



Travel Oregon

2026 Resident Sentiment

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Research Objectives & Methodology

Research Objectives & Methodology

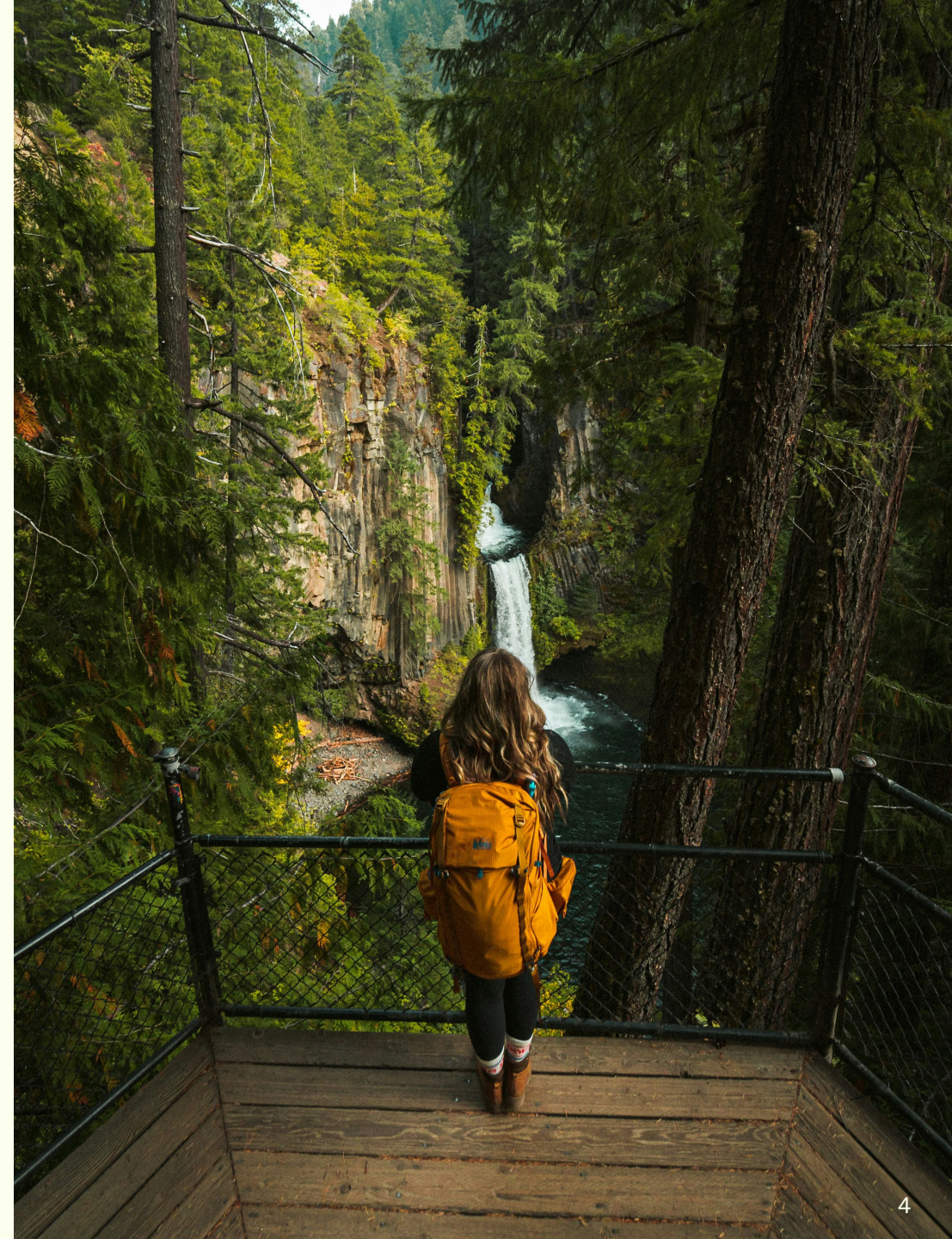
This report presents the findings of a longitudinal study of Oregon residents conducted by Future Partners on behalf of Travel Oregon. The primary objective of this research is to understand Oregon residents' perceptions of tourism and the potential impact on their quality of life. The study measures:

- Perceptions of tourism among Oregon residents
- Perceptions of the impacts of tourism
- Quality of life

More than 4,200 responses were collected across Oregon's seven tourism regions between February and March 2026 using a combination of online panel surveys and partner-owned audience surveys to adults age 18+ who live in the state of Oregon. The results were weighted to Oregon's demographics and population size for each region.

The following total number of responses were collected from each region:

- Coast: 1,017 responses
- Central: 440 responses
- Portland Region: 940 responses
- Eastern: 373 responses
- Willamette Valley: 716 responses
- Mt. Hood/CRG: 210 responses
- Southern: 549 responses



Topline Findings

Oregon Residents Demographic Snapshot

Total residents surveyed:	4,245
Average age:	47.5 years old
Average household income:	\$78,035
Employed:	63%
College graduate:	51%
Married/domestic partnership:	56%
Have children in household:	29%
Ethnicity*	
• White/Caucasian:	77%
• Hispanic/Latino:	12%
• Asian, Native Hawaiian, or Pacific Islander	8%
• Native American, Alaskan Native	4%
• African American/Black	4%
• Other	2%
LGBTQ+:	15%
Accessibility needs in household:	24%

*Percentages sum to more than 100% as respondents could select more than one race/ethnicity.



Topline Findings

Chart: Index of Residents' Perceptions of Tourism Impacts

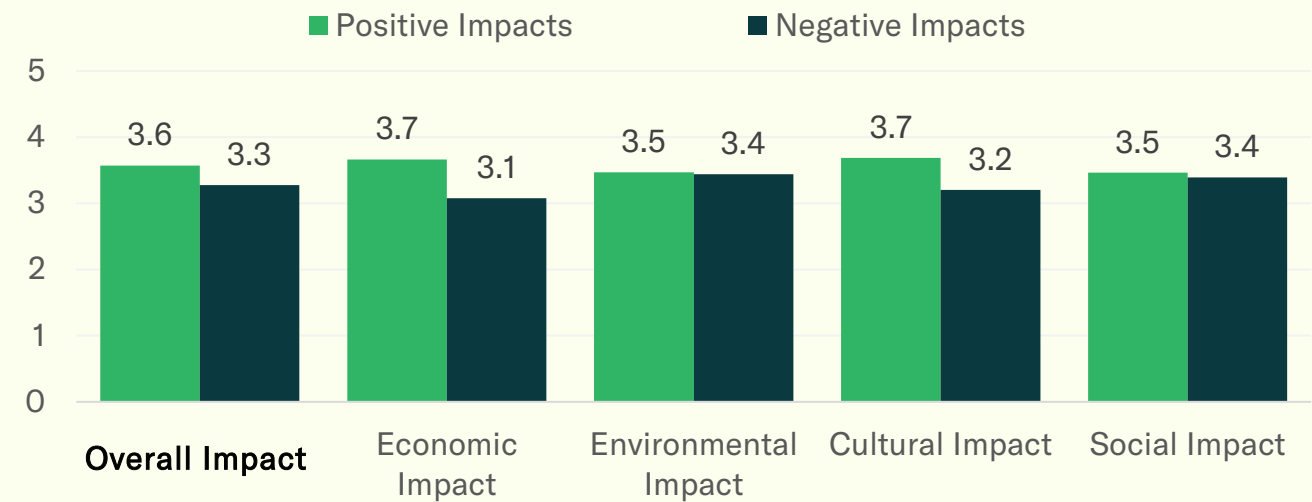


Table: Index of Residents' Perceptions of Tourism Impacts

	Positive Impacts Mean Score	Negative Impacts Mean Score
Overall Impact	3.6	3.3
Economic Impact	3.7	3.1
Environmental Impact	3.5	3.4
Cultural Impact	3.7	3.2
Social Impact	3.5	3.4

The impact measurements shown to the left are calculated using the average agreement score on a five-point scale (5 = strongly agree; 1 = strongly disagree) for eight sets of questions across four dimensions of tourism: economic, environmental, cultural, and social. Respondents were asked to rate their agreement with two sets of questions per dimension, one regarding tourism’s positive impacts (e.g., “Tourism is an important part of the success of local businesses”) and one regarding the industry’s negative impacts (e.g., “Tourism increases the cost of living for residents”). A higher average score indicates stronger agreement that tourism has a positive or negative impact on the dimension in question. The overall impact score is an average of the positive and negative impact scores for all dimensions.

Based on this index, Oregonians’ positive perceptions of tourism’s impacts consistently outweigh the negative across all dimensions. The largest positive/negative gap occurs in the economic impact (3.7 vs. 3.1, a 0.6-point gap) and the cultural impact (3.7 vs. 3.2, a 0.5-point gap). These two measures also reflect the highest positive scores as well. On the other hand, there is a stronger perception of the negative impacts of tourism’s environmental and social dimensions, though those are still marginally outpaced by positive impacts.

Base: Oregon residents. 4,245 completed surveys.

Topline Findings

Residents widely support tourism in Oregon, but less than half say they want the state to depend more on tourism. In terms of overall support for tourism, calculated as the mean score for across all 10 statements shown below, total Oregon residents scored 1.2 out of a maximum possible mean score of 3.0. A majority of Oregon residents supports every potential option for improving tourism, with the exception of depending more on tourism (47%). At least three in five agree that Oregon should encourage outdoor recreation development (80%), advertise in-state (76%), advertise domestically (71%), advertise internationally (68%), attract more visitors (65%), consider tourism a priority (65%), and establish more tourism facilities (64%).

Chart: Overall Support for Tourism Mean Score*

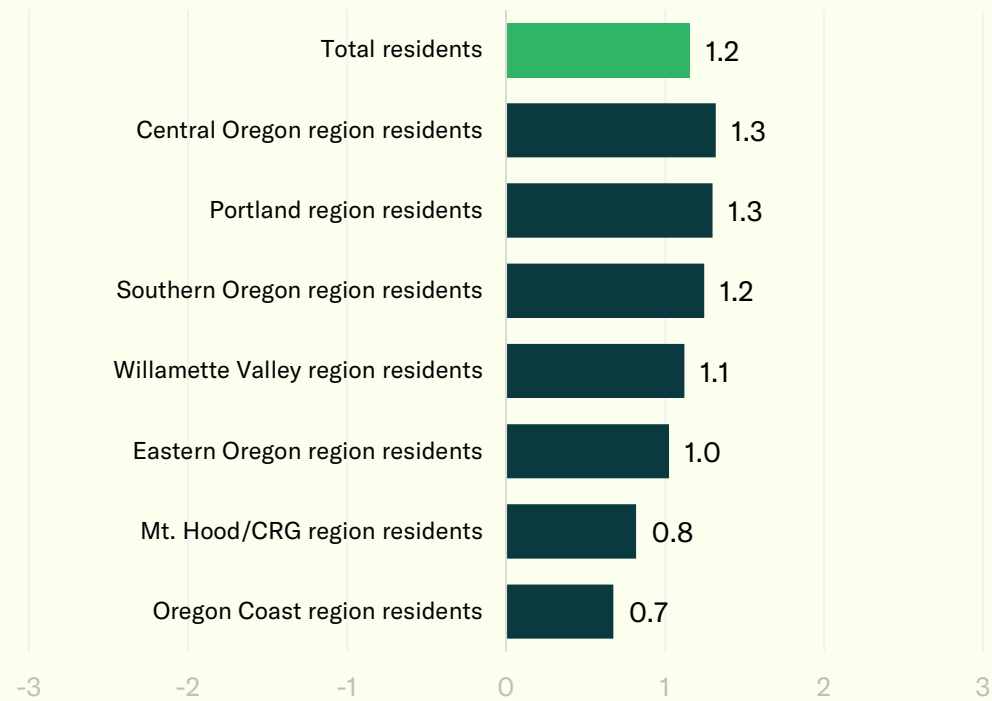


Table: Overall Support for Tourism Mean Score*

Overall Support for Tourism Mean Score	
Total residents	1.2
Central Oregon region residents	1.3
Portland region residents	1.3
Southern Oregon region residents	1.2
Willamette Valley region residents	1.1
Eastern Oregon region residents	1.0
Mt. Hood/CRG region residents	0.8
Oregon Coast region residents	0.7

* Calculated as the mean scores for statements included in the index, with a minimum possible mean score of -3 and a maximum possible mean score of 3. See page 30 for detailed scores for each included statement.

Topline Findings

Overall, Oregon residents score highly on the Perceived Quality of Life index, scoring 11.5 points out of a possible 15. In research, higher levels of perceived quality of life have been associated with improved perceptions of tourism impacts. Three-fourths are “satisfied with my life in Oregon” (75% agree or strongly agree) and roughly two-thirds agree that “my life in Oregon is close to ideal” (68%) and “conditions of my life in Oregon are excellent” (65%).

Chart: Perceived Quality of Life Score*

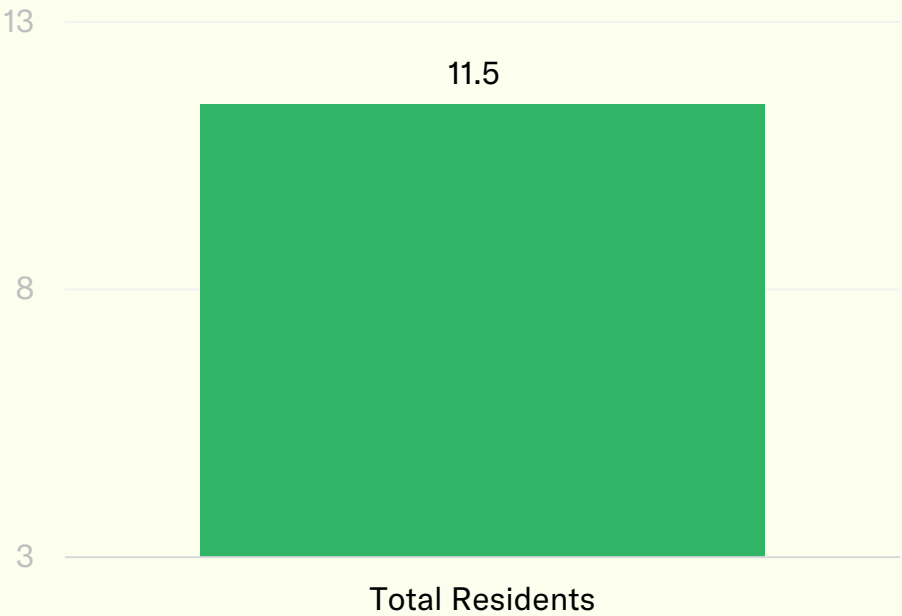


Table: Perceived Quality of Life Score*

Perceived Quality of Life Score	
Total Residents	11.5

*Calculated as a sum of the mean scores for five statements included in the index, with a minimum possible score of 3 (extremely dissatisfied) and a maximum possible score of 15 (extremely satisfied).

Key Insights

1. Residents maintain a clear understanding of tourism's economic and cultural benefits, while perceptions of environmental and social impacts continue to be divided.

The economic benefits of tourism continue to be the most pronounced in the perceptions of Oregon residents, a sentiment that often ties closely to perceived positive impacts in terms of cultural benefits, as tourism is understood as a funding source for community services, the development of local amenities, and cultural heritage preservation efforts. On the other hand, crowding and traffic issues that put a strain on the state's infrastructure and disrupts resident life also persist as the other side of the tourism coin. Many residents continue to feel that visitor increases lead to environmental degradation.

These sentiments are reflected in the index of residents' perceptions of tourism impact, wherein economic and cultural dimensions have significantly higher scores for positive versus negative impacts (+0.6 points and 0.5 points, respectively). One Portland region resident phrased this symbiotic effect as follows: *"To attract tourists, entrepreneurs have opened amazing craft beverage spots that use local ingredients. These have become the new social hubs for residents, giving us great places to gather and relax."* Conversely, the gaps between positive and negative impacts for the environmental (0.0 points) and social (+0.1 points) dimensions of tourism in Oregon remain marginal.

2. Most Oregonians are happy with their life in Oregon, with 45% expecting their quality of life to improve in the next year.

Three-fourths of Oregon residents are satisfied with their life in Oregon (75%), and roughly two-thirds as many say their life in Oregon is close to ideal (68%) and that the conditions of their life in Oregon are excellent (65%). However, as with the previous resident sentiment study, Native American/Alaskan Native residents and African American/Black residents of the state have significantly lower perceived quality of life.

3. Most Oregonians want to develop tourism assets in the state and advertise more to all audiences, but hesitate at the idea of depending more on tourism.

A majority of Oregon residents supports every potential option for improving tourism, with the exception of becoming a major tourism destination that relies more heavily on the industry. At least three in five agree that Oregon should encourage outdoor recreation development (80%), while most also agree that Oregon should encourage tourism development (70%) and establish more tourism facilities (64%). Similarly high shares want Oregon to advertise in-state (76%), advertise domestically (71%), and advertise internationally (68%), reflecting a majority who say they want to attract more visitors (65%) and consider tourism a priority (65%). But when it comes to becoming a major tourism destination (57%) or depending more on tourism (47%), agreement dips notably.

4. Advocating for public transportation utilization and environmental stewardship are potentially fruitful areas to focus on alleviating the tension between tourism's economic and environmental impacts.

Roughly nine in ten Oregonians say that it is somewhat or very important to them that visitors to the state respect the wildlife (91%) and utilize public transportation (88%). Over two-thirds also consider visitors practicing leave no trace principles important. These sentiments align with verbatims from residents who bemoan the negative impacts of tourism on local ecosystems, such as one person who mentioned, *"The land is getting loved to death. The number of people on trails and in the wilderness has grown exponentially. The ecosystems are suffering from too many people."* Similarly, residents view better and more options for public transportations as benefits for both locals and visitors.

Detailed Findings: Life in Oregon

Nearly half of respondents are lifelong Oregonians.

In 2026, just under half of Oregon residents surveyed were born in Oregon (49%). In fact, 44% have lived in the state for their entire lives, while a similar share (45%) have lived in Oregon for six or more years. Only 4% moved to Oregon within the last 2 years, further indicating that the vast majority of resident respondents are long-term Oregonians.

Chart: Place of Birth

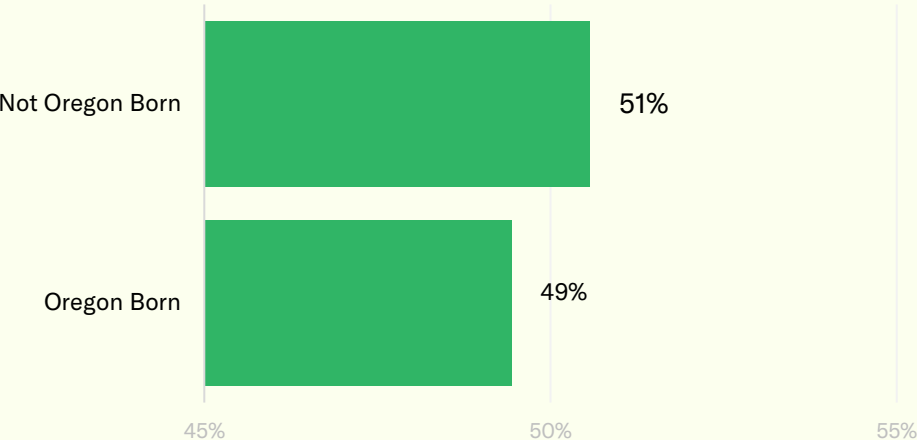


Table: Place of Birth

	% of Total
Not Oregon Born	51%
Oregon Born	49%

Question: Were you born in Oregon?
Base: Total Oregon residents. 4,245 completed surveys.

Chart: Years Lived in Oregon

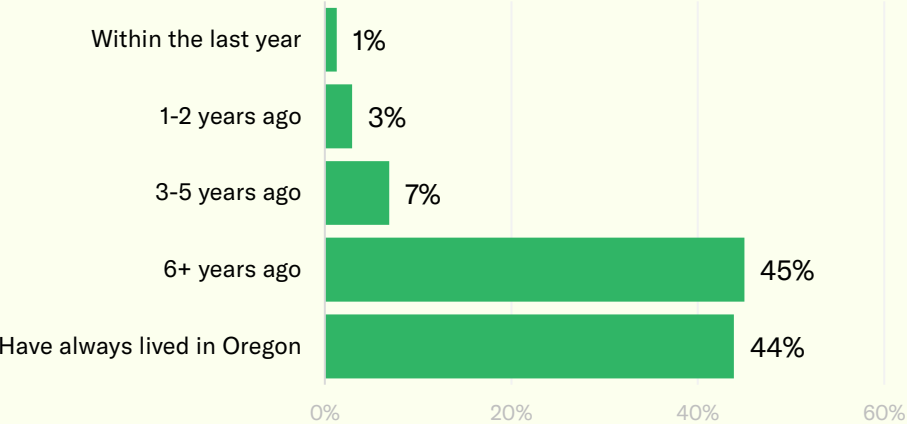


Table: Place of Birth

	% of Total
Within the last year	1%
1-2 years ago	3%
3-5 years ago	7%
6+ years ago	45%
Have always lived in Oregon	44%

Question: How long ago did you move to Oregon?
Base: Total Oregon residents. 4,245 completed surveys.

Perceived quality of life remains high for Oregon residents.

Holistically, Oregon residents are highly satisfied with their quality of life (11.5 out of a possible 15). Three-fourths are “satisfied with my life in Oregon” (75% agree or strongly agree) and roughly two-thirds agree that “my life in Oregon is close to ideal” (68%) and “conditions of my life in Oregon are excellent” (65%).

Chart: Perceived Quality-of-Life Statements Included in Score

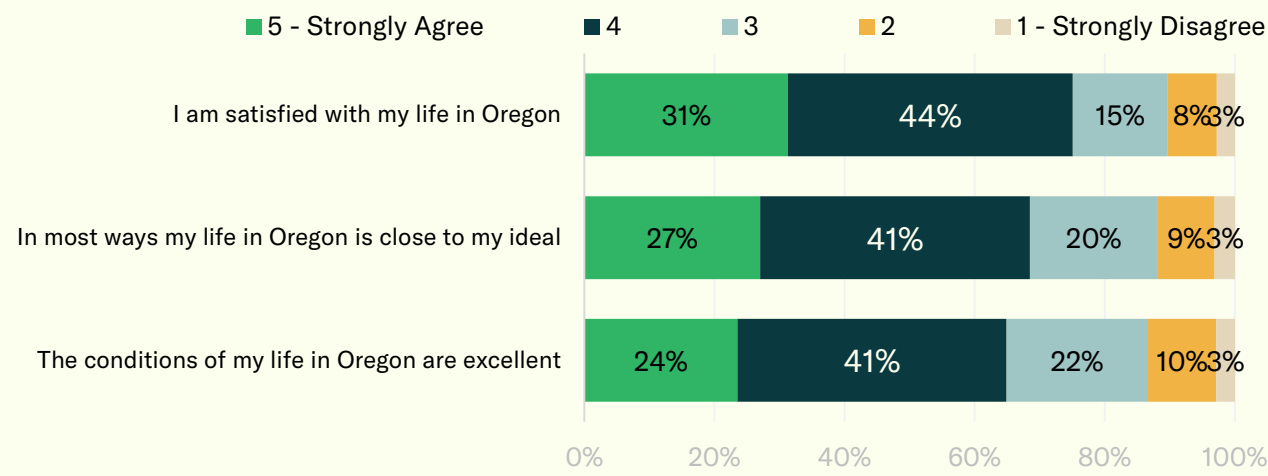


Chart: Perceived Quality of Life Score*

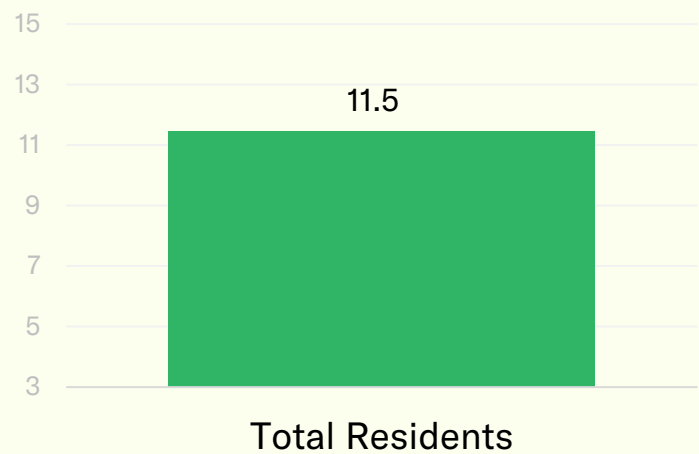


Table: Perceived Quality-of-Life Statements Included in Score

	5 – Strongly Agree	4	3	2	1 – Strongly Disagree
I am satisfied with my life in Oregon	31%	44%	15%	8%	3%
In most ways my life in Oregon is close to my ideal	27%	41%	20%	9%	3%
The conditions of my life in Oregon are excellent	24%	41%	22%	10%	3%

Table: Perceived Quality of Life Score*

Perceived Quality of Life Score	
Total Residents	11.5

*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 3 (extremely dissatisfied) and a maximum possible score of 15 (extremely satisfied).

Note: Percentages may not sum to 100% due to rounding.
Question: Please rate your level of agreement with the following statements.
Base: Oregon residents. 4,245 completed surveys.

Oregon residents report a strong sense of pride in the state.

Eight in ten residents identify with being an Oregonian (80%) and a similarly high share are proud to live in the state (77%) and/or feel a personal responsibility to represent the state well (76%). As with the 2023 study, residents continue to have a general sense of community pride about living in Oregon.

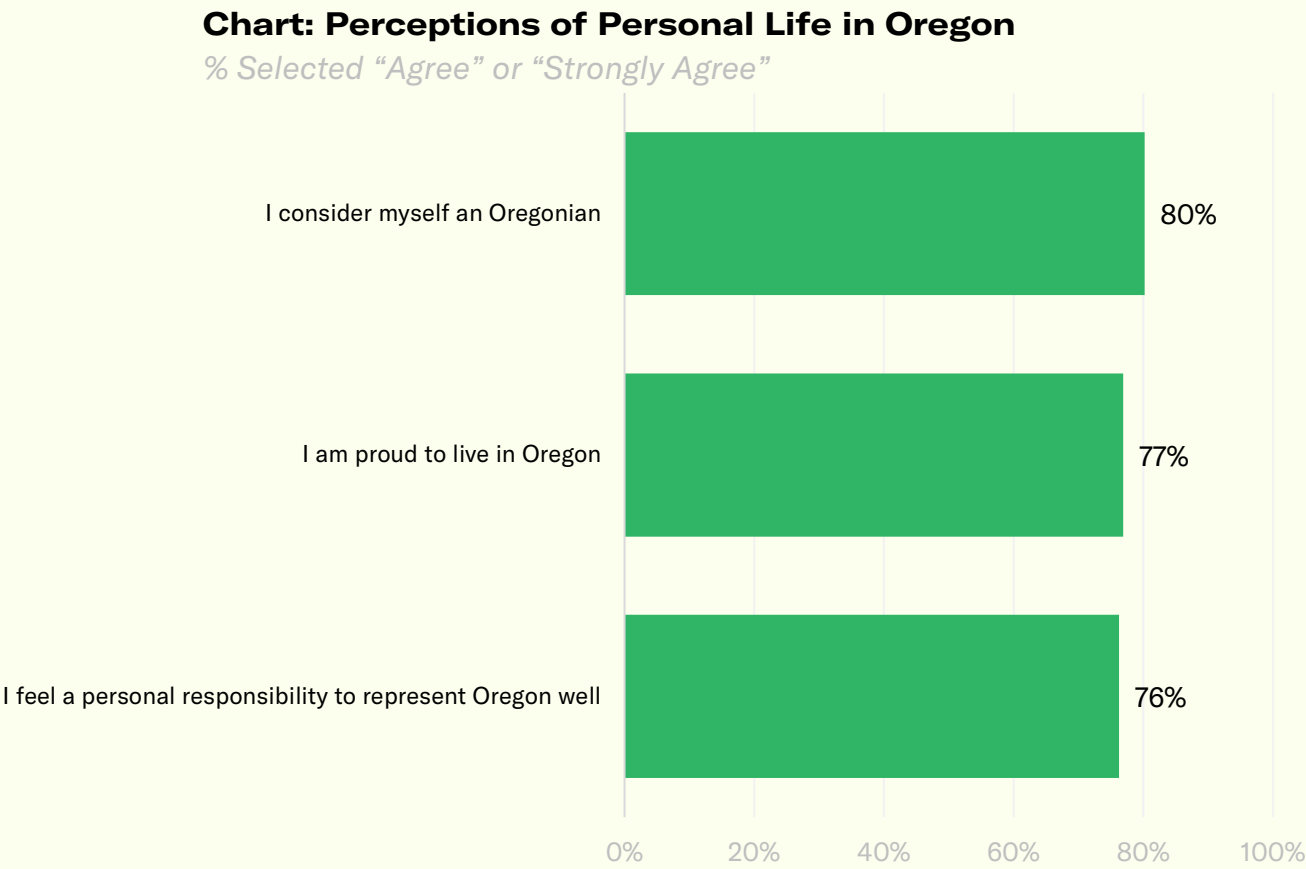


Table: Perceptions of Personal Life in Oregon

	% Selected “Agree” or “Strongly Agree”
I consider myself an Oregonian	80%
I am proud to live in Oregon	77%
I feel a personal responsibility to represent Oregon well	76%

Question: Please rate your level of agreement with the following statements.

Base: Total Oregon residents. 4,245 completed surveys.

One in four Oregonians are extremely likely to recommend their community as a tourism destination.

One-third of Oregon residents are promoters of their local community as a tourism destination (33% scored a 9 or 10 on a 0 to 10-point scale). When subtracting the detractors (residents who scored a 6 or lower) from the promoters (those who scored a 9 or 10), the likelihood-to-recommend score for the state as a whole is -3, on par with 2023 metrics. For this metric, scores between 0-20 are considered poor, 20-30 classifies as fair, 30-50 good, 50-70 excellent, and 70+ world class.

Chart: Likelihood to Recommend Local Community as a Tourism Destination

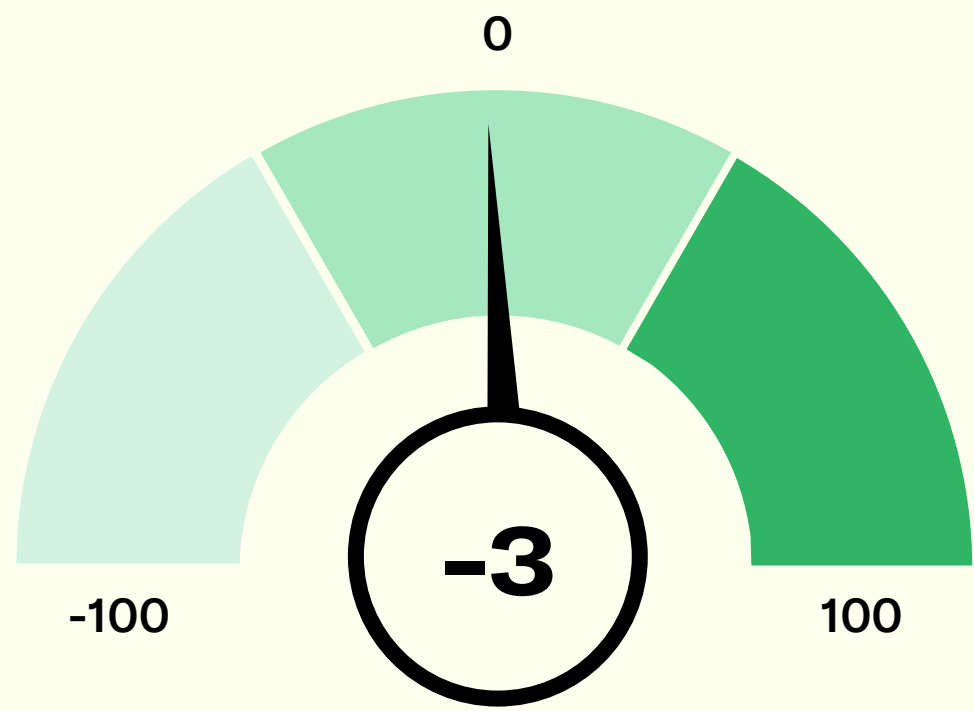


Table: Likelihood to Recommend Local Community as a Tourism Destination

Likelihood to Recommend Score	
Total Residents	-3

Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?
Base: Total Oregon residents. 4,245 completed surveys.

Oregonians are fairly optimistic about their future quality of life improving in the next year.

Nearly half of Oregon residents expect their quality of life will improve in the future (45% somewhat better or much better). Just under one in five report that they expect their quality of life to worsen in the next year (19%, not shown).

Chart: Future Quality of Life
(Top 2 Box Score - % Selected "Somewhat better" or "Much better")

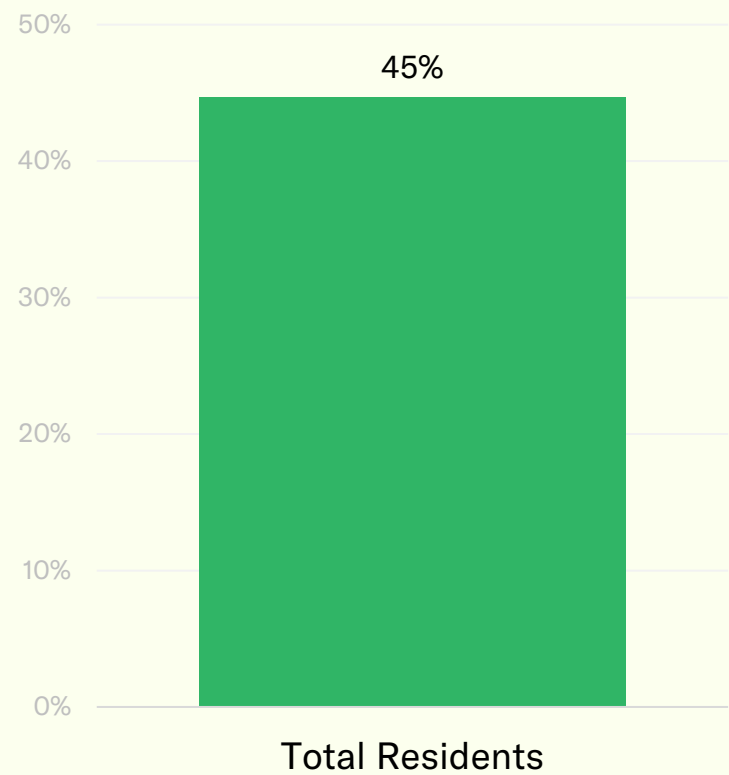


Table: Future Quality of Life

% Selected "Somewhat better" or "Much better"	
Total Residents	45%

Question: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?
Base: Total Oregon residents. 4,245 completed surveys.

Detailed Findings: Tourism Employment

Just over one in ten Oregon residents own a business that serves tourism.

Only a small share of Oregon residents who completed the survey own a tourism-industry business (11%).

Chart: Tourism-Industry Business Owners

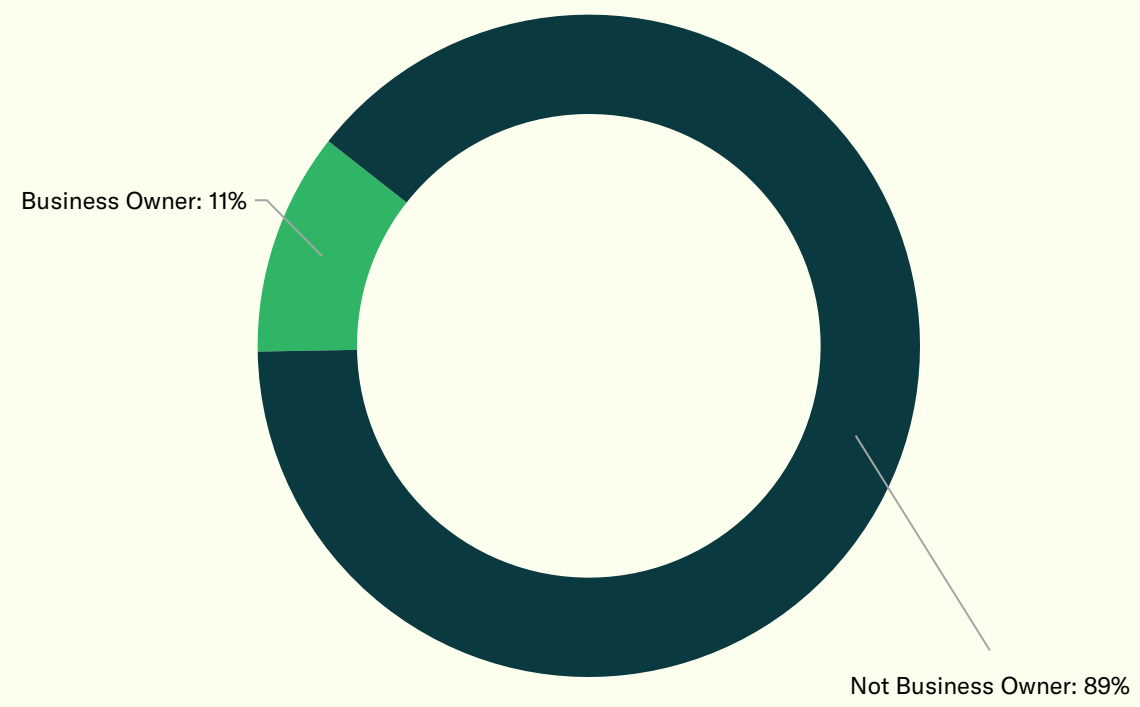


Chart: Tourism-Industry Business Owners

% of Total	
Business Owner	11%
Not Business Owner	89%

Question: Do you own a business that serves Oregon’s tourism industry
Base: Total Oregon residents. 4,245 completed surveys.

Among tourism business owners surveyed, 24% are accommodation businesses.

Of those tourism businesses owned, retail/shopping businesses represent the largest single category (14%). However, the combined categories of accommodations (vacation rentals hotels/motels/hostels, campground/RV park) boost total accommodations to almost a quarter of all business types (24%). Next in line are restaurants (13%) and spas (12%).

Chart: Type of Business Owned

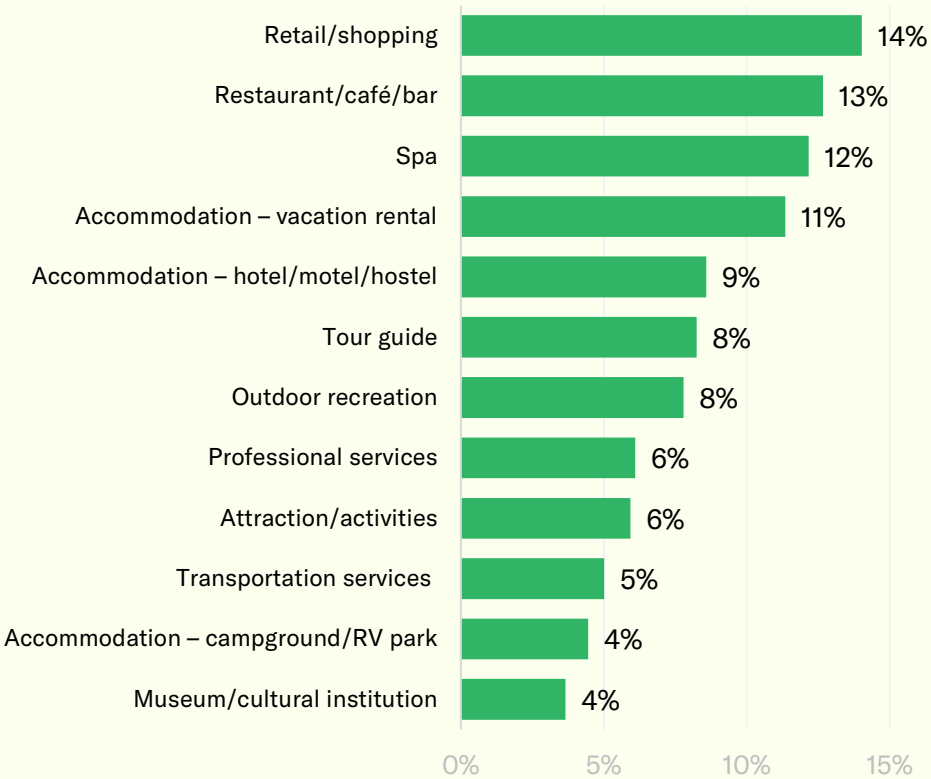


Table: Type of Business Owned

	% of Total
Retail/shopping	14%
Restaurant/café/bar	13%
Spa	12%
Accommodation – vacation rental	11%
Accommodation – hotel/motel/hostel	9%
Tour guide	8%
Outdoor recreation	8%
Professional services	6%
Attraction/activities	6%
Transportation services	5%
Accommodation – campground/RV park	4%
Museum/cultural institution	4%

Question: Which of the following best describes your business?

Base: Oregon residents who own a business that serves the tourism industry. 708 completed surveys.

Among non-business owners, more than one in five residents are currently employed in the Oregon tourism industry.

Over one in five Oregon residents surveyed indicate that they are currently employed in the tourism industry (22%). Additionally, nearly three in ten (29%) of residents not currently employed in the tourism industry have worked in the industry in the past.

Chart: Current Employment in the Tourism Industry

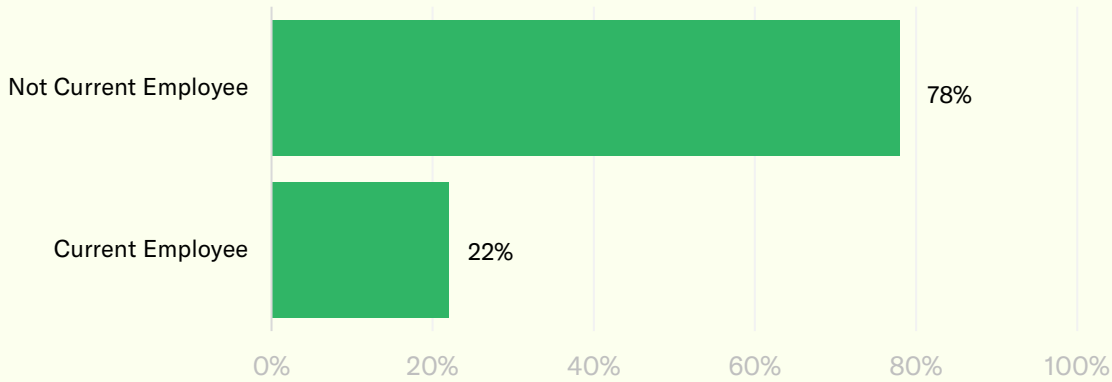


Chart: Former Employment in the Tourism Industry

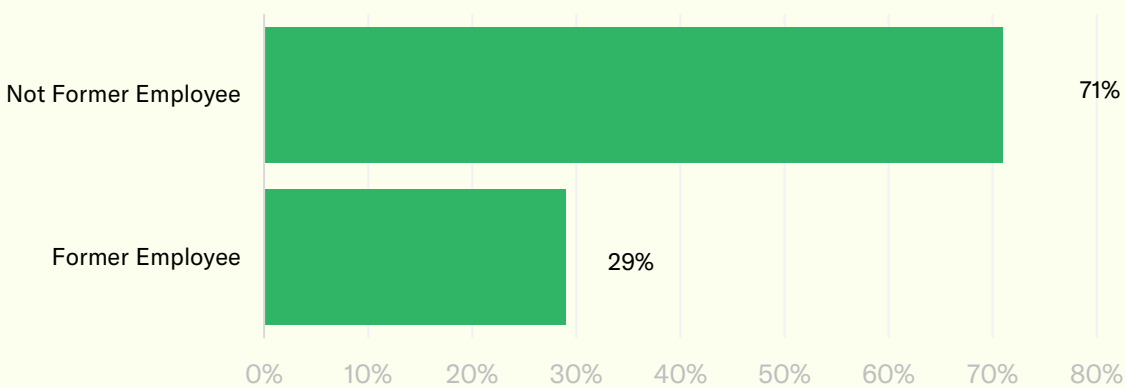


Table: Current Employment in the Tourism Industry

	% of Total
Not Current Employee	78%
Current Employee	22%

Question: Are you currently employed by a business/company that interacts with Oregon’s tourists (e.g., restaurants/bars, food and beverage stores, accommodations, conventions and trade shows, outdoor recreation stores/rentals, etc.)?

Base: Oregon residents who do not own a tourism business. 3,537 completed surveys.

Table: Former Employment in the Tourism Industry

	% of Total
Not Former Employee	71%
Former Employee	29%

Question: Have you ever been employed by a business/company that interacts with Oregon’s tourists (e.g., restaurants/bars, food and beverage stores, accommodations, conventions and trade shows, outdoor recreation stores/rentals, etc.)?

Base: Oregon residents not currently employed by a tourism business. 2,853 completed surveys.

Two-thirds of current tourism employees work full-time year-round, with one-fourth saying they work part-time in the industry.

At 68%, most current tourism employees work full-time year-round.

Chart: Current Employees – Employment Type

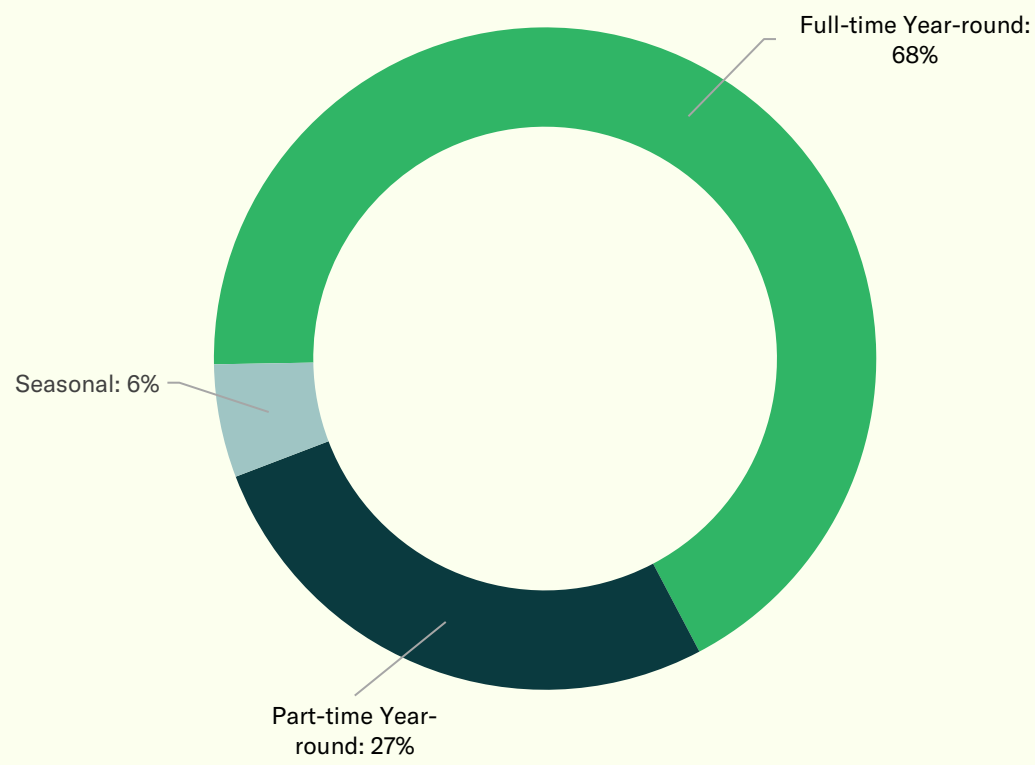


Table: Tourism-Industry Business Owners

	% of Total
Full-time Year-round	68%
Part-time Year-round	27%
Seasonal	6%

Question: Are you currently employed...?
Base: Current tourism business employees. 684 completed surveys

Dining, professional services, and retail employees comprised the largest shares of current tourism workers in this year’s survey.

Five types of businesses dominate the tourism environment: restaurant/café/bar (13%), professional services* (12%), retail/shopping (11%), DMO/Chamber (10%), and hotel/motel/hostel accommodations (9%).

Chart: Place of Employment

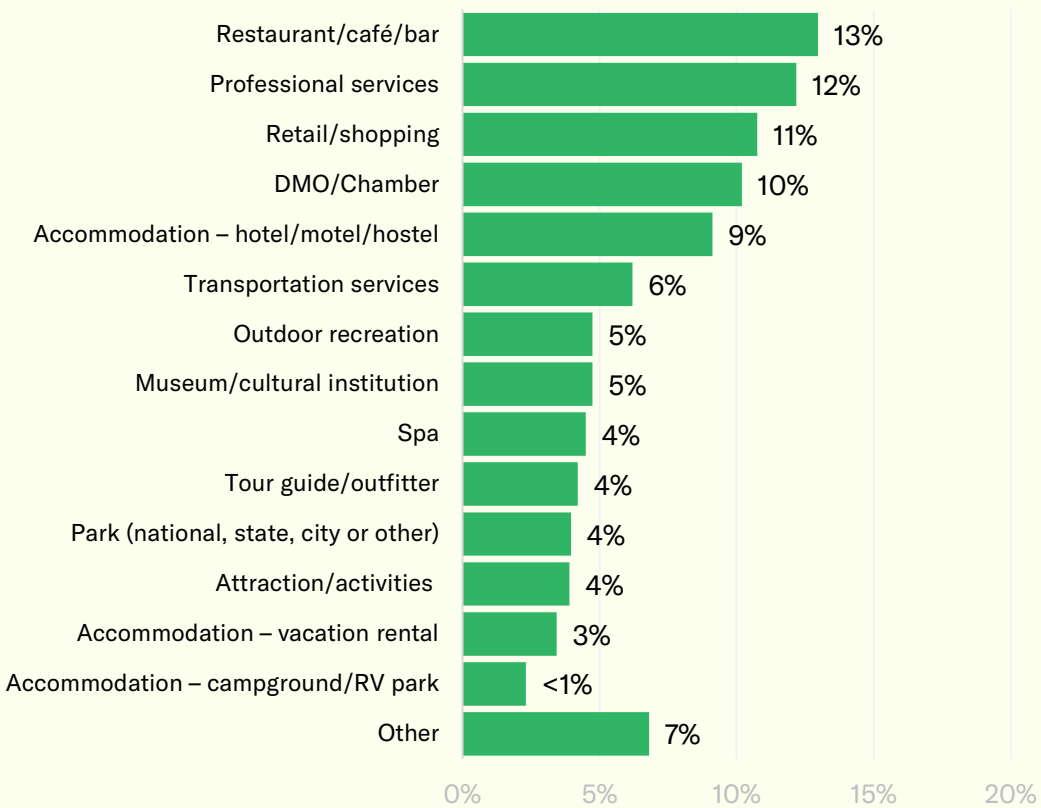


Table: Place of Employment

	% of Total
Restaurant/café/bar	13%
Professional services	12%
Retail/shopping	11%
DMO/Chamber	10%
Accommodation – hotel/motel/hostel	9%
Transportation services	6%
Outdoor recreation	5%
Museum/cultural institution	5%
Spa	4%
Tour/guide outfitter	4%
Park (national, state, city or other)	4%
Attraction/activities	4%
Accommodation – vacation rental	3%
Accommodation – campground/RV park	<1%
Other	7%

Question: Which of the following best describes your current place of employment?
Base: Current tourism business employees. 684 completed surveys

*Professional services is based on open-ended responses to “Other” and includes residents who wrote in responses such as government, media, banking, nonprofits, health care, education, legal, and real estate.

Nearly half of current tourism employees and business owners, reported employment satisfaction levels at an eight or higher on a 10-point scale.

A strong share of tourism workers feel quite satisfied by their employment (46%, top 3 box). The average score across current workers is 8.2 out on a 1- to 10-point scale. This share of high satisfaction among workers outpaces the share of those who rate their experience in the mid-range (43%, rating 5-7). About one in ten feel at least somewhat dissatisfied (11%, rating 1-4).

Chart: Tourism Industry Employment Satisfaction

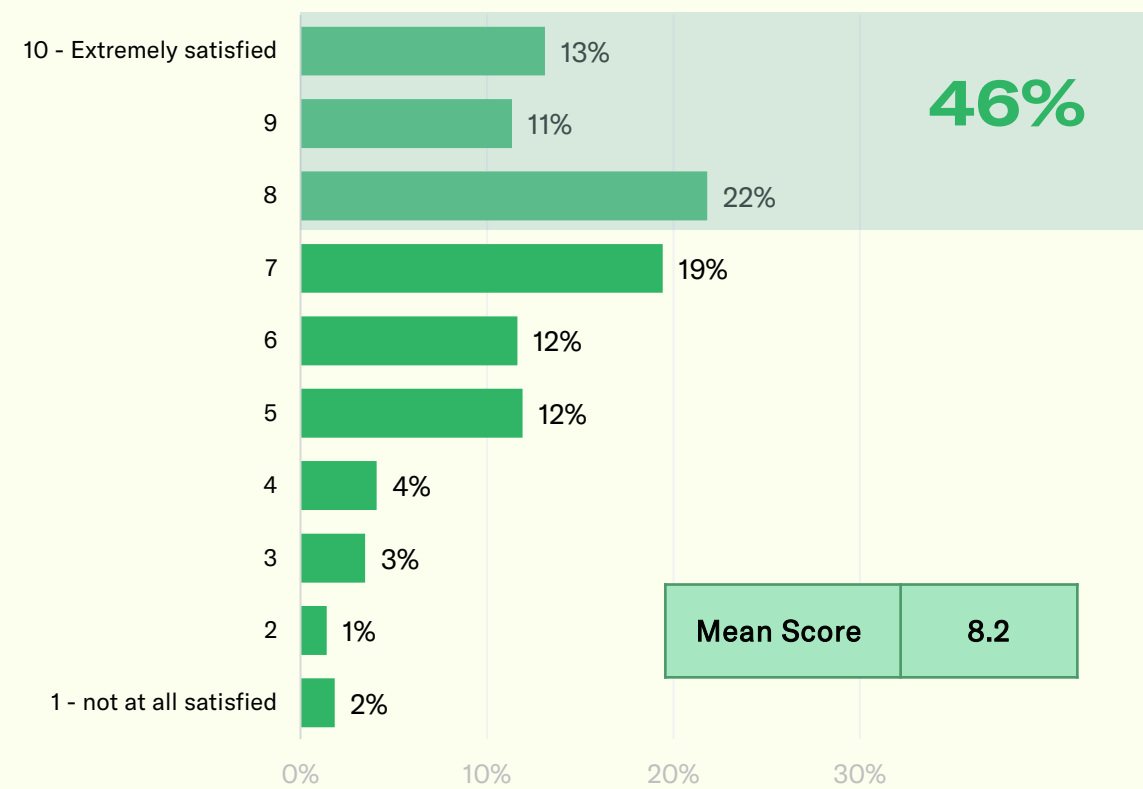


Table: Tourism Industry Employment Satisfaction

	% of Total
Top 3 Box (Scored 8-10)	46%
10 – Extremely satisfied	13%
9	11%
8	22%
7	19%
6	12%
5	12%
4	4%
3	3%
2	1%
1 – not at all satisfied	2%
Mean Score	8.2

Note: Percentages may not sum to 100% due to rounding.

Question: How would you rate your overall satisfaction with working in Oregon’s tourism industry?

Base: Total Oregon residents who currently work for or own a tourism business or have worked in the industry in the past. 2,257 completed surveys.

Almost half of non-tourism-employed Oregon residents would consider working in the industry.

At 47%, a strong share of non-currently-tourism-employed residents would consider tourism employment in the future.

Chart: Tourism Industry Future Employment Interest



Table: Tourism Industry Future Employment Interest

% of Non-Currently-Tourism Employed Residents	
Interested	47%
Not Interested	53%

Question: Would you ever consider working in Oregon's tourism industry in the future?
Base: Residents who do not currently own or work for a tourism business. 2,853 completed surveys.

Detailed Findings: Tourism Perceptions

Oregonians’ positive perceptions of tourism’s impacts continue to outweigh the negative across all dimensions.

Among Oregon residents, tourism maintains a stronger sense of positive impacts over the negative impacts. The largest positive/negative gap continues to be under economic impact (3.7 vs. 3.1, a +0.6-point gap) and the cultural impact (3.7 vs. 3.2, a +0.5-point gap). These two measures also reflect the highest positive scores as well. On the other hand, there remains a higher overall agreement with the negative impacts of tourism’s environmental and social dimensions, though these are still outpaced by the positive impacts at a narrower margin.

Chart: Index of Residents' Perceptions of Tourism Impacts

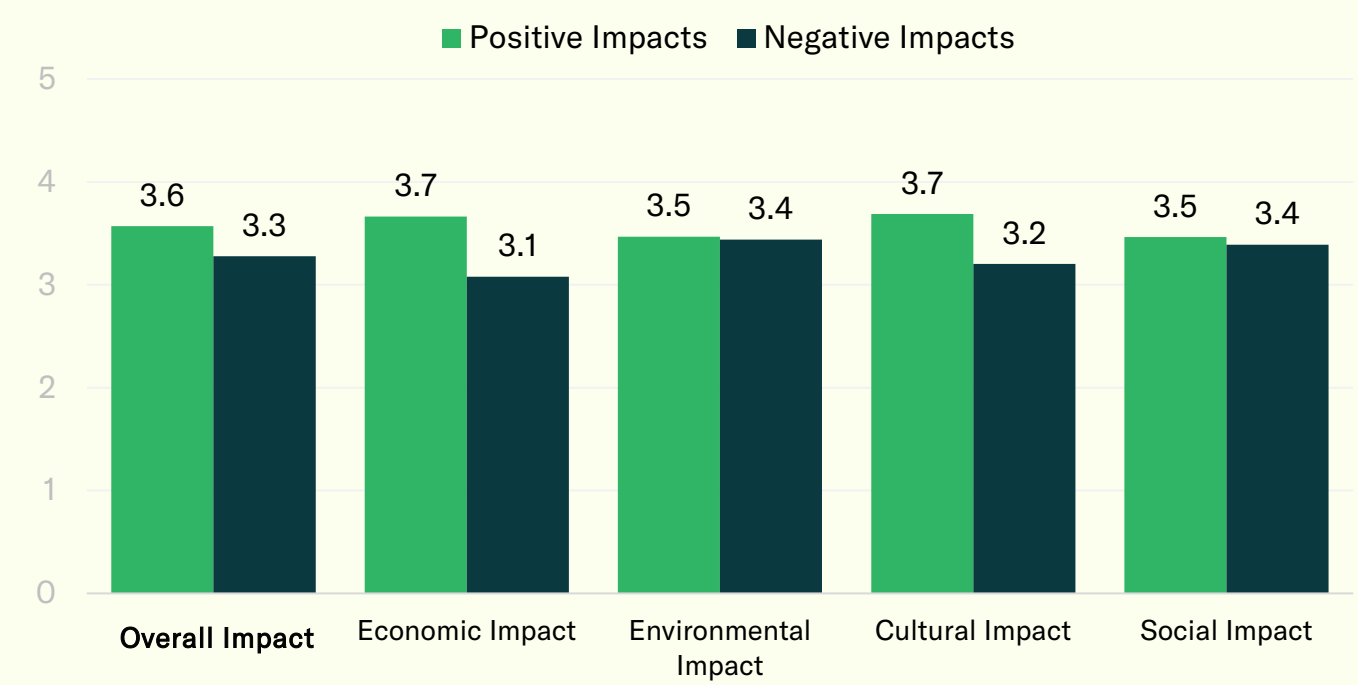


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Environmental Impact	3.5	3.4
Cultural Impact	3.7	3.2
Social Impact	3.5	3.4

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: Oregon residents. 4,245 completed surveys.

Tourism’s economic and cultural benefits are most strongly perceived among Oregonians, but less so for environmental and social benefits.

Looking at residents’ perceptions of tourism’s impact across these dimensions by the share of those whose positive impact scores outweigh their negative impact scores, we see an even clearer view of where tourism’s benefits are more pronounced. For economic (67%) and cultural (64%) impact, a clear majority of statewide residents believe tourism’s benefits outweigh the drawbacks, but opinion is much more divided when it comes to the industry’s environmental and social impacts.

Chart: Perceptions of Tourism Impacts as Benefits vs. Drawbacks

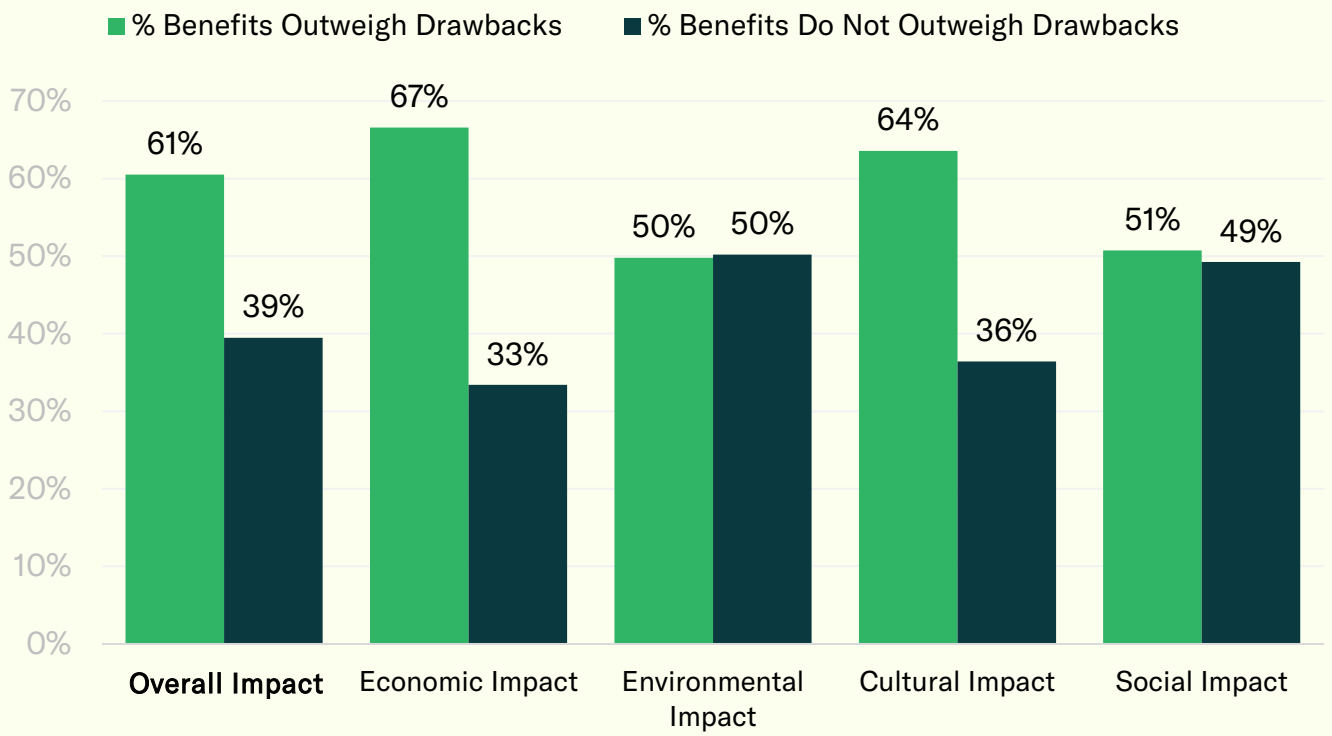


Table: Perceptions of Tourism Impacts as Benefits vs. Drawbacks

	% Benefits Outweigh Drawbacks	% Benefits Do Not Outweigh Drawbacks
Overall Impact	61%	39%
Economic Impact	67%	33%
Environmental Impact	50%	50%
Cultural Impact	64%	36%
Social Impact	51%	49%

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: Oregon residents. 4,245 completed surveys.

Residents view tourism’s biggest benefits as primarily through the lens of economic impact, as a funding source that supports community services, amenities, and cultural heritage.

As with the previous year’s study, Oregon residents continue to largely perceive the top benefits of tourism as anchored in economic value, from a broader level of economic benefits stemming from visitor spending and tax revenue. Below are written responses provided by Oregon residents to the open-ended question “What is the biggest benefit of tourism to your community?” that illustrate these sentiments.

“Additional income to create parks, recreation and restaurants can survive with the help of tourism dollars! It’s wonderful to have options for dining and entertainment, as well as Mt. Bachelor, trails, and adventure!”

“It has led to a huge increase in the quality and variety of our local breweries and distilleries. To attract tourists, entrepreneurs have opened amazing craft beverage spots that use local ingredients. These have become the new social hubs for residents, giving us great places to gather and relax.

“Much nicer municipal services and facilities than the local population could otherwise afford. Marine reserve community teams are of significant value to their communities, and tourism helps support them.”

“Visitors are interested in our history, traditions, and local art, which encourages us to preserve what makes our area unique. Museums, historical sites, and local creators gain support from visitor spending, keeping our culture alive and vibrant.”

Question: What is the biggest benefit of tourism to your community?
Base: Oregon residents. 4,245 completed surveys.

Congestion and environmental damage remain the perceived largest drawbacks to tourism for Oregon residents.

On the other hand, the most negative perceptions of tourism are fragmented across three overarching themes among Oregonians, namely traffic congestion and parking shortages, overcrowding and subsequent loss of access and disrupted community peace, as well as environmental damage caused by littering, pollution, and overuse of trails and beaches. Below are written responses provided by Oregon residents to the open-ended question “What is the biggest drawback of tourism to your community?” that summarize these challenges presented by tourism.

“Too many people to enjoy areas we moved here to enjoy.”

“Tourism brings big-box stores and short-term rentals, which draw on local communities’ limited resources. It also drives up the cost of living, exacerbating barriers for locals for whom wages and housing are too limited for sustainable livelihoods.”

“Too many people in my small community leads to severe traffic congestion, destruction to natural habitats, and increases the wear and tear on local infrastructure.”

“The land is getting loved to death. The number of people on trails and in the wilderness has grown exponentially. The ecosystems are suffering from too many people.”

Question: What is the biggest drawback of tourism to your community?
Base: Oregon residents. 4,245 completed surveys.

Oregon residents generally have a positive perception of tourism’s impacts on their own lives.

The majority of Oregonians continue to acknowledge the benefits of tourism, especially visiting local tourism businesses (60%). Over half also agree that they enjoy visiting attractions in their area and having tourists in their community (55%). Only 30% agreed that their personal income and livelihood is supported by tourist spending.

Chart: Residents' Perceptions of Positive Local Tourism Personal Impacts
(% “Agree” or “Strongly Agree” vs. % “Disagree” or “Strongly Disagree”)

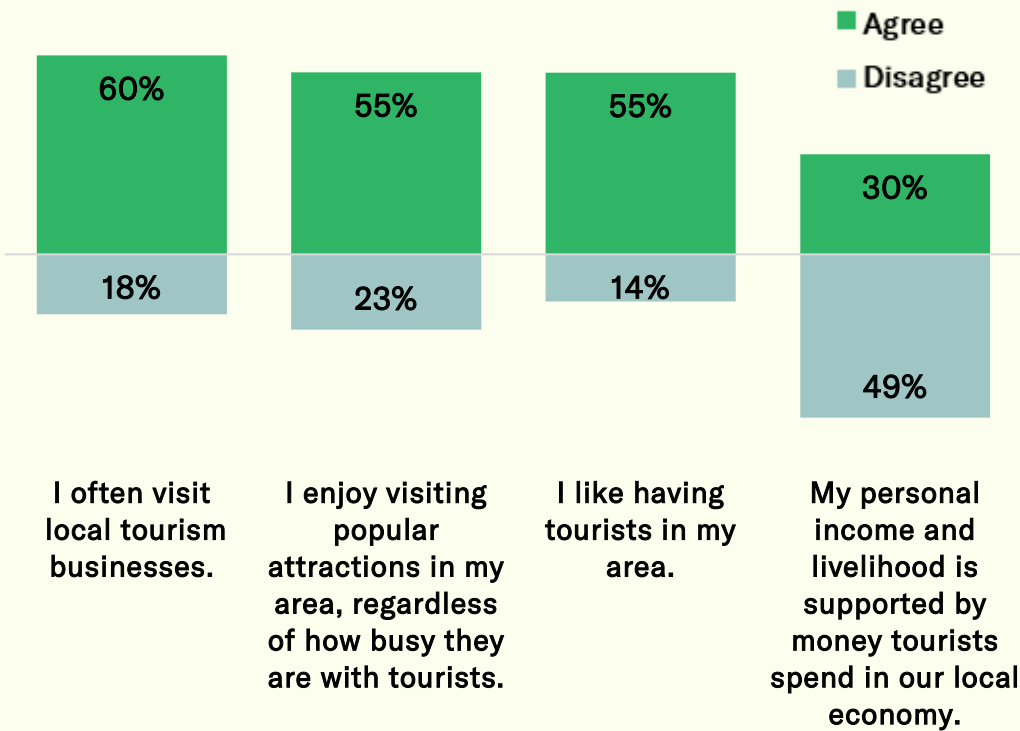


Table: Residents' Perceptions of Positive Local Tourism Personal Impacts

	% Selected “Agree” or “Strongly Agree”	% Selected “Disagree” or “Strongly Disagree”
I often visit local tourism businesses	60%	18%
I enjoy visiting popular attractions in my area, regardless of how busy they are with tourists	55%	23%
I like having tourists in my area	55%	14%
My personal income and livelihood is supported by money tourists spend in our local economy	30%	49%

Question: Thinking about tourism in your local area and its impact on you personally, please rate how much you agree with the following statements.
Base: Oregon residents. 4,245 completed surveys.

However, residents report strong negative perceptions around affected housing costs.

Over six in ten also agreed that tourism is negatively impacting Oregon’s housing market, particularly with second homes (61%) and short-term rentals (60%) perceived as driving up housing prices.

Chart: Residents' Perceptions of Negative Local Tourism Personal Impacts

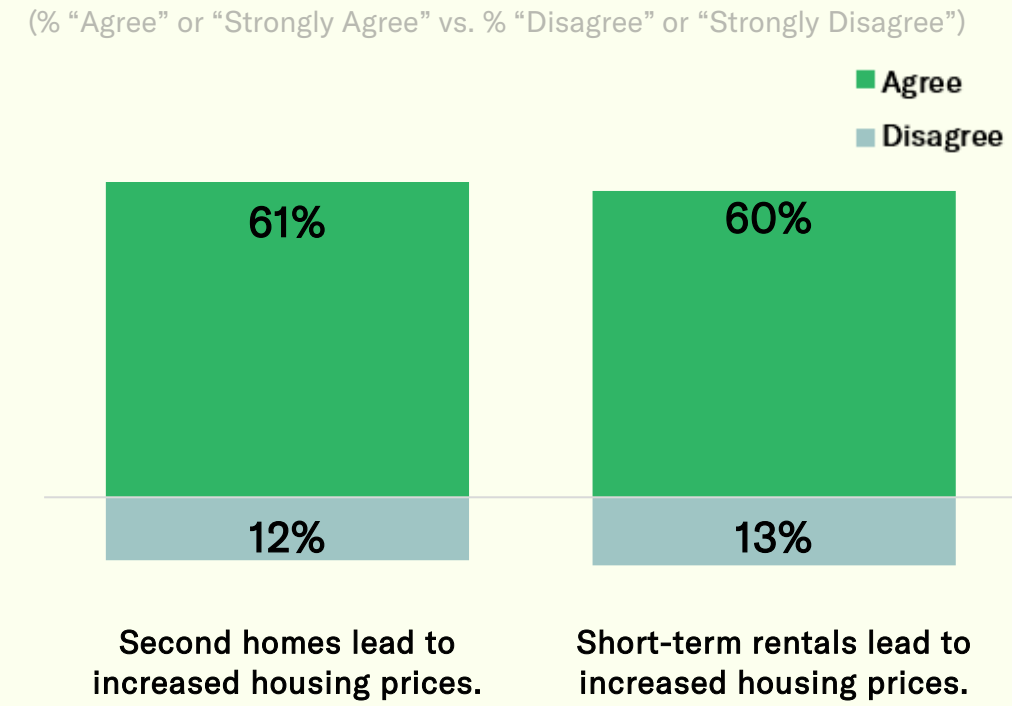


Table: Residents' Perceptions of Positive Local Tourism Personal Impacts

	% Selected “Agree” or “Strongly Agree”	% Selected “Disagree” or “Strongly Disagree”
Second homes lead to increased housing prices.	61%	12%
Short-term rentals lead to increased housing prices.	60%	13%

Question: Thinking about tourism in your local area and its impact on you personally, please rate how much you agree with the following statements.
Base: Oregon residents. 4,245 completed surveys.

Residents widely support tourism in Oregon, but less than half say they want the state to depend more on tourism.

In terms of overall support for tourism, calculated as the mean score for across all 10 statements shown in the following three slides, total Oregon residents scored 1.3 out of a maximum possible mean score of 3.0. A majority of Oregon residents supports every potential option for improving tourism, with the exception of depending more on tourism (47%). At least three in five agree that Oregon should encourage outdoor recreation development (80%), advertise in-state (76%), advertise domestically (71%), advertise internationally (68%), attract more visitors (65%), consider tourism a priority (65%), and establish more tourism facilities (64%).

Chart: Support for Tourism – “Oregon should...”

(On a 7-point scale)

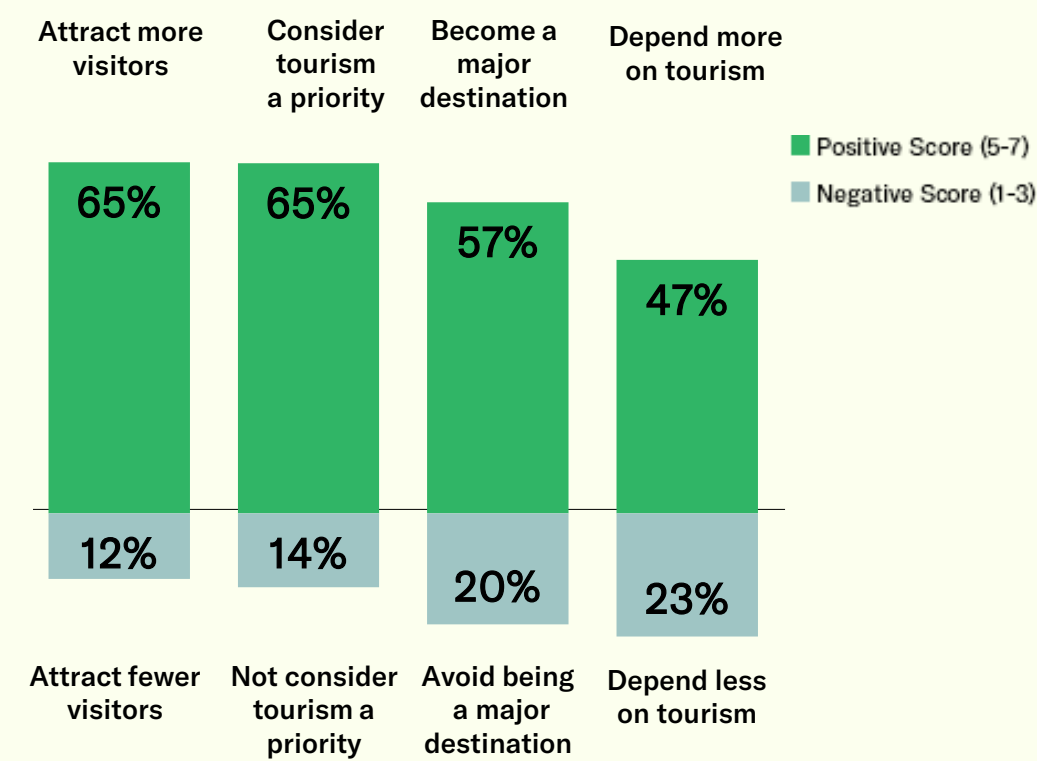


Table: Support for Tourism – “Oregon should...”

(On a 7-point scale)

Tourism Prioritization	Positive Score (5-7)	Negative Score (1-3)
Attract more visitors (positive) vs. Attract fewer visitors (negative)	65%	12%
Consider tourism a priority (positive) vs. Not consider tourism a priority (negative)	65%	14%
Become a major destination (positive) vs. Avoid being a major destination (negative)	57%	20%
Depend more on tourism (positive) vs. Depend less on tourism (negative)	47%	23%

Question: Thinking of tourism in Oregon, please read each statement and complete it by using the slider scales below to plot how closely you agree to each statement. Oregon should...
Base: Oregon residents. 4,245 completed surveys.

Support for Tourism Statements – Continued

Chart: Support for Tourism – “Oregon should...”

(On a 7-point scale)

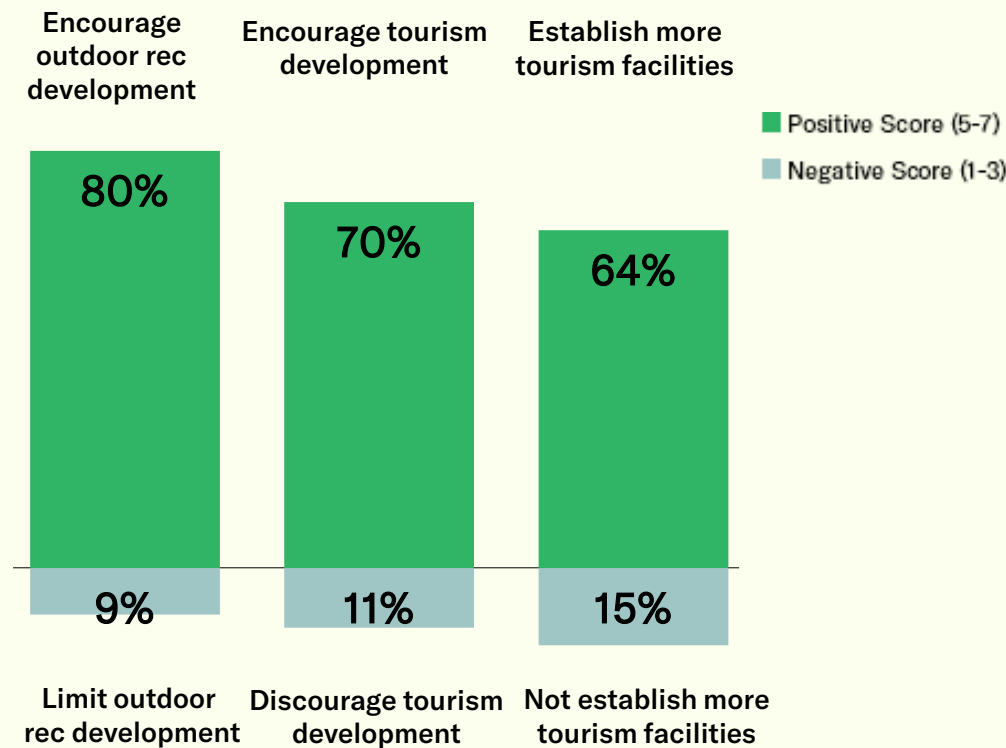


Table: Support for Tourism – “Oregon should...”

(On a 7-point scale)

Tourism Prioritization	Positive Score (5-7)	Negative Score (1-3)
Encourage outdoor rec development (positive) vs. Limit outdoor rec development (negative)	80%	9%
Encourage tourism development (positive) vs. Discourage tourism development (negative)	70%	11%
Establish more tourism facilities (positive) vs. Not establish more tourism facilities (negative)	64%	15%

Question: Thinking of tourism in Oregon, please read each statement and complete it by using the slider scales below to plot how closely you agree to each statement. Oregon should...

Base: Oregon residents. 4,245 completed surveys.

Support for Tourism Statements – Continued

Chart: Support for Tourism – “Oregon should...”

(On a 7-point scale)

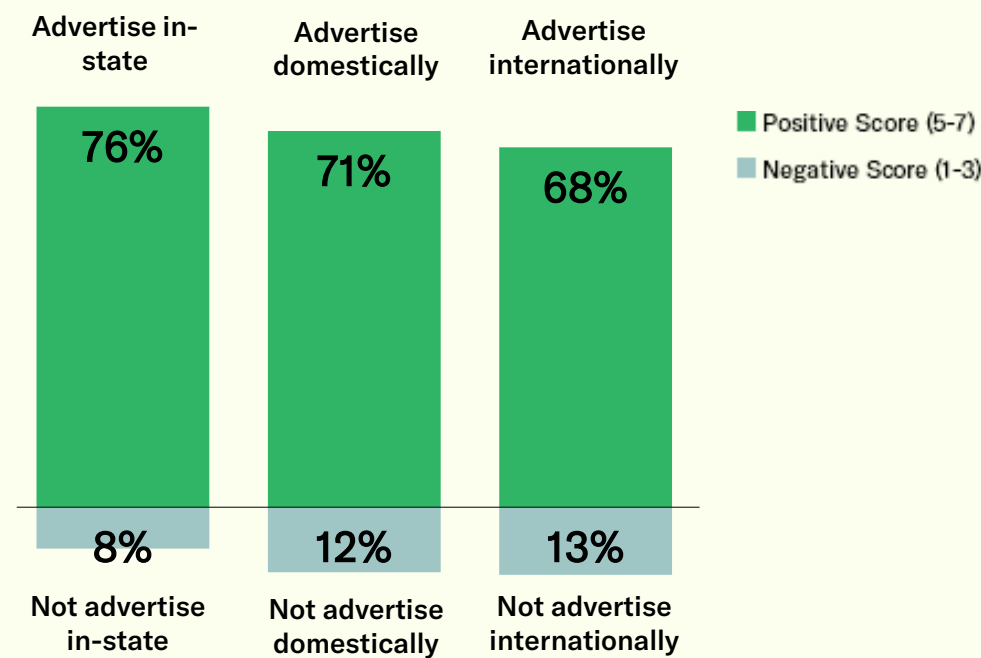


Table: Support for Tourism – “Oregon should...”

(On a 7-point scale)

Tourism Prioritization	Positive Score (5-7)	Negative Score (1-3)
Advertise in-state (positive) vs. Not advertise in-state (negative)	76%	8%
Advertise domestically (positive) vs. Not advertise domestically (negative)	71%	12%
Advertise internationally (positive) vs. Not advertise internationally (negative)	68%	13%

Question: Thinking of tourism in Oregon, please read each statement and complete it by using the slider scales below to plot how closely you agree to each statement. Oregon should...
Base: Oregon residents. 4,245 completed surveys.

Above all, residents want visitors to show respect for wildlife and utilize public transportation in Oregon.

Essentially all Oregon residents want respect from visitors and a decrease in traffic congestion; roughly nine in ten say that it is somewhat or very important to them that visitors to the state respect the wildlife (91%) and utilize public transportation (88%). Over two-thirds also want visitors to be environmentally careful, through the practices of leave no trace (80%), minimizing their carbon footprint (72%), and using reusable/recyclable products (66%).

Chart: Visitor Behavior Importance

(% “Somewhat important” or “Very important”)

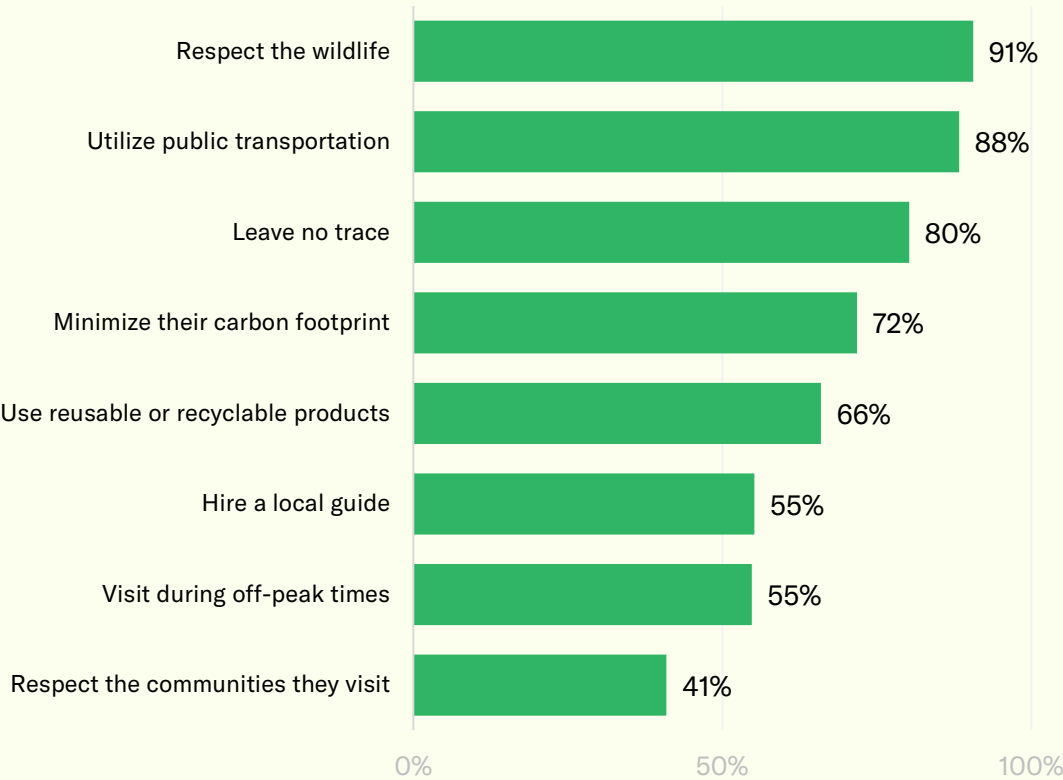


Table: Visitor Behavior Importance

	% Selected “Somewhat important” or “Very important”
Respect the wildlife	91%
Utilize public transportation	88%
Leave no trace	80%
Minimize their carbon footprint	72%
Use reusable or recyclable products	66%
Hire a local guide	55%
Visit during off-peak times	55%
Respect the communities they visit	41%

Question: In your opinion, how important is it that visitors to Oregon...

Base: Total Oregon residents. 4,245 completed surveys.

BIPOC Residents

Among non-white Oregon residents, the following differences emerged:

- These residents are more likely to own or work at a business that serves the tourism industry.
- They are much more likely to be optimistic about their future quality of life compared to total statewide residents.

Overall non-white resident scores for Perceived Quality of Life were on par with the total at 11.4 vs. 11.5, out of a total possible score of 15. But looking at differences across specific ethnic groups, Native American/Alaskan Native (10.8 score) as well as African American/Black residents (10.8) had notably lower Perceived Quality of Life scores.

Additionally, likelihood to recommend their community as a tourism destination was significantly lower for Native American/Alaskan Native (-18) and African American/Black (-32) residents compared to the total statewide resident score of -3.

When comparing the impact index scores for individual ethnic groups, Native American/Alaskan Native and African American/Black residents have slightly higher negative-impact scores for economic impact and cultural impact compared to total residents. For the economic negative-impact index, African American/Black residents scored a 3.5 (vs. 3.1 for total residents), while Native American/Alaskan Natives scored a 3.2. For the cultural negative-impact index, African American/Black residents were again more likely to score higher at 3.5 vs. 3.2 of total residents, and Native American/Alaskan Natives scored a 3.4.



LGBTQIA+ Residents

Among LGBTQIA+ residents, the following differences emerged:

- They are more likely to own or work at a business that serves the tourism industry.
- The LGBTQIA+ community in Oregon reported an overall lower support for tourism score at 0.9 versus the total residents' score of 1.2.
- Their likelihood to recommend their community as a tourism destination is a significantly lower -18 compared to the -3 score for total residents.

When comparing the impact index scores for LGBTQIA+ residents against total residents, Oregon residents who identify as LGBTQIA+ are more likely to have a slightly higher score for the environmental, and cultural negative-impact indexes. While total residents scored a 3.4 for negative impacts to the environment, LGBTQIA+ residents scored a 3.6, which actually outweighs their positive impact score of 3.4 for the environment dimension. Similarly, for the social dimension, their negative impact score of 3.5 surpasses their positive impact score of 3.4.



Residents With Disabilities

Among Oregon residents with disabilities, the following differences emerged:

- They are less likely to own a business that serves the tourism industry but more likely to be employed by a tourism business.
- Residents with disabilities are less likely to be optimistic about their future quality of life, with just 38% expecting to be better off in the next year compared to 45% of total residents.
- Similarly, their Perceived Quality of Life score rated at an 11.0, significantly lower than the total resident score of 11.5 out of a total possible score of 15.

Generally, support for tourism among these residents is lower than average, with their overall support for tourism scoring at a 1.0 on a scale of -3 to 3, while total residents scored a 1.2. When comparing the impact index scores for residents with disabilities against total residents, we see that Oregon residents who have a disability are more likely to have a slightly lower positive scores for all tourism impact indexes (Economic, Environmental, Cultural, Social), although their negative impact scores are on par or slightly below total residents. In particular, their negative impact scores for the environmental and social dimensions outpace their positive index score (3.4 negative vs. 3.3 positive for environmental; 3.4 negative vs. 3.3 positive for social).



Economic Impact

Most residents perceive tourism as an important industry to the local economy, but many remain skeptical about its tax benefits.

Nearly eight in ten residents recognize the importance of tourism to the success of local businesses (79% agree). More than seven in ten agree that tourism supports the creation of a variety of dining/entertainment options (73%), employment opportunities (73%), and the health of the local economy (71%). At 55%, a smaller share of residents agreed that tourism improves the standard of living. However, residents are even more skeptical that tourism reduces their taxes (26% agree, significantly lower than the 42% reported in 2023).

Chart: Perceptions of Tourism’s Positive Economic Impacts

(% “Agree” or “Strongly Agree” vs. % “Disagree” or “Strongly Disagree”)

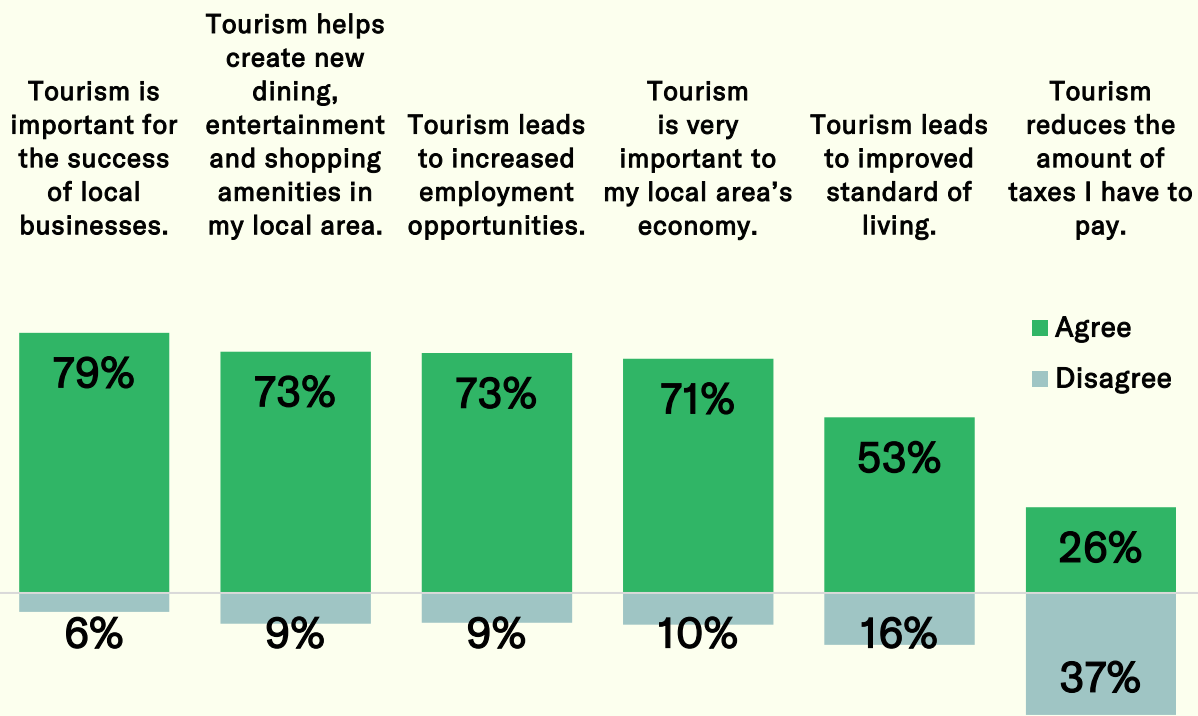


Table: Perceptions of Tourism’s Positive Economic Impacts

	% Selected “Agree” or “Strongly Agree”	% Selected “Disagree” or “Strongly Disagree”
Tourism is important for the success of local businesses.	79%	6%
Tourism helps create new dining, entertainment and shopping amenities in my local area.	73%	9%
Tourism leads to increased employment opportunities.	73%	9%
Tourism is very important to my local area’s economy.	71%	10%
Tourism leads to improved standard of living.	53%	16%
Tourism reduces the amount of taxes I have to pay.	26%	37%

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: Oregon residents. 4,245 completed surveys.

Negative impacts to cost of living are the primary economic downside of tourism for Oregon residents.

Perceptions that tourism increases the cost of living outpaces other negative perceptions about tourism for Oregon residents (47%). Four in ten agree that tourism leads to unstable employment caused by seasonality (41% agree) and increased dependency on a limited number of industries (40% agree), both of which have increased notably since 2023. On the other hand, most residents often do not agree that tourism leads to shortages of products/goods (25% agree; 51% disagree).

Chart: Perceptions of Tourism’s Negative Economic Impacts

(% “Agree” or “Strongly Agree” vs. % “Disagree” or “Strongly Disagree”)

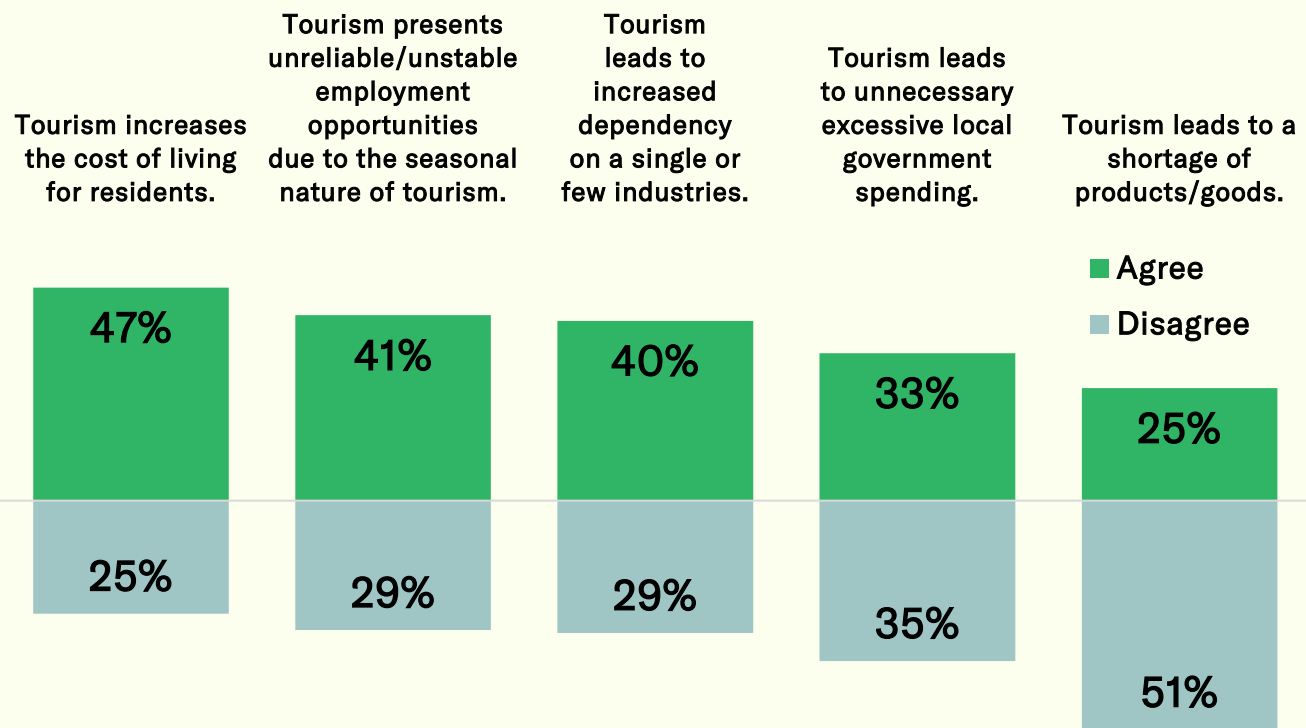


Table: Perceptions of Tourism’s Negative Economic Impacts

	% Selected “Agree” or “Strongly Agree”	% Selected “Disagree” or “Strongly Disagree”
Tourism increases the cost of living for residents.	47%	25%
Tourism presents unreliable/unstable employment opportunities due to the seasonal nature of tourism.	41%	29%
Tourism leads to increased dependency on a single or few industries.	40%	29%
Tourism leads to unnecessary excessive local government spending.	33%	35%
Tourism leads to a shortage of products/goods.	25%	51%

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: Oregon residents. 4,245 completed surveys.

Environmental Impact

A small majority of Oregonians credit tourism with providing environmental benefits.

More than half of Oregon residents agree that tourism leads to the improved condition of state/national parks (56%), improved physical appearance of their community (54%) and the fact tourism aids in funding for environmental improvements (54%). A smaller majority agree that tourism improves opportunities for sustainable development (51%). While not quite a majority, a similar share agree that tourism increases conservation/protection of natural/wildlife habitat (49%).

Chart: Perceptions of Tourism’s Positive Environmental Impacts

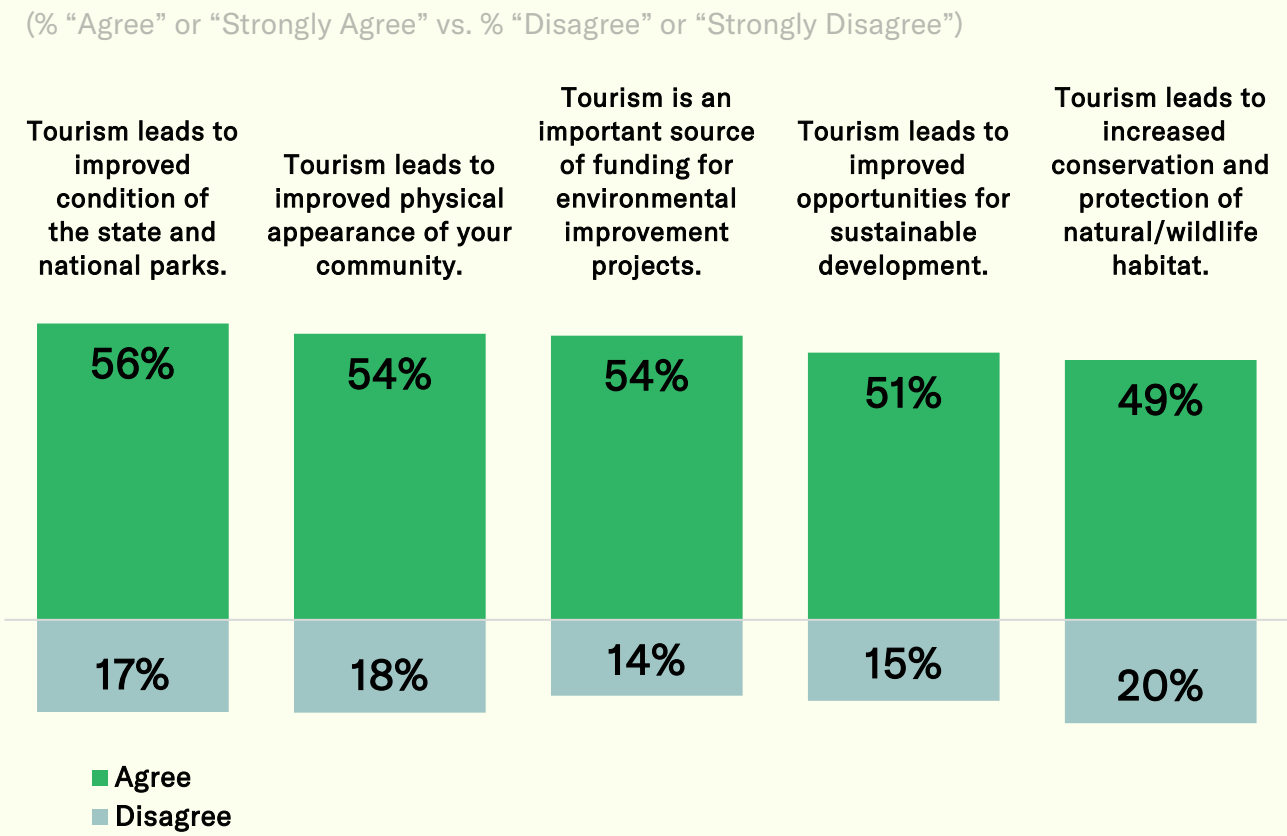


Table: Perceptions of Tourism’s Positive Environmental Impacts

	% Selected “Agree” or “Strongly Agree”	% Selected “Disagree” or “Strongly Disagree”
Tourism leads to improved condition of the state and national parks.	56%	17%
Tourism leads to improved physical appearance of your community.	54%	18%
Tourism is an important source of funding for environmental improvement projects	54%	14%
Tourism leads to improved opportunities for sustainable development.	51%	15%
Tourism leads to increased conservation and protection of natural/wildlife habitat.	49%	20%

Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s environment, please rate how much you agree or disagree with the following statements.
Base: Oregon residents. 4,245 completed surveys.

However, nearly two-thirds of Oregonians continue to flag litter and waste as tourism’s primary negative environmental impact.

Residents continue to point to increased litter/waste as the biggest environmental drawback to tourism, by far (64%). About half agree that tourism is connected to environmental damage (53%), increased noise (52%), and increased risk of wildfires (52%). A large minority are concerned about tourism’ impact on air (47%) and water pollution (45%).

Chart: Perceptions of Tourism’s Negative Environmental Impacts

(% “Agree” or “Strongly Agree” vs. % “Disagree” or “Strongly Disagree”)

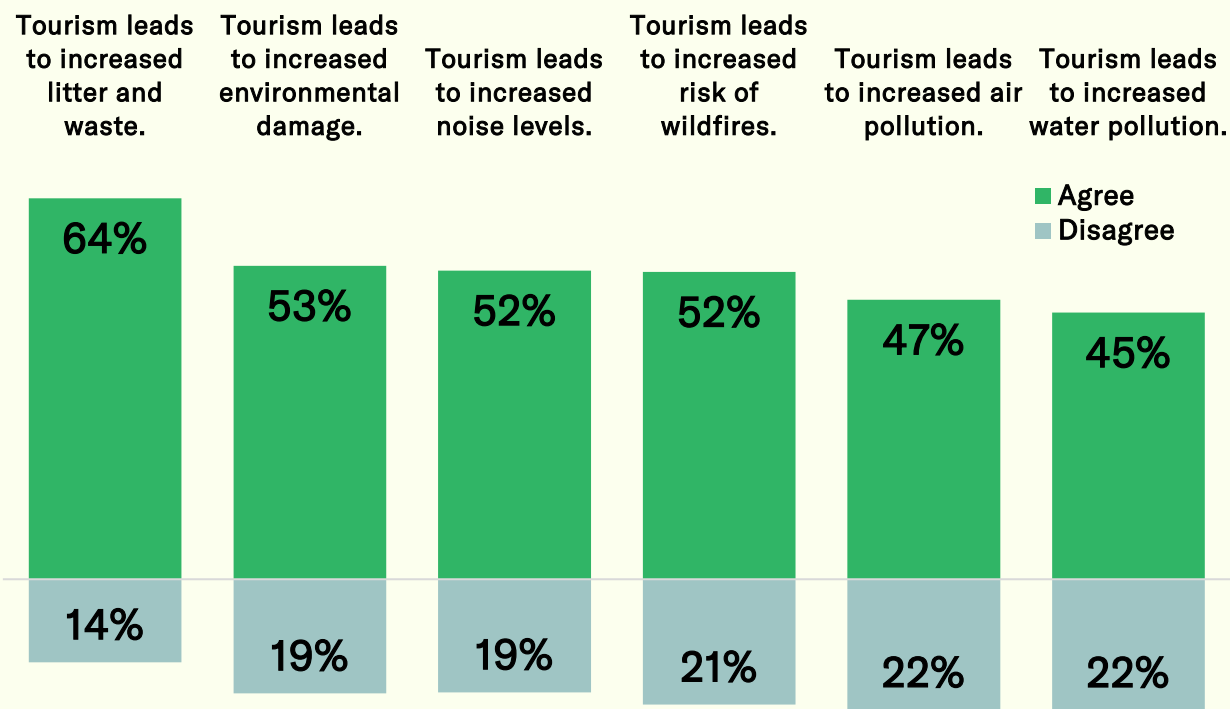


Table: Perceptions of Tourism’s Negative Environmental Impacts

	% Selected “Agree” or “Strongly Agree”	% Selected “Disagree” or “Strongly Disagree”
Tourism leads to increased litter and waste.	64%	14%
Tourism leads to increased environmental damage.	53%	19%
Tourism leads to increased noise levels.	52%	19%
Tourism leads to increased risk of wildfires.	52%	21%
Tourism leads to increased air pollution.	47%	22%
Tourism leads to increased water pollution.	45%	22%

Question: Thinking about Oregon’s tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Oregon residents. 4,245 completed surveys.

Cultural Impact

Tourism continues to be perceived as a positive force for cultural enrichment and community vitality among residents.

Most residents largely appreciate many positive cultural benefits of tourism, with over three-fourths agreeing that the industry encourages activities such as crafts, arts, music, and festivals (76%). Seven in ten agree that tourism increases recreational and entertainment options (70%), and two-thirds agree that it increases cultural exchange (66%). Almost as many agree that it increases demand for cultural events (63%). About half agree that tourism helps to improve the preservation of cultural identity/local culture (52%) and fosters a welcoming environment for diversity.

Chart: Perceptions of Tourism’s Positive Cultural Impacts

(% “Agree” or “Strongly Agree” vs. % “Disagree” or “Strongly Disagree”)



Table: Perceptions of Tourism’s Positive Cultural Impacts

	% Selected “Agree” or “Strongly Agree”	% Selected “Disagree” or “Strongly Disagree”
Tourism leads to encouragement of cultural activities such as crafts, arts, music, festivals	76%	6%
Tourism leads to increased quality of recreational and entertainment opportunities	70%	10%
Tourism leads to increased cultural exchange (sharing customs, learning about other cultures)	66%	11%
Tourism leads to increased demand for cultural events	63%	9%
Tourism leads to improved preservation of cultural identity and local culture	52%	14%
Tourism helps create a more welcoming environment for diverse people (e.g., LGBTQ+, people of color, etc.)	50%	14%

Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s culture, please rate how much you agree or disagree with the following statements.
Base: Oregon residents. 4,245 completed surveys.

Though still a minority, concerns about tourism degrading local culture and lifestyle remain the dominant perceived negative cultural impacts of the industry.

That being said, residents still view the primary negative impacts of tourism as the disturbance of their local life/lifestyles (44%) and commodification of the local culture (42%). Agreement is slightly lower that tourism leads to conflicts between tourists and residents (39%) or that tourism negatively changes the local culture (34%), though opinion on the latter two remains polarized.

Chart: Perceptions of Tourism’s Negative Cultural Impacts

(% “Agree” or “Strongly Agree” vs. % “Disagree” or “Strongly Disagree”)

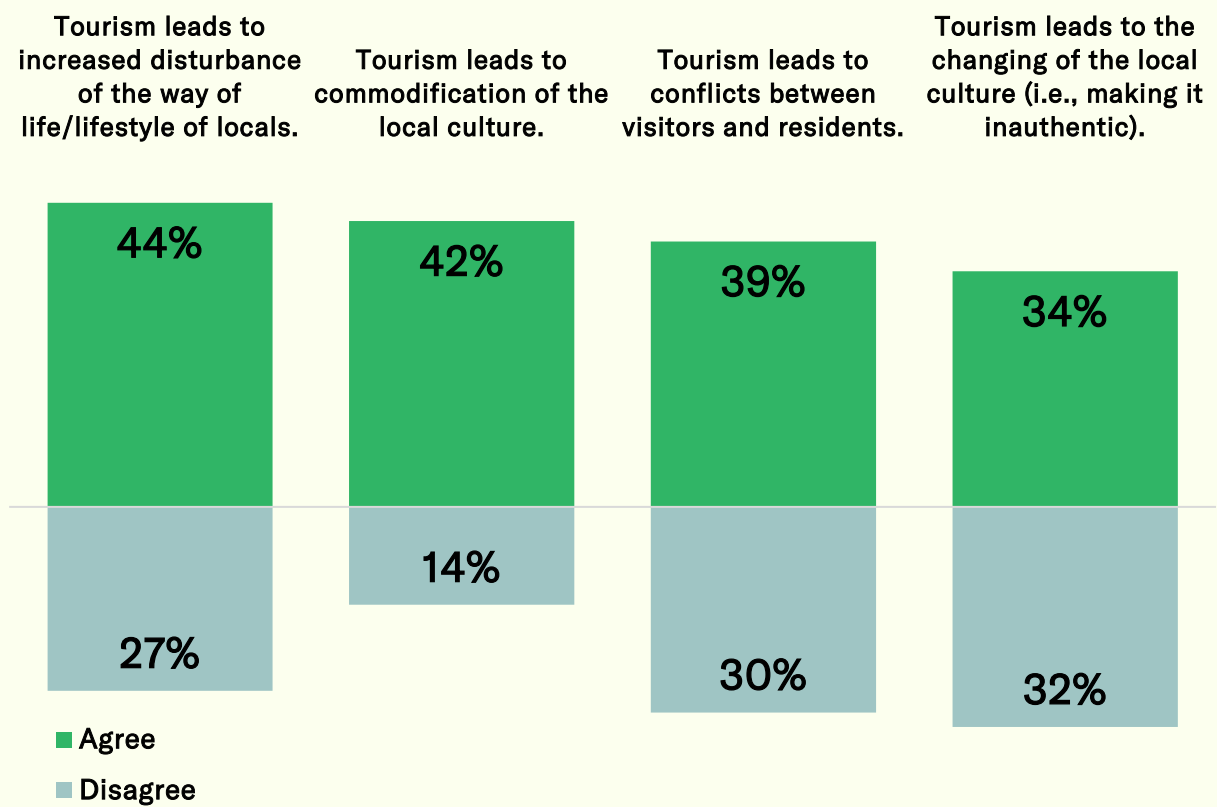


Table: Perceptions of Tourism’s Negative Cultural Impacts

	% Selected “Agree” or “Strongly Agree”	% Selected “Disagree” or “Strongly Disagree”
Tourism leads to increased disturbance of the way of life/lifestyle of locals.	44%	27%
Tourism leads to commodification of the local culture.	42%	14%
Tourism leads to conflicts between visitors and residents.	39%	30%
Tourism leads to the changing of the local culture (i.e., making it inauthentic).	34%	32%

Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s culture, please rate how much you agree or disagree with the following statements.
Base: Oregon residents. 4,245 completed surveys.

Social Impact

In line with positive cultural impacts, tourism is perceived to increase community visibility and to lead to infrastructure improvement.

About two-thirds of residents agree that tourism enhances their communities’ media visibility (70%), global recognition (67%), improved image (64%), and improved infrastructure (61%). Half perceive accelerated community growth, community pride, public infrastructure, volunteering opportunities, and improved leisure facilities. In contrast, around a third disagree that tourism leads to increased education investments or increased safety, or that tourism helps preserve peace/tranquility.

Chart: Perceptions of Tourism’s Positive Social Impacts

(% “Agree” or “Strongly Agree” vs. % “Disagree” or “Strongly Disagree”)

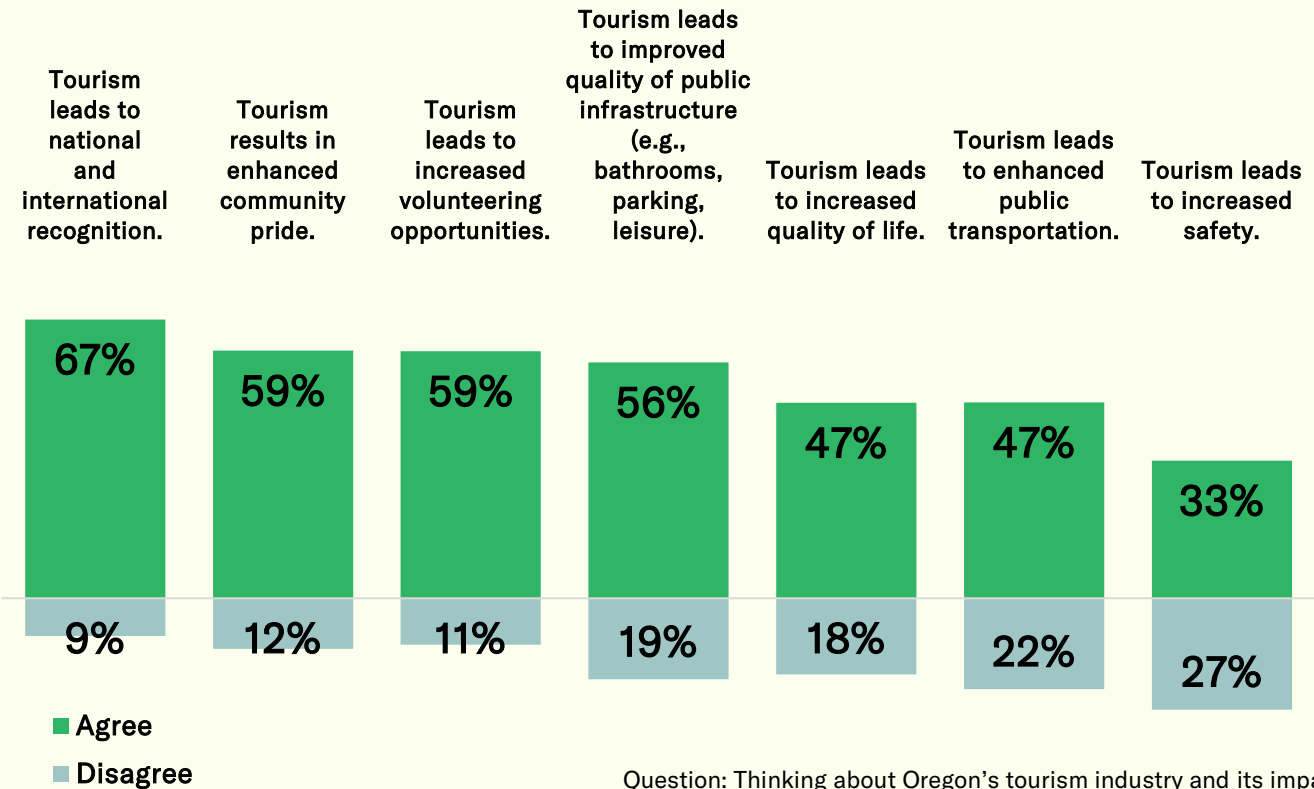


Table: Perceptions of Tourism’s Positive Social Impacts

	% Selected “Agree” or “Strongly Agree”	% Selected “Disagree” or “Strongly Disagree”
Tourism leads to national and international recognition.	67%	9%
Tourism results in enhanced community pride.	59%	12%
Tourism leads to increased volunteering opportunities.	59%	11%
Tourism leads to improved quality of public infrastructure (e.g., bathrooms, parking, leisure).	56%	19%
Tourism leads to increased quality of life.	47%	18%
Tourism leads to enhanced public transportation.	47%	22%
Tourism leads to increased safety.	33%	27%

Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s communities, please rate how much you agree or disagree with the following statements.
Base: Oregon residents. 4,245 completed surveys.

Two-thirds of residents agree that tourism brings traffic congestion, half say it leads to overcrowding; but safety and crime concerns are minimal.

Traffic congestion dominates other negative social impacts (67%), according to residents. Half agree that it leads to overcrowding (49%). More than a third note that tourism disturbs their routine life and yields higher outbreaks of infections (38% each). However, they are more likely to disagree that tourism leads to increased crime (36% disagree; 30% agree).

Chart: Perceptions of Tourism’s Negative Social Impacts

(% “Agree” or “Strongly Agree” vs. % “Disagree” or “Strongly Disagree”)

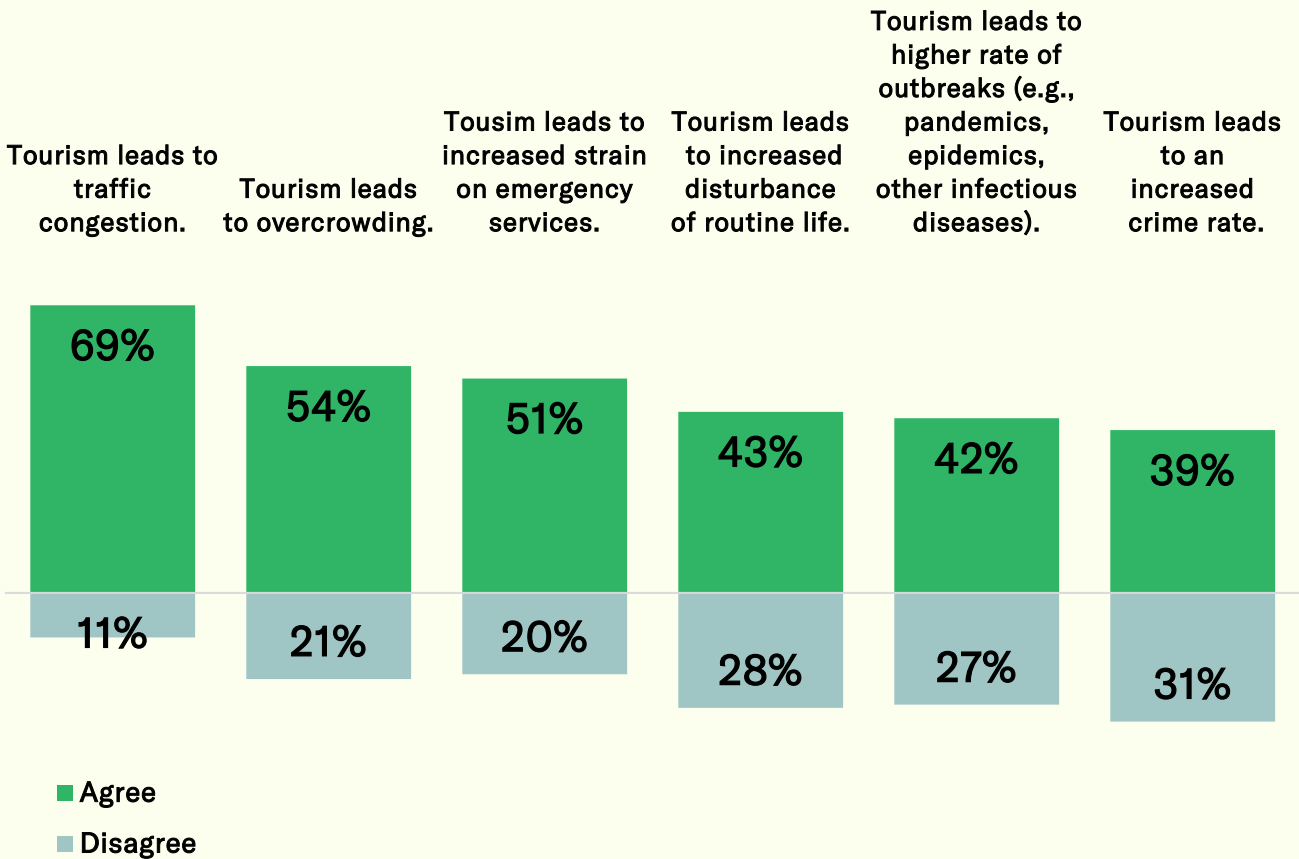


Table: Perceptions of Tourism’s Positive Social Impacts

	% Selected “Agree” or “Strongly Agree”	% Selected “Disagree” or “Strongly Disagree”
Tourism leads to traffic congestion	69%	11%
Tourism leads to overcrowding	54%	21%
Tourism leads to increased strain on emergency services.	51%	20%
Tourism leads to increased disturbance of routine life	43%	28%
Tourism leads to higher rate of outbreaks (e.g., pandemics, epidemics, other infectious diseases)	42%	27%
Tourism leads to an increased crime rate	39%	31%

Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s communities, please rate how much you agree or disagree with the following statements.
Base: Oregon residents. 4,245 completed surveys.

Detailed Findings: Regional Breakouts

Portland Region

The following slides present findings specific to Portland Region residents, including demographics and insights into quality-of-life perceptions, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and questions that were asked specifically of Oregonians who live in the region.

Portland Region Demographic Snapshot

Total residents surveyed:	940
Average age:	45 years old
Average household income:	\$79,724
Employed:	65%
College graduate:	52%
Married/domestic partnership:	54%
Have children in household:	29%
BIPOC:	33%
LGBTQ+:	19%
Accessibility needs in household:	25%



Quality of life perceptions among Portland region residents align closely with statewide metrics.

Of the seven Oregon regions, Portland residents scored roughly average for their perceived quality of life (11.4 vs. 11.5 overall state). Residents in the Portland region are fairly optimistic that their quality of life will improve in the future, though their perceptions align closely to the total (47% vs. the overall average of 45%).

Chart: Portland Region Residents' Score*

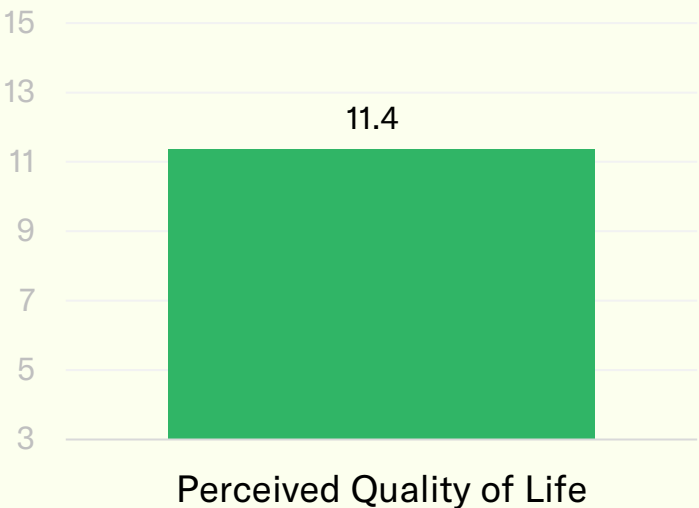


Table: Portland Region Residents' Score*

Perceived Quality of Life Score	
Portland Region Residents	11.4

Chart: Future Quality of Life

(Selected "Somewhat better" or "Much better")

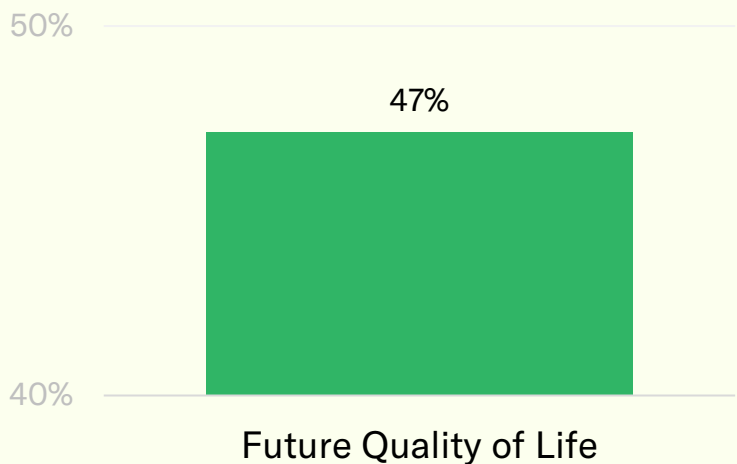


Table: Future Quality of Life

% Selected "Somewhat better" or "Much better"	
Portland Region Residents	47%

*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 3 (extremely dissatisfied) and a maximum possible score of 15 (extremely satisfied).

Questions: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?

Base: Portland Region residents. 940 completed surveys.

Portland region residents are slightly more likely to recommend their community as a tourism destination than overall Oregonians.

More than one-third of Portland region residents are promoters of their local community as a tourism destination (35% scored a 9 or 10 on a 0 to 10-point scale). When subtracting the detractors (residents who scored a 6 or lower) from the promoters (those who scored a 9 or 10), the likelihood-to-recommend score for the Portland Region is 0, compared to the overall state score of -3.

Chart: Likelihood to Recommend Local Community as a Tourism Destination

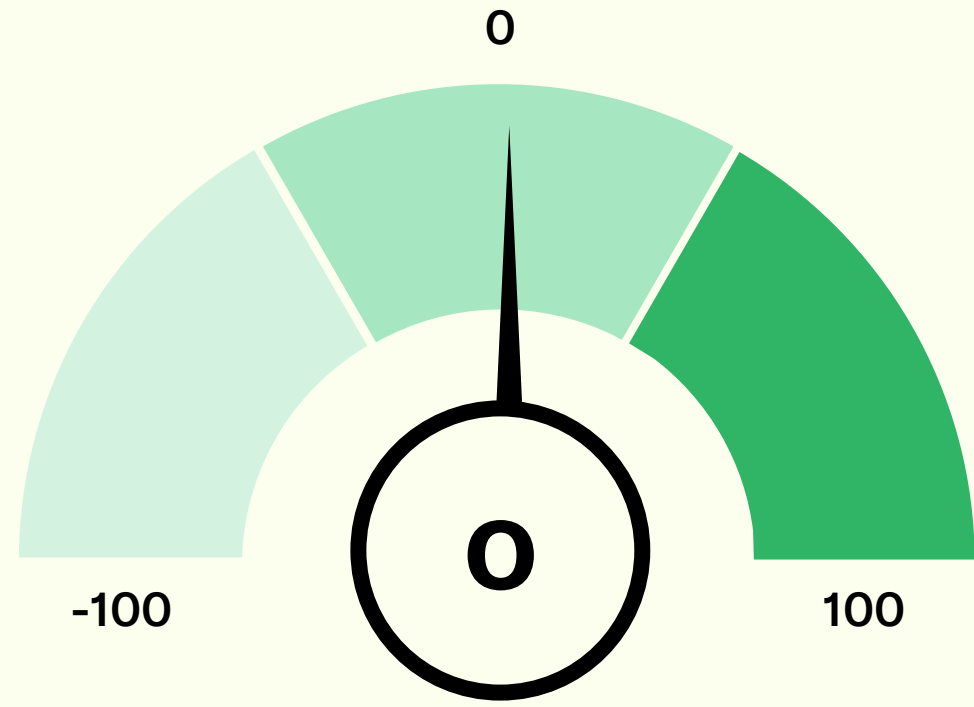


Table: Likelihood to Recommend Local Community as a Tourism Destination

Likelihood to Recommend Score	
Portland Region Residents	0

Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?
Base: Portland Region residents. 940 completed surveys.

Portland region residents perceive tourism’s positive impacts as outweighing negative impacts across all dimensions, particularly economic and cultural.

Across all tourism dimensions, Portland residents feel the positive outweighs the negative impacts of tourism. Portland region residents tied with Central Oregon region residents for the highest reported positive scores on every type of impact except for economic, for which Portland fell slightly below the Central Oregon region. Similar to the overall statewide results, the largest positive/negative gap occurs in the economic impact (3.7 vs. 3.0, a +0.7-point gap) and the cultural impact (3.8 vs. 3.2, a +0.6-point gap). These two dimensions also represent the highest positive impact scores for this region. On the other hand, environmental and social impacts reported high negative impact scores and lower positive impact scores.

Chart: Index of Residents' Perceptions of Tourism Impacts

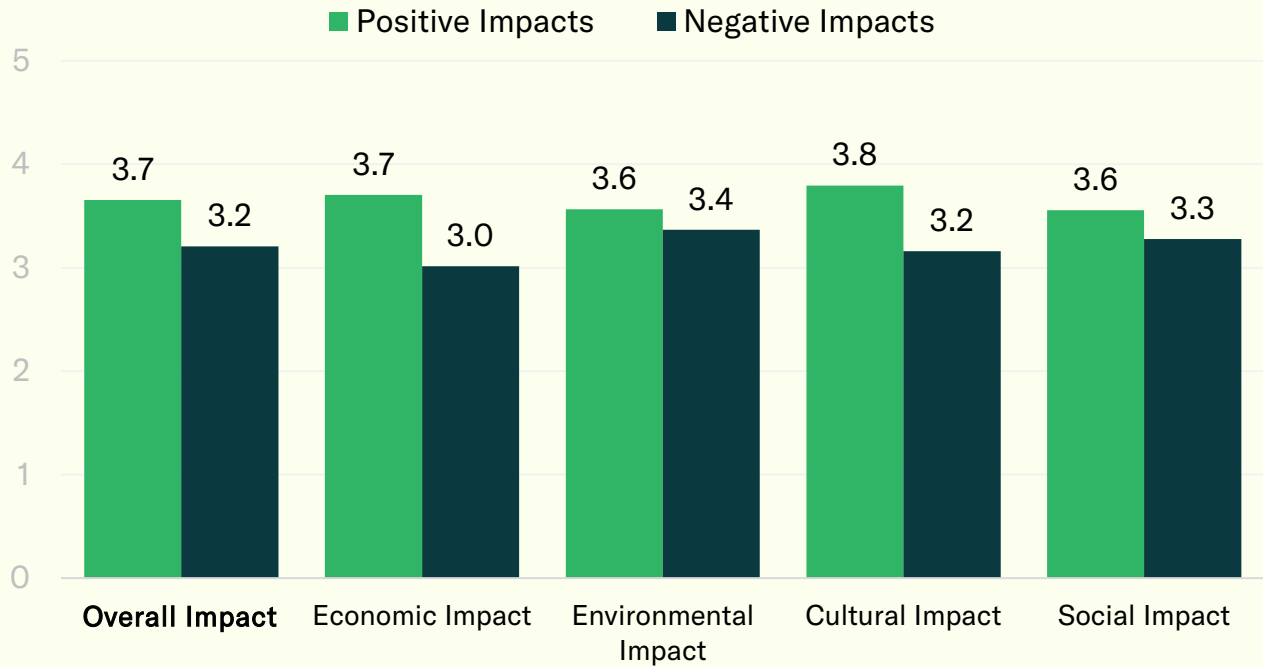


Table: Index of Residents' Perceptions of Tourism Impacts

	Positive Impacts Mean Score	Negative Impacts Mean Score
Overall Impact	3.7	3.2
Economic Impact	3.7	3.0
Environmental Impact	3.6	3.4
Cultural Impact	3.8	3.2
Social Impact	3.6	3.3

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: Portland Region residents. 940 completed surveys.

Portland Region residents view tourism’s impacts more favorable than total Oregonians across all tourism dimensions.

For Portland Region residents, their perceptions of tourism’s impact are more positive than the statewide response, with stronger majorities saying the benefits of tourism outweigh the drawbacks across all dimensions. For economic (68%) and cultural (69%) impact, over two-thirds of regional residents believe tourism’s benefits outweigh the drawbacks, while smaller majorities feel the same about the environmental (56%) and social (57%) impacts of tourism.

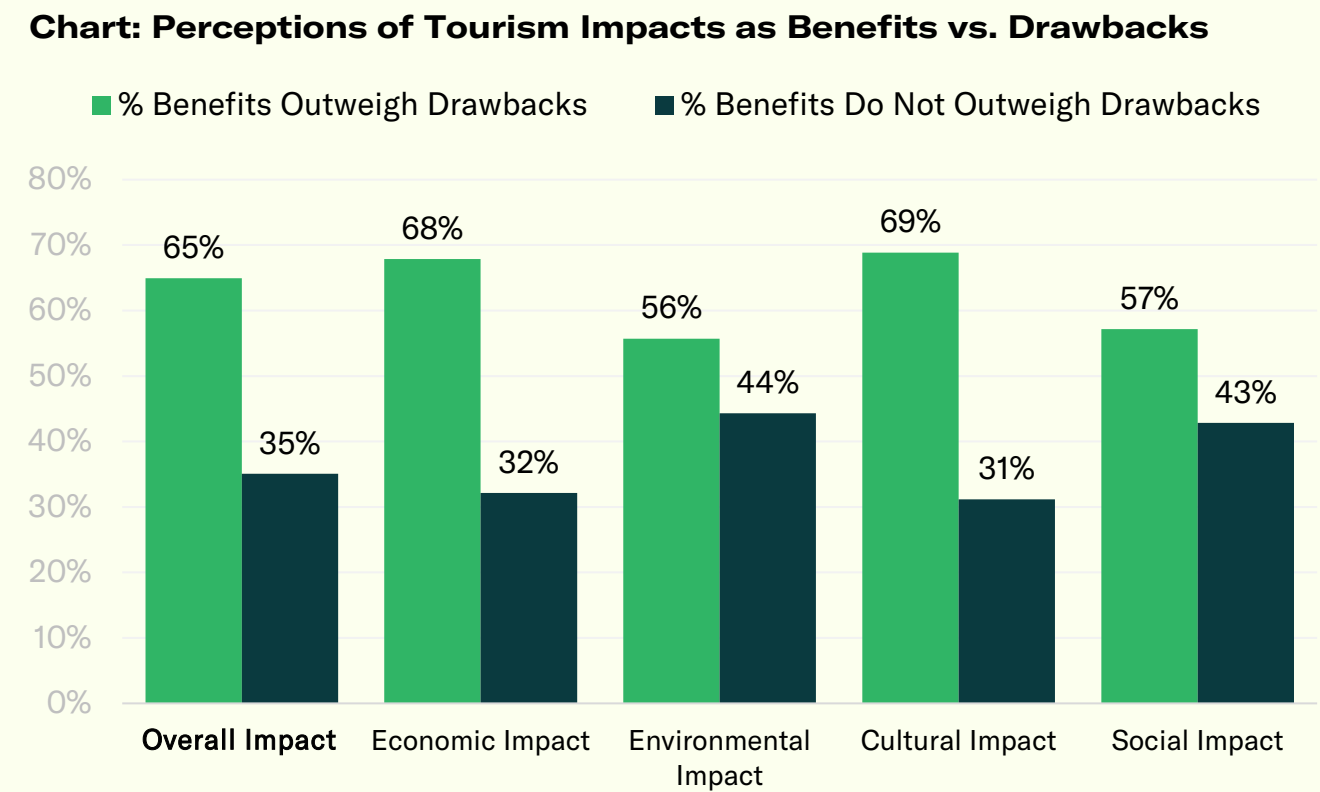


Table: Perceptions of Tourism Impacts as Benefits vs. Drawbacks

	% Benefits Outweigh Drawbacks	% Benefits Do Not Outweigh Drawbacks
Overall Impact	65%	35%
Economic Impact	68%	32%
Environmental Impact	56%	44%
Cultural Impact	69%	31%
Social Impact	57%	43%

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: Portland Region residents. 940 completed surveys.

Downtown Portland visitation is still strong, with one in three regional residents having visiting in the past week.

Recent regional visitation to Portland is slightly below what was reported last year but remains high overall. Nearly a third of Portland region residents have been downtown in the past week (32% vs. 38% in 2023). Seven in ten have been downtown within the past two months (71% vs. 76% in 2023).

Chart: Last Visit to Downtown Portland

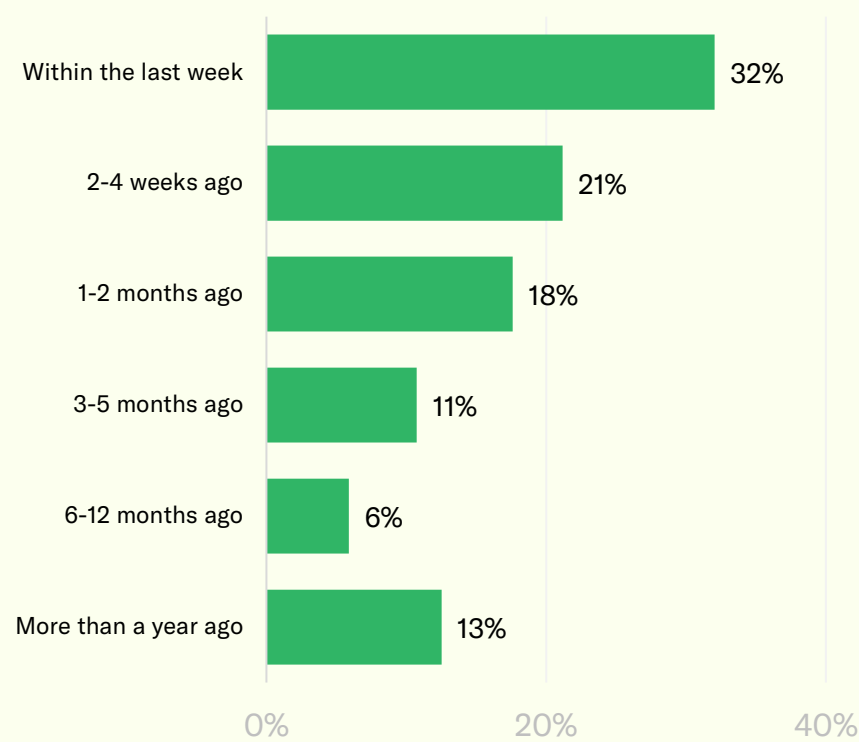


Table: Last Visit to Downtown Portland

% of Portland Region Residents	
Within the last week	32%
2-4 weeks ago	21%
1-2 months ago	18%
3-5 months ago	11%
6-12 months ago	6%
More than a year ago	13%

Question: When was your last visit to Downtown Portland?
Base: Total Portland region residents. 940 completed surveys.

Two-thirds of residents recommend Portland as a place to visit.

Portland’s appeal has grown among regional residents. While in 2023 over half (57%) would likely recommend Portland as a place to visit (28% very likely, 20% somewhat likely), this has increased to 66% this year (33% very likely, 33% somewhat likely). Only 16% are unlikely to recommend the city as a place to visit, down from 28% in 2023, which indicates healthy perception changes with remaining opportunities for improvement.

Chart: Likelihood to Recommend Portland

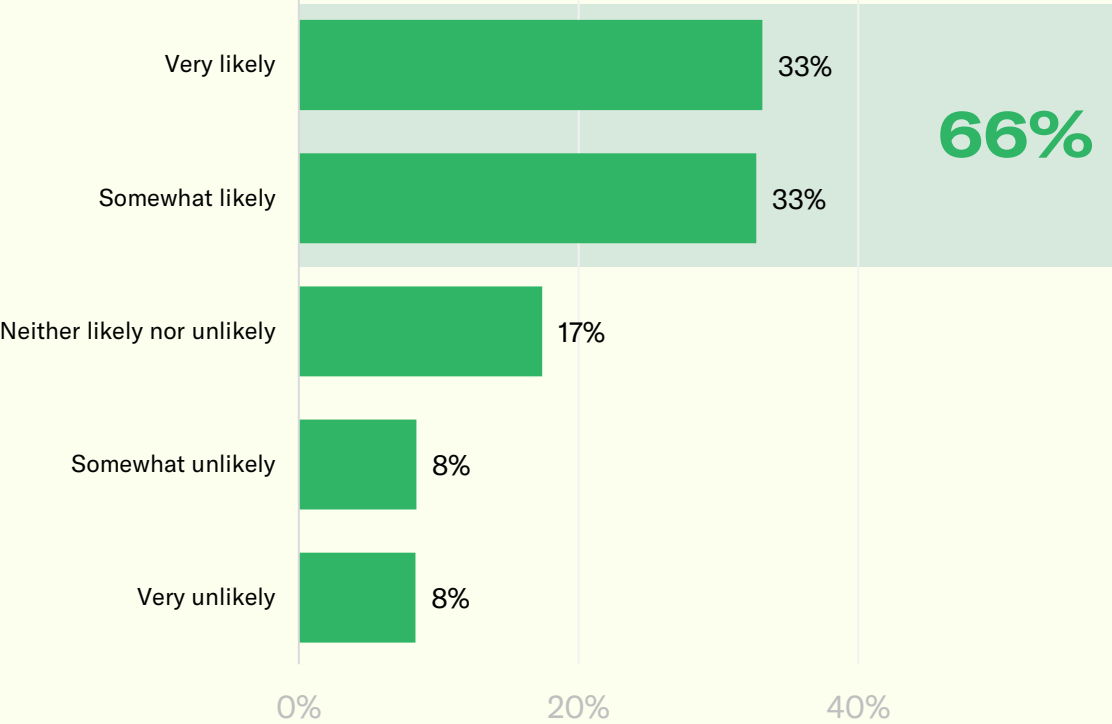


Table: Likelihood to Recommend Portland

	% of Portland Region Residents
Top 2 Box (Somewhat or Very Likely)	66%
Very likely	33%
Somewhat likely	33%
Neither likely nor unlikely	17%
Somewhat unlikely	8%
Very unlikely	8%

Question: How likely are you to recommend Portland as a place to visit?
Base: Total Portland region residents. 940 completed surveys.

Residents increasingly view PR and positive media coverage as important for bringing more visitors to Portland has grown.

The perceived importance of public relations/positive media coverage of Portland to attract visitors to the community has grown from 78% to 82% agreement among regional residents. Importantly, more than half “strongly agree” (55% vs. 48% in 2023).

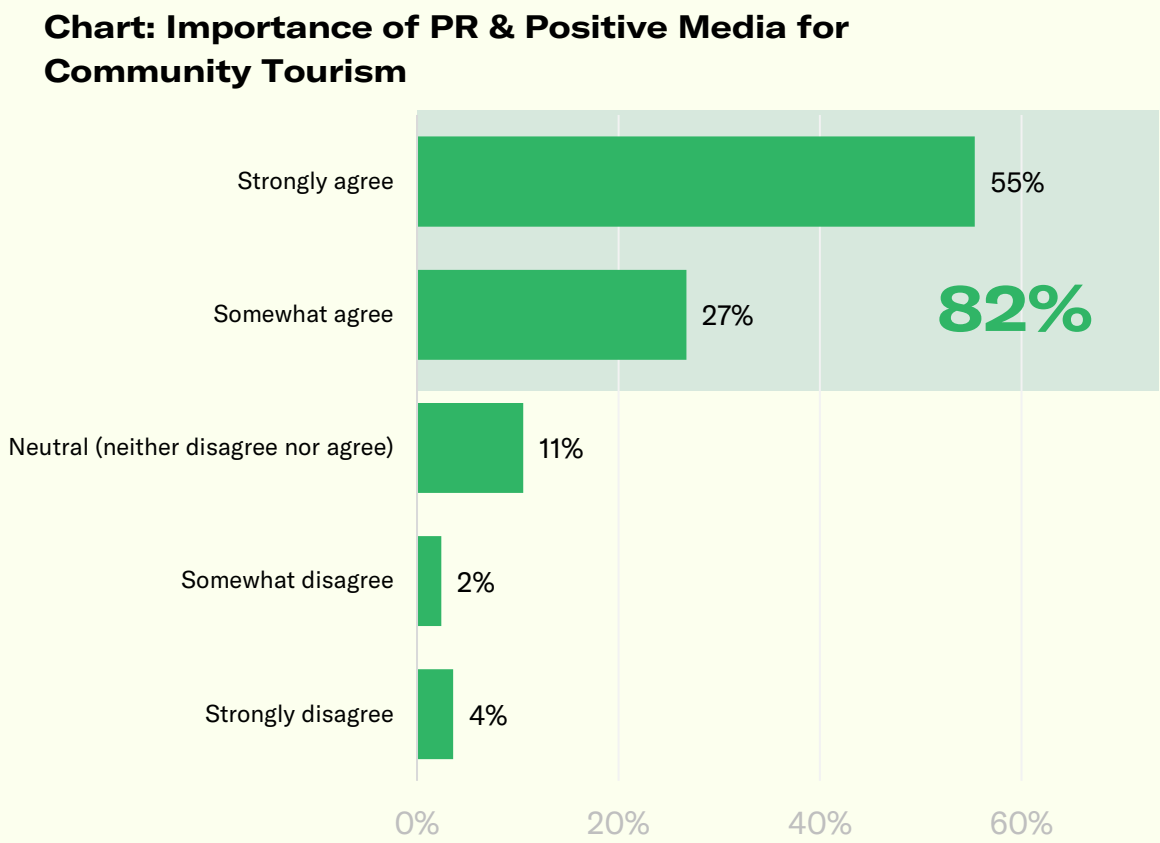


Table: Importance of PR & Positive Media for Community Tourism

% of Portland Region Residents	
Top 2 Box (Somewhat or Strongly Agree)	82%
Strongly agree	55%
Somewhat agree	27%
Neutral (neither disagree nor agree)	11%
Somewhat disagree	2%
Strongly disagree	4%

Question: How much do you agree or disagree with the following statement: Public relations (PR) and positive media coverage are very important for attracting visitors to my community.

Base: Total Portland region residents. 928 completed surveys.

Willamette Valley

The following slides present findings specific to Willamette Valley residents, including demographics and insights into quality-of-life perceptions, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and questions that were asked specifically of Oregonians who live in the region.

Willamette Valley Demographic Snapshot

Total residents surveyed:	716
Average age:	47 years old
Average household income:	\$68,594
Employed:	60%
College graduate:	44%
Married/domestic partnership:	53%
Have children in household:	29%
BIPOC:	23%
LGBTQ+:	17%
Accessibility needs in household:	26%



Willamette Valley residents’ perceived quality of life metrics remain high and on par with overall Oregonians.

Of the seven Oregon regions, Willamette Valley residents scored roughly average for their perceived quality of life (11.4 vs. 11.5 overall state). Residents in the Willamette Valley region are optimistic that their quality of life will improve in the future, with this perception mirroring that of total residents (43% vs. the overall average of 45%).

Chart: Willamette Valley Region Residents’ Score*

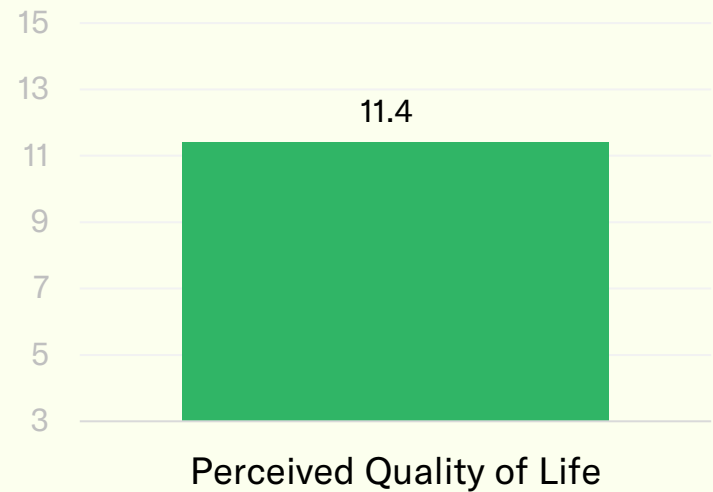


Table: Willamette Valley Region Residents’ Score*

Perceived Quality of Life Score	
Willamette Valley Region Residents	11.4

Chart: Future Quality of Life

(% Selected "Somewhat better" or "Much better")

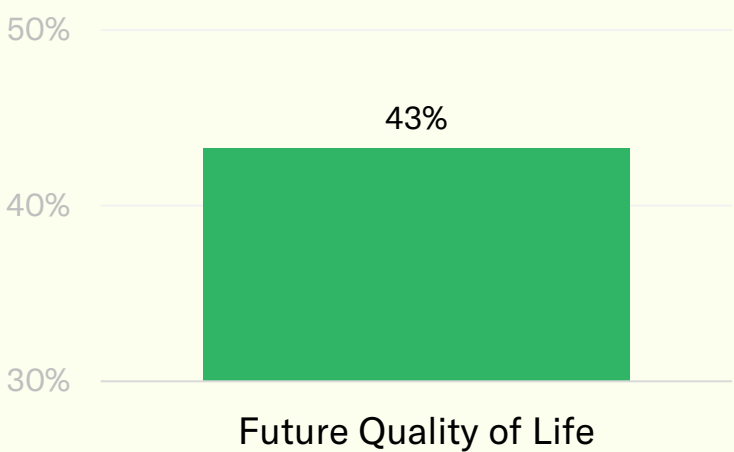


Table: Future Quality of Life

% Selected “Somewhat better” or “Much better”	
Willamette Valley Region Residents	47%

*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 3 (extremely dissatisfied) and a maximum possible score of 15 (extremely satisfied).

Question: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?

Base: Willamette Valley residents. 716 completed surveys.

Likelihood to recommend the Willamette Valley as a destination tracks notably below the overall statewide score.

One-fourth of Willamette Valley residents are promoters of their local community as a tourism destination (25% scored a 9 or 10 on a 0 to 10-point scale). When subtracting the detractors (residents who scored a 6 or lower) from the promoters (those who scored a 9 or 10), the likelihood-to-recommend score for the Willamette Valley falls well behind the state score (-17 vs. -3).

Chart: Likelihood to Recommend Local Community as a Tourism Destination

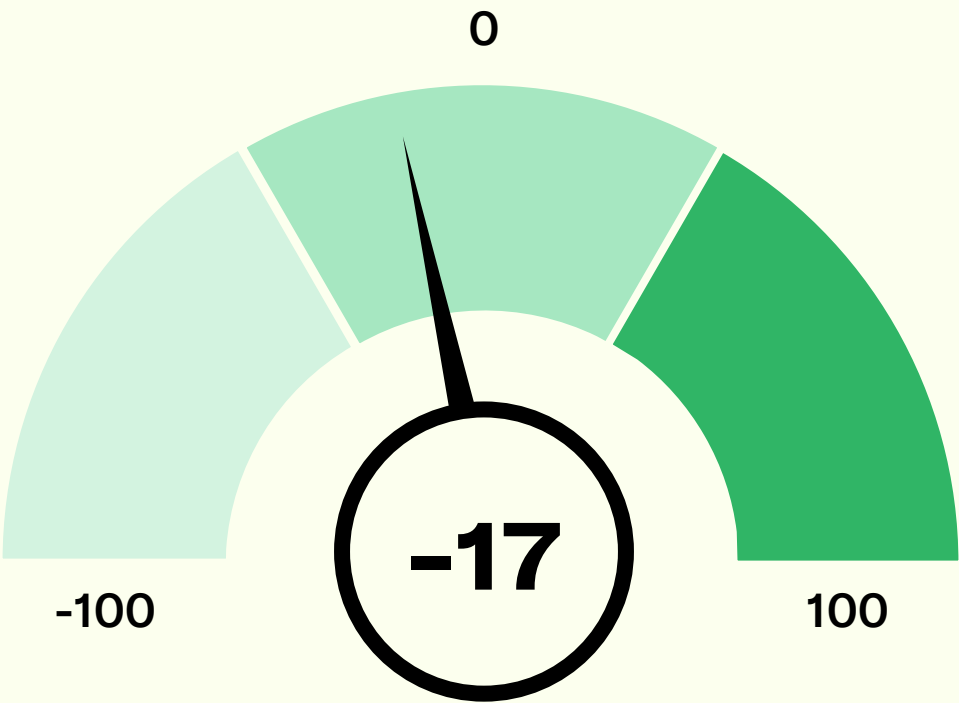


Table: Likelihood to Recommend Local Community as a Tourism Destination

Likelihood to Recommend Score	
Willamette Valley Region Residents	-17

Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?
Base: Willamette Valley residents. 716 completed surveys.

Positive economic and cultural impacts underpin Willamette Valley residents’ positive perceptions of tourism.

Across all tourism dimensions, Willamette Valley residents feel the positive outweighs the negative impacts of tourism. The scores for this region’s residents tend to align very closely with overall statewide scores for both positive and negative impacts. The largest positive/negative gap occurs in the economic impact (3.6 vs. 3.0, a +0.6-point gap) and the cultural impact (3.6 vs. 3.2, a +0.4-point gap). These two dimensions also represent the highest positive impact scores for this region. On the other hand, environmental and social impacts reported high negative impact scores and lower positive impact scores, with much narrower margins between the two.

Chart: Index of Residents' Perceptions of Tourism Impacts

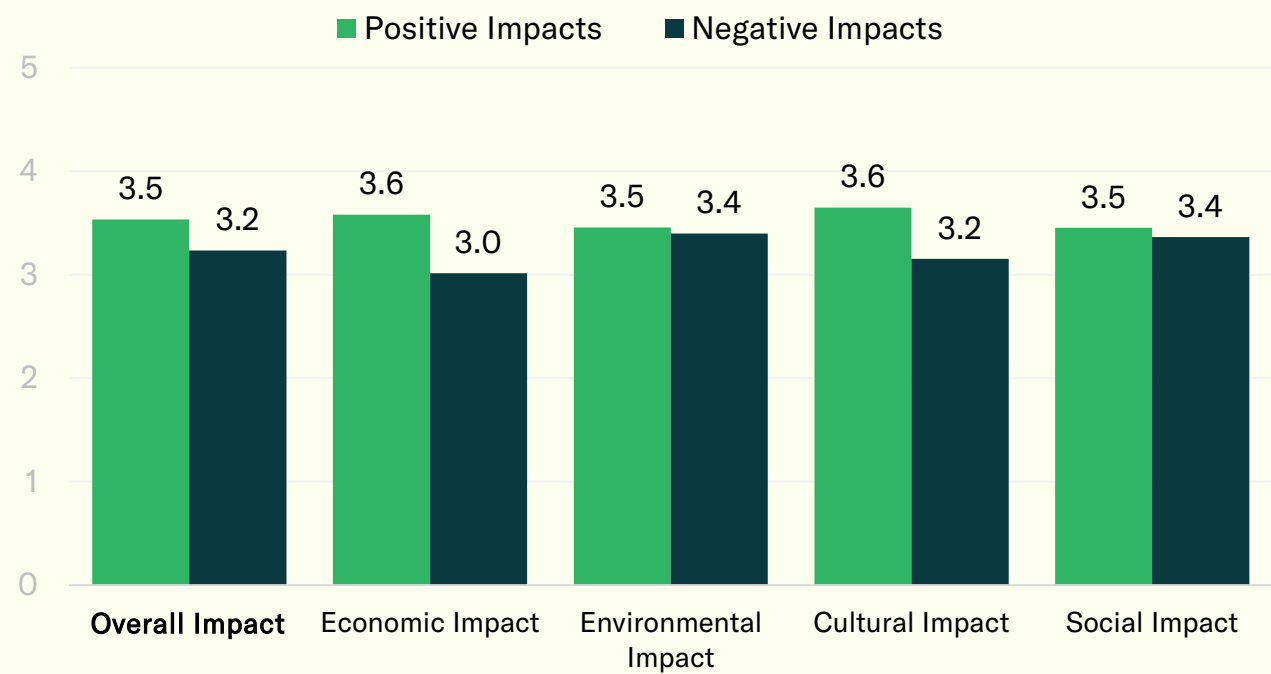


Table: Index of Residents' Perceptions of Tourism Impacts

	Positive Impacts Mean Score	Negative Impacts Mean Score
Overall Impact	3.5	3.2
Economic Impact	3.6	3.0
Environmental Impact	3.5	3.4
Cultural Impact	3.6	3.2
Social Impact	3.5	3.4

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: Willamette Valley residents. 716 completed surveys.

Willamette Valley residents give tourism strong marks for economic and cultural benefits but are split on environmental and social benefits.

For Willamette Valley region residents, their perceptions that tourism’s benefits outweigh its drawbacks closely reflect the statewide response, with most agreeing that benefits of tourism outweigh the drawbacks economically and culturally, but opinion divided for environmental and social impacts. For economic (66%) and cultural (64%) impact, roughly two-thirds of regional residents believe tourism’s benefits outweigh the drawbacks. On the other hand, the share of those who feel tourism’s environmental and social benefits outweigh the drawbacks are neck-and-neck with those who do not agree with that sentiment.

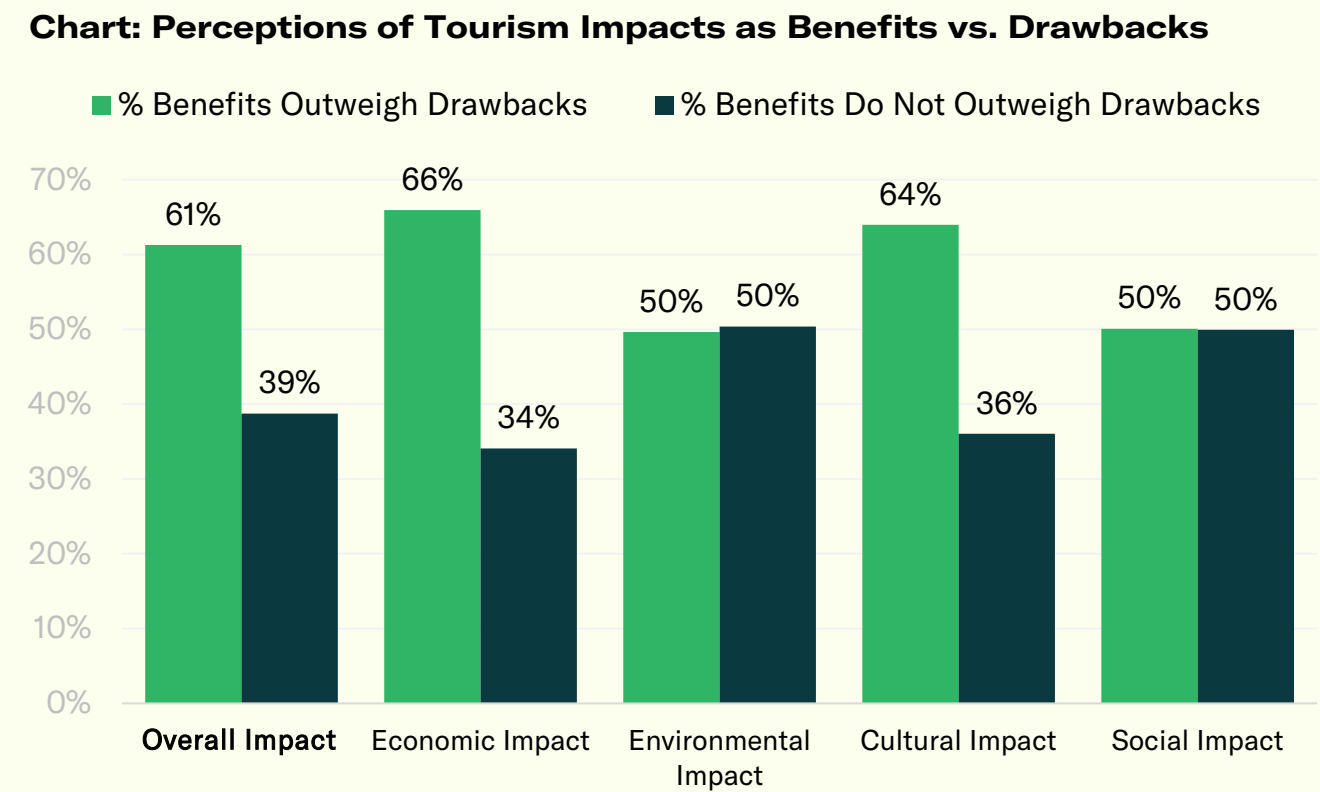


Table: Perceptions of Tourism Impacts as Benefits vs. Drawbacks

	% Benefits Outweigh Drawbacks	% Benefits Do Not Outweigh Drawbacks
Overall Impact	61%	39%
Economic Impact	66%	34%
Environmental Impact	50%	50%
Cultural Impact	64%	36%
Social Impact	50%	50%

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: Willamette Valley residents. 716 completed surveys.

Trust in the WVVA during crisis and recovery periods is strong among tourism stakeholders.

Three-fourths (75%) of tourism business owners and employees feel that the Willamette Valley Visitors Association will help their business or community in a time of crisis/recovery. About one in five feel neutral (19%) and a very low 5% disagree.

Chart: Agreement Levels with the Statement “I can trust the Willamette Valley Visitors Association, my regional destination management organization, will assist my business or community in a time of crisis and continued recovery.”

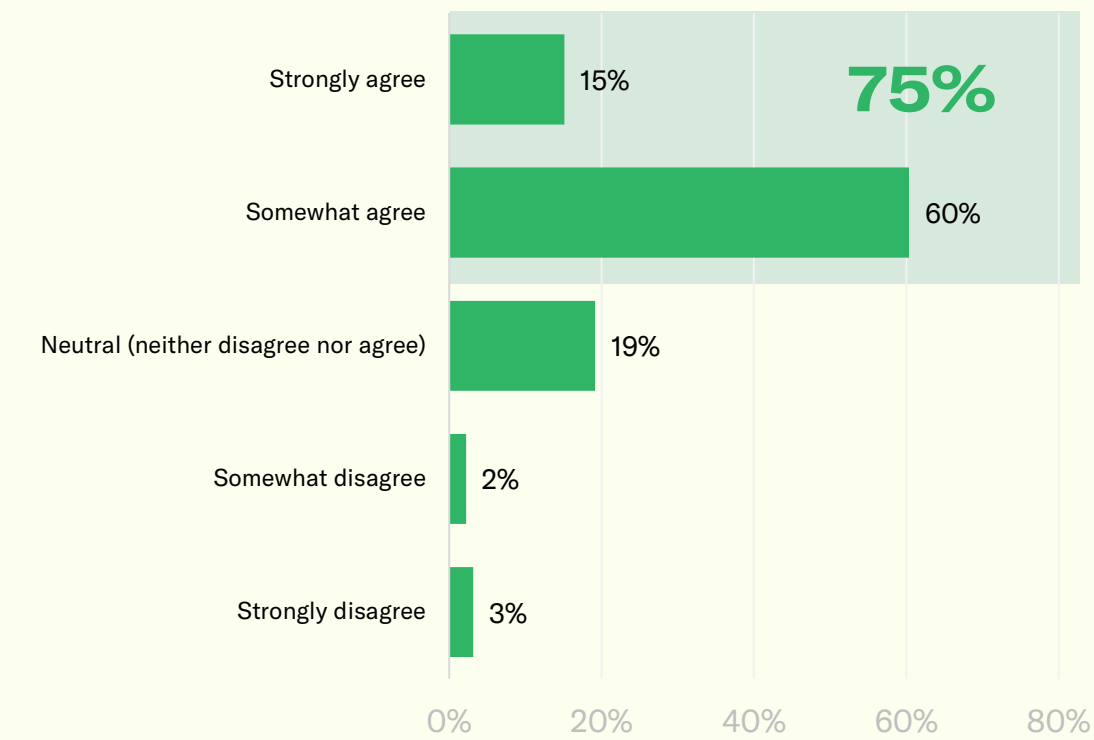


Table: Agreement Levels with the Statement “I can trust the Willamette Valley Visitors Association, my regional destination management organization, will assist my business or community in a time of crisis and continued recovery.”

% of Willamette Valley Region Residents who are Tourism Business Owners or Employees	
Top 2 Box (Somewhat or Strongly Agree)	75%
Strongly agree	15%
Somewhat agree	60%
Neutral (neither disagree nor agree)	19%
Somewhat disagree	2%
Strongly disagree	3%

Question: Please rate your level of agreement with the following statements: I can trust the Willamette Valley Visitors Association, my regional destination management organization, will assist my business or community in a time of crisis and continued recovery.

Base: Willamette Valley residents who own a tourism business or are employed by such a business. 343 completed surveys.

Boosting awareness of the WVVA among tourism businesses could help grow trust among stakeholders.

While only a scant 5 respondents who either own a tourism business or are employed by one said they do not feel that the Willamette Valley Visitors Association is a trusted local resource, 3 of these respondents wrote in that did not know about the organization at all, or else knew very little. The other two respondents mentioned crises issues including a wildfire and environmental damage from tourism to Eugene outdoor recreation areas as reasons they do not trust the organization.

“[They] didn't help after 2020 Labor Day fire.”

“[I] don’t hear much about them.”

“In 15 years of doing this, I never once heard of them.”

“I have no information about how it would assist. I was unaware during the COVID pandemic that it was an option. I am well informed through our local Chamber of Commerce about various resources, and this is not one of them.”

Question: Please explain why you don’t feel that Willamette Valley Visitors Association is a trusted local resource for assisting your business or community.

Base: Willamette Valley residents who own a tourism business or are employed by such a business, who disagree that they can trust the WVVA. 5 completed surveys.

Resident opinion is split on tourism’s negative impact on Willamette Valley areas and attractions.

One in three (34%) Willamette Valley residents feel that there are specific areas or attractions in the region that are negatively impacted by tourism. That being said, opinion is largely divided, with a similar share (34%) reporting feeling neutral, and 36% disagreeing with this perception.

Chart: Agreement Levels with the Statement “There are specific areas or attractions in Willamette Valley that I feel are negatively impacted by tourism.”

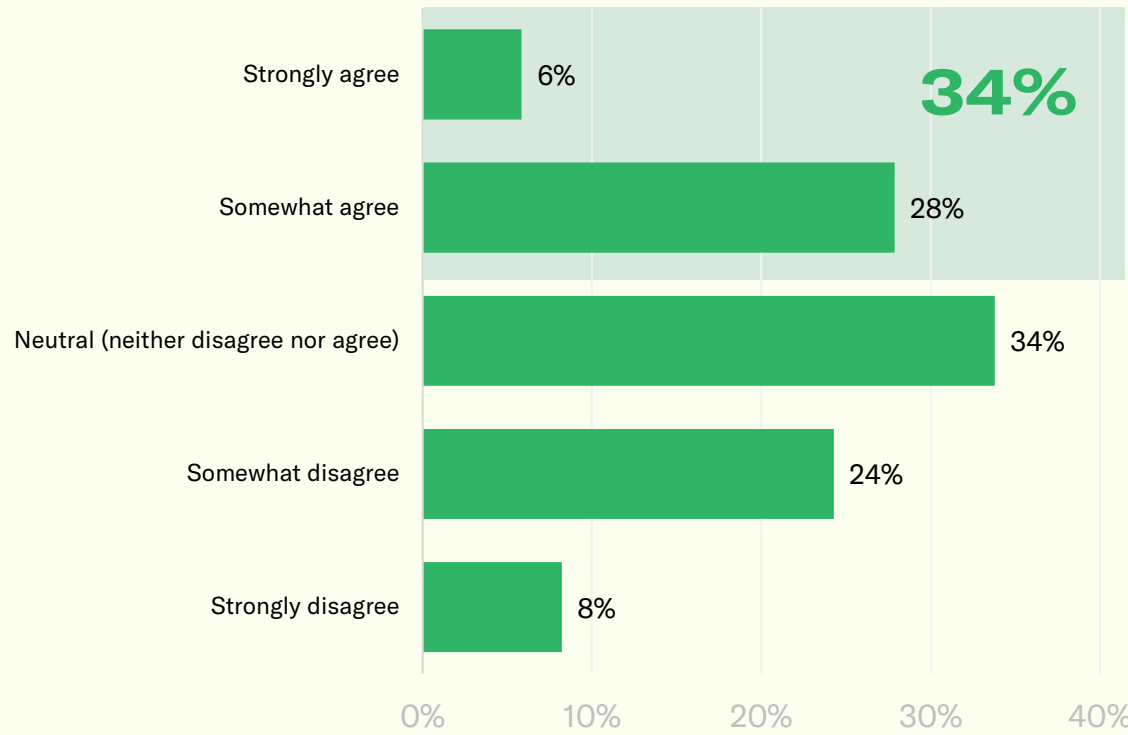


Table: Agreement Levels with the Statement “There are specific areas or attractions in Willamette Valley that I feel are negatively impacted by tourism.”

% of Willamette Valley Region Residents	
Top 2 Box (Somewhat or Strongly Agree)	34%
Strongly agree	6%
Somewhat agree	28%
Neutral (neither disagree nor agree)	34%
Somewhat disagree	24%
Strongly disagree	8%

Question: Please rate your level of agreement with the following statements: There are specific areas or attractions in Willamette Valley that I feel are negatively impacted by tourism.

Base: Willamette Valley residents. 716 completed surveys.

Traffic problems, overcrowding, and environmental destruction are the most commonly cited negative impacts of tourism in the Willamette Valley.

For Willamette Valley residents who feel that there are areas of the region that are negatively impacted by tourism, these perceptions largely echo overall statewide residents' perceived biggest drawbacks of tourism, with responses centering around traffic and parking issues, overcrowding, and environmental damage caused by tourist activity in outdoor recreation areas.

“Silver Falls State Park's Trail of Ten Falls experiences severe trail erosion and vegetation damage from overwhelming visitor numbers. The narrow paths become congested with hikers who step off-trail to take photos, widening the trails and damaging delicate ferns and mosses that take years to recover in the shaded canyon environment.”

“Before more infrastructure is added what we have needs to be updated, maintained, have consistent funding. We don't have enough park rangers to manage campgrounds or maintain them. Our roads are falling apart, freeway rest areas are often dirty and poorly maintained, as just some examples.”

“My hometown of Independence is one of the biggest attractions in the summer, specifically for the 4th of July... This leads to massive overcrowding in the public parks and Old Town area for that entire time frame. Roads are closed to accommodate vendors and fairs. This leads to significant traffic delays and detours for locals to navigate around.”

“Downtown McMinnville can become overcrowded during wine festivals, creating parking problems for residents.”

Question: Please explain why you feel there are specific areas or attractions in Willamette Valley that are negatively impacted by tourism.

Base: Willamette Valley residents who agree that there are Willamette Valley areas or attractions negatively impacted by tourism. 208 completed surveys.

There is strong resident support for positioning the Willamette Valley as a leading U.S. wine region.

When it comes to positioning the Willamette Valley as a premier U.S. wine region, opinion among residents is more decisive, with 63% agreeing. About one in four (27%) are neutral, while a nominal 11% disagree.

Chart: Agreement Levels with the Statement “I would like to see the Willamette Valley positioned and marketed as a premier U.S. wine region.”

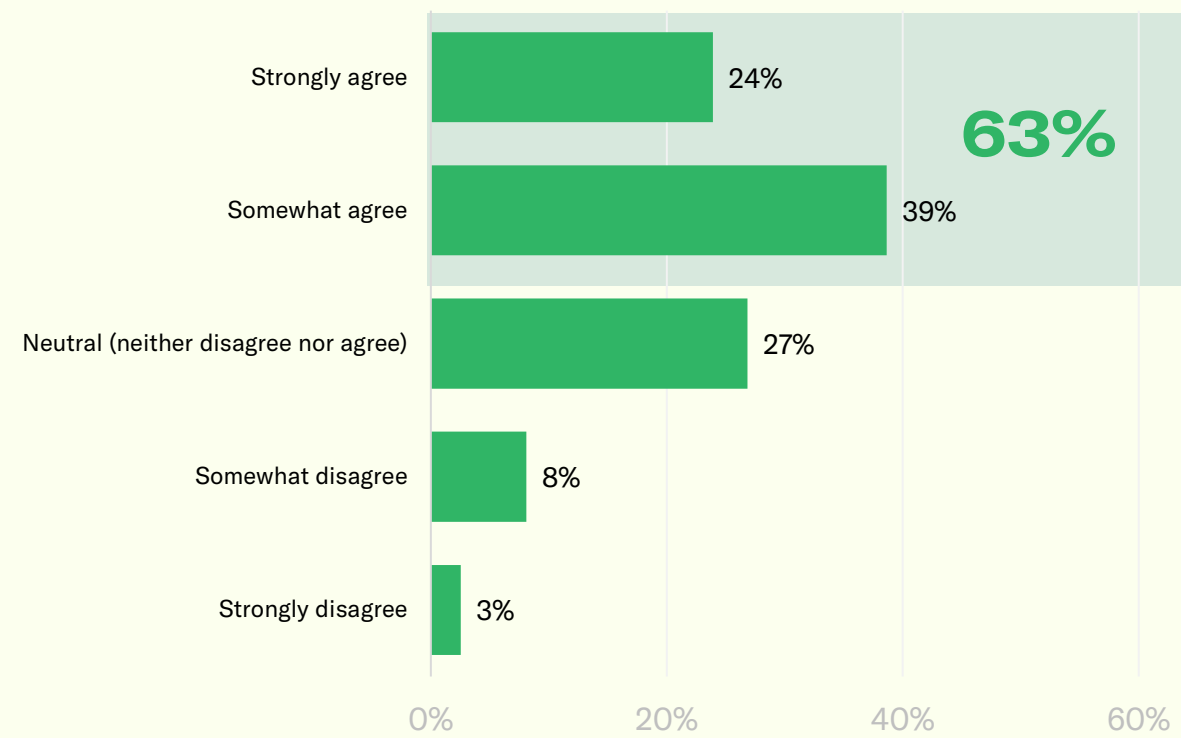


Table: Agreement Levels with the Statement “I would like to see the Willamette Valley positioned and marketed as a premier U.S. wine region.”

% of Willamette Valley Residents	
Top 2 Box (Somewhat or Strongly Agree)	63%
Strongly agree	24%
Somewhat agree	39%
Neutral (neither disagree nor agree)	27%
Somewhat disagree	8%
Strongly disagree	3%

Question: Please rate your level of agreement with the following statements: I would like to see the Willamette Valley positioned and marketed as a premier U.S. wine region.

Base: Willamette Valley residents. 716 completed surveys.

Residents opposed to the region being promoted as a wine destination cite alcohol concerns and infrastructure issues as their top reasons.

Among Willamette Valley residents who do not want to see the region positioned and marketed as a premier U.S. wine region, a large share base their concerns around personal oppositions to alcohol as well as drunk driving safety reasons. But also notable were a number of responses centered around perceptions that the region is already too overcrowded with tourists, and/or the infrastructure of the region is unprepared for further increases in tourism activity.

“I am a 6[th] generation Oregonian and am tired of all the traffic, the lack of services to our homeless, lack of addiction support. I would like to see us get our house in order before we invite more people to it.”

I would be more inclined to support this IF we had the infrastructure to support more people such as easier traveled roads-highways or a park and transport for tourists wanting to visit our wine country. This would also provide additional safety to NO ONE has one sip and gets behind the wheel to drive.”

“Our taxes go up year after year. Our roads are poorly maintained & additional traffic will worsen that issue. We have near yearly bad wildfires & there are a plethora of issues that take priority over tourism. Especially since in my view many of said issues will be exacerbated by larger amounts of traffic.”

“It would bring in the wrong kind of people and promote more alcohol sales in the state which we don't need to promote.”

Question: Please explain why you would not like to see the Willamette Valley positioned and marketed as a premier U.S. wine region.

Base: Willamette Valley residents who disagree that they want the Willamette Valley positioned as a premier U.S. wine region.
72 completed surveys.

Environmental stewardship is the primary lens through which Willamette Valley residents interpret sustainable tourism.

Willamette Valley residents feel most strongly that sustainable tourism in their community involves some level of environmental stewardship, such as protecting nature and reducing everyone’s carbon footprints. A more secondary aspect of sustainable tourism ties into infrastructure investment in key areas such as roads, transportation, and accommodations, as well as engaging the community to ensure residents are given a voice in shaping tourism decisions.

“Continue to encourage recycling at events and restaurants to limit the carbon print, offer alternative transportation for events anticipated. This can not only have impact on our local and regional environment but is an educational opportunity to share with others how we do this and take pride.”

A key aspect of sustainable tourism would be supporting local businesses. Encouraging tourists to shop at local markets and dine at family-owned restaurants would help keep economic benefits within the community, enhancing both visitor and local experiences.”

“Feasible limits to visitor head counts that fire marshal and preservation experts collaborate on to designate at wineries and tasting rooms on weekends. Do 5-year rotating environmental impact studies on high tourism areas to analyze for areas that need more preservation attention.”

“I would like to see more hostels in our area so we can welcome more visitors with limited income. I'd also like to see more green energy and agricultural projects to help educate tourists and locals. And, of course, more options for public transit for both tourists and locals, too. The more we protect our environment, the more everyone can enjoy what Oregon has to offer.”

Question: What would sustainable tourism in your community look like? For the purposes of this question, please use the following definition for sustainable tourism: “Tourism that takes full account of its current and future economic, social and environmental impacts, addressing the needs of visitors, the industry, the environment and host communities.”

Base: Willamette Valley residents. 716 completed surveys.

Central Oregon

The following slides present findings specific to Central Oregon residents, including demographics and insights into quality-of-life perceptions, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and questions that were asked specifically of Oregonians who live in the region.

Central Oregon Demographic Snapshot

Total residents surveyed:	440
Average age:	45 years old
Average household income:	\$107,675
Employed:	82%
College graduate:	73%
Married/domestic partnership:	72%
Have children in household:	50%
BIPOC:	28%
LGBTQ+:	9%
Accessibility needs in household:	15%



Central Oregon residents have the highest perceived quality of life and future quality of life scores compared to overall state residents.

Of the seven Oregon regions, Central Oregon residents scored highest for their perceived quality of life (12.4 vs. 11.5 overall state), well ahead of all other regions. Similarly, residents in the region are extremely optimistic that their quality of life will improve in the future, tracking significantly above the total (60% vs. the overall average of 45%).

Chart: Central Oregon Residents' Score*

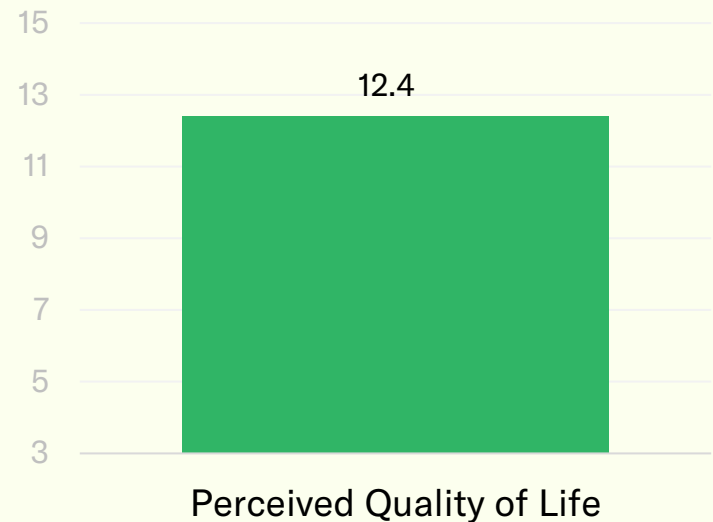


Table: Central Oregon Region Residents' Score*

Perceived Quality of Life Score	
Central Oregon Region Residents	11.4

Chart: Future Quality of Life

(% Selected "Somewhat better" or "Much better")

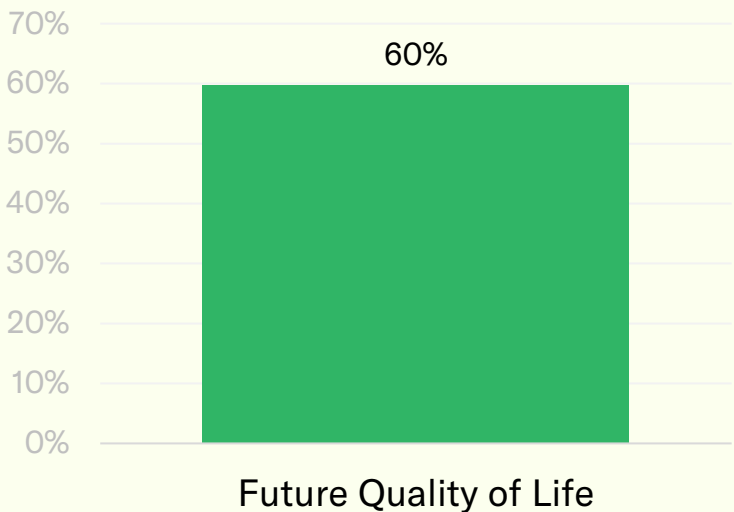


Table: Future Quality of Life

% Selected "Somewhat better" or "Much better"	
Central Oregon Region Residents	47%

*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 3 (extremely dissatisfied) and a maximum possible score of 15 (extremely satisfied).

Questions: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?

Base: Central Oregon residents. 440 completed surveys.

Central Oregon residents are significantly more likely than total residents to recommend their region as a tourism destination.

Nearly half of Central Oregon residents are promoters of their local community as a tourism destination (47% scored a 9 or 10 on a 0 to 10-point scale). When subtracting the detractors (residents who scored a 6 or lower) from the promoters (those who scored a 9 or 10), the likelihood-to-recommend score for the Central Oregon region ranks squarely above the state score (25 vs. -3).

Chart: Likelihood to Recommend Local Community as a Tourism Destination

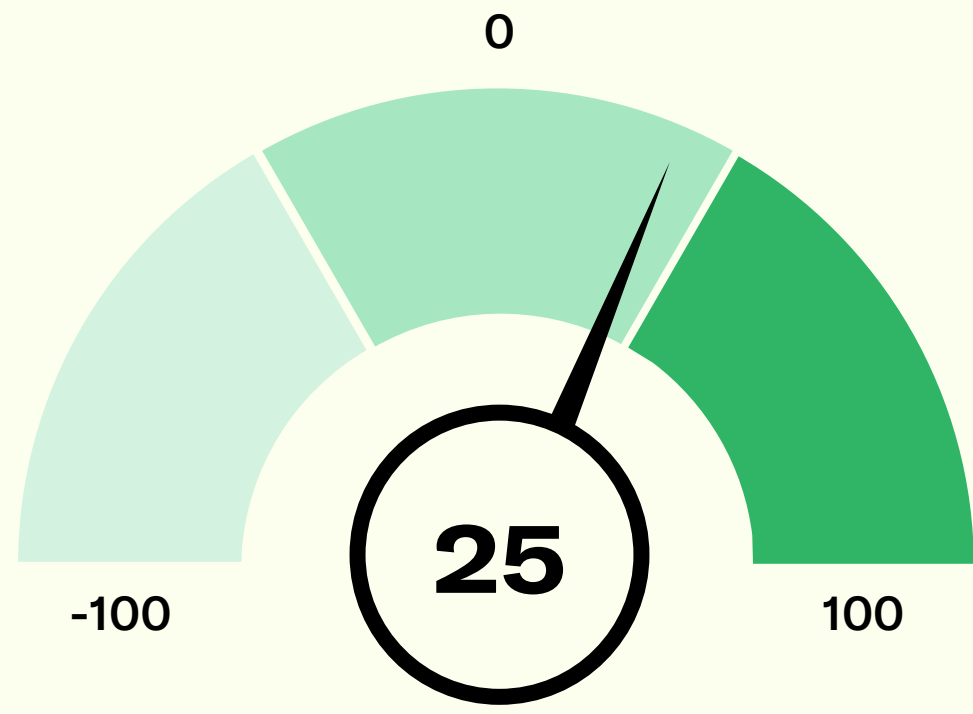


Table: Likelihood to Recommend Local Community as a Tourism Destination

Likelihood to Recommend Score	
Central Oregon Region Residents	25

Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?
Base: Central Oregon residents. 440 completed surveys.

Despite strong positive perceptions for tourism’s economic and cultural impacts, environmental and social impacts skew negative.

Central Oregon region residents feel the positive outweighs the negative impacts of tourism for economic and cultural impacts, but not environmental and social impacts. That being said, the region’s residents tied with Portland region residents for the highest reported positive scores on every type of impact except for economic, for which the Central Oregon region scored highest. Similar to the overall statewide results, the largest positive/negative gap occurs in the economic impact (3.9 vs. 3.4, a +0.5-point gap) and the cultural impact (3.8 vs. 3.5, a +0.3-point gap). These two dimensions also represent the highest positive impact scores for this region. On the other hand, environmental impact reported higher negative impact score at 3.7 vs 3.6 (a -0.1-point gap), while social impact had equal positive and negative impact scores (3.6 vs. 3.6).

Chart: Index of Residents' Perceptions of Tourism Impacts

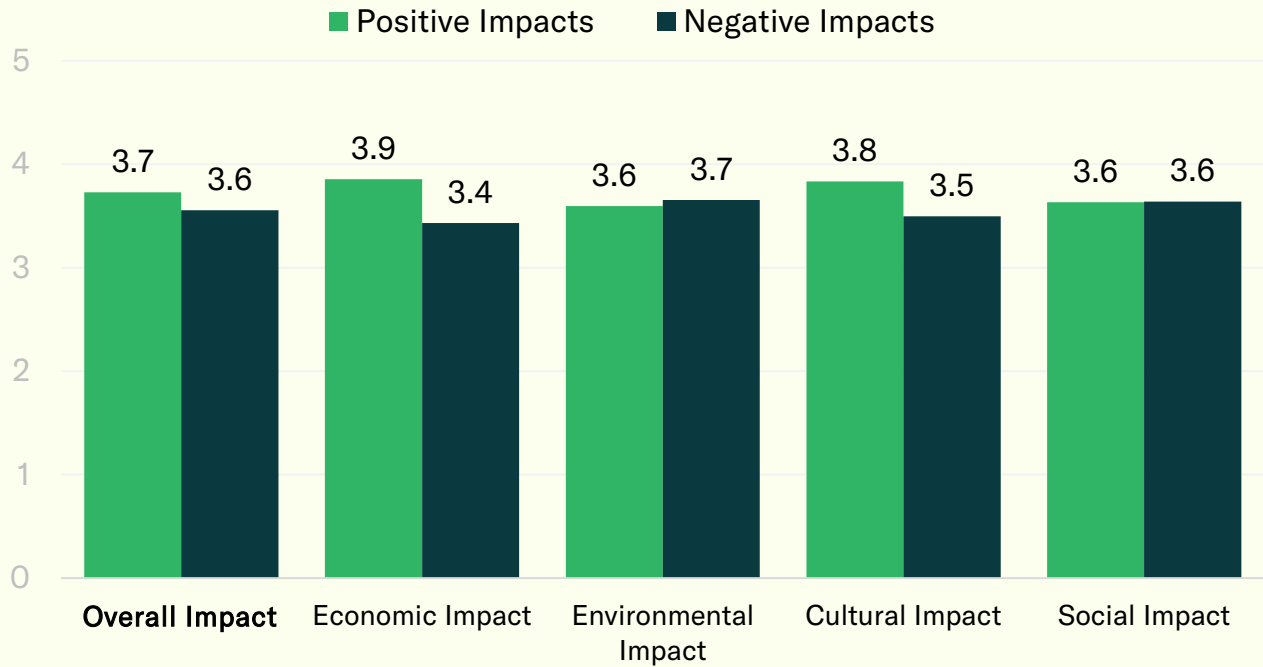


Table: Index of Residents' Perceptions of Tourism Impacts

	Positive Impacts Mean Score	Negative Impacts Mean Score
Overall Impact	3.7	3.6
Economic Impact	3.9	3.4
Environmental Impact	3.6	3.7
Cultural Impact	3.8	3.5
Social Impact	3.6	3.6

Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s _____, please rate how much you agree or disagree with the following statements.
Base: Central Oregon residents. 440 completed surveys.

Central Oregonians perceive tourism’s economic benefits clearly, but its environmental costs are also strongly felt.

For Central Oregon region residents, 67% feel that tourism’s economic benefits outweigh the drawbacks, but in other areas opinion is much more divided. While small majorities also agree that the industry’s cultural (56%) and social (51%) benefits outweigh their drawbacks, when it comes to environmental benefits nearly six in ten (58%) feel that tourism’s benefits do not outweigh the drawbacks, indicating a significantly more negative perception of tourism’s environmental impact compared to the statewide response.

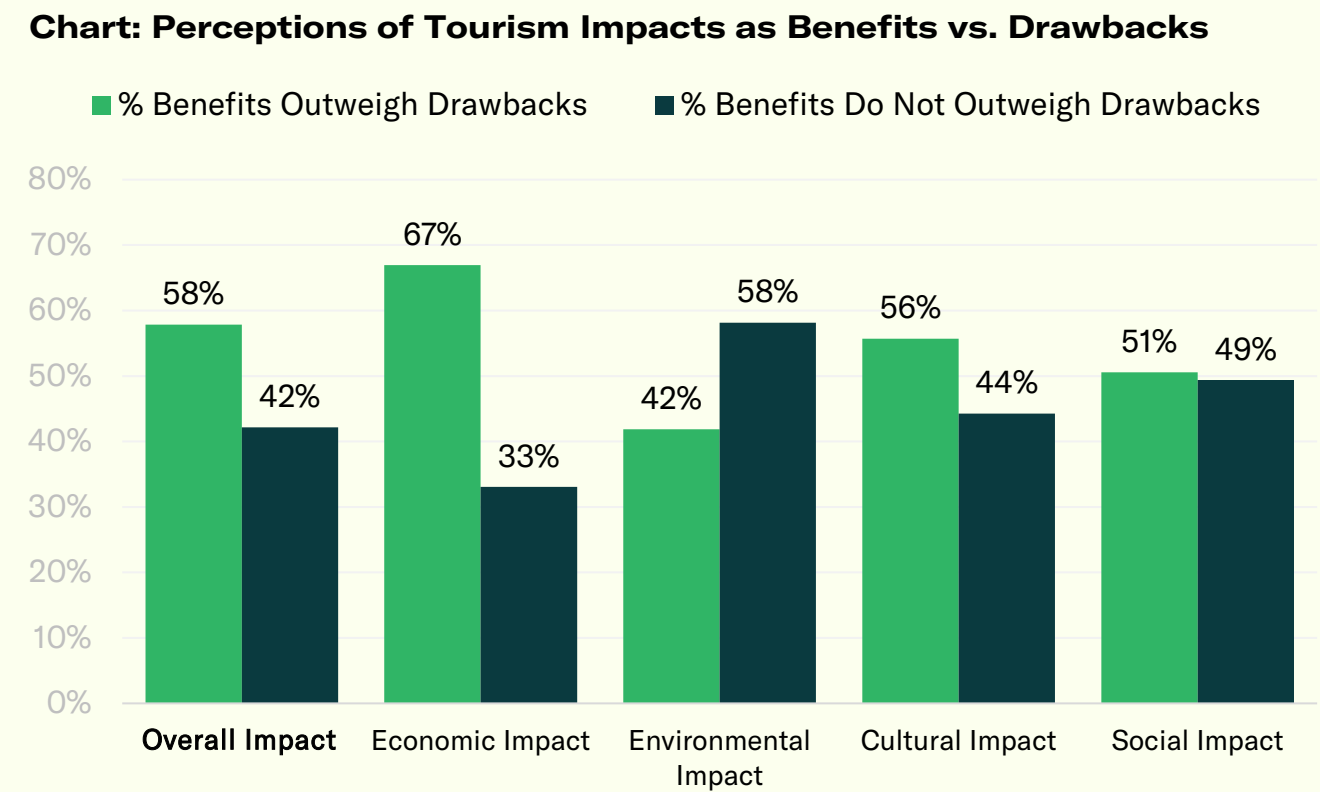


Table: Perceptions of Tourism Impacts as Benefits vs. Drawbacks

	% Benefits Outweigh Drawbacks	% Benefits Do Not Outweigh Drawbacks
Overall Impact	58%	42%
Economic Impact	67%	33%
Environmental Impact	42%	58%
Cultural Impact	56%	44%
Social Impact	51%	49%

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: Central Oregon residents. 440 completed surveys.

Visit Central Oregon is widely viewed as a trusted local resource among tourism stakeholders.

Eight in ten (81%) tourism-business owners trust that the Visit Central Oregon destination management organization would assist their business/community in a time of crisis/recovery, a strong improvement over the 50% reported in 2023. Only 12% are neutral, and a scant 7% disagree.

Chart: Agreement with the Statement “I feel that Visit Central Oregon, my regional destination management organization, is a trusted local resource for assisting my business or community in a time of crisis and continued recovery.”

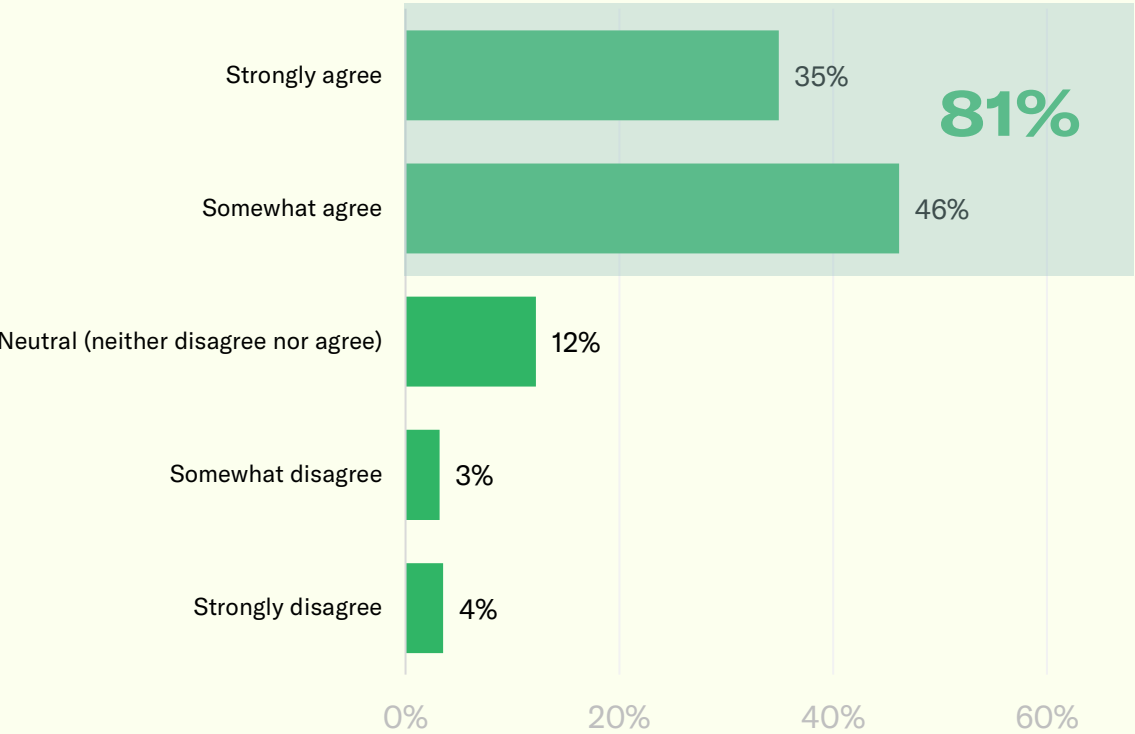


Table: Agreement with the Statement “I feel that Visit Central Oregon, my regional destination management organization, is a trusted local resource for assisting my business or community in a time of crisis and continued recovery.”

	% of Central Oregon Region Residents
Top 2 Box (Somewhat or Strongly Agree)	63%
Strongly agree	24%
Somewhat agree	39%
Neutral (neither disagree nor agree)	27%
Somewhat disagree	8%
Strongly disagree	3%

Question: I feel that Visit Central Oregon, my regional destination management organization, is a trusted local resource for assisting my business or community in a time of crisis and continued recovery.
Base: Central Oregon residents who own a tourism business or are employed by such a business. 255 completed surveys.

Visit Central Oregon has an opportunity to grow awareness among tourism businesses to help increase trust among stakeholders.

Although just 5 respondents who either own a tourism business or are employed by one said they do not feel that the Visit Central Oregon is a trusted local resource, 4 of these respondents wrote in that they felt the organization does not support all tourism businesses or communities within the Central Oregon Region. One respondent said they are not aware of what kind of resources the organization provides to businesses.

“I haven’t seen any media coverage of it offering itself as a resource for my business so it just simply wouldn’t even come to mind.”

I feel that Maupin, Oregon is often overlooked and rarely highlighted by Visit Central Oregon. When our area is mentioned in print or online instances, the same 2 businesses usually receive the attention.

“I don't feel like central Oregon is a trusted local resource because it lacks consistent communication, transparency, and visible support tailored to the specific of my business and community.”

“Their primary focus is Bend. Small rural communities get left out.”

Question: Please explain why you do not agree that Visit Central Oregon, my regional destination management organization, is a trusted local resource for assisting my business or community in a time of crisis and continued recovery.

Base: Central Oregon residents who own a tourism business or are employed by such a business and do not agree with the statement. 5 completed surveys.

Expertise, connections, and resource services are the top-mentioned reasons why tourism stakeholders trust VCO.

Among those tourism business owners or employees who feel that the Visit Central Oregon is a trusted local resource, perceptions that the organization provides local business support by marketing to help drive visitation were the most prevalent. The organization is also perceived as being experts on the community who are well-connected and offer valuable resources around tourism data, communication, and strategic guidance to support tourism businesses.



Question: Please explain why you agree that Visit Central Oregon, my regional destination management organization, is a trusted local resource for assisting my business or community in a time of crisis and continued recovery.

Base: Central Oregon residents who own a tourism business or are employed by such a business and agree with the statement. 68 completed surveys.

Central Oregon residents increasingly agree the destination must be more welcoming to BIPOC and LGBTQIA+ visitors.

Nearly two-thirds of Central Oregon region residents believe that the destination needs to be more welcoming to Black, Indigenous, People of Color, and LGBTQIA+ communities (63%), a strong increase over the 2023 metric (50%). Opinion on this has become more decisive, with the share of those feeling neutral decreasing to 19% from 32% in 2023, though the same share disagree (18%).

Chart: Agreement with the Statement “I believe we need to be a more welcoming destination for Black, Indigenous, People of Color, LGTBTQIA+ communities to improve residents' and visitors' experiences in Central Oregon communities.”

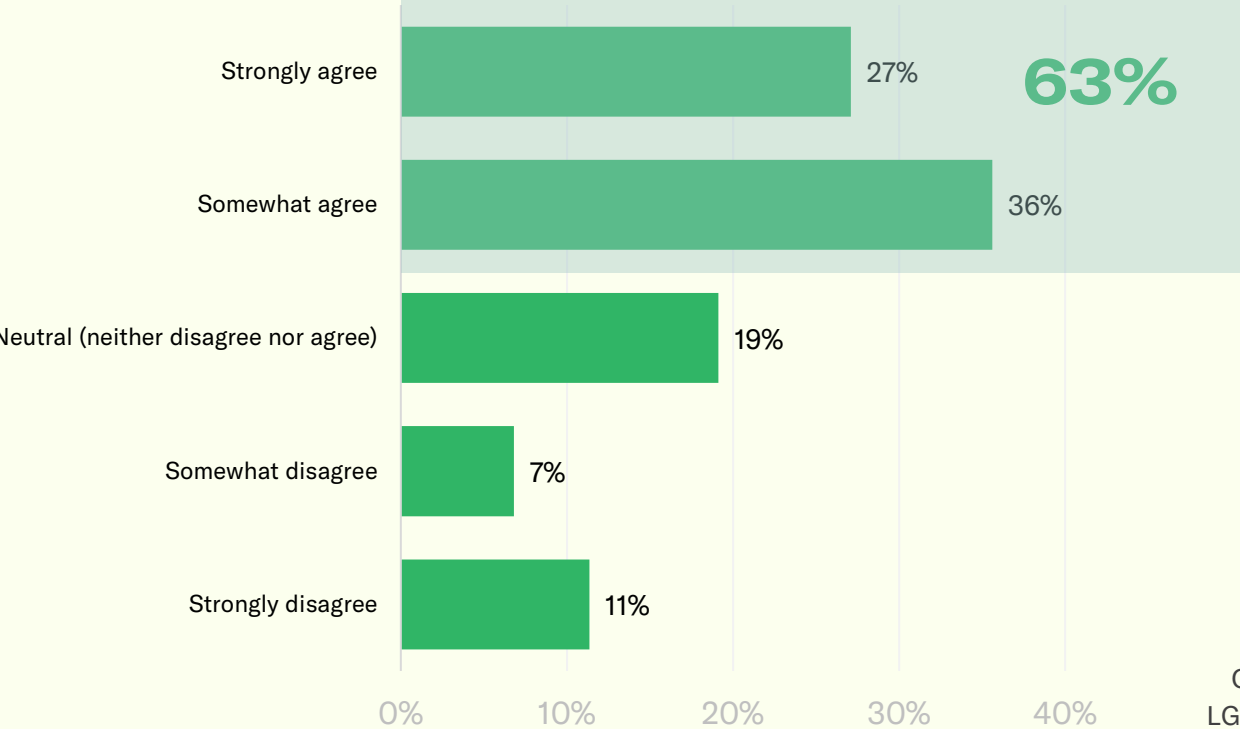


Table: Agreement with the Statement “I believe we need to be a more welcoming destination for Black, Indigenous, People of Color, LGTBTQIA+ communities to improve residents' and visitors' experiences in Central Oregon communities.”

	% of Central Oregon Region Residents
Top 2 Box (Somewhat or Strongly Agree)	63%
Strongly agree	27%
Somewhat agree	36%
Neutral (neither disagree nor agree)	19%
Somewhat disagree	7%
Strongly disagree	11%

Question: I believe we need to be a more welcoming destination for Black, Indigenous, People of Color, LGTBTQIA+ communities to improve residents' and visitors' experiences in Central Oregon communities.

Base: Central Oregon residents. 440 completed surveys.

Opposition to welcoming underrepresented communities is mainly informed by conflicting ideological positions among these residents.

While only a small segment of Central Oregon residents do not agree that the region needs to be more welcoming of BIPOC and LGBTQIA+ communities, those who did disagree tended to either be categorically opposed to LGTBIQA+ communities or rejected the idea of prioritizing minority communities over universally welcoming messaging. There were also a vocal few who cited objections along political lines.

“I totally disagree with that lifestyle, and do not support anything that it does.”

“Doesn't matter what you are, if your human, you can be here. No need to put a definition on your self.”

“I think it caters to a very vocal minority and I’m not a fan of it. It’s not something I want in my community and it’s not something I stand for.”

“People come no matter their race or ethnicity or gender preference. There’s no need to target a visitor by the above choices.”

Question: Please explain why you do not agree that we need to be a more welcoming destination for Black, Indigenous, People of Color, LGTBTQIA+ communities to improve residents' and visitors' experiences in Central Oregon communities.

Base: Central Oregon residents who do not agree with the statement. 66 completed surveys.

Residents feel that welcoming BIPOC and LGBTQIA+ communities to the region will have an overall positive impact on safety perceptions for all community members.

Most Central Oregon residents who agreed that the region needs to be more welcoming to BIPOC and LGBTQIA+ communities cited the belief that welcoming these more underrepresented audiences will have a trickle-down effect of making the entire community feel safer and more inclusive, as well as related benefits such as enriching the community through different cultures and perspectives and fighting against historical and contemporary discrimination and exclusion.

“Because inclusive diverse areas are more vibrant, and Oregon needs to continue to improve our reputation as a white majority state with an ugly history.”

“I think it's especially important to create more marketing outreach to Spanish-speaking people, which can help broaden visitation while supporting the ongoing messaging of inclusivity - especially during a period of increased political tension that has contributed to fear and uncertainty in many immigrant and Spanish-speaking communities.”

“Being more welcoming fosters inclusivity, attracts a diverse group of visitors, and creates a safer, more enjoyable environment for everyone.”

“Central Oregon is known for its beautiful nature and friendly communities. BIPOC and LGBTQIA+ people would help make the region feel safer, more respectful, and more inclusive for everyone.”

Question: Please explain why you agree that we need to be a more welcoming destination for Black, Indigenous, People of Color, LGTBQIA+ communities to improve residents' and visitors' experiences in Central Oregon communities.

Base: Central Oregon residents who agree with the statement. 256 completed surveys.

Central Oregonians largely feel that the Deschutes County Fair & Expo is mainly used by residents.

Three-fourths of Central Oregon region residents agree that the Deschutes County Fair & Expo Center is primarily utilized by residents rather than visitors. Only about one in five (18%) are neutral, and a small share (6%) disagree.

Chart: Agreement with the Statement “I believe the Deschutes County Fair & Expo Center is an amenity primarily utilized by residents, but also by visitors.”

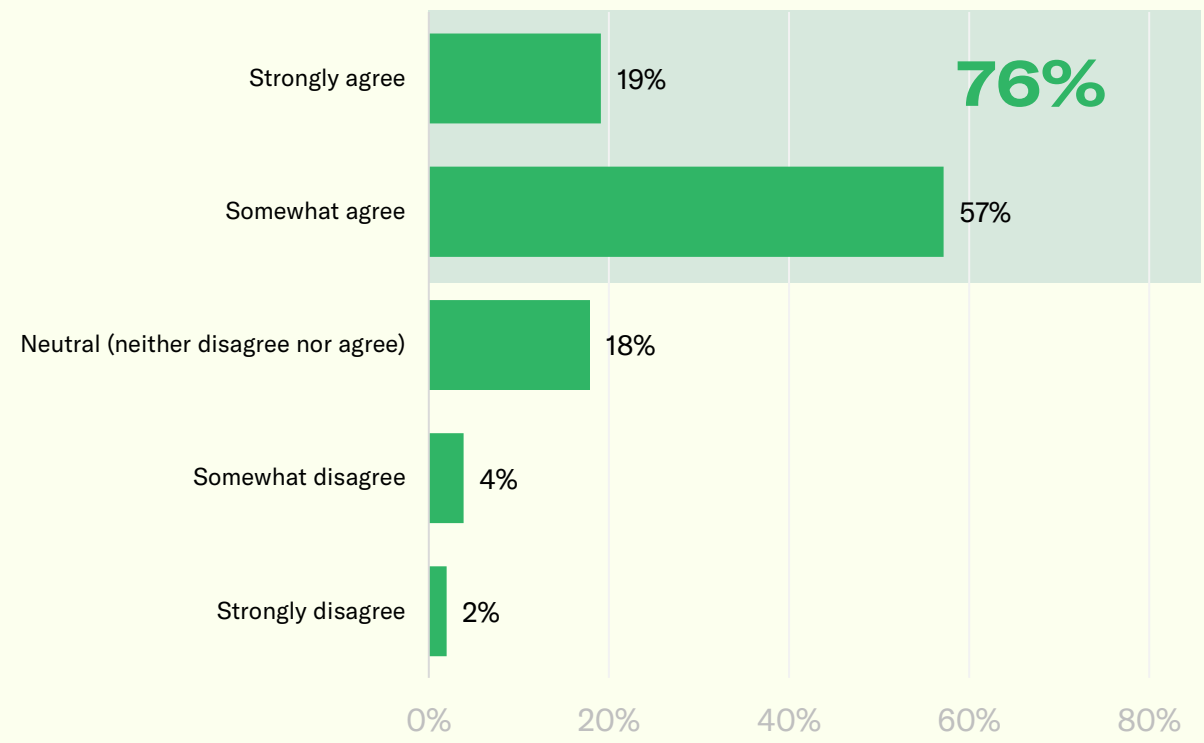


Table: Agreement with the Statement “I believe the Deschutes County Fair & Expo Center is an amenity primarily utilized by residents, but also by visitors.”

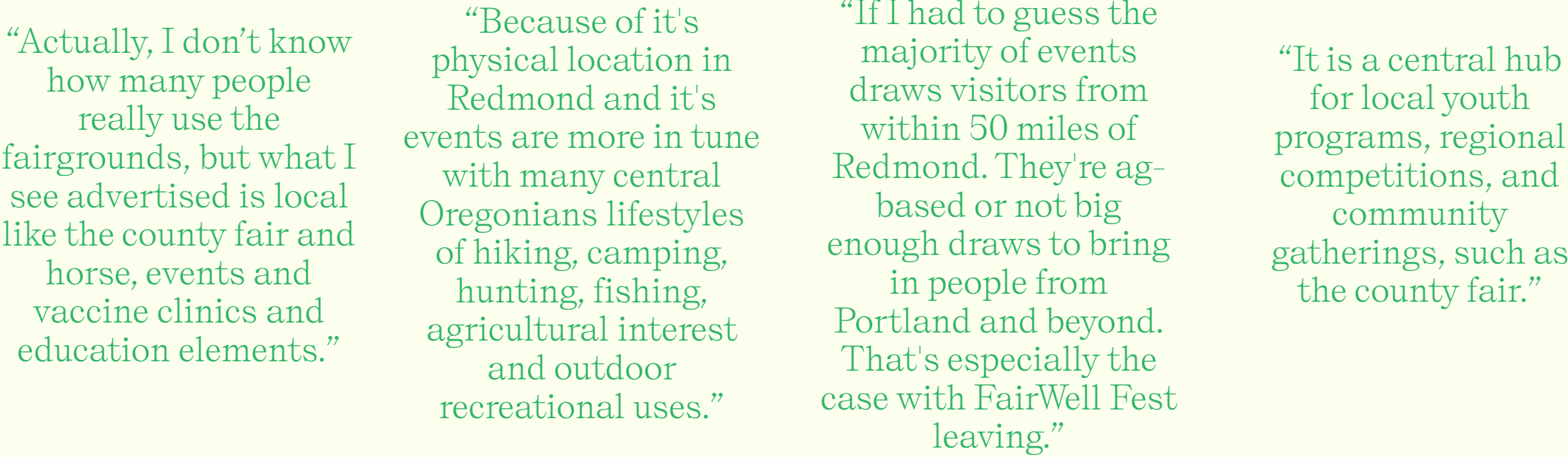
	% of Central Oregon Region Residents
Top 2 Box (Somewhat or Strongly Agree)	76%
Strongly agree	19%
Somewhat agree	57%
Neutral (neither disagree nor agree)	18%
Somewhat disagree	4%
Strongly disagree	2%

Question: I believe the Deschutes County Fair & Expo Center is an amenity primarily utilized by residents, but also by visitors.

Base: Central Oregon residents. 440 completed surveys.

Perceived programming alignment with local interests is the top reason why Central Oregonians feel the Fair & Expo Center is mostly used by residents.

Central Oregon residents who agree that the Deschutes County Fair & Expo Center is primarily utilized by residents rather than visitors were most likely to cite the programming content that they notice advertised or have witnessed themselves, which tend to center around local community interests such as livestock shows, family events, and other interest areas that resonate with the agricultural nature of communities in the region. Several also mentioned that the location is most accessible to people in the immediate vicinity.



Question: Please explain why you agree that the Deschutes County Fair & Expo Center is an amenity primarily utilized by residents, but also by visitors.

Base: Central Oregon residents who agree with the statement. 290 completed surveys.

Those who disagree that the facility is more utilized by residents tend to have little personal experience attending events at the center.

On the other hand, those who disagree that the center is primarily used by residents cited similar reasons around their perceptions of the types of programming on offer. These are also based on first- or second-hand knowledge of events at the facility, such as whether they or other residents they know have attended any programming there recently.

“The Deschutes County fair and Expo center is generally empty when you drive by except for summer when all of the festivals come to town and all of the people flock to Central Oregon from outside the area to attend festival, so no, I don’t think it’s primarily utilized by local residents.”

“Because there are no events there that attract locals. It's all huge concerts or events catered toward people traveling here to attend the event. I think the last time I was there was for my high school graduation 15 years ago.”

“I don’t think locals go there for things; I think it’s mostly people who come to central Oregon for an event there. I have lived here 12 years and never been there for anything.”

“There are HUGE major events that attract tourists. I don't know any friends that have gone to the Expo in the last year.”

Question: Please explain why you do not agree that the Deschutes County Fair & Expo Center is an amenity primarily utilized by residents, but also by visitors.

Base: Central Oregon residents who do not agree with the statement. 21 completed surveys.

Deschutes County is Central Oregon’s top destination for inter-county regional visitation.

More than half of Central Oregon region residents are visiting Deschutes County on a weekly basis (58%), far exceeding any other county in the region, perhaps unsurprising as Bend is the region’s primary hub. Crook County is a distant second-place, with 35% of regional residents saying they visit that county 4-6 times a year. Jefferson County is visited on a slightly similar frequency as Crook County, while South Wasco County has the lowest frequency of regional visitation, with most residents reporting visiting only annually (28%) or biannually (18%).

Chart: Central Oregon County Visited by Frequency

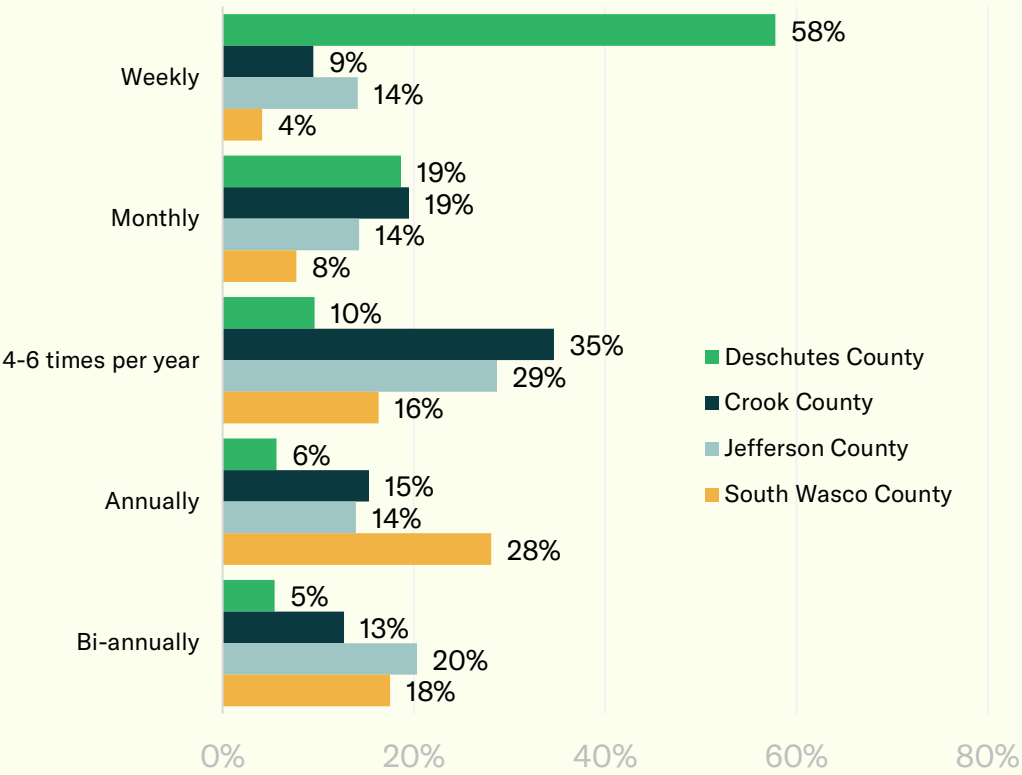


Table: Central Oregon County Visited by Frequency

	% Selected Deschutes County	% Selected Crook County	% Selected Jefferson County	% Selected South Wasco County
Weekly	58%	9%	14%	4%
Monthly	19%	19%	14%	8%
4-6 times per year	10%	35%	29%	16%
Annually	6%	15%	14%	28%
Biannually	5%	13%	20%	18%

Question: How often are you intentionally visiting other Central Oregon counties besides the one in which you reside? (Counties include Deschutes, Crook, Jefferson, and So. Wasco)

Base: Central Oregon residents. 440 completed surveys.

Half of Central Oregon residents would use increased regional public transportation to visit other counties within the region.

At 50%, half of tourism residents say they would use public transportation services to more frequently visit other Central Oregon counties if increased. One in four (24%) are neutral, while a similar share disagree (26%).

Chart: Agreement with the Statement “If connectivity via public transportation for Central Oregon communities were increased, I would utilize those services to more frequently visit the other Central Oregon counties outside of the one in which I reside.”

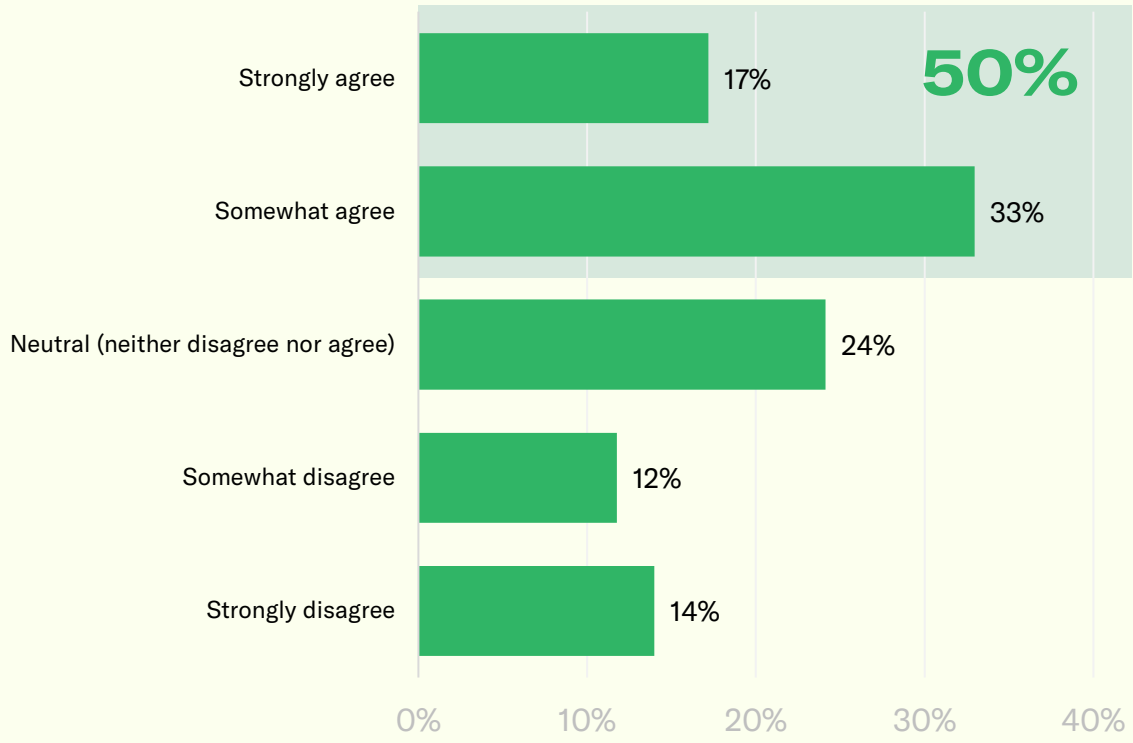


Table: Agreement with the Statement “If connectivity via public transportation for Central Oregon communities were increased, I would utilize those services to more frequently visit the other Central Oregon counties outside of the one in which I reside.”

% of Central Oregon Region Residents	
Top 2 Box (Somewhat or Strongly Agree)	50%
Strongly agree	17%
Somewhat agree	33%
Neutral (neither disagree nor agree)	24%
Somewhat disagree	12%
Strongly disagree	14%

Question: If connectivity via public transportation for Central Oregon communities were increased, I would utilize those services to more frequently visit the other Central Oregon counties outside of the one in which I reside. (Counties include Deschutes, Crook, Jefferson, and So. Wasco).

Base: Central Oregon residents. 440 completed surveys.

Residents who would not use increased public transit services tend to cite a strong preference for using their own vehicle.

For Central Oregonians who would not utilize public transportation services if they were increased for regional communities, a preference for using their own vehicle was by far the most common response, followed by a skepticism of the reliability of public transportation as well as safety concerns that tend to also inform their preference for their own cars.

“1. I doubt public transport would actually be increased, 2. anything I’d travel to those counties for I’d need a car anyway.”

“Because if I leave South Wasco County and go to a different county, I have errands to run and need a car to get to other destinations.”

“Because Bend doesn't have a solid public transport network and I prefer to use my own vehicle.”

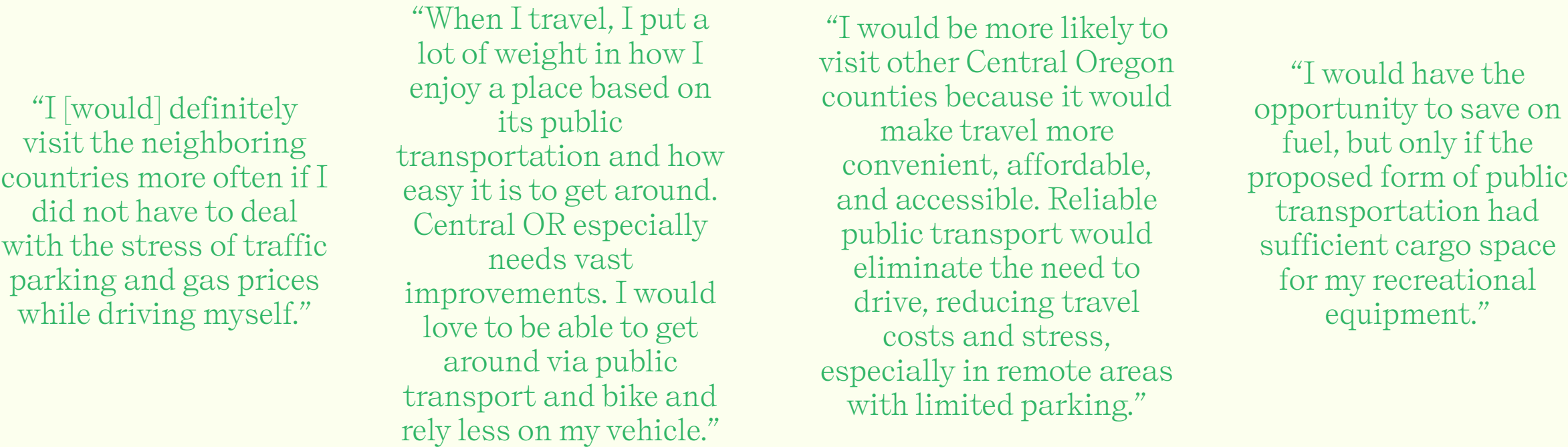
“I don’t like public transportation due to the risk of getting sick. I hate crowds and crowded areas/spaces.”

Question: Please explain why you do not agree that if connectivity via public transportation for Central Oregon communities were increased, you would utilize those services to more frequently visit the other Central Oregon counties outside of the one in which you reside.

Base: Central Oregon residents who do not agree with the statement. 119 completed surveys.

Better regional connectivity, convenience, and cost savings are the top reasons residents would use increased public transit services.

Access to recreation areas and attraction that eliminates the stress of driving, the logistics of parking, and gas prices were the primary reasons that Central Oregon residents mentioned behind why they would use increased public transportation services within the region. There was also a strong sense that such improvements would better connect the region and help make residents feel like they have better access also to other services available around the region that are otherwise inconvenient or difficult for them to get to by car.



Question: Please explain why you agree that if connectivity via public transportation for Central Oregon communities were increased, you would utilize those services to more frequently visit the other Central Oregon counties outside of the one in which you reside.

Base: Central Oregon residents who agree with the statement. 198 completed surveys.

Mt. Hood/Columbia River Gorge

The following slides present findings specific to Mt. Hood/Columbia River Gorge residents, including demographics and insights into quality-of-life perceptions, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and questions that were asked specifically of Oregonians who live in the region.

Mt. Hood/CRG

Demographic Snapshot

Total residents surveyed:	210
Average age:	45 years old
Average household income:	\$92,887
Employed:	71%
College graduate:	57%
Married/domestic partnership:	68%
Have children in household:	41%
BIPOC:	29%
LGBTQ+:	12%
Accessibility needs in household:	17%



Residents of the Mt. Hood/CRG region report high perceived quality of life and positive future quality of life expectations.

Of the seven Oregon regions, Mt. Hood/CRG residents scored slightly above average for their perceived quality of life (11.7 vs. 11.5 overall state). Similarly, residents in the region are moderately optimistic that their quality of life will improve in the future, tracking just above the total (47% vs. the overall average of 45%).

Chart: Mt. Hood/CRG Residents' Score*

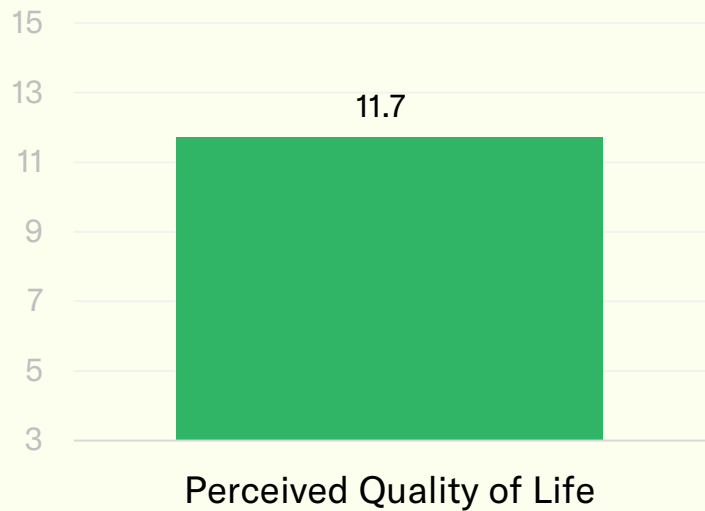


Table: Mt. Hood/CRG Region Residents' Score*

Perceived Quality of Life Score	
Mt. Hood/CRG Region Residents	11.7

*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 3 (extremely dissatisfied) and a maximum possible score of 15 (extremely satisfied).

Chart: Future Quality of Life

(% Selected "Somewhat better" or "Much better")

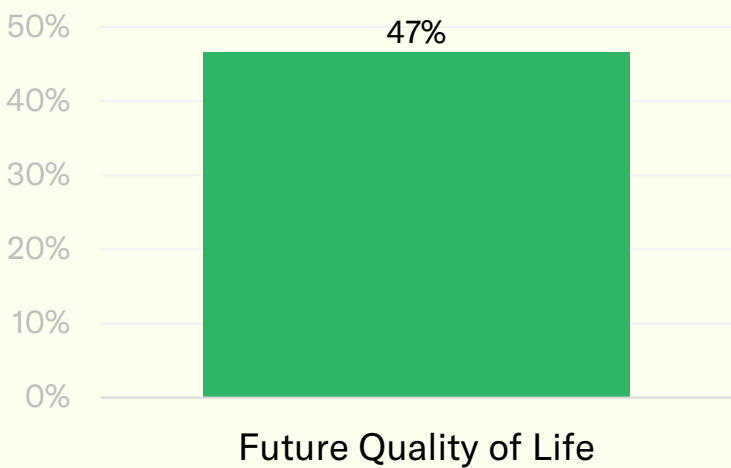


Table: Future Quality of Life

% Selected "Somewhat better" or "Much better"	
Mt. Hood/CRG Region Residents	47%

Questions: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?

Base: Mt. Hood/CRG residents. 210 completed surveys.

Likelihood to recommend the Mt. Hood/CRG region a tourism destination closely aligns with the statewide score.

One-third of Mt. Hood/CRG region residents are promoters of their local community as a tourism destination (32% scored a 9 or 10 on a 0 to 10-point scale). When subtracting the detractors (residents who scored a 6 or lower) from the promoters (those who scored a 9 or 10), the likelihood-to-recommend score for the Mt. Hood/CRG region is on par with the state score (-2 vs. -3).

Chart: Likelihood to Recommend Local Community as a Tourism Destination

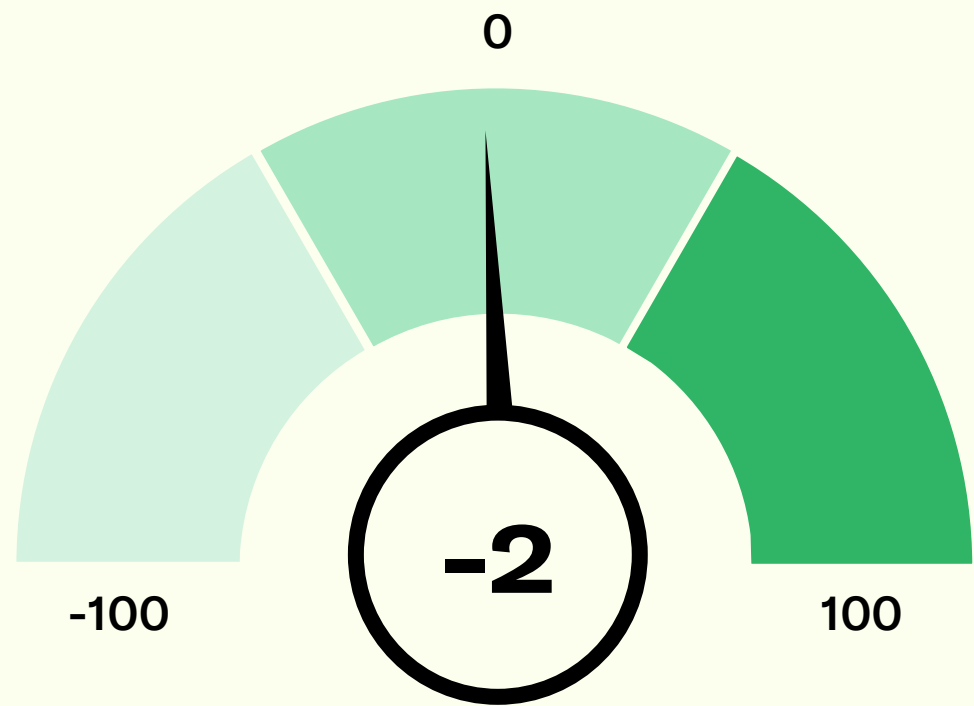


Table: Likelihood to Recommend Local Community as a Tourism Destination

Likelihood to Recommend Score	
Mt. Hood/CRG Region Residents	-2

Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?
Base: Mt. Hood/CRG residents. 210 completed surveys.

Tourism’s negative environmental impact continues to notably outweigh the positive among Mt. Hood/CRG residents.

Mt. Hood/CRG region residents feel the positive outweighs the negative impacts of tourism for economic and cultural dimensions, but not environmental and social dimensions. In fact, the perceptions are so divided that the overall impact negative and positive scores are effectively neutralized. Similar to the overall statewide results, the largest positive/negative gap occurs in the economic impact (3.6 vs. 3.3, a +0.3-point gap), but the second-largest gap is around environmental impact (3.4 vs. 3.7, a -0.3-point gap). For the cultural dimension, positive impacts outweigh the negative (3.6 vs. 3.4), but the narrative is reversed for the social dimension (3.5 vs. 3.6).

Chart: Index of Residents' Perceptions of Tourism Impacts

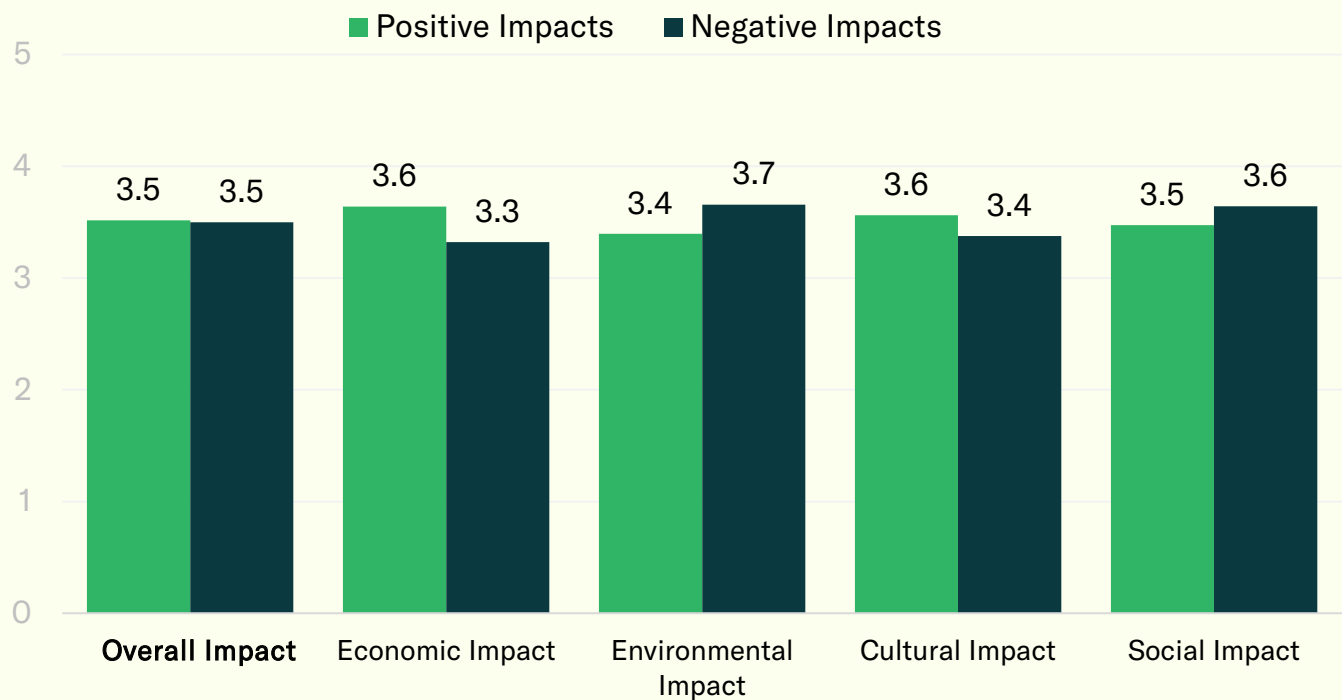


Table: Index of Residents' Perceptions of Tourism Impacts

	Positive Impacts Mean Score	Negative Impacts Mean Score
Overall Impact	3.5	3.5
Economic Impact	3.6	3.3
Environmental Impact	3.4	3.7
Cultural Impact	3.6	3.4
Social Impact	3.5	3.6

Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s ____, please rate how much you agree or disagree with the following statements.
Base: Mt. Hood/CRG residents. 210 completed surveys.

Mt. Hood/CRG residents have mixed perceptions of tourism’s benefits across the dimensions, resulting in a split opinion on overall impact.

For Mt. Hood/CRG region residents, tourism’s economic benefits are perceived by 60%, but this is surpassed by 64% who feel that the environmental benefits do not outweigh the drawbacks. Similarly, nearly six in ten (58%) do not feel the social benefits of tourism outweigh the drawbacks either. A small majority (53%) do agree that tourism’s cultural benefits surpass the costs, but nevertheless a strong minority (47%) do not share that sentiment.

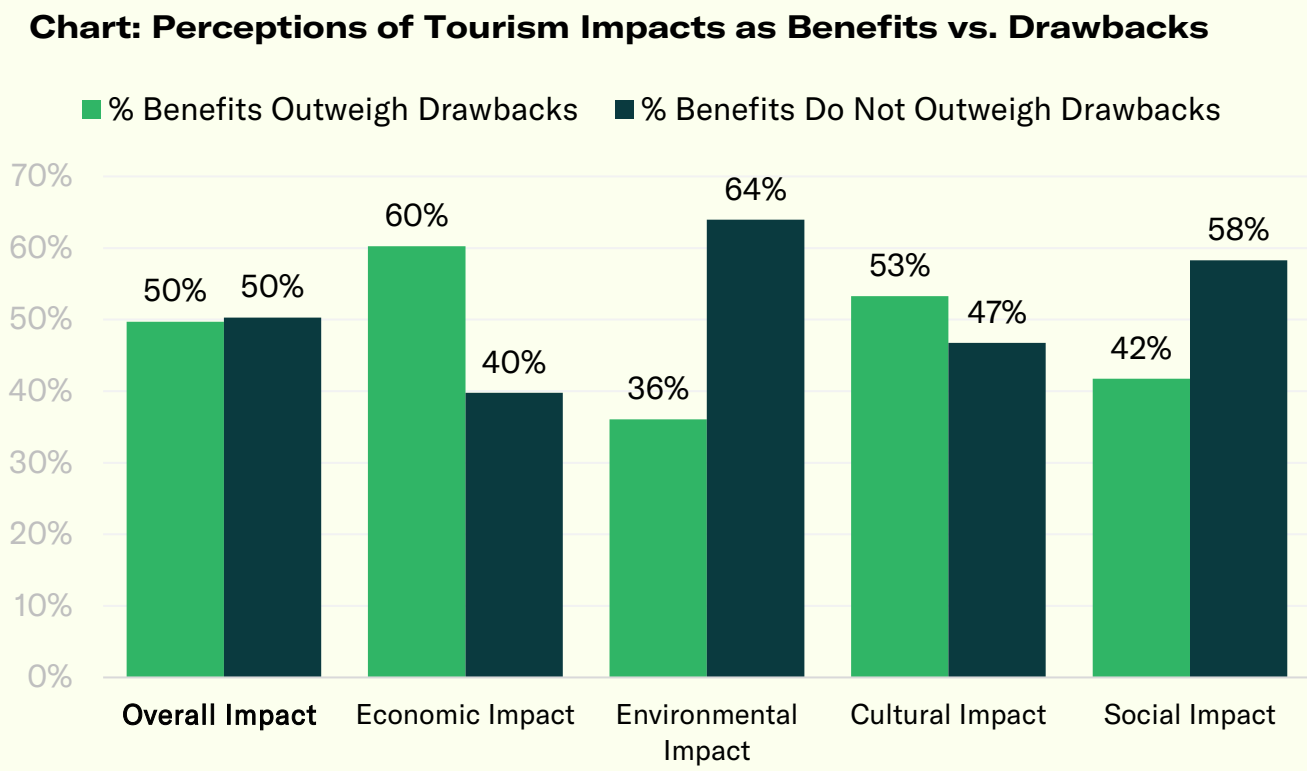


Table: Perceptions of Tourism Impacts as Benefits vs. Drawbacks

	% Benefits Outweigh Drawbacks	% Benefits Do Not Outweigh Drawbacks
Overall Impact	50%	50%
Economic Impact	60%	40%
Environmental Impact	36%	64%
Cultural Impact	53%	47%
Social Impact	42%	58%

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: Mt. Hood/CRG residents. 210 completed surveys.

Use of public transportation has increased among Mt. Hood/CRG residents since 2023.

At 15%, the share of regional residents who report using their community’s public transportation has increased from the 11% reported in 2023. However, a small majority of Mt. Hood/Columbia River Gorge residents still say they never use public transportation (51%), down from 64%. Just under one in five (19%) say they use public transportation on a monthly basis, while a similar share report that they use it less than once a month (15%).

Chart: Frequency of Local Public Transportation Use

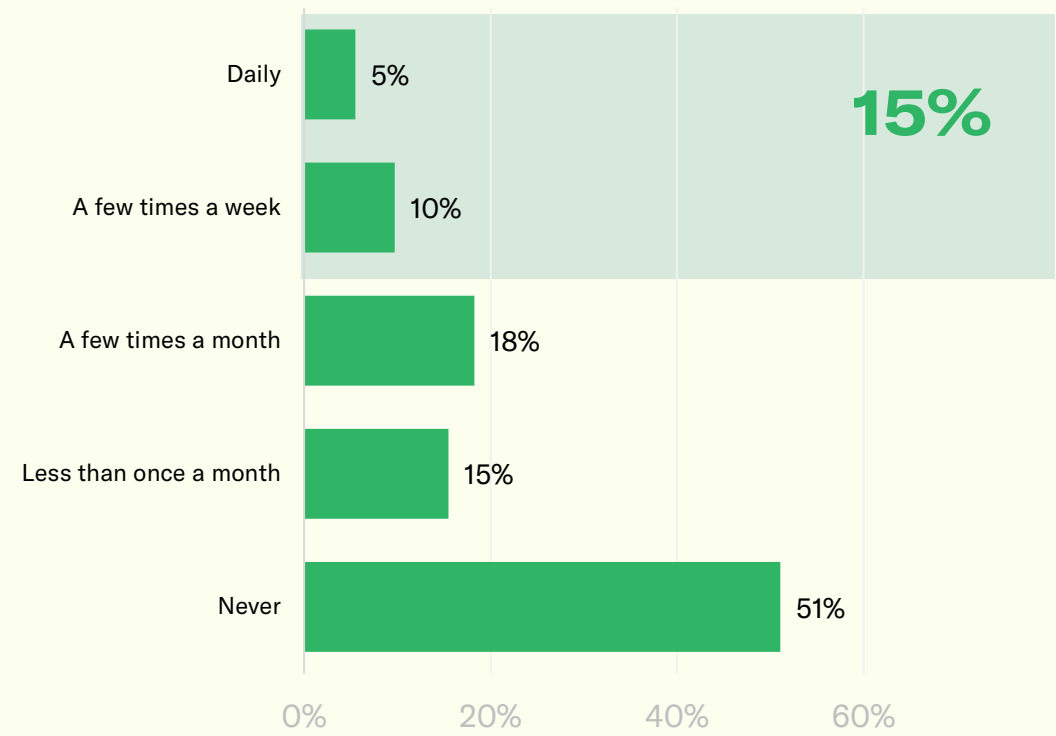


Table: Frequency of Local Public Transportation Use

	% of Mt. Hood/CRG Region Residents
Top 2 Box (Daily or A few times a week)	15%
Daily	5%
A few times a week	10%
A few times a month	18%
Less than once a month	15%
Never	51%

Question: How often do you use public transportation (e.g., Mt Hood Express, Columbia Gorge Express, CAT, SAME Sandy, Trimet, etc.) in your community?

Base: Mt. Hood/CRG residents. 210 completed surveys.

Preference for their own car continues to rank as the top deterrent to using their community’s public transportation.

Reflecting previous trends, most Mt. Hood/Columbia River Gorge residents continue to resist public transportation because they would rather drive their own car (56%). This is followed distantly by 34% who feel that public transportation is not convenient or not within walking distance, while a further one-fourth feel that it takes too long (27%). One in ten potential users say there is no public transit available in their area (11%), and/or that it is too confusing to use (10%).

Chart: Barriers to Using Local Public Transportation

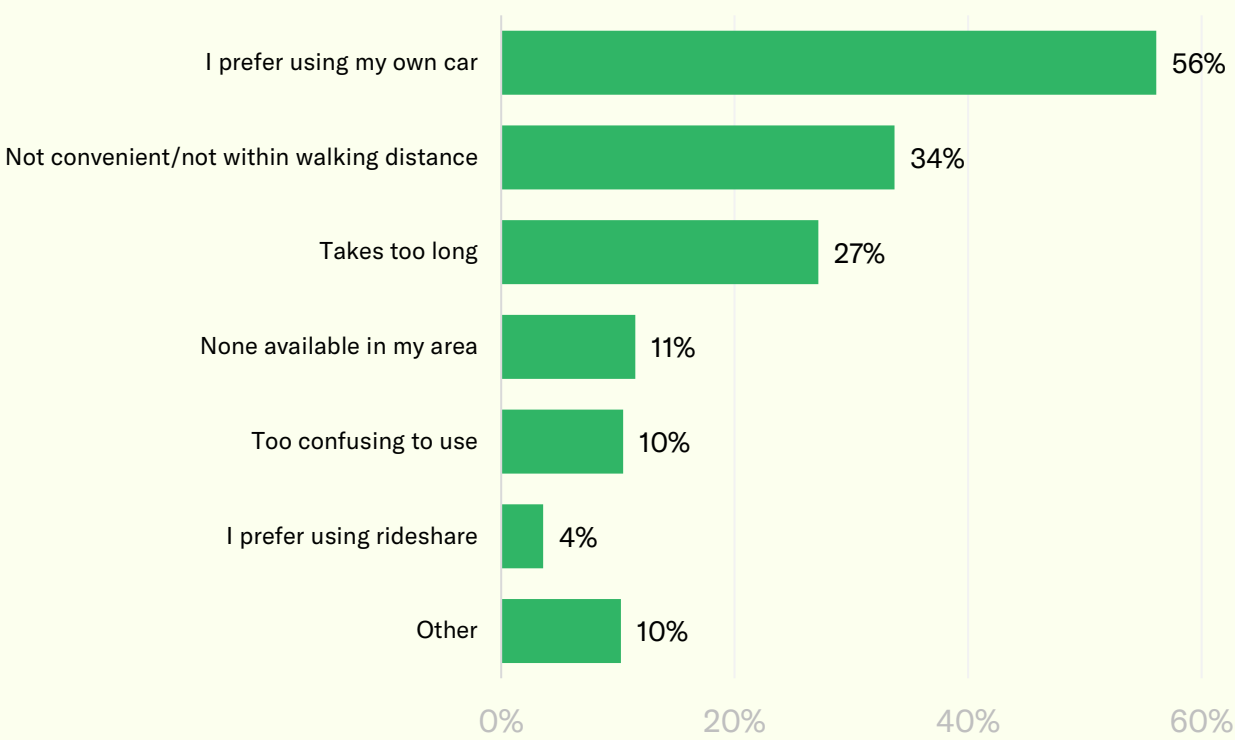


Table: Barriers to Using Local Public Transportation

	% of Mt. Hood/CRG Region Residents
I prefer using my own car	56%
Not convenient/not within walking distance	34%
Takes too long	27%
None available in my area	11%
Too confusing to use	10%
I prefer using rideshare	4%
Other	10%

Question: What prevents you from using public transportation such as city bus, train, etc. in your area? (Select all that apply.)

Base: Mt. Hood/CRG residents who use public transportation in their area less than once a month or never. 179 completed surveys.

Three-fourths of residents feel their quality of life in Mt. Hood/CRG region is staying the same or improving.

Half of Mt. Hood/CRG region residents report that their current quality of life has remained the same (50%). One in four (27%) said that they feel their quality of life in the region is improving, while one in five (20%) said it is declining. Only a small fraction (4%) said they have not lived in the region long enough to have noticed a shift.

Chart: Change in Quality of Life in Mt. Hood/CRG Region

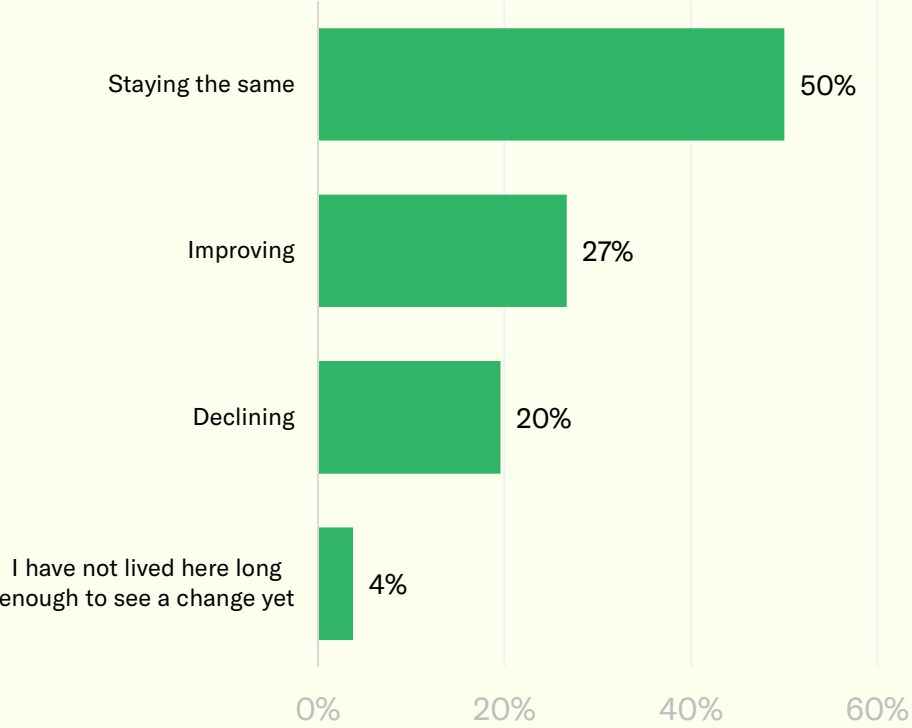


Table: Change in Quality of Life in Mt. Hood/CRG Region

	% of Mt. Hood/CRG Region Residents
Staying the same	50%
Improving	27%
Declining	20%
I have not lived here long enough to see a change yet	4%

Question: Would you say your overall quality of life in the Mt. Hood/Columbia River Gorge Region has been....

Base: Mt. Hood/CRG residents. 210 completed surveys.

Rising costs and tourism-driven congestion are the most cited reasons for negative quality of life perceptions among residents.

Negative quality of life impacts for Mt. Hood/CRG residents reflect similar themes in statewide perceptions of tourism’s biggest drawbacks. Most frequently, residents mentioned rising economic pressures fueled by increased cost of living, closely followed by a sense that traffic and crowding caused by tourism has detrimentally altered the character of their local community.

“Everything is so expensive, so quality of life won’t change much unless things become more affordable.”

“Increased costs, wages not keeping up with those costs is creating a burden on our communities. Changing federal policies are impacting our communities and small businesses significantly.”

“It is no longer the quiet livable community. Tourists brought an influx of people that have now moved here and want my area to be as crowded and congested as where they came from. It has driven up the cost of living.”

“More expensive and more crowded than ever and puts a strain on the farming community that built the area. Locals get no breaks and pay to overpriced user fees as tourists. This was once a quiet small town now it’s a trap.”

Question: Do you have any specific comments about changes in your overall quality of life in the area?

Base: Mt. Hood/CRG residents who opted in to share comments. 139 completed surveys.

Community vitality driven by tourism business is often mentioned as a driver for positive quality of life changes.

On the other hand, for those who mentioned a positive change in their quality of life, a mix of more amenities to enjoy, increased community vibrancy through economic stimulation from tourism, as well as general satisfaction with living in their community were typically mentioned.

“Over time, I’ve noticed a mostly positive shift in my quality of life, thanks in part to responsible tourism growth. Tourism has brought more investment to our area—better roads, improved trail access, and more local jobs that let me work close to home. We now have more diverse dining options and community events that residents can enjoy too. While there are occasional crowds and parking headaches, they’re worth it for the stability and amenities tourism provides. My family and I feel more connected to our community, and I’m grateful tourism has helped keep our small town thriving.”

“In my experience, the overall quality of life in my area has improved due to increased community events and amenities. Access to parks and recreational activities has expanded, allowing residents to enjoy a healthier lifestyle and fostering social connections.”

“The gateway to the gorge has seen recent developments in restaurants, lodging, and hiking experiences that attract visitors from all over to visit our beautiful area. I love living here with my family and it’s only gotten better each year we’ve lived here!”

Question: Do you have any specific comments about changes in your overall quality of life in the area?

Base: Mt. Hood/CRG residents who opted in to share comments. 139 completed surveys.

Eastern Oregon

The following slides present findings specific to Eastern Oregon residents, including demographics and insights into quality-of-life perceptions, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and questions that were asked specifically of Oregonians who live in the region.

Eastern Oregon Demographic Snapshot

Total residents surveyed:	373
Average age:	47 years old
Average household income:	\$78,533
Employed:	73%
College graduate:	52%
Married/domestic partnership:	56%
Have children in household:	25%
BIPOC:	23%
LGBTQ+:	10%
Accessibility needs in household:	24%



Eastern Oregon residents reported the lowest perceived quality of life and future quality of life expectations among the regions.

Of the seven Oregon regions, Eastern Oregon residents scored lowest for their perceived quality of life (10.9 vs. 11.5 overall state). Similarly, residents in the region are less likely to be optimistic that their quality of life will improve in the future at just 36% (vs. the overall average of 45%).

Chart: Eastern Oregon Residents' Score*

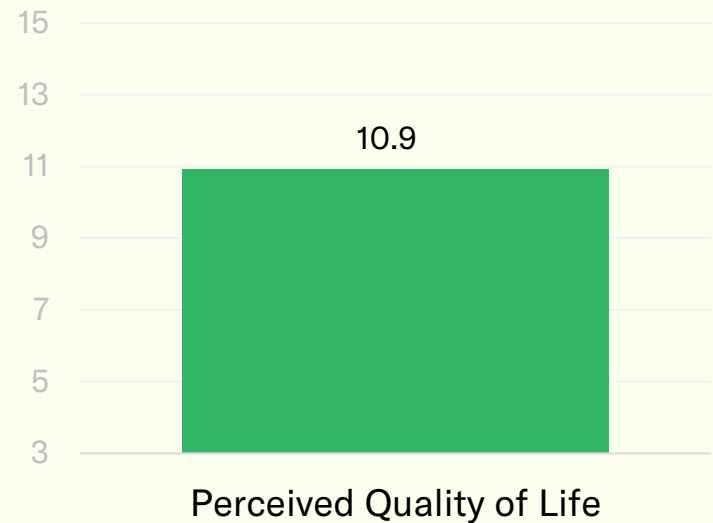


Table: Eastern Oregon Region Residents' Score*

Perceived Quality of Life Score	
Eastern Oregon Region Residents	10.9

*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 3 (extremely dissatisfied) and a maximum possible score of 15 (extremely satisfied).

Chart: Future Quality of Life

(% Selected "Somewhat better" or "Much better")

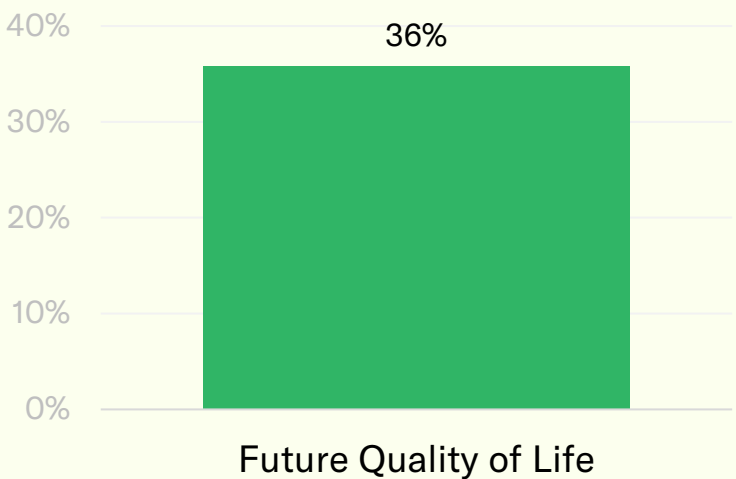


Table: Future Quality of Life

% Selected "Somewhat better" or "Much better"	
Eastern Oregon Region Residents	36%

Question: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?

Base: Eastern Oregon residents. 373 completed surveys.

Of the regions, Eastern Oregon residents tie with Willamette Valley as the least likely to recommend their community as a tourism destination.

Just over one-fourth of Eastern Oregon region residents are promoters of their local community as a tourism destination (27% scored a 9 or 10 on a 0 to 10-point scale). When subtracting the detractors (residents who scored a 6 or lower) from the promoters (those who scored a 9 or 10), the likelihood-to-recommend score for the Eastern Oregon region is significantly lower than the state score (-17 vs. -3), tying with the Willamette Valley region for the lowest score for this metric.

Chart: Likelihood to Recommend Local Community as a Tourism Destination

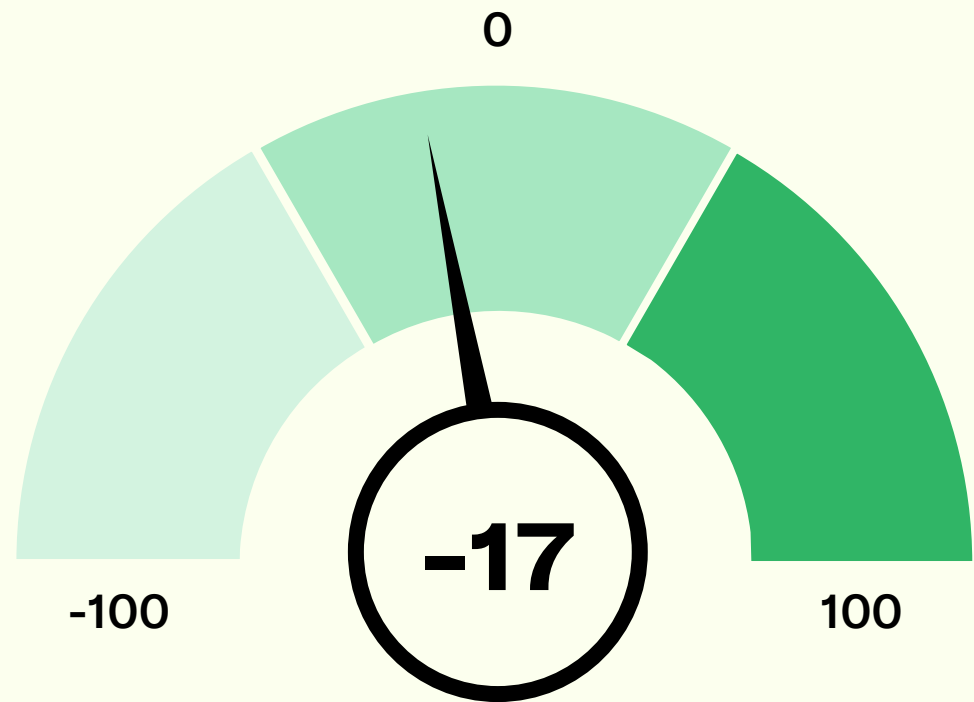


Table: Likelihood to Recommend Local Community as a Tourism Destination

Likelihood to Recommend Score	
Eastern Oregon Region Residents	-17

Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?
Base: Eastern Oregon residents. 373 completed surveys.

Tourism’s positive perceptions remain weaker around environmental and social impacts among Eastern Oregon residents.

Eastern Oregon region residents feel the positive outweighs the negative impacts of tourism for economic and cultural dimensions, but not environmental and social dimensions. However, overall positive impacts still track above overall negative impacts. Similar to the overall statewide results, the largest positive/negative gap occurs in the economic impact (3.6 vs. 3.1, a +0.5-point gap), followed by cultural impact (3.5 vs. 3.2, a +0.3-point gap). For the environmental dimension, negative impacts slightly outweigh the positive (-0.1-point gap), while positive and negative impact perceptions are equal for the social dimension (0.0-point gap).

Chart: Index of Residents' Perceptions of Tourism Impacts

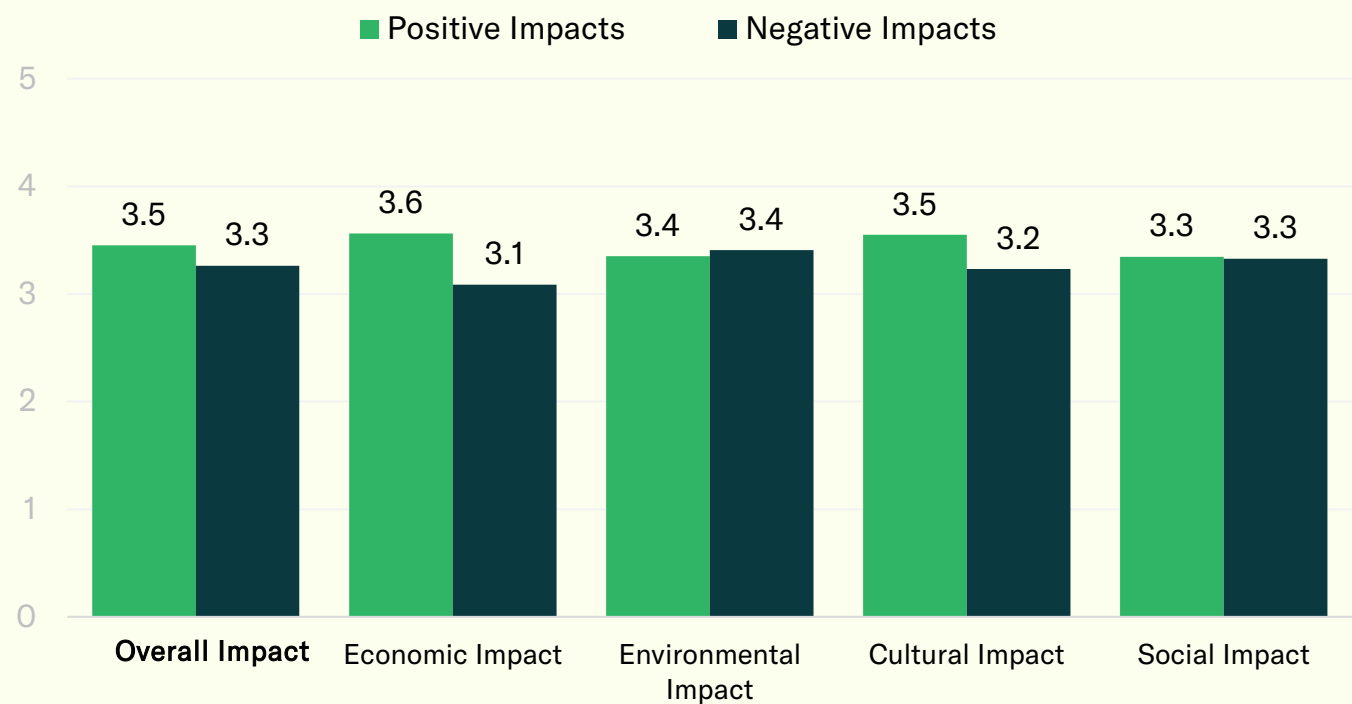


Table: Index of Residents' Perceptions of Tourism Impacts

	Positive Impacts Mean Score	Negative Impacts Mean Score
Overall Impact	3.5	3.3
Economic Impact	3.6	3.1
Environmental Impact	3.4	3.4
Cultural Impact	3.5	3.2
Social Impact	3.3	3.3

Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s ____, please rate how much you agree or disagree with the following statements.
Base: Eastern Oregon residents. 373 completed surveys.

Eastern Oregonians feel tourism brings more economic and cultural benefits than drawbacks, but opinion is divided on environmental and social impacts.

For Eastern Oregon region residents, 65% feel that tourism’s economic benefits outweigh the drawbacks, but in other areas opinion is much more divided. While small majorities also agree that the industry’s cultural (57%) benefits outweigh their drawbacks, when it comes to environmental (51%) and social (52%) impacts, a small majority believe that tourism’s benefits do not outweigh the drawbacks.

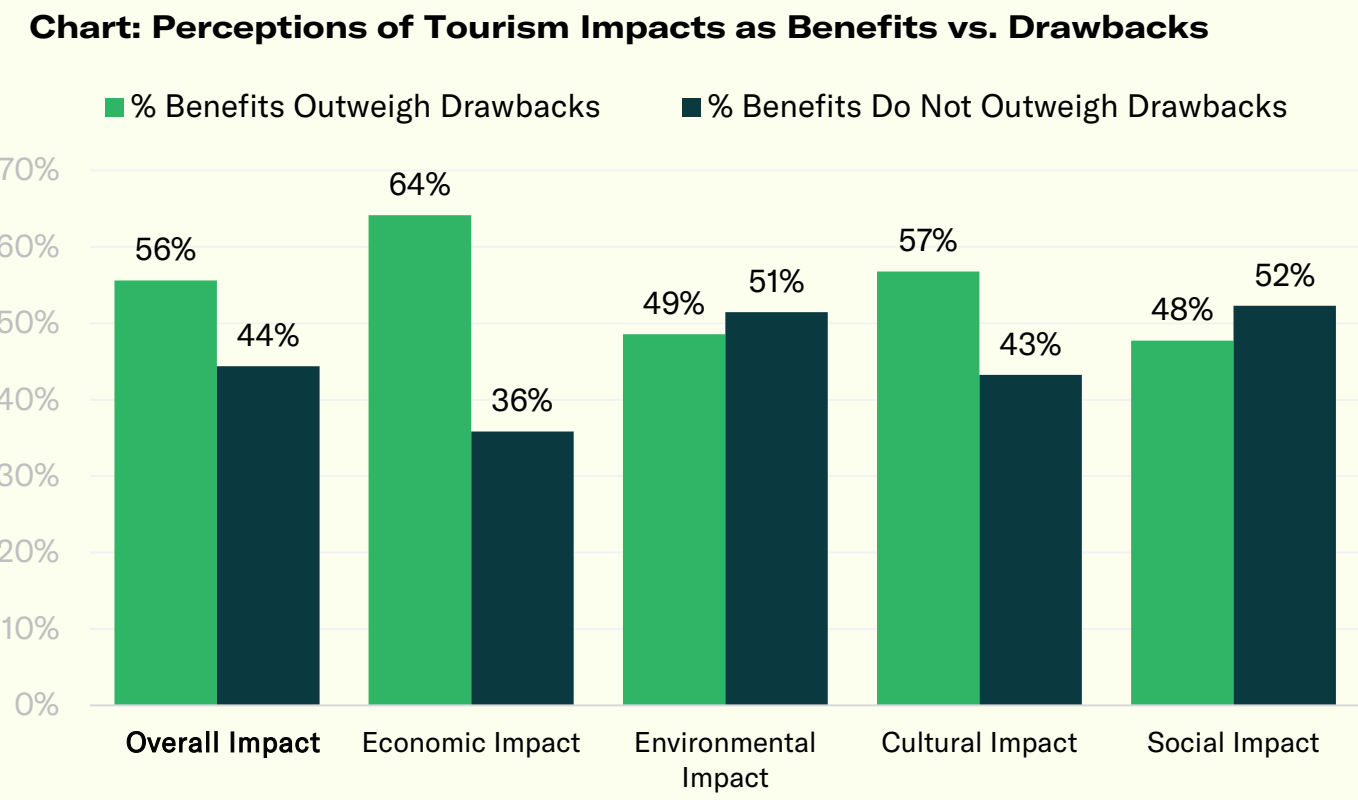


Table: Perceptions of Tourism Impacts as Benefits vs. Drawbacks

	% Benefits Outweigh Drawbacks	% Benefits Do Not Outweigh Drawbacks
Overall Impact	56%	44%
Economic Impact	64%	36%
Environmental Impact	49%	51%
Cultural Impact	57%	43%
Social Impact	48%	52%

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: Eastern Oregon residents. 373 completed surveys.

A small majority of residents feel that local infrastructure and services are able to meet current tourism demand for the region.

More than half (53%) of Eastern Oregon residents agree that local infrastructure and services have the capacity to accommodate current levels of tourism to the region. However, over one in four (27%) disagree, and one in five are neutral (20%).

Chart: Agreement Levels with the Statement “Local infrastructure and services (including transportation, accommodations, and recreation facilities) have the capacity to accommodate the current level of tourism in Eastern Oregon.”

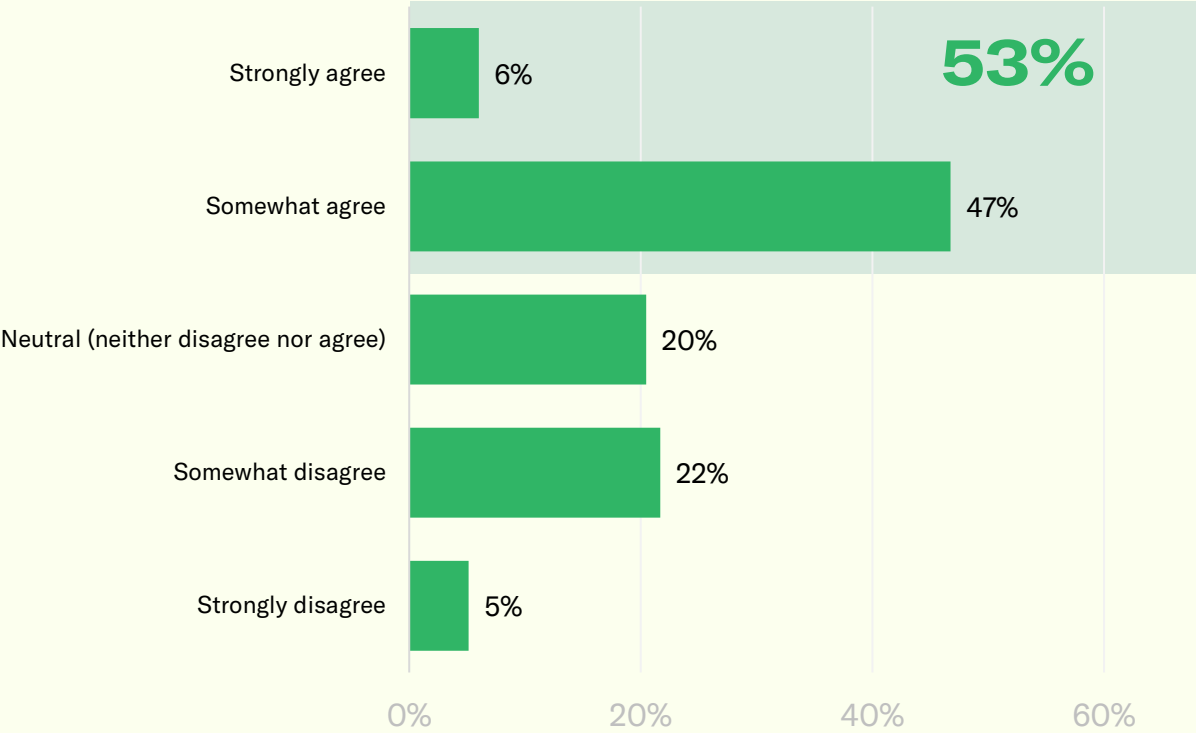


Table: Agreement Levels with the Statement “Local infrastructure and services (including transportation, accommodations, and recreation facilities) have the capacity to accommodate the current level of tourism in Eastern Oregon.”

	% of Eastern Oregon Region Residents
Top 2 Box (Somewhat or Strongly Agree)	53%
Strongly agree	6%
Somewhat agree	47%
Neutral (neither disagree nor agree)	20%
Somewhat disagree	22%
Strongly disagree	5%

Question: Local infrastructure and services (including transportation, accommodations, and recreation facilities) have the capacity to accommodate the current level of tourism in Eastern Oregon.

Base: Eastern Oregon residents. 373 completed surveys.

Widespread infrastructure and service shortages are the most frequently mentioned reasons residents feel Eastern Oregon is already over its tourism capacity.

Eastern Oregon residents who disagree that local infrastructure and services have the capacity to accommodate the current level of regional tourism most often cite limited resource availability, from staffing and emergency services, road maintenance, to insufficient hotel supply as well as campgrounds or RV parks.

“Converting local housing to tourist housing severely impacts the local economy. Restaurants can't keep up, can't find good staff due to no housing. Hospitals struggle to find staff to keep up with the increase in medical needs during tourist season.”

“EO needs more hotels that aren't too high priced. Some of the main highways need redone to make travel smoother. Very small towns (population less than 2,500) need funds to help develop and maintain tourism.”

“Water scarcity in Eastern Oregon makes tourism especially harmful. Popular attractions use massive amounts of water for visitors, worsening shortages that force residents to follow strict conservation rules.”

“Our small towns do not have the funding or infrastructure to provide the services current tourism demands, creating frustration for everyone.”

Question: Please explain why you disagree that local infrastructure and services have the capacity to accommodate the current level of tourism in Eastern Oregon.

Base: Eastern Oregon residents who do not agree with the statement. 110 completed surveys.

Eastern Oregon residents are more likely to feel tourism is harming certain areas and attractions in the region.

Four in ten (42%) Eastern Oregon residents feel that there are specific areas or attractions in the region that are negatively impacted by tourism. This is notably higher than the share who disagree (32%), or those who feel neutral on the subject (26%).

Chart: Agreement Levels with the Statement “There are specific areas or attractions in Eastern Oregon that I feel are negatively impacted by tourism.”

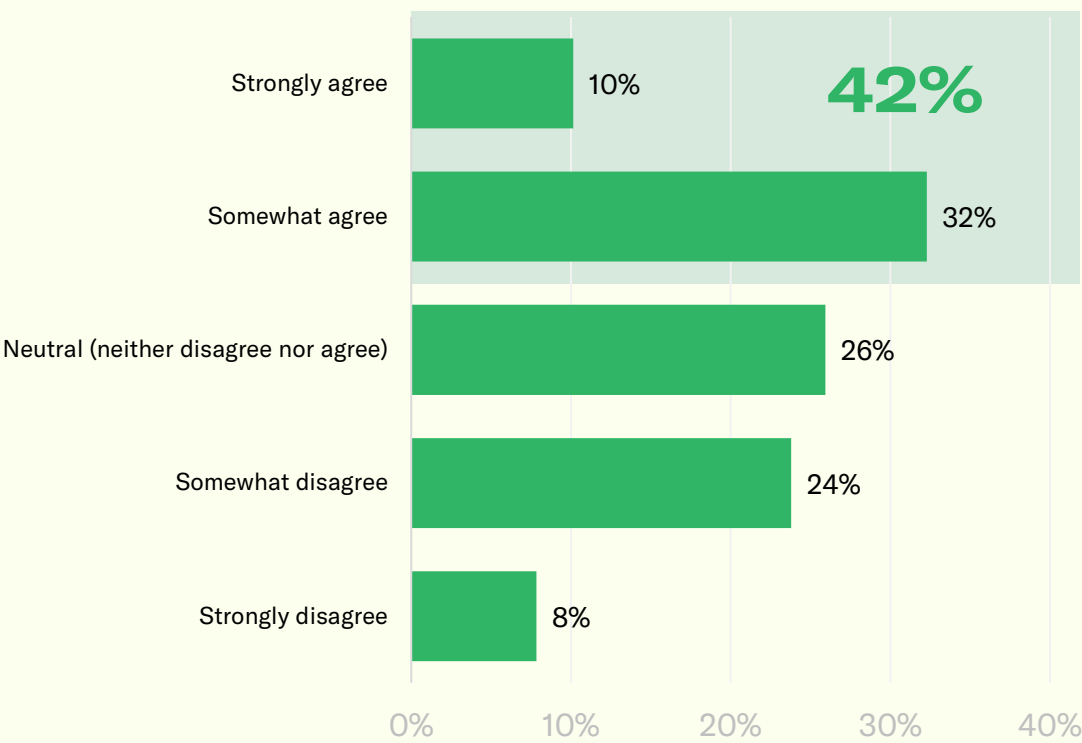


Table: Agreement Levels with the Statement “There are specific areas or attractions in Eastern Oregon that I feel are negatively impacted by tourism.”

	% of Eastern Oregon Region Residents
Top 2 Box (Somewhat or Strongly Agree)	42%
Strongly agree	10%
Somewhat agree	32%
Neutral (neither disagree nor agree)	26%
Somewhat disagree	24%
Strongly disagree	8%

Question: There are specific areas or attractions in Eastern Oregon that I feel are negatively impacted by tourism.
Base: Eastern Oregon residents. 373 completed surveys.

Pollution, congestion, and development are the primary reasons Eastern Oregonians feel tourism is negatively affecting the region.

For Eastern Oregon residents who feel that there are areas of the region that are negatively impacted by tourism, their reasoning tends to focus on issues around litter and pollution of the region’s natural areas, as well as overcrowding, trail overuse, and road congestion in an area that has a small resident population. There were also several who mentioned concerns about gentrification and high-end accommodations pricing out locals from being able to enjoy the area’s attractions.

“A lot of our areas can get dirty and filled with trash by tourists. They also can cause a lot more congestion in areas that are smaller and not good to accommodate lots of people.”

“There are areas that are overran during peak tourism periods. The area has less than 7,000 people for the entire county so large increases in people tends to overrun the area quickly.”

“Expansion of tourism into the Wallowa Mountains and the Eagle Cap Wilderness causes damage to the Wilderness. Additionally, the purchase of the Minam River Lodge and turning it into a high price destination has made it impossible for locals (or honestly most people) to enjoy this unique historic location.”

“I’ve seen areas like the Painted Hills experience wear and tear from increased visitor traffic. The trails are becoming eroded, and litter often accumulates, threatening the natural beauty that draws people in the first place.”

Question: Please explain why you disagree that there are specific areas or attractions in Eastern Oregon that I feel are negatively impacted by tourism.

Base: Eastern Oregon residents who do not agree with the statement. 150 completed surveys.

Eastern Oregon promoters are proud of their home region and want to help drive the economic benefits of tourism to their area.

For Eastern Oregonians who are promoters of the region as a tourism destination, meaning those who rated a 9 or 10 for the likelihood-to-recommend score (0- to 10-point scale), pride in their community’s small-town charm and welcoming atmosphere, the beautiful landscapes of the region, as well as the associated outdoor recreation offerings were most frequently mentioned as their reasons for their score.

“Harney County is a great place to live, work and recreate. From the Malheur National Wildlife Refuge to the Malheur National Forest and beyond, we have over 10,000 square miles to explore.”

“Because I enjoy exploring my area and I LIVE here. The beauty never diminishes.”

“We offer beautiful natural settings, quality facilities, and a welcoming environment. The economic and social benefits tourism brings also help us continue improving what we offer.”

“Grant County is a lovely spot with a rich and interesting history, between ranching, gold, fossils, etc. that could benefit from an influx of tourism, as I've also seen several restaurants and businesses take hits from not getting enough traffic in the off-season.”

Question: Earlier in the survey, you responded with ____ for the likelihood to recommend your community as a tourism destination.

Base: Eastern Oregon residents who rated a 9 or higher. 102 completed surveys.

On the other hand, detractors seek to protect the region from the environmental and infrastructural harms of overtourism.

For those Eastern Oregonians who are detractors of the region as a tourism destination, meaning those who rated a 6 or lower for the likelihood-to-recommend score (0- to 10-point scale), many cite a desire to shield the region from the harms of tourism as their rationale. Particularly, concerns about overcrowding, the resultant environmental degradation, and capacity limitations tend to inform their reasoning.

“Litter, vandalism, and misuse of public spaces have become common problems linked to tourism. Residents spend countless hours cleaning and maintaining areas that visitors damage. Our public spaces are no longer well-kept or enjoyable, and the cost of upkeep falls unfairly on those who live here.”

“I don't even tell people where I live, specifically. We simply can't continue to promote this area. It is literally being degraded by the high level of tourism in the high season.”

“I have seen our natural spaces decline from heavy tourism use. Trails are damaged, wildlife is disturbed, and litter is common in areas that were once clean and quiet. Conservation efforts cannot keep up with visitor pressure, and residents lose access to the peaceful outdoor spaces we value most. Responsible tourism is not happening here at a level that makes recommendation possible.”

Question: Earlier in the survey, you responded with ____ for the likelihood to recommend your community as a tourism destination.

Base: Eastern Oregon residents who rated a 6 or lower. 157 completed surveys.

Oregon Coast

The following slides present findings specific to Oregon Coast residents, including demographics and insights into quality-of-life perceptions, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and questions that were asked specifically of Oregonians who live in the region.

Oregon Coast Demographic Snapshot

Total residents surveyed:	1,017
Average age:	58 years old
Average household income:	\$84,738
Employed:	51%
College graduate:	56%
Married/domestic partnership:	58%
Have children in household:	15%
BIPOC:	15%
LGBTQ+:	13%
Accessibility needs in household:	28%



Oregon Coast residents are the least optimistic about their future quality of life compared to other tourism regions.

Of the seven Oregon regions, Oregon Coast residents scored roughly on par with total residents for their perceived quality of life (11.6 vs. 11.5 overall state). On the other hand, residents in the region are less likely to be optimistic that their quality of life will improve in the future at just 30% (vs. the overall average of 45%), the lowest rating among the regions

Chart: Oregon Coast Residents' Score*

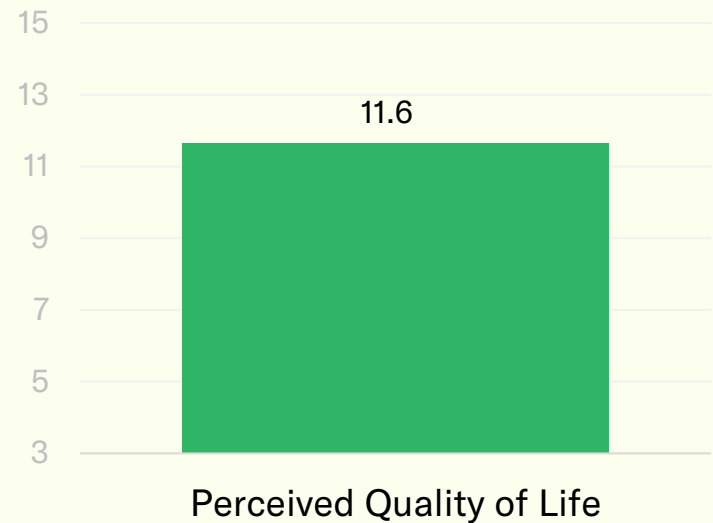


Table: Oregon Coast Region Residents' Score*

Perceived Quality of Life Score	
Oregon Coast Region Residents	11.6

*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 3 (extremely dissatisfied) and a maximum possible score of 15 (extremely satisfied).

Chart: Future Quality of Life

(% Selected "Somewhat better" or "Much better")

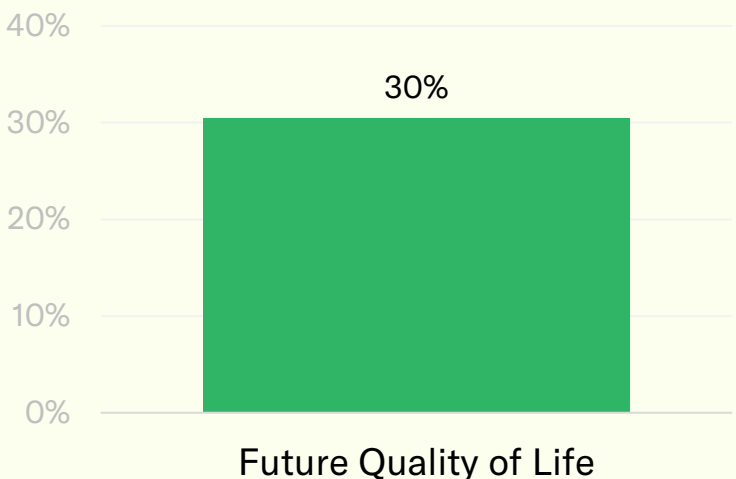


Table: Future Quality of Life

% Selected "Somewhat better" or "Much better"	
Oregon Coast Region Residents	30%

Question: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?

Base: Oregon Coast residents. 1,017 completed surveys.

Likelihood to recommend the Oregon Coast as a tourism destination is notably higher than the statewide average.

Over four in ten Oregon Coast region residents are promoters of their local community as a tourism destination (43% scored a 9 or 10 on a 0 to 10-point scale). When subtracting the detractors (residents who scored a 6 or lower) from the promoters (those who scored a 9 or 10), the likelihood-to-recommend score for the Oregon Coast region is significantly higher than the state score (11 vs. -3), ranking second-highest among the tourism regions.

Chart: Likelihood to Recommend Local Community as a Tourism Destination

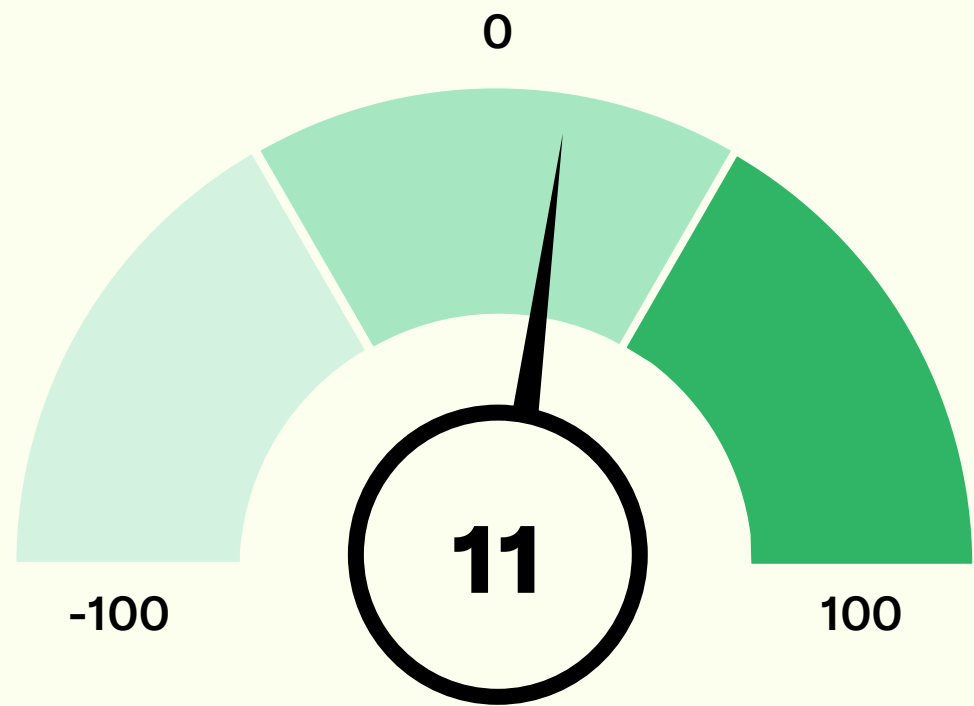


Table: Likelihood to Recommend Local Community as a Tourism Destination

Likelihood to Recommend Score	
Oregon Coast Region Residents	11

Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?
Base: Oregon Coast residents. 1,017 completed surveys.

The Oregon Coast region is the only one whose overall negative impact score is higher than the overall positive impact score for tourism.

Oregon Coast region residents feel the negative outweighs the positive impacts of tourism as a whole, positive economic impacts surpassing the negatives. For all other dimensions, the negative impact score outpaced the positive impact score for this region. Unlike the overall statewide results, the largest positive/negative gap occurs around the social impact of tourism (3.1 vs. 3.8, a -0.7-point gap), followed by environmental impact (3.1 vs. 3.7, a -0.6-point gap). For the cultural dimension, negative impacts are on par with the positive (0.0-point gap), while the economic dimension is the only one for which positive perceptions outweigh the negative (+0.3-point gap).

Chart: Index of Residents' Perceptions of Tourism Impacts

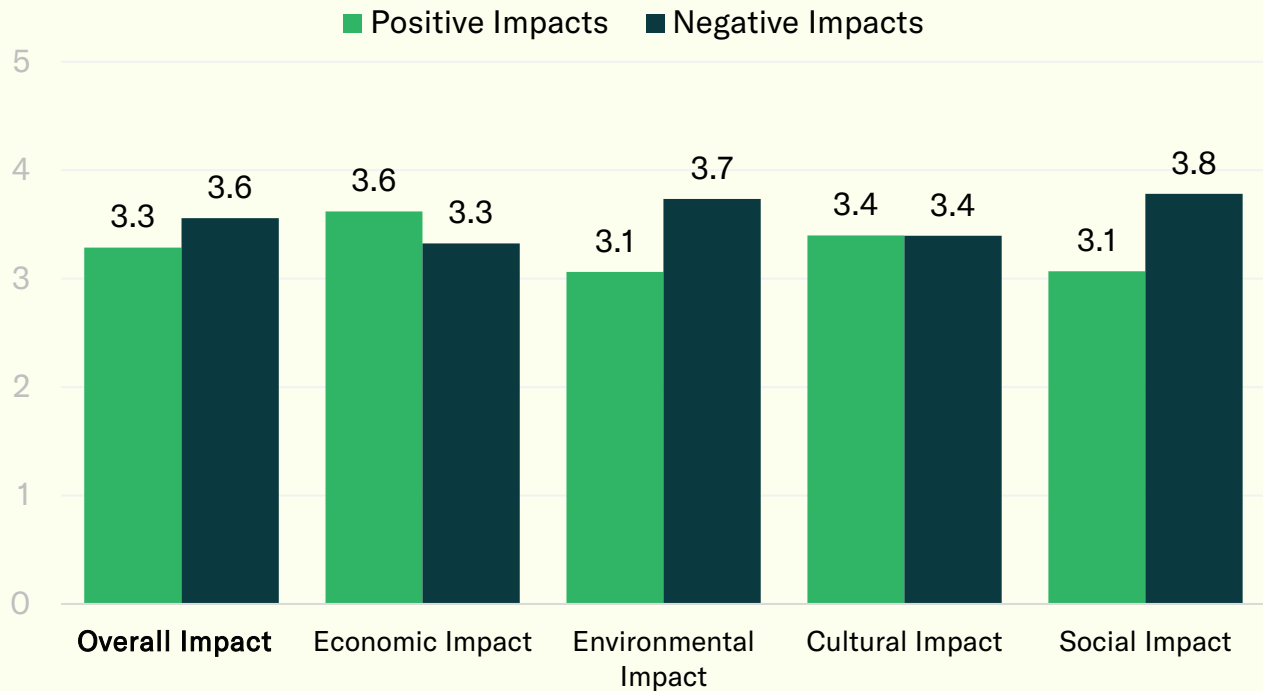


Table: Index of Residents' Perceptions of Tourism Impacts

	Positive Impacts Mean Score	Negative Impacts Mean Score
Overall Impact	3.3	3.6
Economic Impact	3.6	3.3
Environmental Impact	3.1	3.7
Cultural Impact	3.4	3.4
Social Impact	3.1	3.8

Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s _____, please rate how much you agree or disagree with the following statements.
Base: Oregon Coast residents. 1,017 completed surveys.

Oregon Coast residents are the most critical of tourism’s impact, particularly around environmental and social impacts.

For Oregon Coast region residents, a majority (57%) feel that overall tourism’s benefits do not outweigh the drawbacks, led by significantly higher perceptions than the statewide average that tourism’s social (70%) and environmental (69%) benefits do not surpass its drawbacks. Opinion is more divided for tourism’ cultural impacts, while the economic impact is the only dimension for which this region’s residents feel that tourism brings more benefits than drawbacks (60%).

Chart: Perceptions of Tourism Impacts as Benefits vs. Drawbacks

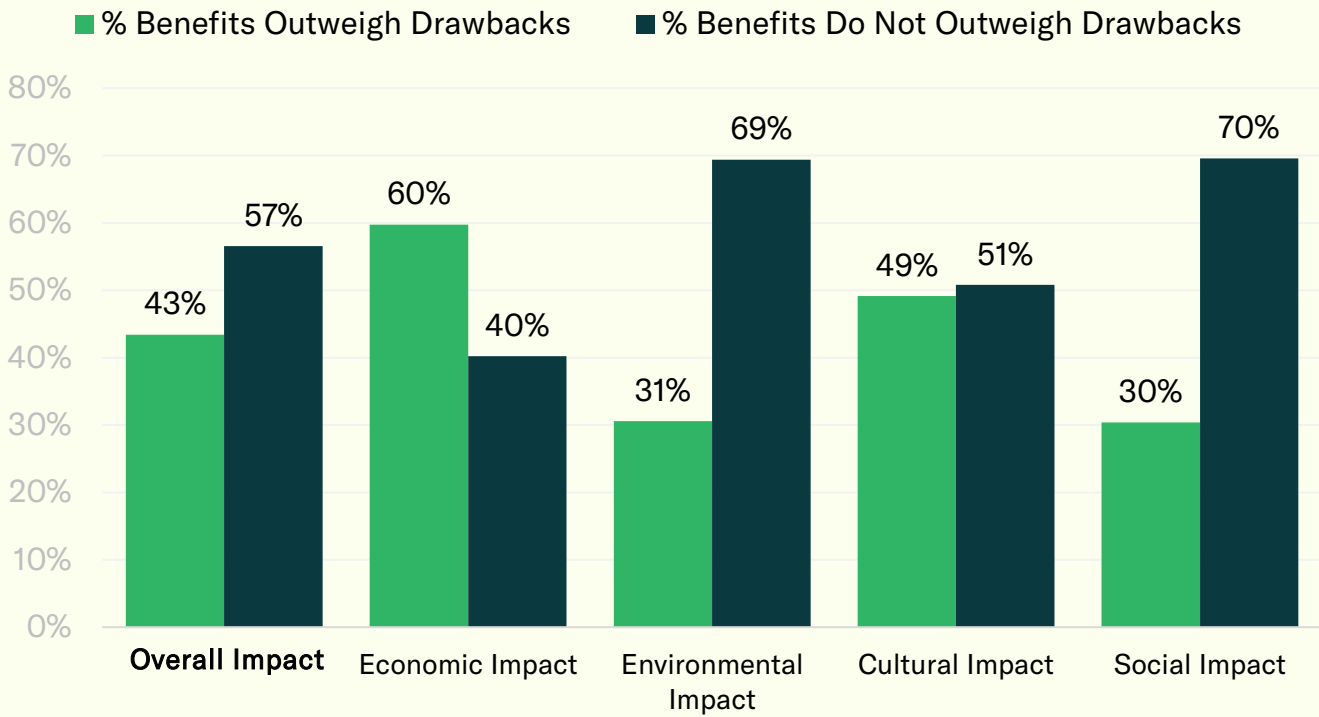


Table: Perceptions of Tourism Impacts as Benefits vs. Drawbacks

	% Benefits Outweigh Drawbacks	% Benefits Do Not Outweigh Drawbacks
Overall Impact	43%	57%
Economic Impact	60%	40%
Environmental Impact	31%	69%
Cultural Impact	49%	51%
Social Impact	30%	70%

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: Oregon Coast residents. 1,017 completed surveys.

Agreement that the tourism economy could better support and integrate with cultural heritage industries remains high.

Sentiment around better integrating the tourism economy with the Oregon Coast’s cultural heritage industries continues to be strong, with two-thirds of Oregon Coast residents agreeing that improvements are needed (65%), on par with the 67% who agreed with this position in 2023. Conversely, only 9% disagree.

Chart: Agreement Levels with the Statement “The tourism economy could better support and be integrated with our cultural heritage industries.”

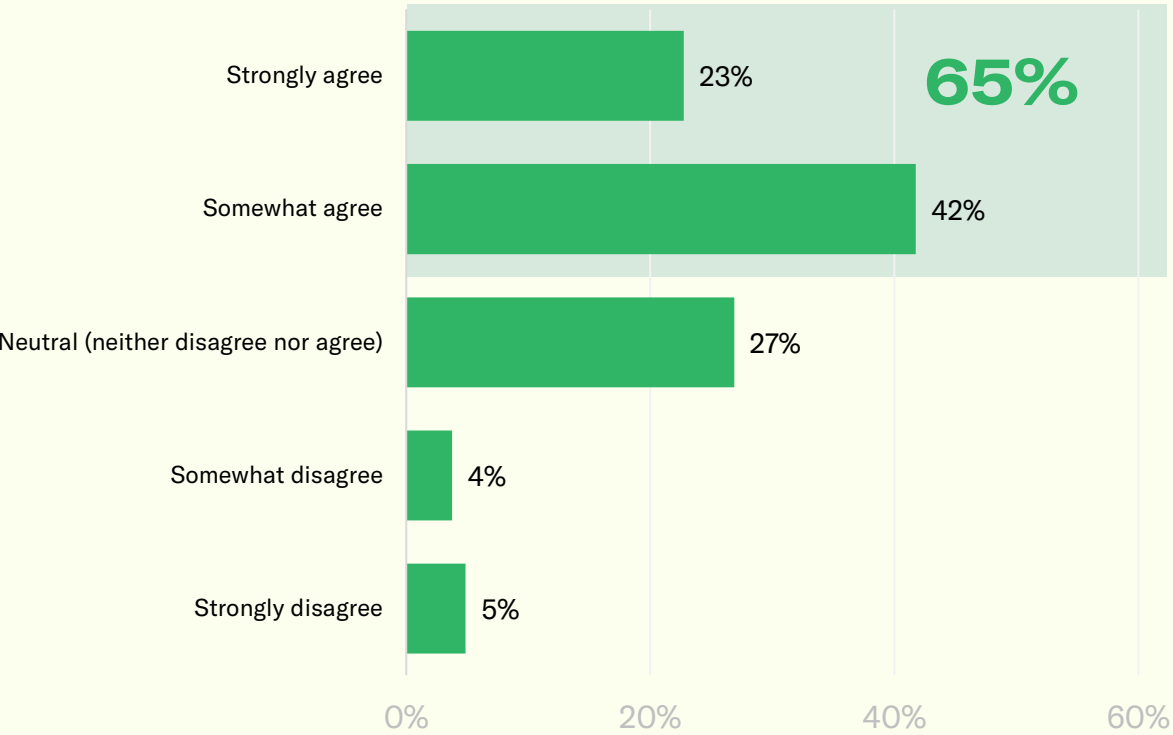


Table: Agreement Levels with the Statement “The tourism economy could better support and be integrated with our cultural heritage industries.”

	% of Oregon Coast Region Residents
Top 2 Box (Somewhat or Strongly Agree)	65%
Strongly agree	23%
Somewhat agree	42%
Neutral (neither disagree nor agree)	27%
Somewhat disagree	4%
Strongly disagree	5%

Question: The tourism economy could better support and be integrated with our cultural heritage industries (commercial fishing/seafood products, farming/agriculture products, forestry/wood products).

Base: Oregon Coast residents. 1,017 completed surveys.

Education through specific attractions and tours were most mentioned as examples of how to integrate tourism and cultural heritage.

Educational components through museums, heritage sites, tours, and other tourism programming were the most frequently cited examples shared by Oregon Coast residents for how they feel the tourism economy could better support and be integrated with cultural heritage industries. A number of residents also mentioned increasing awareness of indigenous history and practices to help foster such an integration.

“1.5% for wildlife would greatly mitigate and minimize impacts, indirectly benefitting commercial fishing and other industries Newport bayfront is an excellent example of integrating cultural heritage and tourism interests. More awareness of Tribal customs and needs.”

“Adopt a recycling program. Tourism produces more waste and recycling helps preserve the cultural heritage industries. Have more opportunities for purchase of local commodities, bigger farmers market, or fish mongers.”

“Advertise cultural events such as the annual blackberry festival and the annual music festival. Advertise art exhibitions at the Art Museum. Encourage visitors who are RV travelers to come into the local towns to explore Main Street shops and restaurants.”

“Our land has a rich Native American/Indigenous history, but this culture is given little attention at tourist sites. These sites also do little to promote stewardship for the land, waters, and wildlife, leading to people acting harmfully and irresponsibly.”

Question: Please provide some examples of how the tourism economy could better support and be integrated with cultural heritage industries.

Base: Oregon Coast residents who agreed with the statement. 641 completed surveys.

Oregon Coast residents maintain that there are feasible ways to reduce vacation rental impacts on local communities.

As with the 2023 study, nearly six in ten (59%) Oregon Coast residents agree that there are reasonable solutions to reduce the impact of vacation rentals in their neighborhoods (58% in 2023). Disagreement is notably lower at 21%.

Chart: Agreement Levels with the Statement “There are reasonable solutions to reduce vacation-rental impacts on our coastal neighborhoods.”

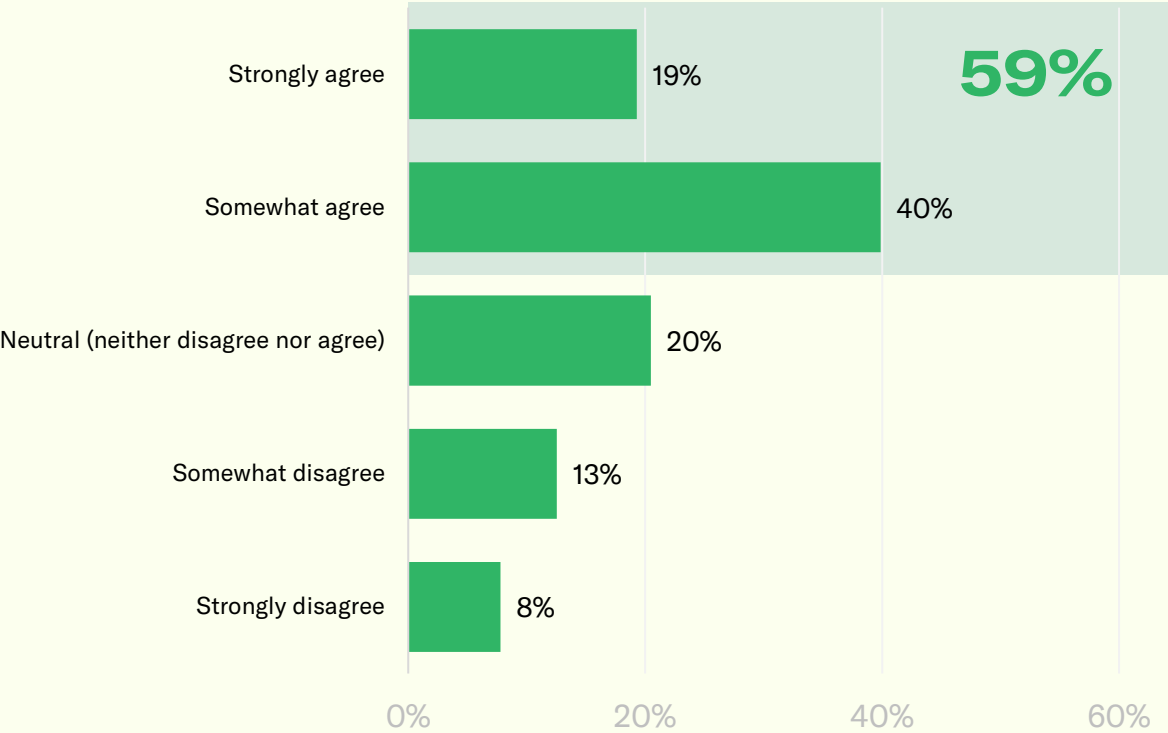


Table: Agreement Levels with the Statement “There are reasonable solutions to reduce vacation-rental impacts on our coastal neighborhoods.”

	% of Oregon Coast Region Residents
Top 2 Box (Somewhat or Strongly Agree)	59%
Strongly agree	19%
Somewhat agree	40%
Neutral (neither disagree nor agree)	20%
Somewhat disagree	13%
Strongly disagree	8%

Question: There are reasonable solutions to reduce vacation-rental impacts on our coastal neighborhoods.

Base: Oregon Coast residents. 1,017 completed surveys.

Noise control, stronger enforcement measures, and zoning laws were among the most frequently shared examples of solutions to reducing vacation rental impacts on Oregon Coast communities.

Oregon Coast residents who agreed that there are reasonable solutions to reduce vacation-rental impacts on our coastal neighborhoods provided examples that centered largely around implementing standards and best practices around quiet hours, occupancy limits, and promoting guest behavior standards, as well as better enforcement and accountability through monitoring and complaint systems, and also suggestions for zoning to alleviate disturbances for residential areas.

“A vacation rental hotline for locals to contact to report renter violations of noise, garbage, parking and trespassing issues. It should not be simply a police matter but rather a responsibility of the vacation rental company (such as VACASA). In order for them to operate in a community, there should be a mandated contact person available 24/7 to deal with renters in their houses when they violate rules or cause trouble. Eviction rules must be followed more stringently, and rules must be posted prominently in vacation rental homes. Better enforcement overall.”

“Build multifamily housing like apartments as Garibaldi did a few years ago. Help local communities with their enforcement of STR rules pertaining to neighborhood disturbances caused by revelry gone amok. Build relationships between locals and STR owners to decrease adversarial perceptions.”

“Cap on the number of STRs, limit STRs to specific geographic areas, requirement for approval/licensing/permitting of STRs, requirements for STRs to have a local contact available, robust compliance auditing and enforcement/penalties for violators of local STR regs, prohibition or limitation of bulk/mass corporate ownership of STRs.”

Question: Please provide some examples of solutions to reduce vacation rental impacts on our coastal neighborhoods.

Base: Oregon Coast residents who agreed with the statement and opted in to share examples. 588 completed surveys.

Only a minority of Oregon Coast residents feel that visitors to the region are exhibiting better stewardship behavior.

Fewer than one in five (18%) agree that visitors are showing improved stewardship compared to previous years. On the other hand, a significantly larger 43% disagree with this statement, while a similar share are neutral (39%).

Chart: Agreement Levels with the Statement “Compared to previous years, visitors to the Oregon Coast are showing improved stewardship.”

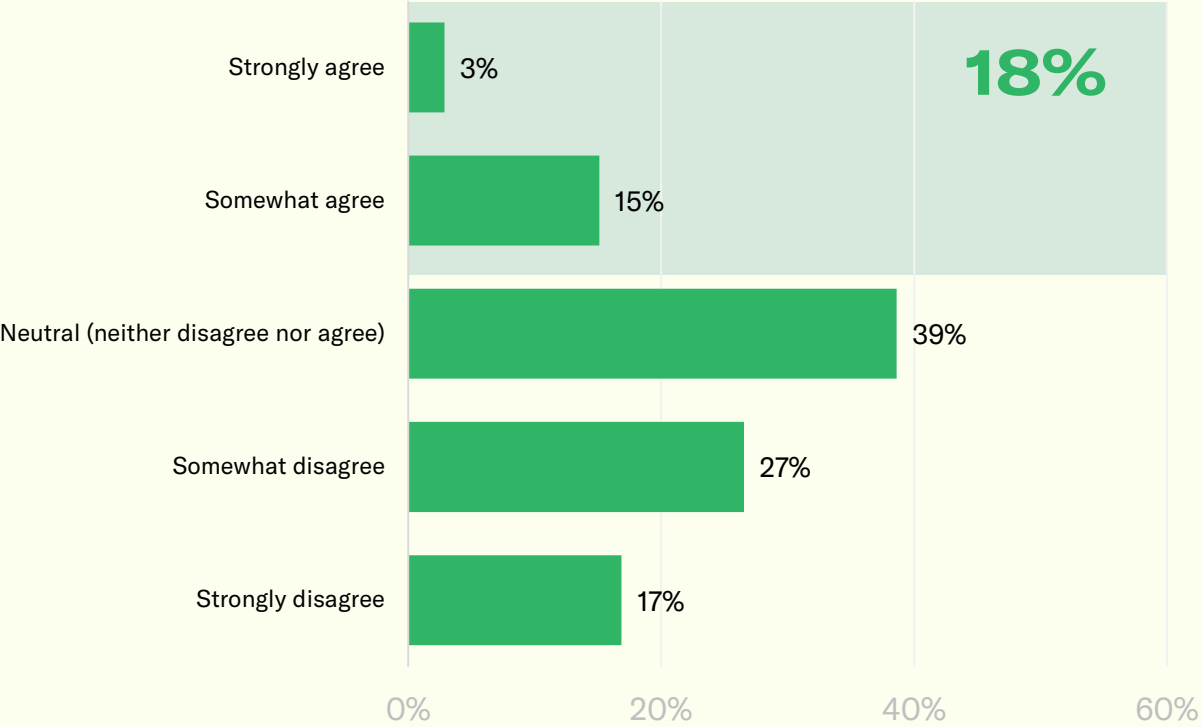


Table: Agreement Levels with the Statement “Compared to previous years, visitors to the Oregon Coast are showing improved stewardship.”

	% of Oregon Coast Region Residents
Top 2 Box (Somewhat or Strongly Agree)	18%
Strongly agree	3%
Somewhat agree	15%
Neutral (neither disagree nor agree)	39%
Somewhat disagree	27%
Strongly disagree	17%

Question: Compared to previous years, visitors to the Oregon Coast are showing improved stewardship (e.g., better etiquette outdoors, greater ecosystem awareness, reduced littering).

Base: Oregon Coast residents. 1,017 completed surveys.

Greater environmental awareness among visitors was mentioned by a number of Oregon Coast residents, along with more year-round visitation.

A number of themes emerged in Oregon Coast residents' descriptions of changes to visitor behavior, including an overall increase in visitors year-round, with degraded off-seasons and shoulder seasons, as well as a sense that visitors are showing more care for the environment on their visits. However, the latter observations are often quick to note that the benefits of increased sustainable practices among tourists are offset by increased overall numbers of visitors to the area.

“I’ve noticed a big increase in visitors coming year-round, not just during summer. More people now visit in fall, winter, and spring to enjoy quieter beaches and mild weather. This means our coastal areas are busy in every season.”

“I’ve observed a big increase in visitors using public transit and shuttle services to reach coastal areas and move between towns. I’ve also noticed more visitors interested in low-impact activities like birdwatching, sketching, and nature photography. They spend more time quietly observing the coast instead of creating loud disturbances. Unfortunately, even careful visitors add to cumulative erosion on popular trails and shorelines over time.”

“Visitors are much more likely to support businesses that show clear environmental values. They choose hotels with recycling, composting, and energy-saving practices. Many avoid places with excessive plastic use. However, the sheer number of eco-conscious visitors still puts pressure on natural areas. Social media has created fame for previously unknown beaches, leading to overuse. Visitors care more about sustainability but often don’t realize how many people are following the same trends.”

Question: Please describe any changes in visitor behavior you’ve noticed.

Base: Oregon Coast residents who agreed with the statement. 186 completed surveys.

Southern Oregon

The following slides present findings specific to Southern Oregon residents, including demographics and insights into quality-of-life perceptions, likelihood to recommend their community as a tourism destination, and index scores for tourism's impacts.

Southern Oregon Demographic Snapshot

Total residents surveyed:	549
Average age:	48 years old
Average household income:	\$71,078
Employed:	62%
College graduate:	45%
Married/domestic partnership:	59%
Have children in household:	24%
BIPOC:	23%
LGBTQ+:	9%
Accessibility needs in household:	24%



Southern Oregon residents’ quality of life metrics align closely with the statewide resident averages.

Of the seven Oregon regions, Southern Oregon residents are aligned with the statewide scores for their perceived quality of life (11.4 vs. 11.5 overall state). Similarly, residents in the region have similarly expectations that their quality of life will improve in the future compared to the total (47% vs. the overall average of 45%).

Chart: Southern Oregon Residents’ Score*

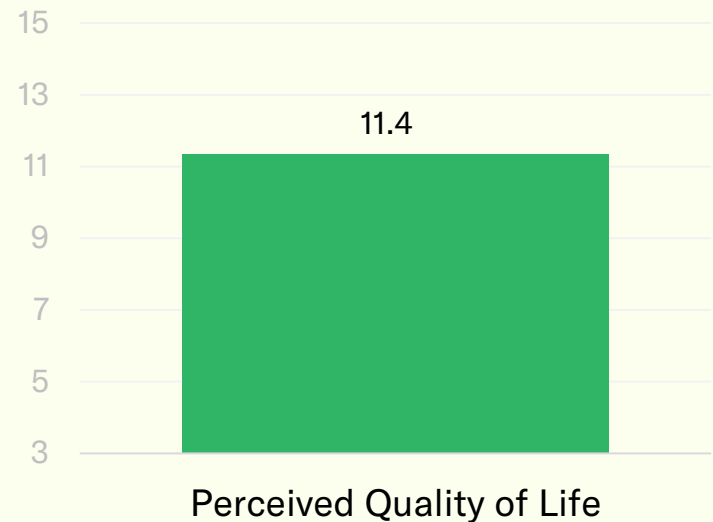


Table: Southern Oregon Region Residents’ Score*

Perceived Quality of Life Score	
Southern Oregon Region Residents	11.4

Chart: Future Quality of Life

(% Selected "Somewhat better" or "Much better")

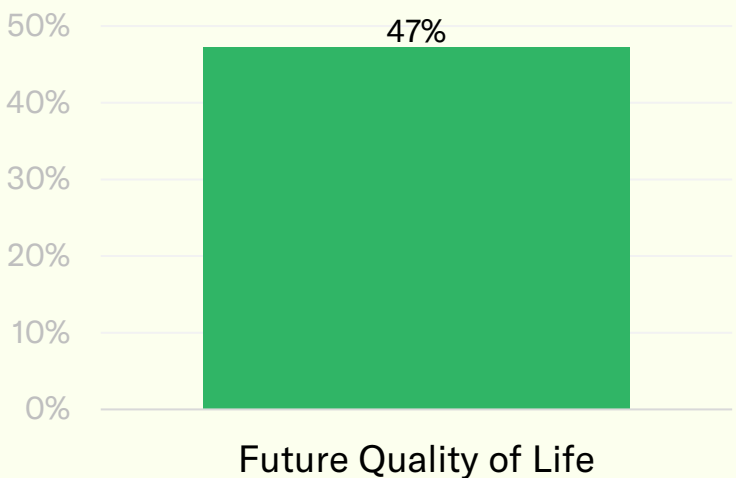


Table: Future Quality of Life

% Selected “Somewhat better” or “Much better”	
Southern Oregon Region Residents	47%

*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 3 (extremely dissatisfied) and a maximum possible score of 15 (extremely satisfied).

Questions: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?

Base: Southern Oregon residents. 549 completed surveys.

Southern Oregon region residents' likelihood to recommend their community as a tourism destination aligns with statewide residents.

One-third of Southern Oregon region residents are promoters of their local community as a tourism destination (33% scored a 9 or 10 on a 0 to 10-point scale). When subtracting the detractors (residents who scored a 6 or lower) from the promoters (those who scored a 9 or 10), the likelihood-to-recommend score for the Southern Oregon region is on par with the state score (-3 vs. -3).

Chart: Likelihood to Recommend Local Community as a Tourism Destination

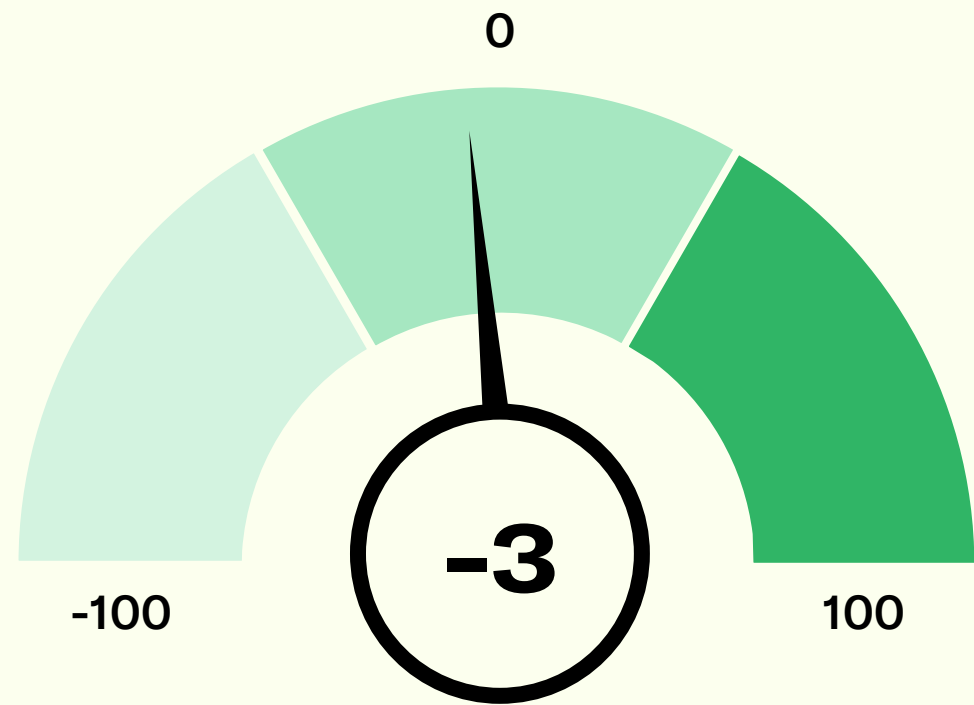


Table: Likelihood to Recommend Local Community as a Tourism Destination

Likelihood to Recommend Score	
Central Oregon Region Residents	-3

Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?
Base: Southern Oregon residents. 549 completed surveys.

Southern Oregon region residents are most likely to perceive tourism as having positive economic benefits, followed closely by cultural.

Southern Oregon region residents feel the positive outweighs the negative impacts of tourism for all dimensions. Similar to the overall statewide results, the largest positive/negative gap occurs in the economic impact (3.7 vs. 3.0, a +0.7-point gap), followed by cultural impact (3.7 vs. 3.1, a +0.6-point gap). For the environmental and social dimensions, positive impacts only slightly outweigh the negative, indicating those as potential pain points for tourism in these communities.

Chart: Index of Residents' Perceptions of Tourism Impacts

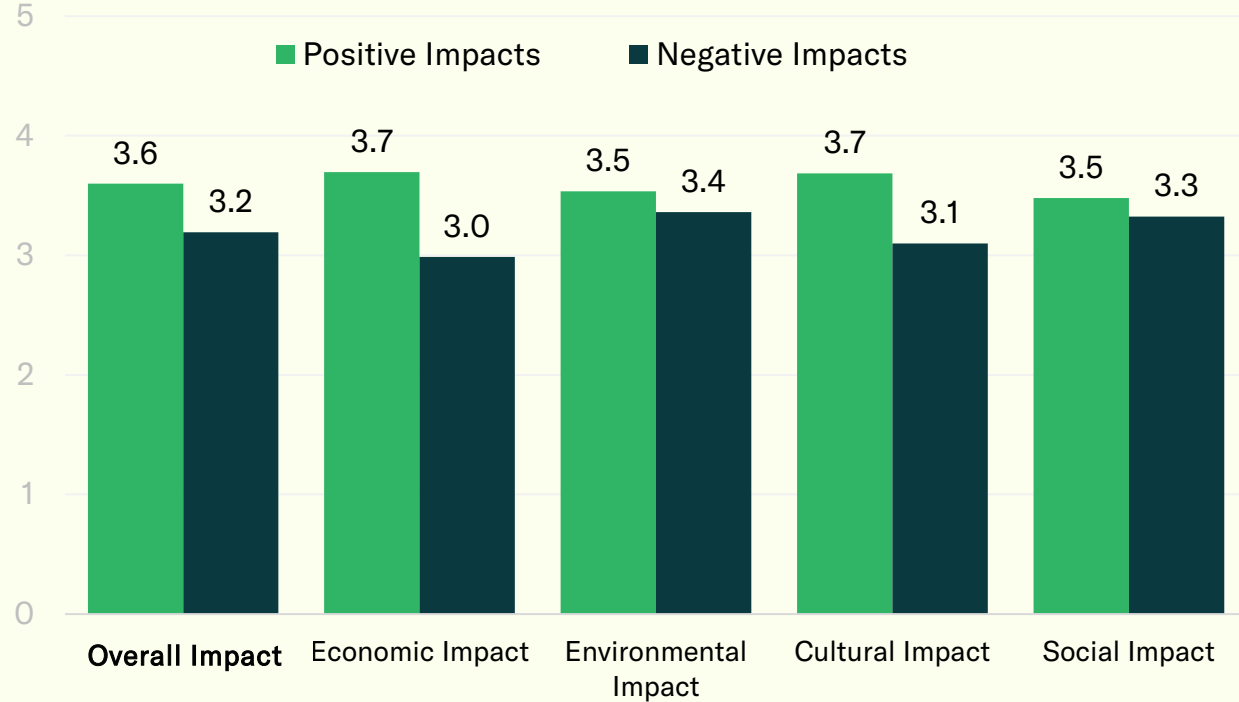


Table: Index of Residents' Perceptions of Tourism Impacts

	Positive Impacts Mean Score	Negative Impacts Mean Score
Overall Impact	3.6	3.2
Economic Impact	3.7	3.0
Environmental Impact	3.5	3.4
Cultural Impact	3.7	3.1
Social Impact	3.5	3.3

Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s _____, please rate how much you agree or disagree with the following statements.
Base: Southern Oregon residents. 549 completed surveys.

Southern Oregon residents broadly agree with tourism’s benefits, with the highest benefits from economic and cultural impacts.

For Southern Oregon region residents, their perceptions of tourism’s impact are more positive than the statewide response, with stronger majorities saying the benefits of tourism outweigh the drawbacks across all dimensions. For economic (72%) and cultural (67%) impact, over two-thirds of regional residents believe tourism’s benefits outweigh the drawbacks, while smaller majorities feel the same about the environmental (55%) and social (52%) impacts of tourism.

Chart: Perceptions of Tourism Impacts as Benefits vs. Drawbacks

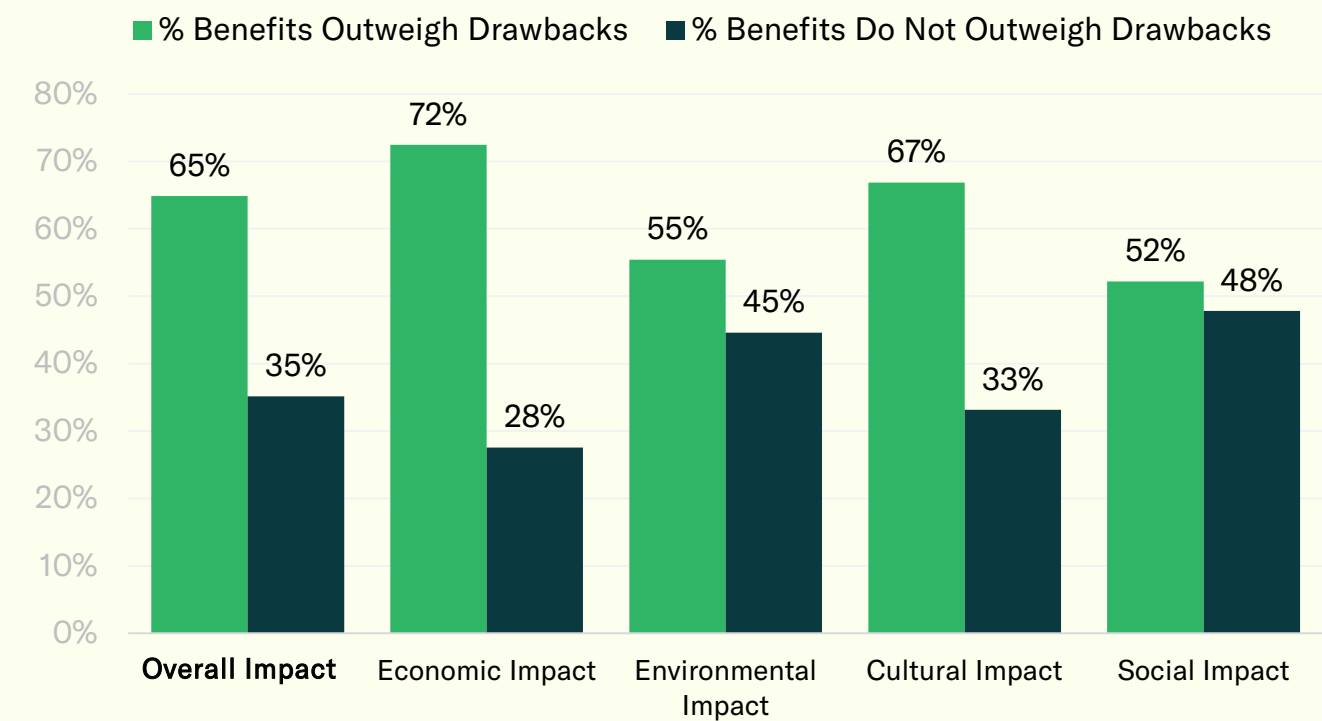


Table: Perceptions of Tourism Impacts as Benefits vs. Drawbacks

	% Benefits Outweigh Drawbacks	% Benefits Do Not Outweigh Drawbacks
Overall Impact	65%	35%
Economic Impact	72%	28%
Environmental Impact	55%	45%
Cultural Impact	67%	33%
Social Impact	52%	48%

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: Southern Oregon residents. 549 completed surveys.

Most Southern Oregonians do not feel that the region currently has the capacity to properly respond to existing tourism levels.

More than half (56%) of Southern Oregon residents agree that local infrastructure and services have the capacity to accommodate current levels of tourism to the region. One in five (21%) disagree and a similar share (23%) are neutral about this position.

Chart: Agreement Levels with the Statement “Local infrastructure and services have the capacity to accommodate the current level of tourism in Southern Oregon.”

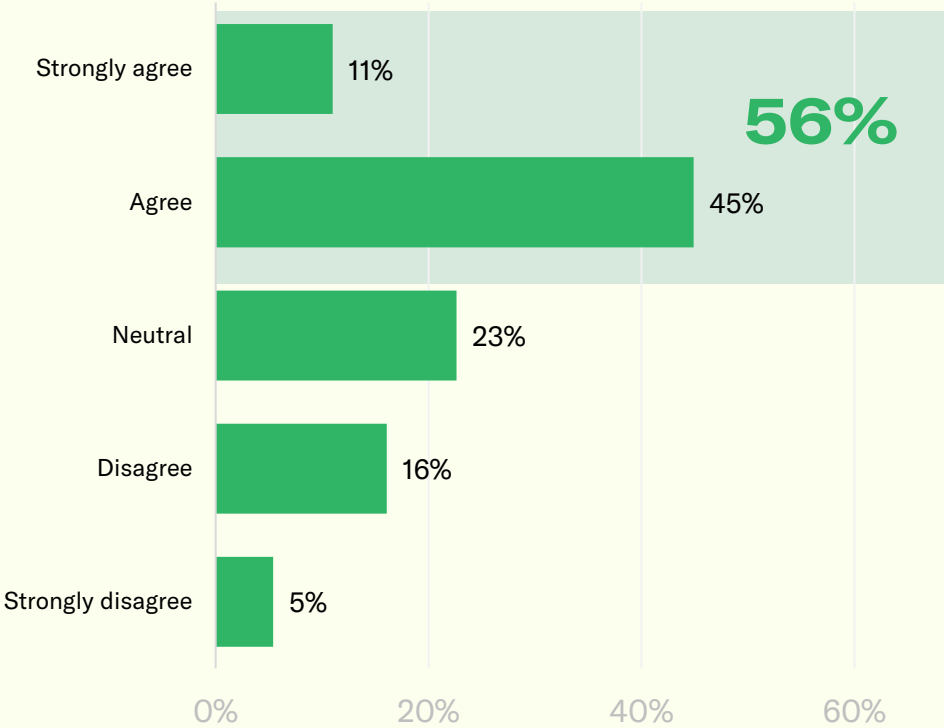


Table: Agreement Levels with the Statement “Local infrastructure and services have the capacity to accommodate the current level of tourism in Southern Oregon.”

	% of Southern Oregon Region Residents
Top 2 Box (Agree or Strongly Agree)	56%
Strongly agree	11%
Agree	45%
Neutral	23%
Disagree	16%
Strongly disagree	5%

Question: Local infrastructure and services (including transportation, accommodations, and recreation facilities) have the capacity to accommodate the current level of tourism in Southern Oregon.

Base: Southern Oregon residents. 549 completed surveys.

Lack of funding for infrastructure development as well as limited accommodation are the top reasons residents feel the region is already at overcapacity for tourism.

Southern Oregon residents who disagree that local infrastructure and services have the capacity to accommodate the current level of regional tourism tend to mention the need for funding to be directed to better infrastructure, particularly around public transportation or other transit options to counteract the long driving distance. Several also noted that roads can become congested during peak seasons, and many towns in the region near tourism attractions lack the accommodations to be able to keep tourists in the area.

“Arterial streets tend to get grid locked. Amtrak is ridiculously scheduled and far away. Buses are cutting back and should shuttle people with taxpayers’ money, too expensive and inconvenient.”

“The tourists have to rent cars and pay for expensive tourism buses (not local as far as I am aware). So, there isn't a reliable, long distance, tour/cabby service that is affordable and would encourage people to start visiting the smaller towns that tourism would help and instead they remain in the bigger hub cities like Grants Pass, Medford and Ashland.”

“I feel like we need more nicer restaurants and hotels. In my area of Jackson county, we definitely need better public transportation. It is really poor!”

“I've observed that during peak tourist seasons, local roads often become congested. This strain on our transportation infrastructure makes it difficult for both residents and visitors to navigate the area comfortably.”

Question: Please share why you disagree that local infrastructure and services (including transportation, accommodations, and recreation facilities) have the capacity to accommodate the current level of tourism in Southern Oregon.

Base: Southern Oregon residents who do not agree with the statement and opted in to share why. 130 completed surveys.

There is no clear consensus among Southern Oregon residents on whether tourism is negatively impacting specific areas and attractions.

One in three (35%) Southern Oregon residents feel that there are specific areas or attractions in the region that are negatively impacted by tourism. That being said, opinion is largely divided, with a similar share (33%) reporting feeling neutral, and 32% disagreeing with this position.

Chart: Agreement Levels with the Statement “There are specific areas or attractions in Southern Oregon that I feel are negatively impacted by tourism.”

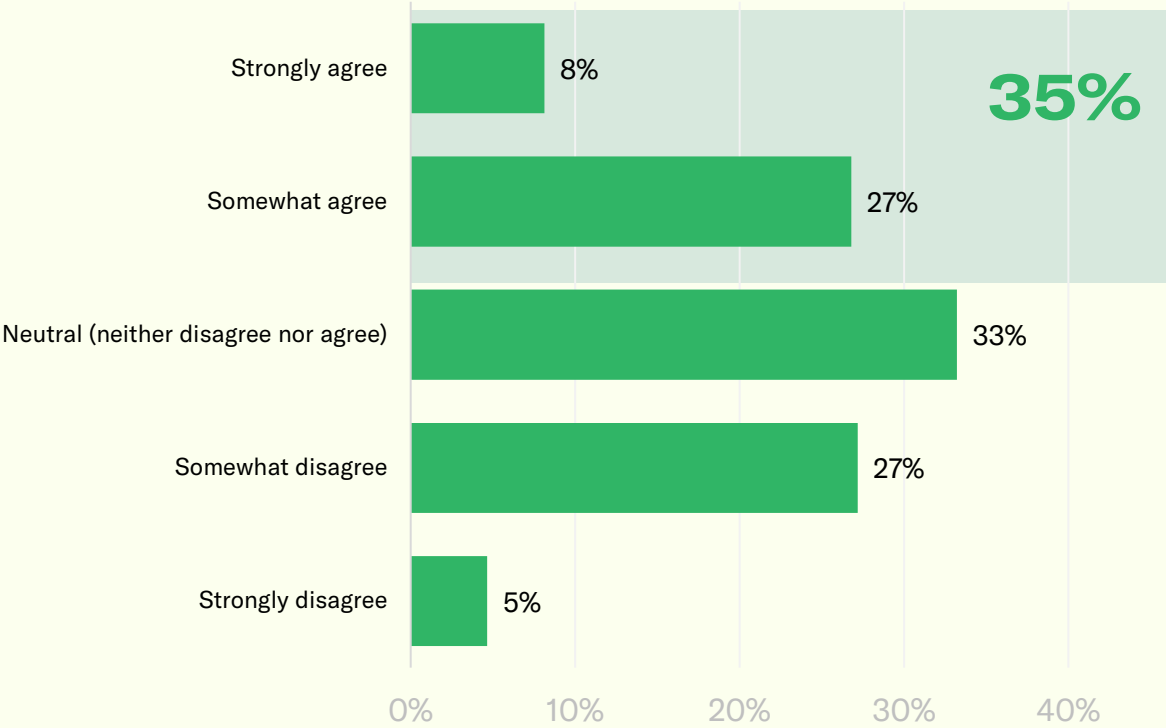


Table: Agreement Levels with the Statement “There are specific areas or attractions in Southern Oregon that I feel are negatively impacted by tourism.”

	% of Southern Oregon Region Residents
Top 2 Box (Somewhat or Strongly Agree)	35%
Strongly agree	8%
Somewhat agree	27%
Neutral (neither disagree nor agree)	33%
Somewhat disagree	27%
Strongly disagree	5%

Question: There are specific areas or attractions in Southern Oregon that I feel are negatively impacted by tourism.

Base: Southern Oregon residents. 549 completed surveys.

Environmental damage, congestion, and limitations for resident life were the most mentioned negative impacts of tourism on Southern Oregon.

For Southern Oregon residents who feel that there are areas of the region that are negatively impacted by tourism, these perceptions are predominantly driven by perceptions of environmental degradation, particularly littering in outdoor areas, overcrowding during peak seasons, and related impacts on resident’s abilities to partake in local events and enjoy outdoor attractions.

“Ashland can be overcrowded during peak season, leading to local frustration and business unable to scale quickly to meet demand.”

“At the end of every summer for the past 40 years, I hike the rivers, streams and mountain passes to observe what has been left behind by our visitors. Last year a volunteer group of us filled 23 dumpsters full of trash and debris.”

“Campgrounds are full. Parking lots are full. Local events have become too expensive for locals to attend. Local events are too crowded. Medford wants to build more sports facilities and tourist facilities, but the city continues to increase our monthly utility fees to pay for tourist attractions.”

“It is difficult to appreciate restaurant venues because the waiting times are onerous, and the entry times into the [Crater Lake] park and to selected areas are heavily delayed because of the high tourist use levels.”

Question: Please explain why you agree that there are specific areas or attractions in Southern Oregon that I feel are negatively impacted by tourism.

Base: Southern Oregon residents who do not agree with the statement and opted in to share why. 130 completed surveys.

Southern Oregon residents report tentative signs of improved visitor stewardship in the region.

One in three (33%) Southern Oregon residents agree that visitors are showing improved stewardship compared to previous years. While roughly half (49%) are neutral about this stance, a significantly smaller share (19%) disagree. This suggests many residents are still forming an opinion around this issue, but there are latent signs of cautious optimism, with a minority of dissenters compared to a modest but much higher share of assenters.

Chart: Agreement Levels with the Statement “Compared to previous years, visitors to Southern Oregon are showing improved stewardship.”

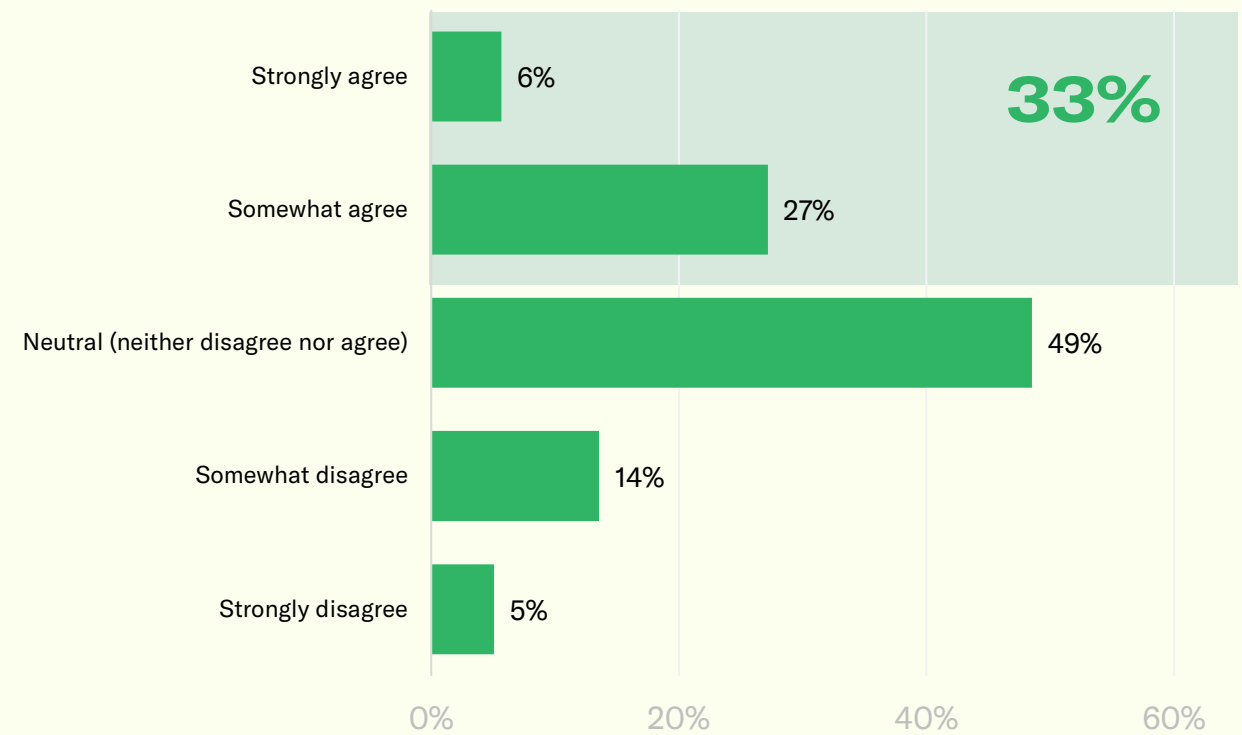


Table: Agreement Levels with the Statement “Compared to previous years, visitors to Southern Oregon are showing improved stewardship.”

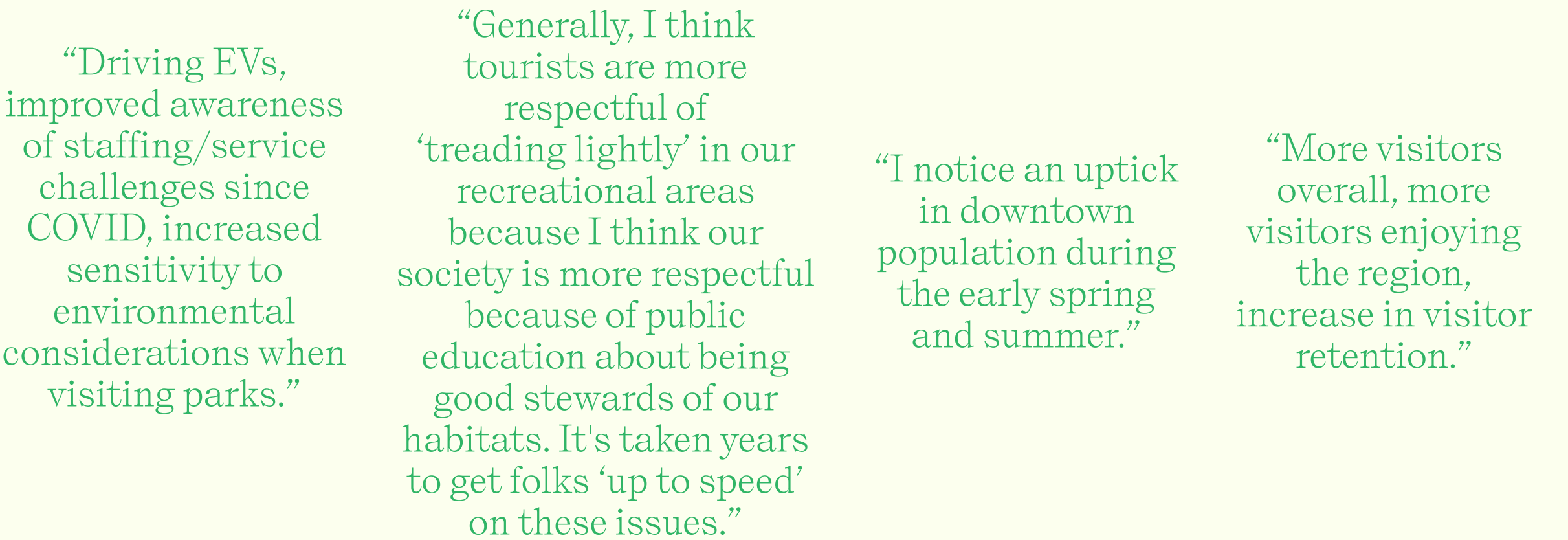
	% of Southern Oregon Region Residents
Top 2 Box (Somewhat or Strongly Agree)	33%
Strongly agree	6%
Somewhat agree	27%
Neutral (neither disagree nor agree)	49%
Somewhat disagree	14%
Strongly disagree	5%

Question: Compared to previous years, visitors to Southern Oregon are showing improved stewardship (e.g., better etiquette outdoors, greater ecosystem awareness, reduced littering).

Base: Southern Oregon residents. 549 completed surveys.

Changes in visitor behavior include increased volume, more respectful behavior, and engagement in more sustainable practices.

Southern Oregonians shared a range of descriptions of changes to visitor behavior in the region, but the largest shares centered around observations that there are more people coming to the region, and that visitors tend to be more well-behaved and appreciative than previous years. A number of residents also shared that they have noticed visitors practicing more care for public lands and endeavoring to behave more sustainably in the destination.



Question: If agree, please describe any changes in visitor behavior you’ve noticed.

Base: Southern Oregon residents who agreed with the statement. 130 completed surveys.

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