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Seasonality: Identify where season could be extended by region and county

Based on STR (hotel data). The figures are broken down by month to show the percentage of rooms sold (or demand) over the course of a year for the state, by tourism region, and by specific counties. You can see that most overnight stays (rooms sold) increase to the highest levels for the majority of counties during the months of June, July and August. Hotel data correlates with overall visitation and visitor spend, therefore we can safely assume that visitation patterns (seasonality) will be similar to lodging demand. This data allows identifying shoulder season for the specific county/counties where the project you are proposing is located. The data on the table corresponds to the average demand by month for calendar years 2023, 2024 and 2025.

	January	February	March	April	May	June	July	August	September	October	November	December
Statewide	6.4%	6.7%	8.0%	8.1%	8.7%	9.9%	10.5%	10.3%	9.4%	8.8%	7.0%	6.2%
Central Oregon	5.9%	6.0%	7.7%	8.2%	9.1%	10.3%	11.1%	10.6%	9.9%	8.9%	6.3%	6.1%
Eastern OR	5.7%	5.9%	7.8%	8.2%	9.3%	10.4%	10.7%	10.4%	9.8%	9.1%	7.0%	5.7%
Coast	5.8%	6.1%	8.0%	8.0%	8.8%	10.0%	11.2%	11.3%	10.1%	8.5%	6.5%	5.7%
Mt Hood/CRG	6.2%	6.5%	7.8%	8.2%	9.2%	9.9%	10.8%	10.5%	9.6%	8.6%	6.6%	6.1%
WV	6.8%	7.0%	8.1%	8.2%	8.7%	9.8%	10.2%	10.0%	9.2%	8.5%	7.3%	6.3%
Southern	5.9%	5.9%	7.4%	7.8%	9.0%	10.5%	11.1%	10.5%	9.9%	9.0%	6.9%	6.0%
Portland	7.0%	7.4%	8.3%	8.1%	8.4%	9.6%	9.9%	9.9%	8.8%	8.9%	7.3%	6.5%
Baker	5.5%	6.3%	7.2%	7.4%	9.1%	10.9%	11.8%	11.0%	10.2%	9.3%	6.2%	5.0%
Benton	6.8%	7.3%	8.5%	8.1%	8.5%	10.5%	9.7%	9.3%	9.8%	8.5%	7.4%	5.4%
Clackamas	7.3%	7.5%	8.3%	7.9%	8.3%	9.6%	9.9%	9.9%	8.9%	8.5%	7.1%	6.9%
Clatsop	5.5%	5.9%	7.9%	8.1%	9.1%	10.1%	11.5%	11.8%	10.4%	8.4%	6.2%	5.2%
Coos	6.5%	6.2%	7.9%	7.7%	8.5%	9.9%	10.5%	10.6%	10.0%	8.6%	7.2%	6.2%
Curry	6.3%	5.5%	7.2%	7.6%	9.0%	10.1%	11.4%	11.4%	10.3%	9.0%	6.4%	5.7%
Deschutes	6.0%	6.1%	7.7%	8.2%	9.1%	10.2%	11.1%	10.7%	9.8%	8.8%	6.3%	6.0%
Douglas	6.2%	6.1%	7.7%	7.9%	8.7%	10.5%	11.3%	11.0%	9.9%	8.3%	6.7%	5.8%
Hood River	5.4%	5.9%	7.6%	8.4%	9.4%	9.8%	10.8%	10.6%	9.9%	9.2%	6.8%	6.3%
Jackson	6.2%	6.2%	7.7%	8.0%	9.1%	10.4%	10.8%	10.1%	9.5%	8.8%	7.0%	6.3%
Jefferson	5.3%	5.4%	7.5%	9.1%	9.6%	11.0%	11.9%	11.0%	9.9%	8.4%	5.8%	5.1%
Josephine	5.8%	5.9%	7.6%	7.6%	9.0%	10.4%	11.1%	10.6%	9.9%	8.8%	6.9%	6.4%
Klamath	5.1%	5.2%	6.5%	7.7%	8.9%	10.9%	12.0%	11.2%	11.0%	10.1%	6.3%	5.1%
Lane	6.8%	6.8%	8.0%	8.1%	8.6%	9.8%	10.3%	10.2%	9.4%	8.6%	7.2%	6.0%
Lincoln	5.9%	6.3%	8.2%	8.0%	8.8%	9.8%	11.2%	11.2%	9.9%	8.4%	6.6%	5.8%
Linn	6.9%	6.9%	8.0%	8.2%	8.4%	10.2%	10.3%	9.9%	9.3%	8.4%	7.2%	6.5%
Malheur	5.3%	5.5%	7.4%	7.9%	9.6%	10.9%	10.9%	10.6%	9.9%	9.5%	6.8%	5.8%
Marion	6.6%	6.9%	8.3%	8.3%	8.8%	9.7%	10.3%	10.1%	9.0%	8.4%	7.2%	6.5%
Morrow	6.7%	6.6%	8.1%	8.6%	8.8%	9.6%	10.1%	10.0%	9.1%	9.0%	7.3%	6.0%
Multnomah	6.7%	7.3%	8.3%	8.2%	8.4%	9.6%	10.0%	10.0%	8.9%	9.1%	7.2%	6.3%
Umatilla	6.0%	6.1%	8.3%	8.6%	9.1%	10.0%	10.0%	10.0%	9.5%	9.0%	7.3%	6.0%
Union	5.5%	6.0%	7.5%	7.7%	9.3%	10.6%	10.9%	10.5%	10.1%	9.5%	7.0%	5.6%
Wasco	5.8%	6.2%	7.2%	8.2%	9.3%	10.1%	11.4%	10.9%	10.1%	8.9%	6.4%	5.4%
Washington Co	7.5%	7.5%	8.4%	8.0%	8.4%	9.5%	9.7%	9.6%	8.4%	8.5%	7.6%	6.9%
Yamhill	6.2%	6.4%	7.7%	7.8%	8.9%	10.0%	10.6%	10.8%	9.5%	9.2%	7.0%	5.9%

Economic Impact data: Estimate potential economic impact by understanding past visitor spending

Every year Travel Oregon publishes the “Economic Impact of Travel” report, prepared by Dean Runyan Associates. This report offers estimates for spending, overnight visits, jobs generated and taxes collected that can be attributed to folks traveling at least 50 miles or staying overnight in their destination. The report breaks down the data **statewide, by region and by county**.

You can find the full report here:

<https://industry.traveloregon.com/research/oregon-travel-impacts/>

Please note that the latest report covers economic impact for calendar year 2024. Our 2025 study will be released on our website in May 2026.

To find your county, scroll to the table of contents and enter the number to the page navigation (depending on what pdf reader you are using, the location of the page navigation may shift around). For example for Lincoln County we’d want to go to page number 193.

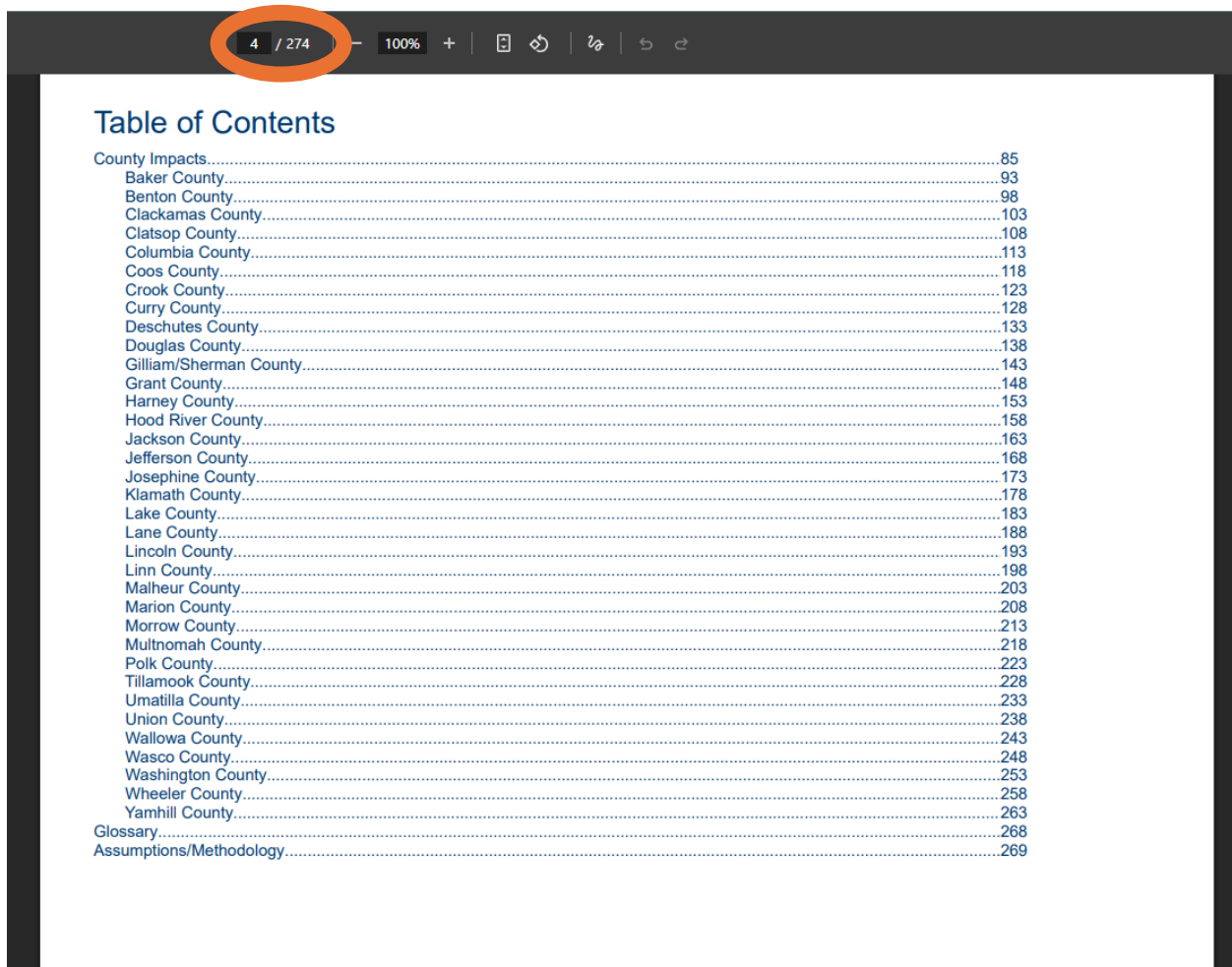
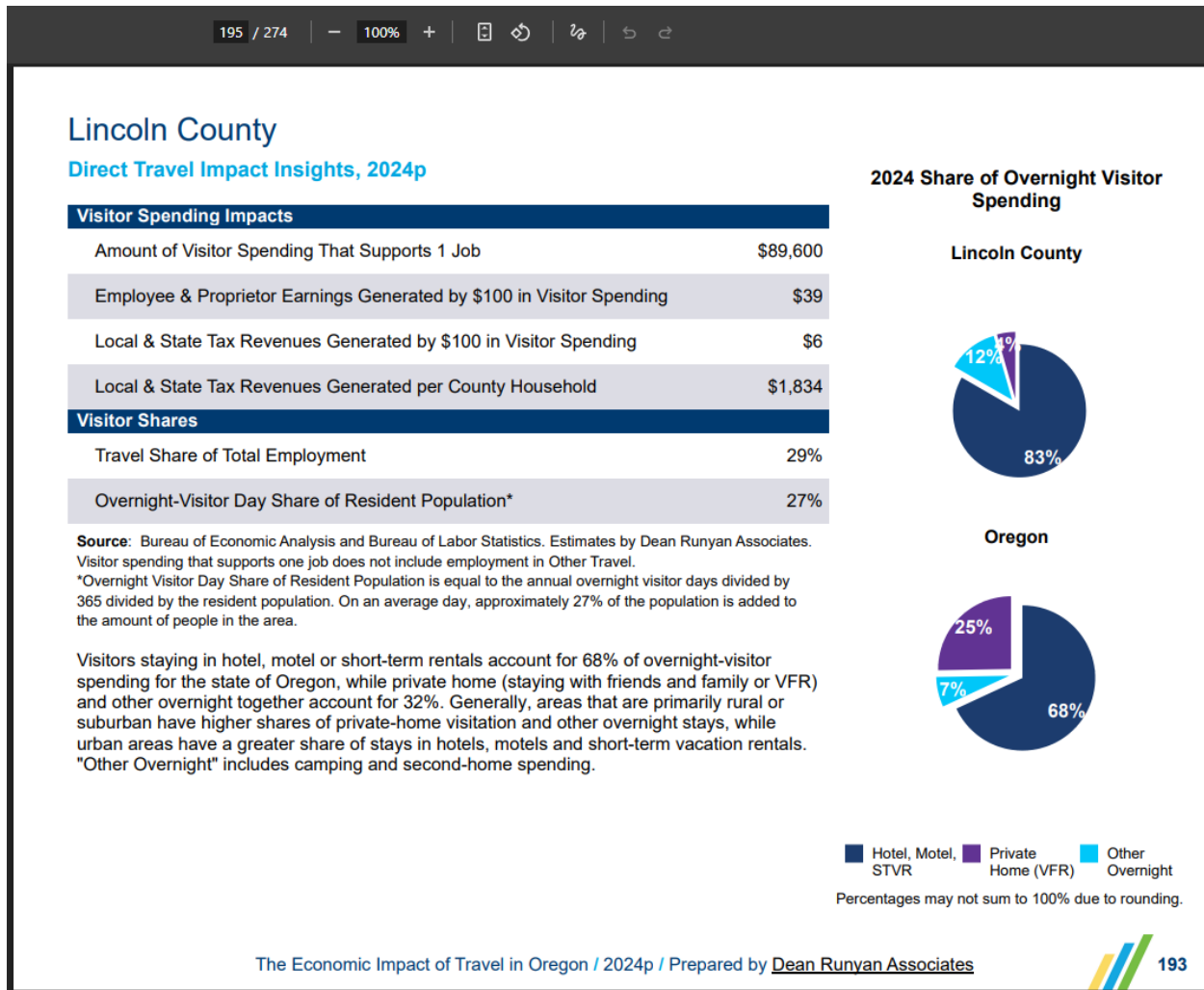


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Please note that the number on the document and the number on the navigator don't always coincide, see Lincoln County below (navigator: 195, actual page number 193)



The first page shows high level takeaways of the data, as well as a comparison of which type of overnight visitor generates the most spending in the county when compared to statewide. E.g., 83% of overnight visitor spending in Lincoln County is attributable to visitors who stay at a hotel, motel or short-term rental – much higher than the 68% figure for statewide. **Please note that page 268 has a glossary** in case you require clarification on any of the terms that appear on the report.

The following pages break down the total economic impact for the county in a variety of manners. For specifics on what each of the breakouts mean, please refer to the glossary.

Of particular relevance to grants applicants is the last page of each county level report. See below for Lincoln County:

Lincoln County

Overnight Visitation

Overnight visitor volume for Lincoln County is based on cross-referencing visitor surveys, visitor air travel, and lodging data. Volume estimates, therefore, will differ from methodologies that rely solely on visitor surveys. Visitor spending is a more reliable metric than visitor volume in accounting for changes in the travel industry, as it is more closely tied to economic data and lessens the variability from visitor surveys. Day travel estimates are not included because of data limitations.

Additional years available at www.travelstats.com/impacts/orego

Average Expenditure for Overnight Visitors, 2024

	Person		Party		Party Size	Length of Stay
	Day	Trip	Day	Trip		
Hotel, Motel, STVR	\$256	\$484	\$626	\$1,183	2.4	1.9
Private Home	\$40	\$120	\$103	\$313	2.6	3.0
Other Overnight	\$46	\$154	\$150	\$499	3.2	3.3
All Overnight	\$113	\$285	\$311	\$763	2.7	2.5

Overnight Visitor Volume, 2022-2024

	Person-Nights			Party-Nights		
	2022	2023	2024	2022	2023	2024
Hotel, Motel, STVR	3,082,990	3,078,180	2,914,910	1,149,350	1,169,180	1,134,480
Private Home	648,450	648,550	651,410	258,950	253,840	249,990
Other Overnight	1,265,980	1,304,670	1,520,500	439,050	428,120	469,160
All Overnight	4,997,430	5,031,400	5,086,820	1,847,350	1,851,140	1,853,640

	Person-Trips			Party-Trips		
	2022	2023	2024	2022	2023	2024
Hotel, Motel, STVR	1,421,140	1,409,990	1,347,920	533,980	541,390	531,530
Private Home	196,430	204,510	214,190	78,440	80,050	82,200
Other Overnight	382,310	391,970	457,110	132,160	128,230	140,640
All Overnight	1,999,880	2,006,470	2,019,210	744,580	749,670	754,370

This page shows overnight visitor spend per person, average party size and average length of stay by type of lodging as well as overall average. This is a good starting point for understanding the potential economic impact of a project that is applying for a grant - if you have an estimate on the **additional overnight visitation** that will be generated by the project, then you can assume that the economic impact of the project will be equivalent to the number of people multiplied by the per person daily spend (in this case \$113), and multiplied by the party size (2.7) as well as the length of stay (2.5). Please note that every estimate requires its own set of assumptions. For calculating impact of day trips, per Travel Oregon’s 2025 visitor profile, folks who took day trips reported spending an average of \$50 per day per person – however keep in mind that to be considered visitor spend, folks must have traveled at least 50 miles to get to your destination.

Visitor Profile Data: Learn what brings visitors to your destination, identify potential growth areas and develop target markets

Access the full study here:

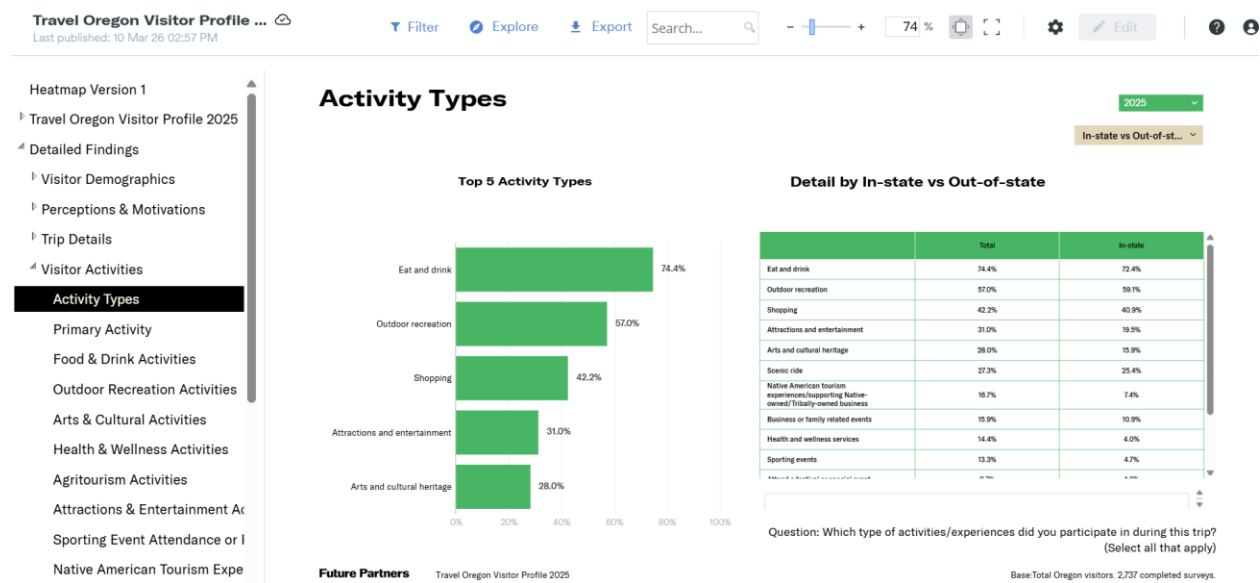
<https://industry.traveloregon.com/research/oregon-visitor-profile/>

Travel Oregon surveys visitors to Oregon that come from:

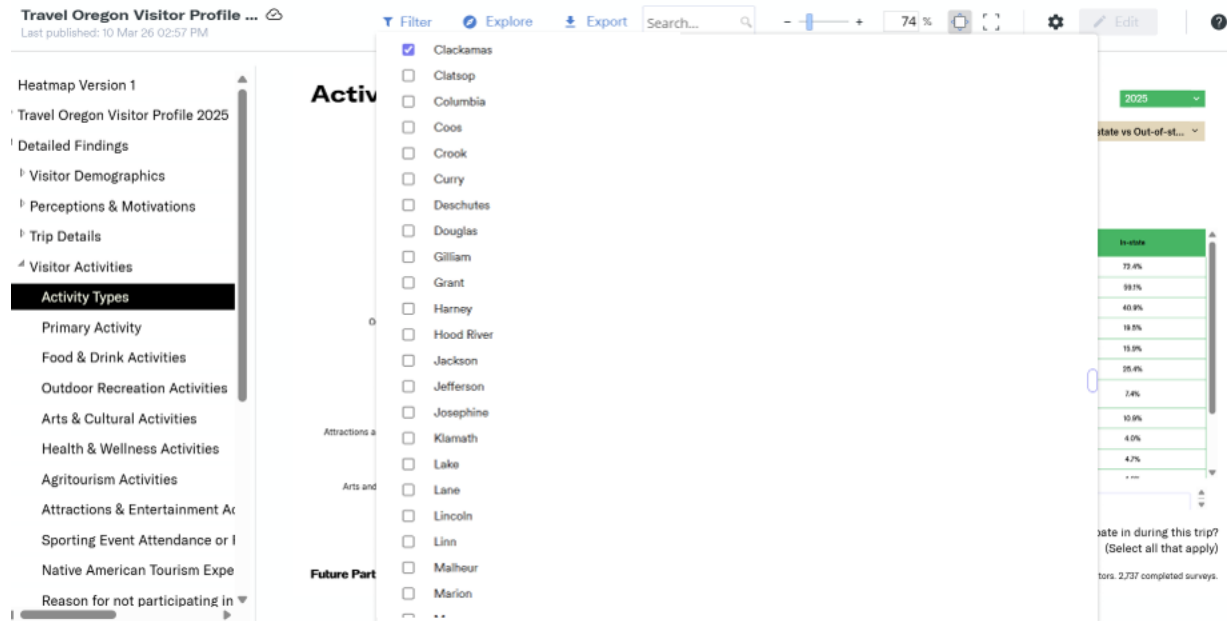
- Other US states
- In state (Oregonians)
- Canadian visitors

This study looks at perceptions and motivations, trip details (e.g., primary purpose, length of stay, cities visited, spending), detailed activities and sub-activities (e.g., outdoor recreation and hiking), visitor satisfaction and travel planning. To access the dataset visit our research page on the Travel Oregon industry website ([link](#)) – for grant applicants it is suggested to use the interactive dashboard, as it allows you to filter down to county level data.

For grant applicants, visitor profile data may be used in a variety of manners. It may show that the activity that will be supported by your project is already drawing visitors to your destination, or on the contrary it may be used to argue that it is a space for opportunity as an underdeveloped activity in your destination. It can also be used to determine target demographics for marketing purposes. To view county level data, you must first navigate to the page that you wish to view using the left hand navigation menu (please note that the menu has dropdown options that must be expanded to see all the details) for example, we can look at activities:



Then hit the “filter” drop down menu at the top, scroll down to the county list, and select your county.



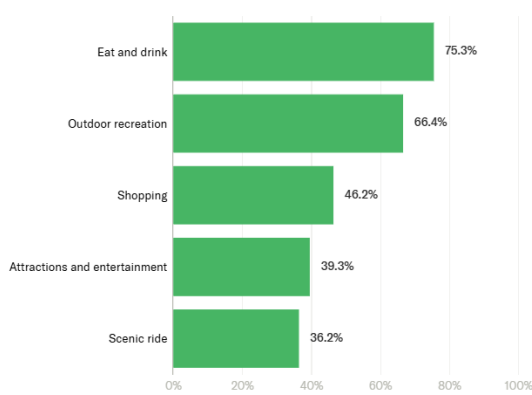
This will filter the charts to show you responses for all the people who said they visited one of the cities in your county during their visit, as well as show you how many people actually selected one of these (bottom right corner, may require scrolling) – in this case 762 folks selected they visited a Clackamas County city during their visit. – Please note that not all counties/cities will have a sample size this big, if your sample size falls under 100 we recommend also combining it with a neighboring (or similar) counties by going back to the filter and selecting the corresponding counties.

Activity Types

2025

In-state vs Out-of-st...

Top 5 Activity Types



Detail by In-state vs Out-of-state

	Total	In-state
Attractions and entertainment	39.3%	40.0%
Scenic ride	36.2%	37.6%
Arts and cultural heritage	34.7%	25.2%
Native American tourism experiences/supporting Native-owned/Tribally-owned business	25.5%	15.7%
Health and wellness services	21.4%	10.6%
Sporting events	19.6%	11.7%
Business or family related events	18.5%	13.0%
Participated in agricultural experience on a working landscape	12.7%	7.9%
Attend a festival or special event	12.3%	10.8%
Activities related to LGBTQIA+ culture	6.0%	6.5%
None of the above	1.4%	6.4%

Question: Which type of activities/experiences did you participate in during this trip? (Select all that apply)

visitors: 762 completed surveys.

Future Partners Travel Oregon Visitor Profile 2025

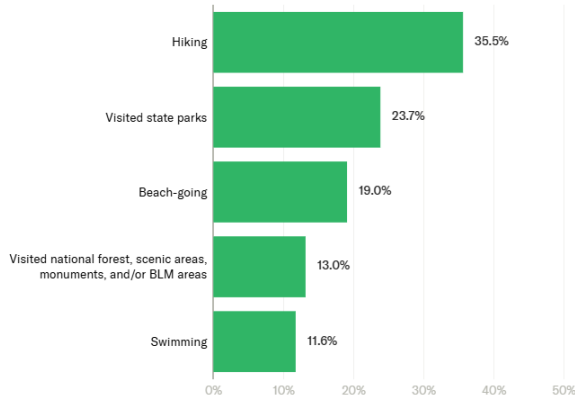
Please note that there are more detailed activity lists available, the chart above shows the overarching activity categories – for example, folks who selected outdoor rec were then shown a list of outdoor rec activities to choose from – this should cover most popular activities.

Outdoor Recreation Activities

2025

In-state vs Out-of-st...

Top 5 Outdoor Recreation Activities



Detail by In-state vs Out-of-state

	Total	In-state
Hiking	35.5%	36.5%
Visited state parks	23.7%	25.7%
Beach-going	19.0%	29.2%
Visited national forest, scenic areas, monuments, and/or BLM areas	13.0%	13.3%
Swimming	11.6%	9.1%
Running	10.5%	1.9%
Nature observation	10.4%	13.3%
Mountain biking	8.3%	2.5%
Backpacking	8.1%	3.8%

Question: Which of the following outdoor recreation activities did you do on this trip? (Select all that apply)

Base: Total Oregon visitors: 2,737 completed surveys.

Future Partners Travel Oregon Visitor Profile 2025

Resident Sentiment: See what types of projects residents may be more likely to welcome

Travel Oregon measures resident sentiment every 2 years, with the latest available data collected in 2024. Resident sentiment can help identify project ideas that may receive support from the communities where they are taking place. Generally, higher resident sentiment towards tourism would indicate that residents have more tolerance towards tourism and are more likely to support projects that enhance visitation/spending.

You can access the data [in this online interactive dashboard](#). The dashboard is navigated similarly to the visitor profile. We recommend reviewing the following menu options:

- Resident Perceptions Toward Tourism Impacts
- Overall Perceptions Toward Tourism Impacts**
- Resident Perceptions Toward Tourism Impacts
- Support for Tourism
- Support for Tourism by Oregon Region
- Visitor Behaviors
- Likelihood to Recommend Community as a Tourism Destination
- Tourism's Impact on Personal Income / Livelihood
- Perceptions of Tourism's Positive Economic Impacts
- Perceptions of Tourism's Negative Economic Impacts
- Perceptions of Tourism's Positive Environmental Impacts
- Perceptions of Tourism's Negative Environmental Impacts
- Perceptions of Tourism's Positive Social Impacts
- Perceptions of Tourism's Negative Social Impacts
- Perceptions of Tourism's Positive Cultural Impacts
- Perceptions of Tourism's Negative Cultural Impacts
- Perceptions of Tourism's Positive Personal Impacts
- Perceptions of Tourism's Negative Personal Impacts

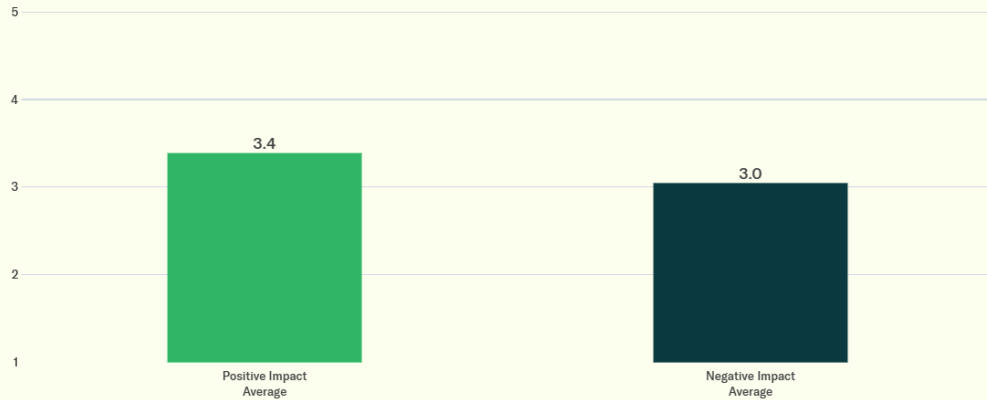
Just like in the visitor profile dashboard, you can use the filter drop down menu to view results for your county – for example Klamath.



When we filter the overall sentiment towards tourism for Klamath County residents, we can see perceptions of positive impacts and perceptions of negative impacts. In this case, perceptions of positive impacts are higher than perceptions of negative impacts – therefore residents may be more receptive to tourism projects.

Overall Perceptions Toward Tourism Impacts

Overall Index of Residents' Perceptions of Tourism Impacts



Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements:
 Base: Klamath Oregon residents. 314 completed surveys.

Future Partners Travel Oregon Resident Sentiment

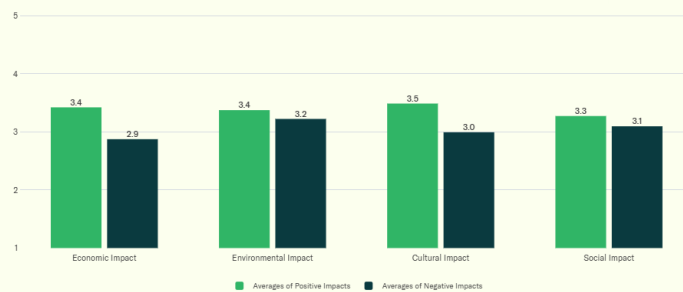
Resident Sentiment

Next we can see specifically across what dimensions of tourism impacts residents are more or less concerned about:

- Overview & Methodology
- Detailed Findings
- Living in Oregon
- Resident Perceptions Toward Tourism Impacts
- Overall Perceptions Toward Tourism Impacts
- Resident Perceptions Toward Tourism Impacts**
- Support for Tourism
- Support for Tourism by Oregon Region
- Visitor Behaviors
- Likelihood to Recommend Community as a Tourism Destination
- Tourism's Impact on Personal Income / Livelihood
- Perceptions of Tourism's Positive Economic Impacts
- Perceptions of Tourism's Negative Economic Impacts
- Perceptions of Tourism's Positive Environmental Impacts
- Perceptions of Tourism's Negative Environmental Impacts
- Perceptions of Tourism's Positive Social Impacts
- Perceptions of Tourism's Negative Social Impacts
- Perceptions of Tourism's Positive Cultural Impacts
- Perceptions of Tourism's Negative Cultural Impacts
- Perceptions of Tourism's Positive Personal Impacts

Resident Perceptions Toward Tourism Impacts

Index of Residents' Perceptions of Tourism Impacts by Dimension



Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements (Scale 1 - 5)
 Base: Klamath Oregon residents. 314 completed surveys.

Future Partners Travel Oregon Resident Sentiment

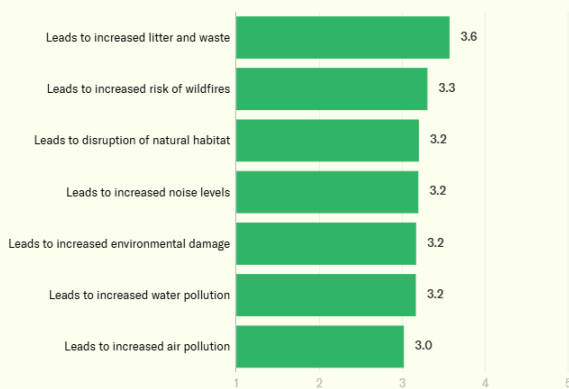
Resident Sentiment

You may notice that the largest concerns for tourism impacts (highest negative rating) are around negative environmental impacts, while the highest positive perceptions are around positive economic impacts. We can go down one level, to see specifically what concerns residents in the environmental dimension:

Perceptions of Tourism's Negative Environmental Impacts

Negative Environmental Impacts of Tourism

(Averages on a scale of 1 - Strongly disagree to 5 - Strongly agree)



Detail by Generation

Generation ▼

	Total	Gen Z	Millennials	Gen X	Boomers+
Leads to increased litter and waste	3.6	3.9	3.5	3.6	3.5
Leads to increased risk of wildfires	3.3	4.1	3.2	3.2	3.3
Leads to disruption of natural habitat	3.2	4.0	3.1	3.2	3.2
Leads to increased noise levels	3.2	4.0	3.1	3.1	3.2
Leads to increased environmental damage	3.2	3.9	3.2	3.1	3.1
Leads to increased water pollution	3.2	4.1	3.1	3.1	3.1
Leads to increased air pollution	3.0	3.8	3.0	2.9	3.0
Mean	3.2	4.0	3.2	3.2	3.2
Base	314	9	86	101	118

Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree with the following statement

Base: Klamath Oregon Residents. 314 completed surveys.

Future Partners Travel Oregon Resident Sentiment

Resident Sentiment

The largest concerns for Klamath County residents are increased litter and waste, risk of wildfires, and general disruption of natural habitat. Grant applicants could use this data to help design mitigation strategies for tourism impacts that are particularly top of mind for their county residents – or conversely applicants can look at positive impacts and design strategies that enhance (and showcase) said positive impacts.