 72 |
| San Francisco Bay Area | 18.6% | n = 185 |
| Other Northern California | 19.0% | n = 188 |
| Western Oregon | 14.3% | n = 142 |
| Eastern Oregon | 1.8% | n = 18 |
| Portland | 9.3% | n = 92 |
| Seattle | 4.7% | n = 47 |
| Other Washington | 9.8% | n = 97 |
| Total | 100% | n = 992 |

*Cases weighted (see Table A-2).

The table above shows the San Francisco Bay Area and other parts of Northern California are the predominant residences of visitors to the Medford/Ashland region. It is noteworthy, though, that other regions also contribute substantial numbers of visitors to this region.

If respondents did not live in the United States, they were asked to indicate their country of residence. In this region, there were eleven respondents from six countries, as shown in the table below:

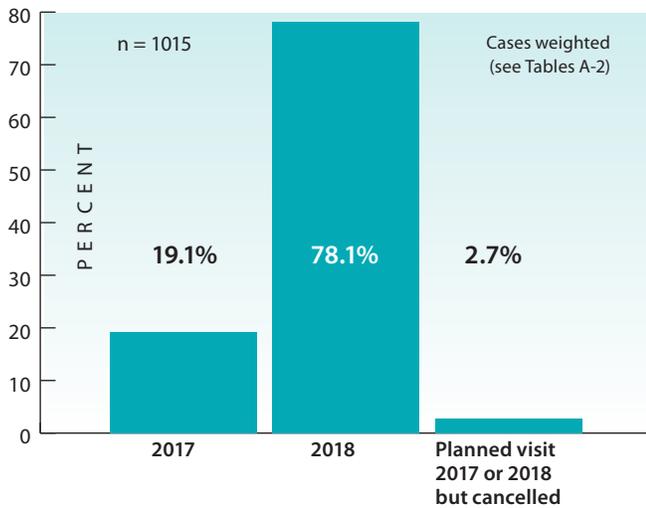
Please indicate your country of residence*

| | | |
|-----------------|-------|--------|
| Canada | 45.5% | n = 5 |
| Sri Lanka | 9% | n = 1 |
| Sweden | 9% | n = 1 |
| Switzerland | 18.2% | n = 2 |
| The Netherlands | 9% | n = 1 |
| United Kingdom | 9% | n = 1 |
| Total | 100% | n = 11 |

*Cases weighted (see Table A-2).

Respondents were then asked about the year of their most recent visit to Southern Oregon, as indicated in the graph below:

Please indicate the year of your last visit to Southern Oregon*



A large proportion of the sample last visited in 2018 (78.1%, n=793), a smaller proportion in 2017 (19.1%, n=194), and a very small proportion (2.7%, n=28) planned to visit in 2017 or 2018 but cancelled their trip. For this latter group, we asked the reasons they cancelled their trip. Results for this question are shown in the table below (multiple responses allowed):

I canceled my trip to Southern Oregon in 2017 or 2018 for the following reasons:*

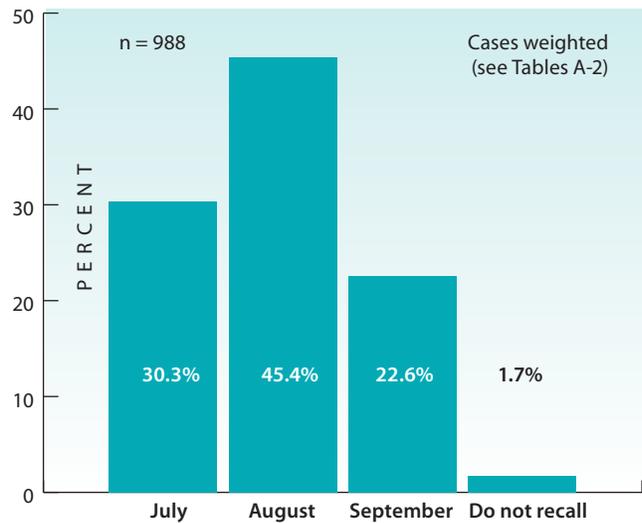
| | | |
|--------------------------|-------|--------|
| Health reason | 13% | n = 4 |
| Financial reason | 2.2% | n = 1 |
| Family/friend reason | 2.2% | n = 1 |
| Work-related reason | 0% | n = 0 |
| Wildfire or smoke reason | 79.3% | n = 22 |

*Cases weighted (see Table A-2).

Clearly, the predominant reason for cancelling their trip had to do with wildfire and/or smoke (79.3%, or 22 out of the 28 respondents specified this as a reason for not coming, although not necessarily the only reason).

Those who did actually visit in 2017 or 2018 were asked the month they visited. Results are shown in the graph below.

Please indicate the month of your last visit to Southern Oregon*



The most popular month was August (45.4%, n=449), followed by July (30.3%, n=299), and then September (22.6%, n=223). The small proportion who did not remember which month they visited were asked to recall the season; 9 people recalled summer, 7 people recalled fall.

Those who visited in 2017 or 2018 were then asked about when they would be interested in visiting in the future with respect to season of the year. Multiple responses were allowed, unless they specified they were ONLY interested in summer. Results are shown in the table below:

Are you interested in visiting Southern Oregon in the future during the spring, fall, or winter?*

| | | |
|--|-------|---------|
| I am interested in visiting in the spring | 46.9% | n = 464 |
| I am interested in visiting in the fall | 49.4% | n = 487 |
| I am interested in visiting in the winter | 13.6% | n = 135 |
| No, I am only interested in visiting in the summer | 16.5% | n = 155 |
| Not sure | 21.2% | n = 209 |
| *Cases weighted (see Table A-2). | | |

Interest in visiting in seasons other than summer is important information, since summers tend to be the times when wildfires and smoke are most likely to occur, and the respondents we surveyed had visited in the summer or early fall season. The question is whether they are committed to the summer season, and the responses indicated they are generally not committed to summer only, but are open to other seasons.

Respondents were then asked, "While you were in Southern Oregon, which of the following activities did you participate in?", and given a list of 14 activities from which they could choose as many as applied (see table below).

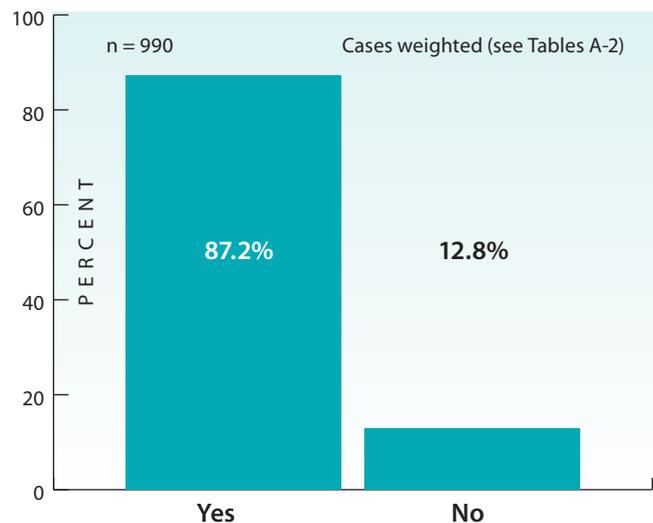
While you were in Southern Oregon, which of the following activities did you participate in?*

| | | |
|----------------------------------|-------|---------|
| Oregon Shakespeare Festival | 66.7% | n = 660 |
| Other cultural attractions | 10.6% | n = 105 |
| Wildlife Safari | 1.9% | n = 19 |
| River rafting | 7.4% | n = 74 |
| Hellgate Jetboats | 2.3% | n = 23 |
| Other water-related recreation | 5.3% | n = 52 |
| Running Y Ranch | 1.1% | n = 11 |
| Golfing | 2.5% | n = 24 |
| Wine tasting | 23.8% | n = 236 |
| National parks or monuments | 30.7% | n = 304 |
| Other outdoor recreation | 31.1% | n = 308 |
| Visiting family | 17.6% | n = 174 |
| Visiting friends | 18.3% | n = 181 |
| Business Trip | 8.1% | n = 81 |
| *Cases weighted (see Table A-2). | | |

The preceding table shows that the Oregon Shakespeare Festival was by far the most often selected, identified by two-thirds (n=660) of our respondents in this region. National parks or monuments, and other outdoor recreation, tied for second place at 30.7% (n=304) and 31.1% (n=308). Wine tasting was in fourth place at 23.8% (n=236). The results overall show a diversity of activities selected by visitors to this region, while the dominance of the Oregon Shakespeare Festival is noteworthy.

Next we come to the heart of the study: a series of questions involving wildfire smoke and its impact on visitors to Southern Oregon. The first question is shown in the graph below:

Were wildfires or smoke from wildfires present during your last visit?



We see that 87.2% of our sample of visitors in 2017/18 experienced smoke during their visit, and only 12.8% did not. For the large proportion who did experience smoke, the next question is to what degree it hindered their ability to take part in activities. Respondents were asked to choose a number from 1 to 10 to represent this, with 1 being no effect on their ability to take part in activities and 10 meaning they were prevented by the smoke from taking part in any activities. These results are shown in the next table.

To what degree did smoke from wildfires hinder your ability to take part in activities while in Southern Oregon?*

| | | |
|--|-------|---------|
| 1 – smoke had no impact | 11.8% | n = 102 |
| 2 | 7.7% | n = 66 |
| 3 | 9.8% | n = 84 |
| 4 | 5.7% | n = 49 |
| 5 – medium impact | 7.6% | n = 65 |
| 6 | 7.8% | n = 67 |
| 7 | 15.4% | n = 132 |
| 8 | 19.4% | n = 167 |
| 9 | 9.8% | n = 84 |
| 10 – due to the smoke, I was not able to take part in any activities | 5% | n = 43 |
| Mean = 5.66 | | |
| Median = 6.00 | | |
| Mode = 8 | | |
| Standard Deviation = 2.807 | | |
| *Cases weighted (see Table A-2). | | |

The summary statistics at the bottom of the table help us interpret the results. The mean of 5.66 indicates an average perception of slightly above medium impact of the smoke on activities. The median of 6 means that half of the respondents were below this number and half were above. The mode of 8 indicates that the largest number of respondents chose this number (19.4%, n=167). However, the standard deviation shows quite a bit of variation in the responses.

Respondents who experienced smoke during their visit were also asked if the smoke changed their plans during their trip. Results are shown in the table below (multiple responses were allowed):

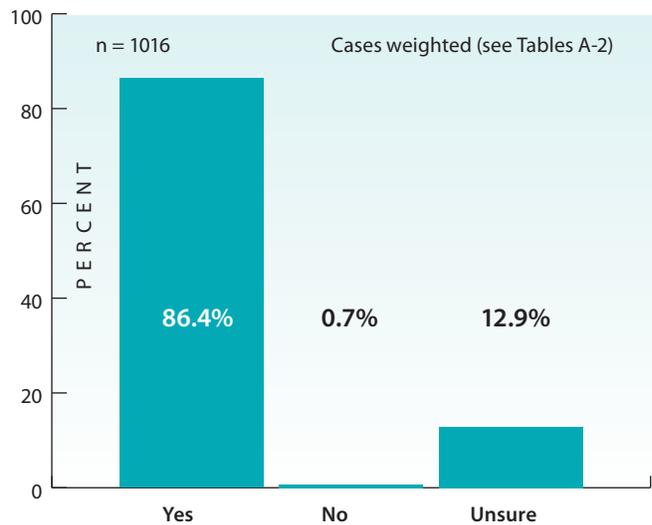
Did the smoke from wildfires change your plans during your trip?*

| | | |
|---|-------|---------|
| No, the smoke did not change my plans during my trip to Southern Oregon | 38.1% | n = 327 |
| Yes, I shortened my stay in Southern Oregon | 15.4% | n = 132 |
| Yes, I changed my travel destination to another location in Oregon | 6.2% | n = 53 |
| Yes, I restricted my outdoor activities during my stay in Southern Oregon | 44.7% | n = 383 |
| *Cases weighted (see Table A-2). | | |

The largest proportion of respondents said they restricted their outdoor activities during their stay in Southern Oregon (44.7%, n=383). A fairly close second response selected was that the smoke did not change their plans (38.1%, n=327). Fifteen percent said they shortened their stay and six percent changed their destination.

Finally, the crucial question of future plans was explored in a series of questions. First, the full sample was asked: Do you plan on visiting Southern Oregon in the future? Results are shown in the graph below:

Do you plan on visiting Southern Oregon in the future?



The above results are obviously heartening: 86 percent (n=878) plan to visit again, 13 percent (n=131) are unsure, and only seven-tenths of one percent (n=7) do NOT plan to visit Southern Oregon in the future.

For the 138 respondents who said they do not plan to visit Southern Oregon in the future, or were unsure, the following question was asked (multiple responses allowed):

Please indicate the reasons why you do not plan on visiting Southern Oregon or are unsure about visiting Southern Oregon again.*

| | | |
|--|-------|--------|
| Cost of the trip | 4.4% | n = 6 |
| I want to visit other areas | 43.6% | n = 60 |
| I have done everything I want to do in Southern Oregon | 4.3% | n = 6 |
| This was a one-time visit | 17.3% | n = 24 |
| Concerns or experience related to smoke from wildfires | 44.4% | n = 61 |
| *Cases weighted (see Table A-2). | | |

The largest proportion of these respondents (44.4%, n=61) mentioned smoke as a reason, but “I want to visit other areas” (43.6%, n=60) was a very close second. Of course, respondents were allowed to choose both factors as reasons.

The following question was asked of the 61 respondents who did say that concerns or experiences related to smoke from wildfires was a reason for being negative or unsure about visiting Southern Oregon again (multiple responses allowed).

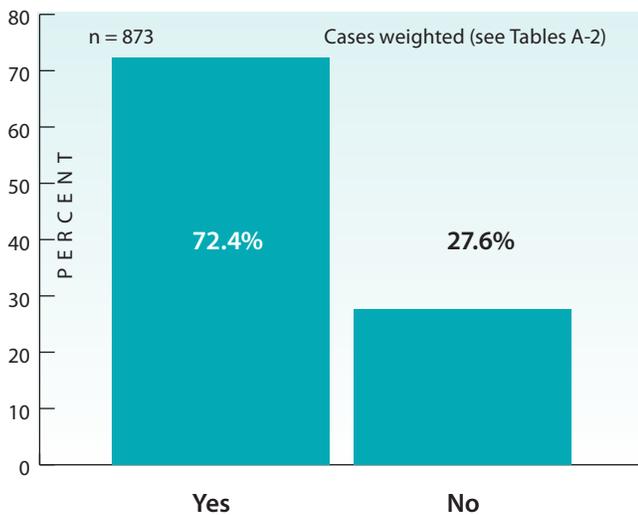
What are your concerns or experiences related to smoke from wildfires in Southern Oregon?*

| | | |
|--|-------|--------|
| Lack of certainty about how wildfires or smoke will impact my trip | 70.2% | n = 43 |
| Potential health effects from wildfire smoke | 73.8% | n = 45 |
| Negative experience with smoke during a previous visit | 68% | n = 41 |
| *Cases weighted (see Table A-2). | | |

All of the above concerns are approximately equal in importance to the respondents.

Turning to the respondents who said yes, they plan on visiting Southern Oregon in the future, the issue of smoke was also explored in further questions. The first question was whether the possibility of smoke would be a factor in deciding when to visit. Results are shown in the graph below:

Is the possibility of smoke from wildfires a factor in deciding when you will visit?



The preceding results show that almost three-quarters (632) of the respondents reported that wildfire smoke is a factor in deciding when they will visit. This is not surprising, but perhaps it is more surprising that over a quarter (241) of respondents do not see smoke as a factor in deciding when they will visit.

For the 632 respondents who answered yes, the possibility of smoke from wildfires is a factor in deciding when they will visit, the following question was asked (multiple responses allowed):

How will the possibility of smoke have an impact on your planned visit?*

| | | |
|---|-------|---------|
| I will not visit when there are active wildfires | 52.2% | n = 325 |
| I will not visit when there is smoke from wildfires | 58.3% | n = 362 |
| I will not visit in July | 13.4% | n = 83 |
| I will not visit in August | 22.6% | n = 140 |
| I will visit in April | 6.2% | n = 38 |
| I will visit in May | 9.6% | n = 60 |
| I will visit in June | 10.4% | n = 64 |
| I will visit in September | 11.2% | n = 69 |
| I will visit in October | 11.4% | n = 71 |
| *Cases weighted (see Table A-2). | | |

The above results show the variety of responses people may make in the face of the possibility of smoke. Other than trying to avoid active wildfires or smoke, the most common response is to avoid coming in August.



Open-Ended Comments for Medford/Ashland Region

The Southern Oregon Visitor Smoke Survey had an open-ended final question that asked, “Is there anything else you would like us to know?” This gave the respondents the opportunity to address any issue from the survey as well as items that were not included. There were 661 qualitative answers to this open-ended question which give us greater insight into the visitor experience and how people coped with and responded to the smoke from wildfires during their trip. These more extended answers enhance the quantitative findings of the rest of the survey. Below, we present the Medford/Ashland answers grouped into overall categories. These categories, as well as the examples provided, elucidate the experiences, criticisms, and coping strategies that were reported by visitors to Southern Oregon. The analysis of the open-ended responses from visitors to the Klamath Basin/Upper and Middle Rogue/Umpqua Valley region is included at the end of that section.

For visitors to the Medford/Ashland region, a total of 878 survey respondents indicated that they would visit Southern Oregon again. Of those, 323 people answered the final open-ended question of the survey and gave more information about their trip.

For 73 of those respondents, wildfire smoke was not perceived as a problem or had no effect on their experience. Here are some direct quotes that illustrate these types of answers: “We worried about it and

thought we would be stuck indoors, but it was actually reasonably clear during our visit.” “I have traveled to southwest Oregon the past two summers—it is a new area for our family - it is absolutely beautiful!!!!” “We love Oregon and visit 2 to 3 times a year.” The smoke, while present, did not have a significant impact on the visits of others, “In spite of the smoke we enjoyed our time in Oregon since we had never been there before.” “We saw two plays at the Bowmer theater but chose not to see the plays at Ashland High School. We did enjoy some lovely meals in local restaurants and shopped a little, but could not fly fish, ride bikes or hike as we usually do. We usually visit every other year and love the area. We have been coming to Ashland for 40 years and anticipate coming back.”

Conversely, 51 people reported very challenging experiences while visiting Southern Oregon, “This is a serious problem. I wish you well in working on it. Last summer was really hard.” “Smoke caused my wife and me to cancel attendance at the Oregon Shakespeare Festival, even though we had to pay for unused tickets and a hotel booking.” Six survey respondents described visits that were shortened due to smoke, “I would have spent a full week in Ashland but only went for an overnight trip due to the smoke. My indoor activities/appointments were still great, and I was still able to enjoy eating good food in Ashland, but being outside was awful and it was stressful to have to change plans around the smoke.”

Fifteen people referred to specific physical problems that resulted from exposure to smoke, “My throat

has not fully recovered. I am going to undergo tests.” Although they indicated on the survey that they are planning on returning to Southern Oregon, 12 respondents described not returning to the area or changing locations of further events, “We intend to ask the many cousins to move our annual reunion to someplace else for 2020 and following years.” Another specified,

“We love the Shakespeare Festival and have come for years usually in August. The smoke did not cancel any of our plays but did cancel/change plays for others in our group and some family who had come the week before. We do not want to give up on OSF but it is a lot of money to pay to spend the entire trip in the smoke. We are unsure about what we will do for 2019.”

Many of the responses included coping strategies for upcoming trips to Southern Oregon. Shifting the dates of future visits to avoid fire season was specifically mentioned by 29 respondents. “I love Ashland and have lots of friends there. The fires were prohibitive. I will schedule visits around the summer months.” “We have decided to NOT get tickets to the Elizabethan Theatre due to possible smoke -- only indoor theatres. Also we are trying to move our visits earlier in July -- trying to plan around possible smoke.” Others described a “flexible” approach to travel that incorporates wildfire possibilities when planning trips to Southern Oregon. Thirty-six respondents described this strategy, “Smoke is a huge factor on a bicycling trip. You can’t predict fires, months in advance. So if

we had another trip and there was an active fire, we would most likely have to restructure the trip at the last minute.” Access to information is an important part of the flexible approach to travel, “Since wildfire smoke is localized, and may affect one location while another one, not far away, is unaffected, we will plan our trips by staying updated on local air quality/fire hazard warnings.”

Smoke from wildfires is a problem for the entire west coast region, according to 26 respondents, and they have incorporated this already into their travel plans, as these quotes indicate: “We live in an area that has frequent wildfires and smoke so adjusting our plans is something we are used to. Southern Oregon is beautiful and we plan to come visit more often.” “Our property was damaged in the Tubbs fire. Wildfires and danger of them is now a large factor in any decision.”

Survey respondents visiting Medford/Ashland also had feedback regarding the visitor experience; 25 people had specific suggestions and most of them centered around wanting more clear and detailed information about wildfire/smoke conditions,

“If there is some way visitors could receive clearer instruction and education about smoke before visiting that would be great. I had never experienced such heavy smoke before, and the impact it had on my health and activities took me very much by surprise! It is one thing to see the air quality numbers online, and quite another to breathe the stuff! Now I know better, but others new to the situation may not.”





Other comments reflected the need for information, "I love Southern Oregon and won't let the FEAR of smoke or fire keep me away. However, would appreciate easy to access, up-to-date detailed info on active fires and smoke intensity, so I can plan my visit appropriately." "We do believe it is important for hotels/motels/inns and major entertainment venues such as the Oregon Shakespeare Festival to notify visitors and ticket holders of severe smoke issues." Three survey respondents specifically asked about having free masks for visitors, "Noting thick smoke and ashes in Ashland I tried to find a M90 mask. Would have appreciated it if the Visitor's Center stocked the masks."

A total of 11 survey respondents commented specifically on the issue of indoor versus outdoor theaters. Eight visitors were in favor of covered or indoor theaters, "I have been a dedicated member of OSF and wish to continue. I believe they will need to 'cover' the Elizabethan in the future for the possibility of fires." Conversely, three people cited the importance of keeping the Allen Elizabethan as an outdoor theater. In addition, there were 39 responses of various descriptions of trips to Southern Oregon or general comments that did not fit into any of the major themes presented here.

For the Medford/Ashland region, 7 respondents

said they would not return to Southern Oregon and 131 were unsure. Of those respondents, only one person who is not coming back answered the final open-ended question and 41 who were unsure about coming back answered it.

Not surprisingly, the people who were unsure whether they are coming back reported more problems in their comments. The overall experience was discouraging for 12 respondents, "Used to be that Oregon and Washington were two places we did not want to leave in the summer. So beautiful! But the smoke the last two years has begun to change our thinking." Five people had specific criticisms of how smoke-related issues were handled, and they centered around cancellations and refunds, "Hotels did not return cash paid for rooms even we had to leave because of the smoke." Health concerns comprised the comments of 7 people, "My wife developed severe eye inflammation due to the smoke while staying in Ashland."

There were 10 people who reported positive experiences, "Despite the smoke and closed roads we enjoyed the natural wonders of Oregon outdoors." Three acknowledged that there is smoke throughout the west coast region, and two people may visit again if there are no fires. Lastly, there were 3 respondents with comments that did not address their Southern Oregon visit.



Survey Findings for the Klamath Basin/Upper and Middle Rogue/Umpqua Valley Region

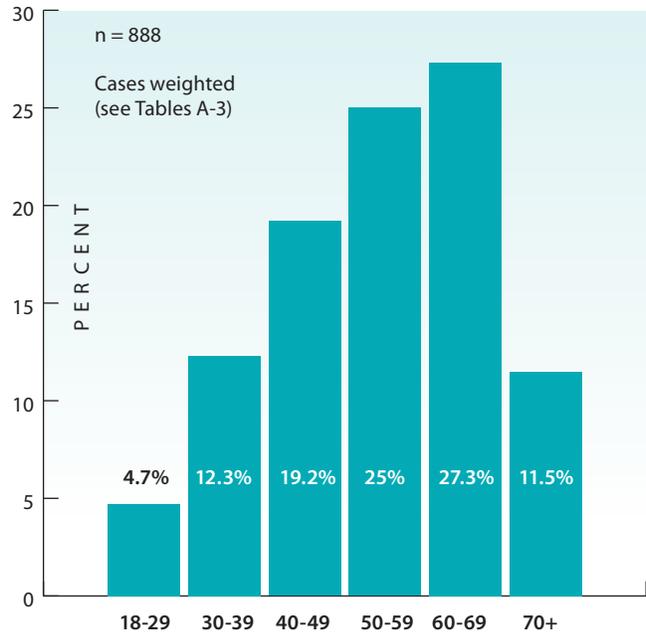
The host organizations in the Klamath Basin/Upper Rogue/Umpqua Valley region that provided us with respondent information are Running Y Ranch Resort, Wildlife Safari, Prospect Hotel, the Lodge at Riverside, Weasku Inn, and Wine Country Inn. There are 889 cases in our sample representing this region. This sample size yields a conservative confidence interval at the 95 percent level of +/-3.29 percentage points. This means that we can be 95 percent confident that estimates of proportions with our sample size are within this interval. Note, however, that when questions are filtered to smaller numbers of respondents, confidence intervals will widen.

We weighted the cases in our sample so that the proportion of cases from each organizational entity was equivalent to their proportion in the population of names and emails originally provided to us. For example, Running Y Ranch Resort provided us 35.6 percent of our original respondent pool for this region, so we adjusted the weight of the cases in our sample from Running Y Ranch Resort so that their proportion of our total (N=889) was also 35.6 percent. Note that the weighting procedure may introduce very slight discrepancies in total frequencies and percentages, due to rounding. Full information for all host organizations in the region is given in Table A-3 in the Appendix.

Findings

Respondents were first asked about their age. The resulting age distribution is shown below

What is your age?



It is clear from the graph that the age distribution is skewed toward the later years, with 60-69 the most common category (27.3%, n=243).

Respondents were then asked to provide their zip code. We grouped zip codes into regions as shown in the table below.

Region of residence*

| | | |
|---------------------------|-------|---------|
| East of the Rockies | 27.6% | n = 223 |
| Rocky Mountains | 2.7% | n = 22 |
| Nevada/Arizona/Idaho | 4.7% | n = 38 |
| Southern California | 5.8% | n = 47 |
| San Francisco Bay Area | 10.3% | n = 83 |
| Other Northern California | 13.1% | n = 106 |
| Western Oregon | 17.5% | n = 141 |
| Eastern Oregon | 2.3% | n = 18 |
| Portland | 5.8% | n = 45 |
| Seattle | 1.7% | n = 14 |
| Other Washington | 8.6% | n = 70 |
| Total | 100%* | n = 808 |

*Cases weighted (see Table A-3).

The most common residence of U.S. visitors to the Klamath/Rogue/Umpqua region was east of the Rockies (28 percent, N=223). If respondents did not live in the United States, they were asked to indicate their country of residence. In this region, there were 58 respondents from 16 countries, as shown in the table below:

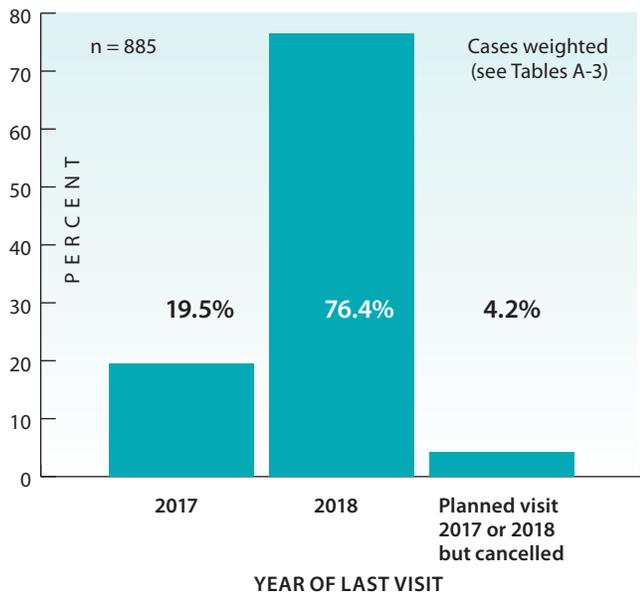
Please indicate your country of residence*

| | | |
|----------------------|-------|--------|
| Australia | 3.4% | n = 2 |
| Canada | 15.6% | n = 9 |
| Denmark | 6.9% | n = 4 |
| Finland | 1.7% | n = 1 |
| France | 8.6% | n = 5 |
| Germany | 10.3% | n = 6 |
| Italy | 6.9% | n = 4 |
| Norway | 1.7% | n = 1 |
| Saudi Arabia | 1.7% | n = 1 |
| Singapore | 1.7% | n = 1 |
| Sweden | 1.7% | n = 1 |
| Switzerland | 5.2% | n = 3 |
| Taiwan | 1.7% | n = 1 |
| The Netherlands | 6.9% | n = 4 |
| United Arab Emirates | 3.4% | n = 2 |
| United Kingdom | 22.4% | n = 13 |
| Total | 100% | n = 58 |

*Cases weighted (see Table A-3).

The timing of the respondent’s most recent visit is shown in the graph below:

Please indicate the year of your last visit to Southern Oregon*



Over three-quarters of our sample (n=676) visited in 2018, twenty percent (n=172) in 2017, and only four percent (n=37) planned to visit in 2017 or 2018 but cancelled their trip. For this latter group, the reasons they cancelled were ascertained, as shown in the table below (multiple responses allowed):

I canceled my trip to Southern Oregon in 2017 or 2018 for the following reasons:*

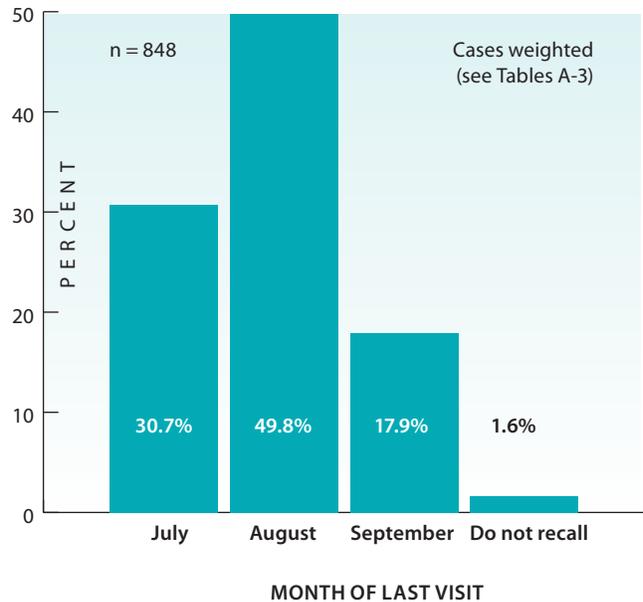
| | | |
|--------------------------|-------|--------|
| Health reason | 8.7% | n = 3 |
| Financial reason | 6.4% | n = 2 |
| Family/friend reason | 5.1% | n = 2 |
| Work-related reason | 0% | n = 0 |
| Wildfire or smoke reason | 93.5% | n = 35 |

*Cases weighted (see Table A-3).

Clearly, the predominant reason for cancelling their trip had to do with wildfire and/or smoke (93.5%, or 35 out of the 37 respondents specified this as a reason for not coming, although not necessarily the only reason).

Those who did actually visit in 2017 or 2018 were asked the month they visited. Results are shown in the graph below.

Indicate the month of that visit to Southern Oregon*



The most popular month was August (49.8%, n=422), followed by July (30.7%, n=260), and then September (17.9%, n=152). The small proportion who did not remember which month they visited were asked to recall the season; summer was recalled by 12 people, fall by 2 people.

Those who visited in 2017 or 2018 were then asked about when they would be interested in visiting in future with respect to season of the year. Multiple responses were allowed, unless they specified they were ONLY interested in summer. Results are shown in the table below:

Are you interested in visiting Southern Oregon in the future during the spring, fall, or winter?*

| | | |
|--|-------|---------|
| I am interested in visiting in the spring | 40.4% | n = 342 |
| I am interested in visiting in the fall | 39.5% | n = 334 |
| I am interested in visiting in the winter | 18.3% | n = 155 |
| No, I am only interested in visiting in the summer | 16.2% | n = 132 |
| Not sure | 29.5% | n = 250 |
| *Cases weighted (see Table A-3). | | |

Interest in visiting in seasons other than summer is important information, since summers tend to be the times when wildfires and smoke can occur and the respondents we surveyed had been here in the summer or early fall season. The question is whether they are committed to the summer season, and the responses indicate only 16 percent of respondents are only interested in visiting in the summer, while most are open to other seasons.

Respondents were then asked, “While you were in Southern Oregon, which of the following activities did you participate in?”, and given a list of 14 activities from which they could choose as many as applied (see table following).

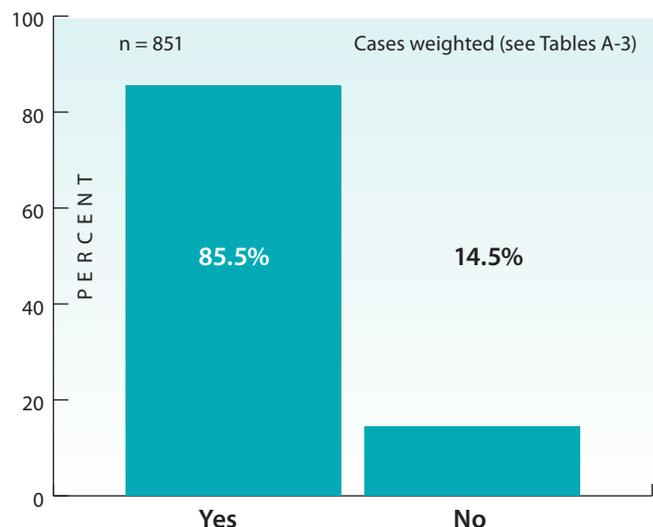
While you were in Southern Oregon, which of the following activities did you participate in?*

| | | |
|----------------------------------|-------|---------|
| Oregon Shakespeare Festival | 7.5% | n = 64 |
| Other cultural attractions | 5.5% | n = 47 |
| Wildlife Safari | 19.3% | n = 165 |
| River rafting | 9.6% | n = 81 |
| Hellgate Jetboats | 4.6% | n = 39 |
| Other water-related recreation | 10.7% | n = 91 |
| Running Y Ranch | 27.1% | n = 230 |
| Golfing | 10% | n = 85 |
| Wine tasting | 16.3% | n = 139 |
| National parks or monuments | 63.9% | n = 544 |
| Other outdoor recreation | 46.6% | n = 396 |
| Visiting family | 16.4% | n = 140 |
| Visiting friends | 16.6% | n = 141 |
| Business Trip | 6.4% | n = 55 |
| *Cases weighted (see Table A-3). | | |

The table above shows that National Parks or monuments was the activity chosen by the highest proportion of respondents (63.9%, n=544), followed by other outdoor recreation, then Running Y Ranch and Wildlife Safari. Wine tasting, visiting family, and visiting friends were all chosen by about 16 percent of respondents. All other activities were chosen by 10 percent or fewer respondents, although none were near zero. These results emphasize the variety of activities available in this region, and also that the most popular ones are outdoors.

Next we come to the heart of the study: a series of questions involving wildfire smoke and its impact on visitors to Southern Oregon. The first question is shown in the graph below:

Were wildfires or smoke from wildfires present during your visit to Southern Oregon?*



We see that 85.5% of our sample of visitors in 2017/18 experienced smoke during their visit, and only 14.5 % did not. For the large proportion who did experience smoke, the next question is to what degree it hindered their ability to take part in activities. Respondents were asked to choose a number from 1 to 10 to represent this, with 1 being no effect on their ability to take part in activities and 10 meaning they were prevented by the smoke from taking part in any activities. These results are shown in the next table.

To what degree did smoke from wildfires hinder your ability to take part in activities while in Southern Oregon?*

| | | |
|--|-------|---------|
| 1 – smoke had no impact | 12.6% | n = 91 |
| 2 | 10.2% | n = 73 |
| 3 | 12.9% | n = 94 |
| 4 | 5.8% | n = 42 |
| 5 – medium impact | 8% | n = 58 |
| 6 | 10.3% | n = 75 |
| 7 | 13.6% | n = 98 |
| 8 | 14% | n = 102 |
| 9 | 8% | n = 58 |
| 10 – due to the smoke, I was not able to take part in any activities | 4.6% | n = 33 |
| Mean = 5.22 Median = 6.00 Mode = 8 Standard Deviation = 2.794 | | |
| *Cases weighted (see Table A-3). | | |

The summary statistics at the bottom of the table help us interpret the results. The mean of 5.22 indicates an average perception of slightly above medium impact of the smoke on activities. The median of 6 means that half of the respondents were below this number and half were above. The mode of 8 indicates that the most respondents chose this number (14%, n=102). However, the standard deviation shows quite a bit of variation in the responses.

Respondents who experienced smoke during their visit were also asked if the smoke changed their plans during their trip. Results are shown in the table below (multiple responses were allowed):

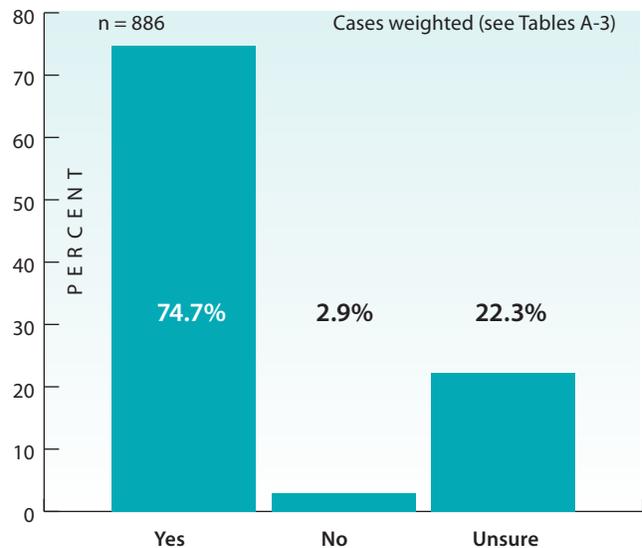
Did the smoke from wildfires change your plans during your trip?*

| | | |
|---|-------|---------|
| No, the smoke did not change my plans during my trip to Southern Oregon | 41.3% | n = 299 |
| Yes, I shortened my stay in Southern Oregon | 15.6% | n = 113 |
| Yes, I changed my travel destination to another location in Oregon | 12.8% | n = 93 |
| Yes, I restricted my outdoor activities during my stay in Southern Oregon | 40.4% | n = 293 |
| *Cases weighted (see Table A-3). | | |

Respondents were most likely to report that the smoke did not change their plans (41.3%, n=299), and/or that they restricted their outdoor activities (40.4%, n=293). The more drastic changes of shortening their stay or changing their travel destination were less common but not negligible.

Finally, the crucial question of future plans was explored in a series of questions. First, the full sample was asked: Do you plan on visiting Southern Oregon in the future? Results are shown in the graph below:

Do you plan on visiting Southern Oregon in the future?*



It is heartening that three-quarters of the full sample planned on a future visit (n=662). This number is not as high for this region as that of the Medford/Ashland region, undoubtedly because of the outdoor focus of the Klamath Basin/Middle and Upper Rogue/Umpqua Valley region’s activities. Correspondingly, the number who did not plan to come back (2.9%, n=26) or were unsure (22.3%,n=198) added up to a quarter of respondents who were not positive about returning to Southern Oregon.

Looking more closely at the reasons for not planning, or being unsure about planning, to return to Southern Oregon, the following table shows that smoke was not the main reason chosen by respondents. The following table shows this (multiple responses allowed):

Please indicate the reasons why you do not plan on visiting Southern Oregon or are unsure about visiting Southern Oregon again.*

| | | |
|--|-------|---------|
| Cost of the trip | 4.9% | n = 11 |
| I want to visit other areas | 61.9% | n = 138 |
| I have done everything I want to do in Southern Oregon | 9.4% | n = 21 |
| This was a one-time visit | 21.2% | n = 47 |
| Concerns or experience related to smoke from wildfires | 24.8% | n = 55 |

*Cases weighted (see Table A-3).

The response, “I want to visit other areas”, was chosen by 61.9% (n=138), while “concerns or experience related to smoke from wildfires” was chosen by only 24.8% (n=55). Nevertheless, it was important to probe these latter respondents further with the question, “What are your concerns or experiences related to smoke from wildfires in Southern Oregon?” Results are shown in the table below (multiple responses allowed):

What are your concerns or experiences related to smoke from wildfires in Southern Oregon?*

| | | |
|--|-------|--------|
| Lack of certainty about how wildfires or smoke will impact my trip | 76.2% | n = 42 |
| Potential health effects from wildfire smoke | 62.4% | n = 34 |
| Negative experience with smoke during a previous visit | 71% | n = 39 |

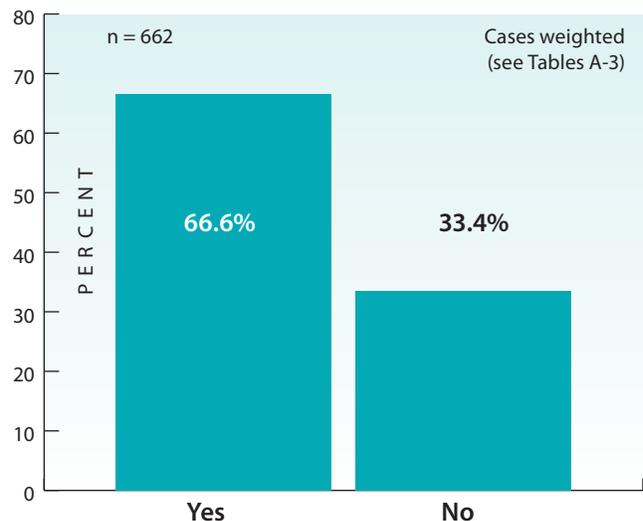
*Cases weighted (see Table A-3).



A substantial proportion chose each of the responses, with lack of certainty about how wildfires/smoke would impact the trip having the highest proportion (76.2%, n=42), negative experience with smoke next (71%, n=39), and potential health effects having the lowest (62.4%, n=34). All three responses appear to be important reasons for smoke to be a factor in making people hesitant or negative about planning a trip to Southern Oregon.

Turning to the three-quarters of the survey respondents who said yes, they plan on visiting Southern Oregon in the future, the issue of smoke was also explored in further questions. The first question was whether the possibility of smoke would be a factor in deciding when to visit. Results are shown in the graph below:

Is the possibility of smoke a factor in deciding when to visit Southern Oregon?*



For two-thirds of the respondents planning to visit in future, smoke is a factor in deciding when to visit, and for one-third it is not. For those for whom smoke is a factor, more details were requested as shown in the following table (multiple responses allowed):

How will the possibility of smoke have an impact on your planned visit?*

| | | |
|---|-------|---------|
| I will not visit when there are active wildfires | 62.7% | n = 271 |
| I will not visit when there is smoke from wildfires | 65.4% | n = 283 |
| I will not visit in July | 6.1% | n = 27 |
| I will not visit in August | 8.4% | n = 36 |
| I will visit in April | 3.7% | n = 16 |
| I will visit in May | 5.7% | n = 25 |
| I will visit in June | 5.8% | n = 25 |
| I will visit in September | 5.9% | n = 26 |
| I will visit in October | 4.4% | n = 19 |
| *Cases weighted (see Table A-3). | | |

The predominant responses involved not visiting when wildfires and/or smoke are present. With respect to specific months to visit or not visit, however, there were fairly small percentages choosing each option. Not visiting in August was chosen at a slightly higher rate than the rest.

Open-Ended Comments for Klamath Basin/Upper and Middle Rogue/Umpqua Valley Region

As discussed in the Medford/Ashland region analysis, there was an open-ended final survey question that asked, "Is there anything else you would like us to know?" This gave the respondents the opportunity to address any issue from the survey as well as items that were not included. Below is the analysis of the answers to that open-ended question for the Klamath/Umpqua/Rogue region.

In the Klamath/Umpqua/Rogue region, a total of 662 survey respondents indicated that they would return to Southern Oregon. Of those, 218 people answered the final open-ended question of the survey. According to the answers, smoke was either not present or was not perceived as a problem for 71 survey respondents. For some, the smoke was not as bad as they anticipated, "I have to admit we thought about cancelling our plans because of the smoke, but after contacting the Britt and the Weasku lodge where we stayed we decided to chance it. It turned out to be no problem because the wind blew the smoke away from where we were although it was hazy at times." Another responded, "Nope, we had a great time, amazing smoky sunsets." Others did not mention smoke from wildfires in their assessments of their visits, "Love Southern Oregon. Friendly helpful people and lovely scenery." "We typically visit Southern Oregon at least 2 to 3 times a year and love the area."

Conversely, 40 people reported very challenging experiences while visiting Southern Oregon, "We went to Crater Lake and could not even see the lake from the lodge. We had planned to spend a day visiting the lake and taking a boat tour of the lake and could not due to the smoke. Very disappointed!" "It was scary." "Smoke was quite heavy and impacted our time outdoors. We rafted on the Rogue, but we weren't impacted much. However, walking around town was uncomfortable." Visits were shortened due to smoke as described by 7 survey respondents, "I travel to Southern Oregon often for business. The smoke in the summer months keeps my visits during that time frame short. I also do not extend my time for personal activities such as fishing and golf." Although they indicated earlier on the survey that they are planning on returning to Southern Oregon, 14 respondents described not returning to the area or changing

locations, "Southern Oregon is a beautiful area, and I love to visit there. However, my age and health are such that I cannot be exposed to smoke from wildfires." One particularly memorable quote had a distinctive play on words, "The smoke was so bad at Crater Lake that we moved on to Ashland (no pun intended) for the last two days of our vacation."

Twelve people described specific physical problems that resulted from exposure to smoke, "Due to the smoke we lost value on our spent vacation dollars, we missed scenic views, it affected our respiratory health." Others had larger concerns about the impact the smoke had on the region, as 6 people indicated in comments such as, "The influence of wildfires is extensive both geographically and socially. Their influence on the resident populace and visitors is significant and should they become more common will be a hindrance to the economy as well as the environment."

Many of the responses included coping strategies for upcoming trips to Southern Oregon. Shifting the dates of future visits to avoid fire season was specifically mentioned by 14 respondents. "Planning to go this month (January) and July." "Southern Oregon is one of our favorite locations to visit. However, we will not travel if there is significant smoke due to wildfires, and very likely not from mid-July to the end of August." Others presented a "flexible" approach to travel that incorporates wildfire possibilities when planning trips to Southern Oregon. Thirteen respondents described this strategy, "Wildfire(s)/Smoke may or may not affect any plans to visit. Will evaluate as events warrant." "Southern Oregon is beautiful, and there is a huge variety of activities. Wildfires cannot be predicted, but we do think about them more as we plan." Smoke from wildfires is a problem for the entire west coast region, according to 14 respondents, and they have incorporated this already into their travel plans, as these quotes indicate: "My wife and I live in Bend, so we are used to smoky conditions and still try and get out and support local business!" "Lived in Idaho for 27 years and forest fire smoke is a way of life. Just deal with it and I won't let it slow me down."

Survey respondents in the Klamath/Umpqua/Rogue region also had feedback regarding the visitor experience; 9 people had specific suggestions and most of them centered around forest management, "Just a pity to travel halfway around the world to visit southern Oregon and a lot of awesome views hindered by fire smoke. But as international travelers we understand that these incidents do occur from time to time. Bushfire control burns should be restricted to given months and notified to intending visitors." "Reinstate responsible timber harvest!"

A total of 18 responses were various descriptions of trips to Southern Oregon or other comments that did not fit into any of the major themes presented here.

In the Klamath/Umpqua/Rogue region, 26 respondents said they would not return to Southern Oregon and 198 were unsure. Of those respondents, 8 people who are not coming back and 70 who were unsure about coming back answered the final open-ended question.

A total of 41 people gave comments that detailed negative outcomes from wildfire smoke. Thirty-three people explained how it impacted their experience, including shortening their trip or going to another location. "Just to capture the disappointment of not being able to see the beauty of Crater Lake because the smoke obscured the view and changed the colour". "I know you can't control fires, but they made for an unpleasant portion of our trip. I did however enjoy my visit to the southern Oregon coast." "Due to high wildfires risk, I am not sure I will come back to Oregon or California." Physical outcomes were concerns for 5 people, with asthma being a particular problem, "My husband has asthma and definitely could feel the effects of even light smoke."

There were 22 people who are not coming back or who are unsure, who reported positive experiences, "We thoroughly enjoyed our stay on the Rogue River. We also drove to K. Falls and up to Crater Lake and Diamond Lake." Two respondents wrote that they will come back at different times of the year, 2 had suggestions regarding keeping Crater Lake open in the smoke and enhancing lodging, and 11 respondents gave statements that did not fit in any of the categories described here.



Conclusion

The purpose of this study is to provide Southern Oregon businesses and decision-makers with information to assist in developing strategic responses to the possibility of wildfires in the future. These data on the experiences of 2017/18 summer visitors can guide regional decisions that affect both visitors and residents. By separating the findings into Medford/Ashland and Klamath/Rogue/Umpqua, we have provided data and analyses that can be used for solutions that respond to the unique natural and cultural attractions of each area.

This information from visitors can inform policies and choices in a range of areas. Tourists' interest in visiting during seasons in which there is a low likelihood of wildfires could lead to discussions about expanding seasonal availability of attractions. Visitors' behavior and responses to the smoke they encountered while they were in Southern Oregon in 2017/18 can provide insight into how to respond and manage similar scenarios going forward. The numerous measures of how wildfires and smoke from wildfires will affect future visitor decision-making can help organizations plan contingencies. The requests in the open-ended comments for more consistent and centralized information regarding wildfires and cultural and natural attraction availability can be a springboard for regional work to provide this resource for visitors and residents alike. Our hope is that the data found here will inform and enhance the discussions and decisions in Southern Oregon regarding tourism and the regional economy.

Appendix



Southern Oregon Visitor Smoke Survey

Start of Block: Demographics

Welcome

Welcome to the Southern Oregon Visitor Survey, administered by the Southern Oregon University Research Center. This survey is very short and will take about three minutes of your time. We truly appreciate your input and for those of you who complete the survey, you will have the opportunity to enter a drawing for one of forty \$50 Amazon gift cards.

Age What is your age?

- Under 18 years old
- 18-29 years old
- 30 - 39 years old
- 40-49 years old
- 50-59 years old
- 60 - 69 years old
- 70 years and older

Skip To: End of Block If What is your age? = Under 18 years old

Zipcode What is your zip code? If you do not live in the United States, please leave the field blank and answer the next question.

Skip To: End of Block If What is your zip code? If you do not live in the United States, please leave the field blank and... Is Matches Regex

Skip To: Country If What is your zip code? If you do not live in the United States, please leave the field blank and... Is Empty

Display This Question:

If If What is your zip code? If you do not live in the United States, please leave the field blank and... Text Response Is Empty

Country Please indicate your country of residence.

Year visit Please indicate the year of your last visit to Southern Oregon.

- I last visited Southern Oregon in 2017
- I last visited Southern Oregon in 2018
- I planned a visit to Southern Oregon in 2017 or 2018, but canceled my trip.
- I did not visit or plan a visit to Southern Oregon in 2017 or 2018

Skip To: End of Block If Please indicate the year of your last visit to Southern Oregon. = I did not visit or plan a visit to Southern Oregon in 2017 or 2018

Skip To: Cancel trip If Please indicate the year of your last visit to Southern Oregon. = I planned a visit to Southern Oregon in 2017 or 2018, but canceled my trip.

Display This Question:

If Please indicate the year of your last visit to Southern Oregon. = I planned a visit to Southern Oregon in 2017 or 2018, but canceled my trip.

Carry Forward Selected Choices from "Please indicate the year of your last visit to Southern Oregon."



Cancel trip I canceled my trip to Southern Oregon in 2017 or 2018 for the following reasons. Please check all that apply.

- Health reason
 - Financial reason
 - Family/Friend reason
 - Work-related reason
 - Wildfire or smoke from wildfire reason
 - Other weather-related reason
 - Other reason, please specify
-

- I last visited Southern Oregon in 2017
- I last visited Southern Oregon in 2018
- I planned a visit to Southern Oregon in 2017 or 2018, but canceled my trip.
- I did not visit or plan a visit to Southern Oregon in 2017 or 2018

Skip To: Plan to visit If I canceled my trip to Southern Oregon in 2017 or 2018 for the following reasons. Please check all... = Health reason

Skip To: Plan to visit If I canceled my trip to Southern Oregon in 2017 or 2018 for the following reasons. Please check all... = Financial reason

Skip To: Plan to visit If I canceled my trip to Southern Oregon in 2017 or 2018 for the following reasons. Please check all... = Family/Friend reason

Skip To: Plan to visit If I canceled my trip to Southern Oregon in 2017 or 2018 for the following reasons. Please check all... = Work-related reason

Skip To: Plan to visit If I canceled my trip to Southern Oregon in 2017 or 2018 for the following reasons. Please check all... = Wildfire or smoke from wildfire reason

Skip To: Plan to visit If I canceled my trip to Southern Oregon in 2017 or 2018 for the following reasons. Please check all... = Other weather-related reason

Skip To: Plan to visit If I canceled my trip to Southern Oregon in 2017 or 2018 for the following reasons. Please check all...(Other reason, please specify) Is Empty

Skip To: Plan to visit If I canceled my trip to Southern Oregon in 2017 or 2018 for the following reasons. Please check all...(Other reason, please specify) Is Not Empty

Month Visit Indicate the month of that visit to Southern Oregon.

- January
- February
- March
- April
- May
- June
- July
- August
- September
- October
- November
- December
- I do not remember which month I visited Southern Oregon

Skip To: Season If Indicate the month of that visit to Southern Oregon. = I do not remember which month I visited Southern Oregon

Skip To: End of Block If Indicate the month of that visit to Southern Oregon. = January

Skip To: End of Block If Indicate the month of that visit to Southern Oregon. = February

Skip To: End of Block If Indicate the month of that visit to Southern Oregon. = March

Skip To: End of Block If Indicate the month of that visit to Southern Oregon. = April

Skip To: End of Block If Indicate the month of that visit to Southern Oregon. = May

Skip To: End of Block If Indicate the month of that visit to Southern Oregon. = June

Skip To: End of Block If Indicate the month of that visit to Southern Oregon. = October

Skip To: End of Block If Indicate the month of that visit to Southern Oregon. = November

Skip To: End of Block If Indicate the month of that visit to Southern Oregon. = December

Display This Question:

If Indicate the month of that visit to Southern Oregon. = I do not remember which month I visited Southern Oregon

Season Which season did you visit Southern Oregon?

- Summer
- Fall
- Spring
- Winter

Skip To: End of Block If Which season did you visit Southern Oregon? = Spring

Skip To: End of Block If Which season did you visit Southern Oregon? = Winter

Seasons to visit Are you interested in visiting Southern Oregon in the future during the spring, fall, or winter? Please check all that apply.

- I am interested in visiting in the spring
- I am interested in visiting in the fall
- I am interested in visiting in the winter
- No, I am only interested in visiting in the summer
- Not sure
- Other _____

Activities While you were in Southern Oregon, which of the following activities did you participate in? (Please check all that apply.)

- Oregon Shakespeare Festival
- Other cultural attractions (e.g. Britt Festival, other area theaters)
- Wildlife Safari
- River rafting
- Hellgate Jetboats
- Other water-related recreation (e.g. boating, fishing, etc.)
- Running Y Ranch
- Golfing
- Wine tasting
- National Parks or Monuments (e.g. Crater Lake, Oregon Caves, Cascade Siskiyou Monument)
- Other outdoor recreation (e.g. hiking, biking, running, horseback riding)
- Visiting family
- Visiting friends
- Business trip
- Other, please specify _____

Smoke impact Were wildfires or smoke from wildfires present during your visit to Southern Oregon?

Yes

No

Skip To: Degree of smoke If Were wildfires or smoke from wildfires present during your visit to Southern Oregon? = Yes

Display This Question:

If Were wildfires or smoke from wildfires present during your visit to Southern Oregon? = Yes

Degree of smoke To what degree did smoke from wildfires hinder your ability to take part in activities while in Southern Oregon? Please choose from 1 - 10.

- 1 - The smoke had no effect on my ability to take part in activities.
- 2
- 3
- 4
- 5
- 6
- 7
- 8
- 9
- 10 - Due to the smoke, I was not able to take part in any activities.

Skip To: Change plans If To what degree did smoke from wildfires hinder your ability to take part in activities while in S... = 1 - The smoke had no effect on my ability to take part in activities.

Skip To: Change plans If To what degree did smoke from wildfires hinder your ability to take part in activities while in S... = 2

Skip To: Change plans If To what degree did smoke from wildfires hinder your ability to take part in activities while in S... = 3

Skip To: Change plans If To what degree did smoke from wildfires hinder your ability to take part in activities while in S... = 4

Skip To: Change plans If To what degree did smoke from wildfires hinder your ability to take part in activities while in S... = 5

Skip To: Change plans If To what degree did smoke from wildfires hinder your ability to take part in activities while in S... = 6

Skip To: Change plans If To what degree did smoke from wildfires hinder your ability to take part in activities while in S... = 7

Skip To: Change plans If To what degree did smoke from wildfires hinder your ability to take part in activities while in S... = 8

Skip To: Change plans If To what degree did smoke from wildfires hinder your ability to take part in activities while in S... = 9

Skip To: Change plans If To what degree did smoke from wildfires hinder your ability to take part in activities while in S... = 10 - Due to the smoke, I was not able to take part in any activities.

Skip To: Change plans If To what degree did smoke from wildfires hinder your ability to take part in activities while in S... = 1 - The smoke had no effect on my ability to take part in activities.

Display This Question:

If Were wildfires or smoke from wildfires present during your visit to Southern Oregon? = Yes

Change plans Did the smoke from wildfires change your plans during your trip? Please check all that apply.

- No, the smoke did not change my plans during my trip to Southern Oregon.
- Yes, I shortened my stay in Southern Oregon
- Yes, I changed my travel destination to another location in Oregon.
- Yes, I restricted my outdoor activities during my stay in Southern Oregon
- Other, please specify _____

Plan to visit Do you plan on visiting Southern Oregon in the future?

- Yes
- No
- Unsure

Skip To: When visit If Do you plan on visiting Southern Oregon in the future? = Yes

Skip To: Reasons not visit If Do you plan on visiting Southern Oregon in the future? = No

Skip To: Reasons not visit If Do you plan on visiting Southern Oregon in the future? = Unsure

Display This Question:

If Do you plan on visiting Southern Oregon in the future? = Yes

When visit Is the possibility of smoke from wildfires a factor in deciding when you will visit?

- Yes
- No

Skip To: Smoke next visit If Is the possibility of smoke from wildfires a factor in deciding when you will visit? = Yes

Display This Question:

If Do you plan on visiting Southern Oregon in the future? = No

Or Do you plan on visiting Southern Oregon in the future? = Unsure

Reasons not visit Please indicate the reasons why you do not plan on visiting Southern Oregon or are unsure about visiting Southern Oregon again. Check all that apply.

- Cost of the trip
- I want to visit other areas
- I have done everything I want to do in Southern Oregon
- This was a one-time visit
- Concerns or experience related to smoke from wildfires
- Other, please specify _____

Skip To: Smoke concerns If Please indicate the reasons why you do not plan on visiting Southern Oregon or are unsure about v... = Concerns or experience related to smoke from wildfires

Display This Question:

If Please indicate the reasons why you do not plan on visiting Southern Oregon or are unsure about v... = Concerns or experience related to smoke from wildfires

Smoke concerns What are your concerns or experiences related to smoke from wildfires in Southern Oregon? Please choose all that apply.

- Lack of certainty about how wildfires or smoke will impact my trip
- Potential health effects from wildfire smoke
- Negative experience with smoke during a previous visit
- Other, please specify _____

Display This Question:

If Is the possibility of smoke from wildfires a factor in deciding when you will visit? = Yes

Smoke next visit How will the possibility of smoke have an impact on your planned visit? Please check all that apply.

- I will not visit when there are active wildfires
- I will not visit when there is smoke from wildfires
- I will not visit in July
- I will not visit in August
- I will visit in April
- I will visit in May
- I will visit in June
- I will visit in September
- I will visit in October
- Other, please specify _____

Anything else Is there anything else you would like us to know?

| Name of Organization | Location | Sampling Frame | Proportion of Sampling Frame | Respondent Frequency | Proportion of Respondents | Case Weights* |
|-----------------------------|-----------------|-----------------------|-------------------------------------|-----------------------------|----------------------------------|----------------------|
| Oregon Shakespeare Festival | Ashland | 7282 | 31.7 | 609 | 32.0 | 0.99 |
| Ashland Hills Hotel | Ashland | 4564 | 19.9 | 163 | 8.6 | 2.31 |
| Ashland Springs Hotel | Ashland | 2051 | 8.9 | 93 | 4.9 | 1.82 |
| Inn at the Commons | Medford | 2041 | 8.9 | 65 | 3.4 | 2.61 |
| Lithia Springs Hotel | Ashland | 1537 | 6.7 | 57 | 3.0 | 2.23 |
| Peerless Hotel | Ashland | 2189 | 9.5 | 29 | 1.5 | 6.35 |
| Running Y Ranch Resort | Klamath Falls | 1186 | 5.2 | 243 | 12.8 | 0.40 |
| Wildlife Safari | Winston | 604 | 2.6 | 68 | 3.6 | 0.73 |
| Prospect Hotel | Prospect | 999 | 4.3 | 281 | 14.8 | 0.29 |
| The Lodge at Riverside | Grants Pass | 234 | 1.0 | 120 | 6.3 | 0.16 |
| Weasku Inn | Rogue River | 161 | 0.7 | 102 | 5.4 | 0.13 |
| Wine Country Inn | Jacksonville | 141 | 0.6 | 75 | 3.9 | 0.16 |
| Total | | 22992 | 100.0 | 1905 | 100 | |

*Case weights were calculated by dividing the proportion of sampling frame by the proportion of respondents for each host organization.

Table A-2: Sampling Frame, Respondent Sample, and Case Weights by Host Organization (Medford/Ashland Region)

| Name of Organization | Location | Sampling Frame | Proportion of Sampling Frame | Respondent Frequency | Proportion of Respondents | Case Weights* |
|-----------------------------|----------|----------------|------------------------------|----------------------|---------------------------|---------------|
| Oregon Shakespeare Festival | Ashland | 7282 | 37.0 | 609 | 59.9 | 0.62 |
| Ashland Hills Hotel | Ashland | 4564 | 23.2 | 163 | 16.0 | 1.45 |
| Ashland Springs Hotel | Ashland | 2051 | 10.4 | 93 | 9.2 | 1.14 |
| Inn at the Commons | Medford | 2041 | 10.4 | 65 | 6.4 | 1.62 |
| Lithia Springs Hotel | Ashland | 1537 | 7.8 | 57 | 5.6 | 1.39 |
| Peerless Hotel | Ashland | 2189 | 11.1 | 29 | 2.9 | 3.90 |
| Total | | 19664 | 100.0 | 1016 | 100.0 | |

*Case weights were calculated by dividing the proportion of sampling frame by the proportion of respondents for each host organization.

Table A-3: Sampling Frame, Respondent Sample, and Case Weights by Host Organization (Klamath Basin/Middle and Upper Rogue/Umpqua Valley Region)

| Name of Organization | Location | Sampling Frame | Proportion of Sampling Frame | Respondent Frequency | Proportion of Respondents | Case Weights* |
|------------------------|---------------|----------------|------------------------------|----------------------|---------------------------|---------------|
| Running Y Ranch Resort | Klamath Falls | 1186 | 35.6 | 243 | 27.3 | 1.30 |
| Wildlife Safari | Winston | 604 | 18.1 | 68 | 7.6 | 2.37 |
| Prospect Hotel | Prospect | 999 | 30.0 | 281 | 31.6 | 0.95 |
| The Lodge at Riverside | Grants Pass | 234 | 7.0 | 120 | 13.5 | 0.52 |
| Weasku Inn | Rogue River | 161 | 4.8 | 102 | 11.5 | 0.42 |
| Wine Country Inn | Jacksonville | 141 | 4.3 | 75 | 8.4 | 0.51 |
| Total | | 3328 | 100.0 | 889 | 100 | |

*Case weights were calculated by dividing the proportion of sampling frame by the proportion of respondents for each host organization.

Southern Oregon Wildfire Insight Report

APRIL 2019

Michelle Janke, Partner
Colin Stoetzel, Associate Principal
Alexandra Reese, Associate Principal





Southern Oregon Wildfire and Visitor Perception Focus Group Supplement

Between March 6th and 13th, Coraggio Group, a Portland based management consulting firm specializing in the Travel and Tourism industry, ran three focus groups—two in Portland and one in San Francisco—to explore the impact of wildfire/smoke on travel behavior in Southern Oregon. Travel Southern Oregon selected focus group participants from the population of survey respondents who visited Southern Oregon in the wildfire season of 2017 and 2018 and opted-in to additional contact.

We designed these focus groups to further explore and build on the survey findings provided by Southern Oregon University Research Center (SOURCE) summarized in the first section of this report. We asked participants of each focus group a series of questions in the following topic areas:

- General Perception of Southern Oregon as a Travel Destination
- Wildfire Impact on Travel Itineraries
- Wildfire Research on Travel Plans
- Influencers of Travel to Southern Oregon
- Potential Behavior Shifts as a Result of Wildfires

In total, we spoke with 10 people who visited Southern Oregon in the summer of 2017 or 2018. The opinions summarized in the following report should not be considered statistically significant given the limited participation, but rather suggestive of the type of opinions the broader group may hold.

Key Takeaways:

1. **Wildfire/smoke is considered the new norm for traveling in Southern Oregon and Northern California.**
2. **A love for Southern Oregon and its tourism experience keeps people coming back, and wildfire/smoke has had a minimal impact on people's willingness to travel in the future.**
3. **Although wildfire/smoke has not significantly impacted travel behavior among Oregon Shakespeare Festival (OSF) attendees in the past, focus group attendees say this may not always be the case.**
4. **Southern Oregon outdoor visitors are more impacted by wildfire and smoke and more likely to cancel trips.**
5. **Events, plays, lodging rates, and weather are key influencers of visitors' willingness to shift travel into the shoulder seasons.**
6. **Travelers feel well educated about the wildfire/smoke conditions surrounding their travel plans but understand conditions can change at a moment's notice.**

Demographics and Segments:



7 out of 10

focus group participants acknowledge that wildfire/smoke impacted their trip



3 out of 10

changed their itinerary



1 out of 10

report having less of a desire to travel to Southern Oregon



8 out of 10

would consider shifting future travel to spring or fall months



100%

experienced wildfire/smoke on their trip



100%

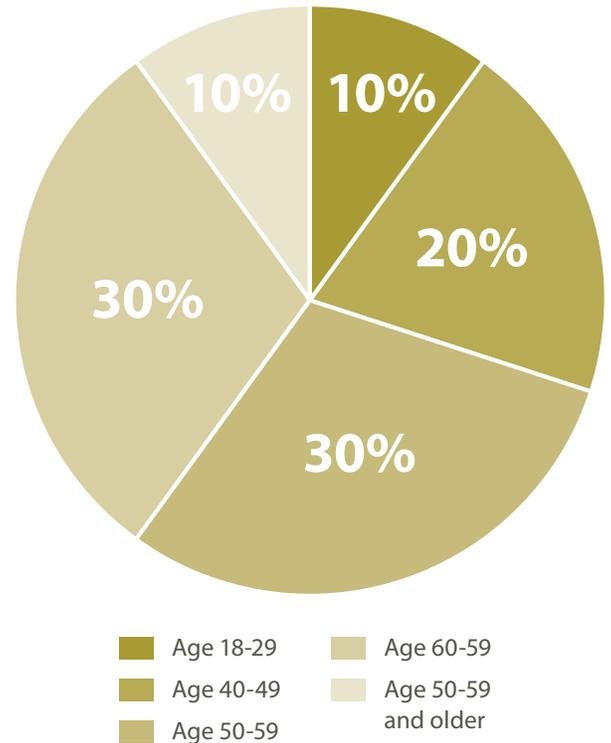
traveled during July or August



90%

plan of visiting Southern Oregon again

Focus Group Participant Age



Key Drivers of Visitation

a. The Oregon Shakespeare Festival (OSF)

OSF is the primary driver of visitation to Southern Oregon. Other tourism assets, mainly outdoor activities in the area, are secondary, complementary considerations for many visitors.

b. Regional Events (Music festivals, the Eclipse, Crater Lake Marathon)

Like the OSF, other large events also help drive and anchor visitation to the area.

c. Outdoor Attractions (the Rogue River, Crater Lake)

For outdoor enthusiasts, Southern Oregon outdoor assets are primary drivers of visitation. Trips to these areas are opportunistic and camping oriented.

d. Bleisure Travel

A segment of Southern Oregon travelers is purely opportunistic. They extend business trips for 2-3 days to enjoy Southern Oregon's outdoor and cultural assets.

Focus Group Themes

The following is a summation of focus group key themes and findings. Themes were identified using cluster analysis of topics discussed throughout the focus groups.



1 Wildfire/smoke is considered the new norm for traveling in Southern Oregon and Northern California.

- The majority of focus group participants indicated that wildfire/smoke impacted their trips, but many understand that this is just a natural part of traveling to these locations in the summer season. Therefore is not a significant deterrent to visitation.
- Because wildfire/smoke has become the new norm, most visitors are aware its potential impact on their travel plans. As a result, they are prepared to shift their plans accordingly and deal with the environmental affects.
- Wildfire/smoke could become more of a deterrent for travel if they become too large, create visible fire near towns, and threaten roads—all factors that increase a visitor’s sense of danger.

“If I can see the fires....I would think about it and worry. It would freak me out. If people see it, I would imagine people not going back.”

“I didn’t think to change my plans because the fires are just a fact of life. You just go through it.”

Implications

With wildfire/smoke being the new norm and itinerary shifts becoming more common, Southern Oregon tourism stakeholders should consider developing itineraries that provide alternative travel options and experiences that are less affected by smoke. Additionally, Southern Oregon should evaluate its fire mitigation and communication strategy to assess if mitigation efforts are adequate and if the communication of existing efforts is clear, as awareness of efforts can help ease concerns of travel.



“I’m a mountain girl, so you can’t take me out of the mountains. And, there are the same concerns [wildfire/smoke] elsewhere. So, you just have to choose your timing.”



2 A love for Southern Oregon and its tourism experience keeps people coming back, and wildfire/smoke has had a minimal impact on people's willingness to travel in the future.

- Aligning with the SOURCE report, focus group participants confirmed that wildfire has a minimal impact on their willingness to travel to Southern Oregon.
- Visitors perceive Southern Oregon as a one-of-a-kind destination that is unique and differentiated. They are reluctant to abandon the destination due to recent spikes in wildfire/smoke.
- The OSF, quaint Main Street experiences like Ashland and Klamath Falls, and second-to-none natural resource assets such as Crater Lake and the Rogue River drive destination perception. This itinerary generates a committed, loyal visitor segment.
- While focus group participants suggest that wildfire/smoke does not threaten their willingness to travel now, some provided factors that could impact their willingness to travel to Southern Oregon in the future. These factors are largely unrelated to wildfire and more aligned with life events or market conditions. They include:
 - » Becoming empty nesters and no longer having travel plans tied to summers and school schedules
 - » Retirement and more expendable time that allows for traveling to more distant destinations and events
 - » Increased traffic congestion
 - » Increased congestion of state parks, trails, and natural resource attractions like Crater Lake
 - » The closing of stores, downturn of commercial areas and the related impacts on main street experiences



1 out of 10

report having less of a desire to travel to Southern Oregon



7 out of 10

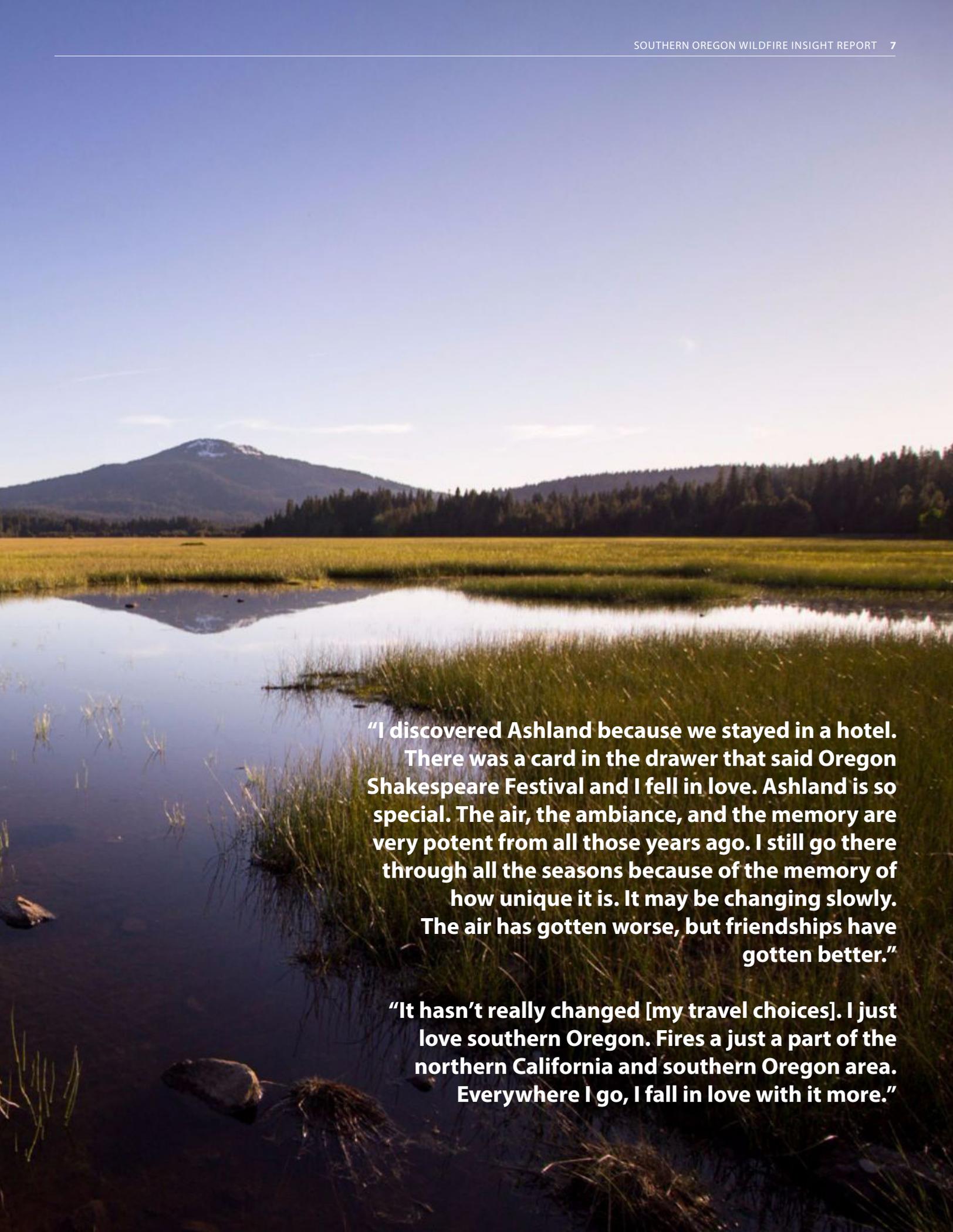
focus group participants acknowledge that wildfire/smoke impacted their trip

“I love the area. One reason I go is I want to continue to put money into Southern Oregon. I want it to be there when things get better. So if wildfire/smoke are ‘iffy,’ I still go.”

Implications

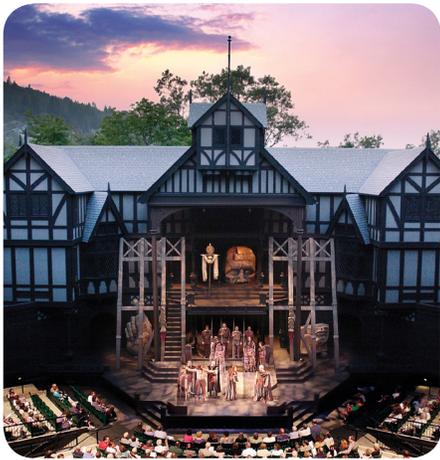
While wildfire/smoke does not currently impact the travel patterns of most loyal Southern Oregon visitors, Travel Southern Oregon and its partners should monitor this affinity to anticipate potential shifts in perception/travel behavior. With Southern Oregon being a destination driven by repeat visitors, monitoring the experience of this base is imperative to maintaining a healthy tourism industry.

Travel Southern Oregon and its partners may also consider implementing destination management strategies to mitigate the potential impacts of wildfire/smoke on travel behavior. For example, those strategies could include product development to attract visitors during the shoulder season, coordination with local events and attractions to spread popular events across the summer months or regulations to reduce the economic burden wildfire/smoke may have on local travel dependent businesses.



“I discovered Ashland because we stayed in a hotel. There was a card in the drawer that said Oregon Shakespeare Festival and I fell in love. Ashland is so special. The air, the ambiance, and the memory are very potent from all those years ago. I still go there through all the seasons because of the memory of how unique it is. It may be changing slowly. The air has gotten worse, but friendships have gotten better.”

“It hasn’t really changed [my travel choices]. I just love southern Oregon. Fires are just a part of the northern California and southern Oregon area. Everywhere I go, I fall in love with it more.”



3 Although wildfire/smoke has not significantly impacted travel behavior among Oregon Shakespeare Festival attendees in the past, focus group attendees say this may not always be the case.

- The OSF has a dedicated base that is not easily deterred from Festival attendance.
- The flexibility policies that OSF has adopted have helped ensure a positive visitor experience even in the face of wildfire/smoke. These policies include keeping patrons informed of any cancellations, refunding tickets, or relocating events.
- Theatre patrons love Ashland's outdoor venue, world-class performances, and comfortable Southern Oregon evenings. It is a world-class experience. The impact of sporadic and unpredictable wildfire/smoke on the theater's outdoor schedule and key plays could diminish the OSF brand over time.
- Some avid Shakespeare enthusiasts are less opportunistic travelers than their outdoor-oriented cousins or more casual playgoers. They plan ahead, book flights and lodging, and order tickets early in order to reserve seating at the most popular outdoor plays. As such, this travel segment is more averse to canceling plans, but also more likely to cancel plans going forward or search for other Shakespeare alternatives.
- The presence of smoke in OSF's outdoor venue also creates a concern among elderly patrons, who consider increased smoke exposure hazardous to their health.
- The more opportunistic patrons are less concerned by smoke, indicating that they will continue to attend OSF and just monitor for favorable weather, a luxury they have given their willingness to book late and shift travel plans.

“I’ve been wanting to try other Shakespeare festivals, and maybe now it’s time to expand.”

“I really welcome the Shakespeare festival and just started going two years ago. I love live theater and typically go to NY. I will continue to go [to OSF] when there is smoke.”

Implications

The OSF is critical to a thriving Southern Oregon tourism industry. How can Southern Oregon tourism stakeholders work with OSF to protect the outdoor experience that OSF has become known for? Opportunities include reallocating popular plays from across the summer months into shoulder months and identifying different alternative venues with assigned seating. While current ticketing policies have been well received, this approach may not be a long-term solution. Other options include expanding itineraries to provide festival patrons with alternative experiences or activities to consider should wildfire/smoke impact their play-oriented travel plans, redirecting them to other regional assets and minimizing the impact of any potential cancellations.



“The thought [to not return] occurred to us after last year...It’s so unpredictable, so we’re doing a five-day trip instead of ten-day trip because chances are plays will be canceled.”

“It was questionable if the play was going to happen in the outdoor venue, which was discouraging.”

“I couldn’t see several of the shows I wanted to. One was in the high school and that was a different experience. We went to a bar instead and watched the Giants game.”



4 Southern Oregon outdoor visitors are more impacted by wildfire/smoke and most likely to cancel trips.

- Visitors who travel to Southern Oregon to hike, bike, camp, or fish are impacted most by wildfire/smoke.
- These travelers tend to be in-state and opportunistic, often extending business trips or tagging on a few days while visiting family and friends.
- Smoke is more of an issue for this travel segment because they are participating in more active, outdoor activities, vs. visitors who go to plays, stay in hotels, and use cities and towns as a hub for travel.
- This segment is more open to canceling plans or cutting trips short because their upfront, committed travel costs are not as high as event based (OSF, Eclipse) travelers and they can wait for more favorable conditions.
- Some outdoor visitors suggested their outdoor safety is more of a focus and that a lack of wildfire-related information on trails can discourage them from hiking or traveling.

“I’m warier than I used to be about being in a forest. So, that’s on my mind.”

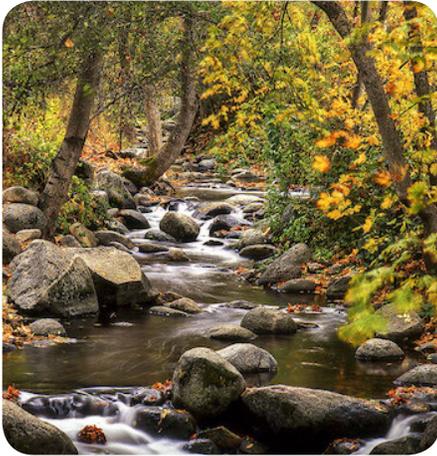
“We didn’t hike as far out; we didn’t know where there was danger, so we didn’t go on long hikes.”

Implications

Southern Oregon is an outdoor visitor's dream. These visitors tend to be more flexible and willing to travel in all four seasons. Southern Oregon could evaluate their outdoor experience marketing efforts to see if their shoulder and winter season product portfolio is strong and has broad awareness. Additionally, Southern Oregon tourism stakeholders could coordinate and provide easily accessible, last minute, lodging opportunities and discounted pricing to incentivize outdoor travelers to keep their travel plans and shift their itineraries to Southern Oregon’s downtown experience and other tourism assets not as impacted by smoke.



“I canceled a trip. We were going to camp but decided not to. We would have gone if we had a hotel room, because you can escape it. You can’t when there is too much smoke you’re in a tent.”



5 Events, plays, lodging rates, and weather are key influencers of visitors' willingness to shift travel into the shoulder seasons.

- Events and plays at OSF tend to anchor travel to Southern Oregon. Most travelers are drawn to plays and secondarily engage with Southern Oregon's natural assets. Spreading new or existing events (food tours, music festivals) and popular plays into shoulder seasons are seen as potential drivers of shifting travel patterns.
- Weather also plays an important role in seasonal travel. Some visitors are dedicated to the summer season. They value the summer heat, evening plays, and deep blues of Southern Oregon rivers and Crater Lake as only experienced in summer. These visitors are reluctant to shift activities to the shoulder seasons due to the cold and its impact on these activities.
- Some believe Southern Oregon is a three-season destination. They appreciate the less congested shoulder seasons and would happily shift travel.
- Lower lodging rates incentivize some visitors to travel in shoulder seasons.

“If the summers weren't so untenable, I would shift. I would go in the spring and fall if I had no other choice. I would miss some shows or find another Shakespeare festival.”

“For me, the events would have to shift. A lot of great shows are in the summer, but most things we do could be done over three seasons.”

“A one-time unique event that is hosted within driving distance would help. It could be a winery fest, a brew fest...if there is something that is unique, I would go.”

Implications

With events anchoring travel to Southern Oregon, tourism stakeholders should begin to identify opportunities for more regional events not tied to OSF. A larger roster of events such as food tours, outdoor events, and music festivals would create more opportunities to draw visitors to Southern Oregon. The timing of these events is key and should overlap into shoulder seasons (but not too far), as while some believe Southern Oregon is a three-season destination, many dedicated visitors are firm that the magic is correlated to the favorable warm weather Southern Oregon provides. Pricing is a vehicle to help convert travelers to shoulder months but should also be evaluated in the peak season to help offset the impact of wildfire/smoke and balance visitors' perceived value.

A person is lying on their back on a white blanket on a grassy field at night. They are wearing a dark jacket and a headlamp. To their right is a yellow tent. In the background, there is a calm lake reflecting the starry night sky. The sky is filled with numerous stars, and a faint glow is visible on the horizon. The overall scene is peaceful and serene.

“The outdoor theatre in summer is special. Where else can I go to an outdoor play?”

“Crater Lake is a little different in the summer, you can’t see the same blue other times of the year and the weather is just amazing.”



6 Travelers feel well educated about the wildfire/smoke conditions surrounding their travel plans but understand conditions can change at a moment's notice.

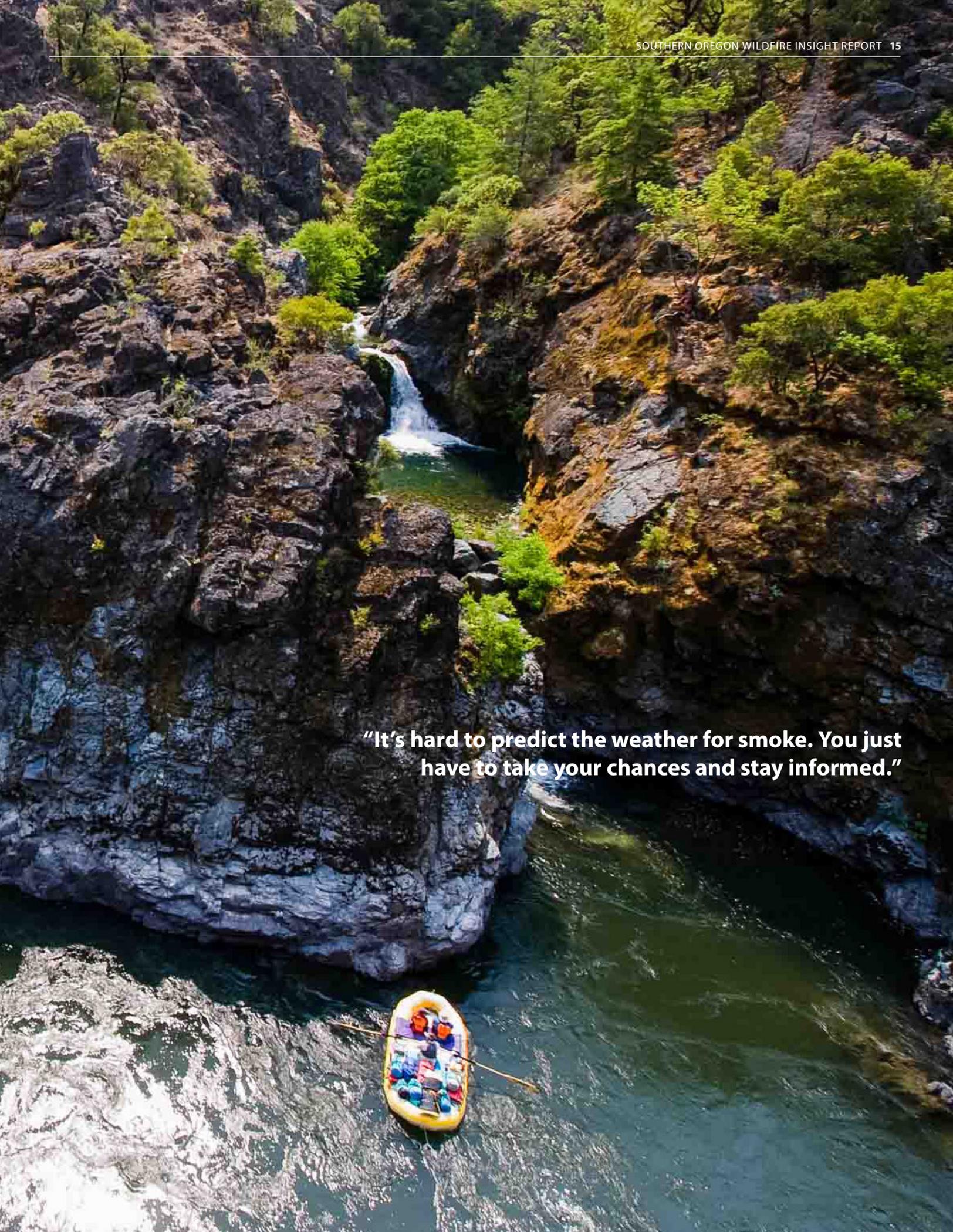
- Travelers to Southern Oregon understand wildfire/smoke and how to inform themselves about it. They primarily use:
 1. Local news
 2. Webcams on ODOT website
 3. Social media
 4. State park websites
 5. Friends and relatives
- Regardless of how travelers inform themselves about wildfires, they recognize that information can be delayed because of how quickly weather patterns can shift.
- Some less-knowledgeable travelers understand that wildfire/smoke was present during their travel plans but didn't understand the magnitude of it.
- More communication on best practices (safety, evacuation, etc.) in wildfire season is generally valued.
- Others believe clearer and more prominent route detours would help to counter fears associated with traveling in a wildfire environment.

“Prominently posting what one should do in the case of a rogue fire would be helpful. Also, providing some general recommendations (e.g., always bring water, alternate routes) would be helpful.”

“Smoke changes. I went for the marathon and, up until the day before, we didn't know if it was happening or not. But we went anyways, and the air was great on the day of the marathon.”

Implications

Visitors understand the variability of the weather and the danger in assuming conditions are the same day-to-day. Tourism stakeholders should focus their attention on proactive in-market education and wayfinding to help direct visitors to and from destinations and activities during wildfire seasons. Stakeholders could also evaluate their social media and usage of live-feed help incentivize opportunistic visitor travel or alleviate any misconceived perceptions of wildfire/smoke.

An aerial photograph of a river flowing through a deep, rocky canyon. A small waterfall cascades into a pool of water in the middle of the canyon. In the foreground, a yellow inflatable raft with several people and gear is on the river. The canyon walls are steep and covered with green trees and shrubs. The water is a deep green color.

"It's hard to predict the weather for smoke. You just have to take your chances and stay informed."

Southern Oregon Wildfire and Visitor Perception Study

APRIL 2019



coraggiogroup

