

Future Partners

Travel Oregon Resident Sentiment



Today

Research Overview

Life in Oregon

Tourism Employment

Tourism Sentiment

Tourism Industry Action

Diverse Residents

Research Overview



Objectives

Develop a deep understanding of Oregon residents' attitudes and opinions on the state's tourism industry, including:

- Perceptions of tourism
- Value of tourism
- Impact on quality of life

Method

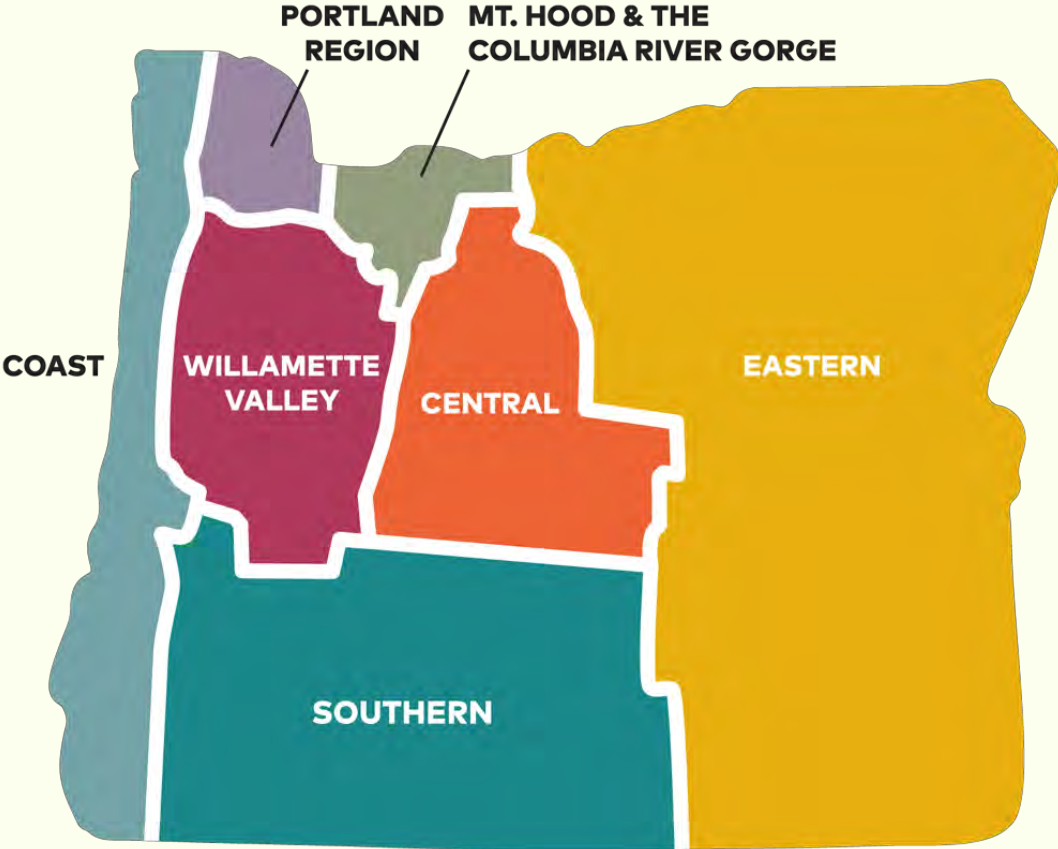


More than 6,800 responses were collected across Oregon's seven tourism regions between December 2023 and January 2024.

- Online Panel Survey
- Partner Owned Audience Survey

The results were weighted to Oregon's demographics and population size for each region.

Responses by Region



Coast	1,813
Portland Region	1,518
Willamette Valley	1,041
Southern	890
Central	820
Eastern	614
Mt. Hood/Gorge	168

Oregon Residents



Oregon Residents

Respondent Demographics

**12%
LGBTQ+**

**17%
accessibility
needs in
household**

**18%
BIPOC**

**27%
have
children**

**\$88,000
average
household
income**

**63%
employed**

**50 years
old on
average**

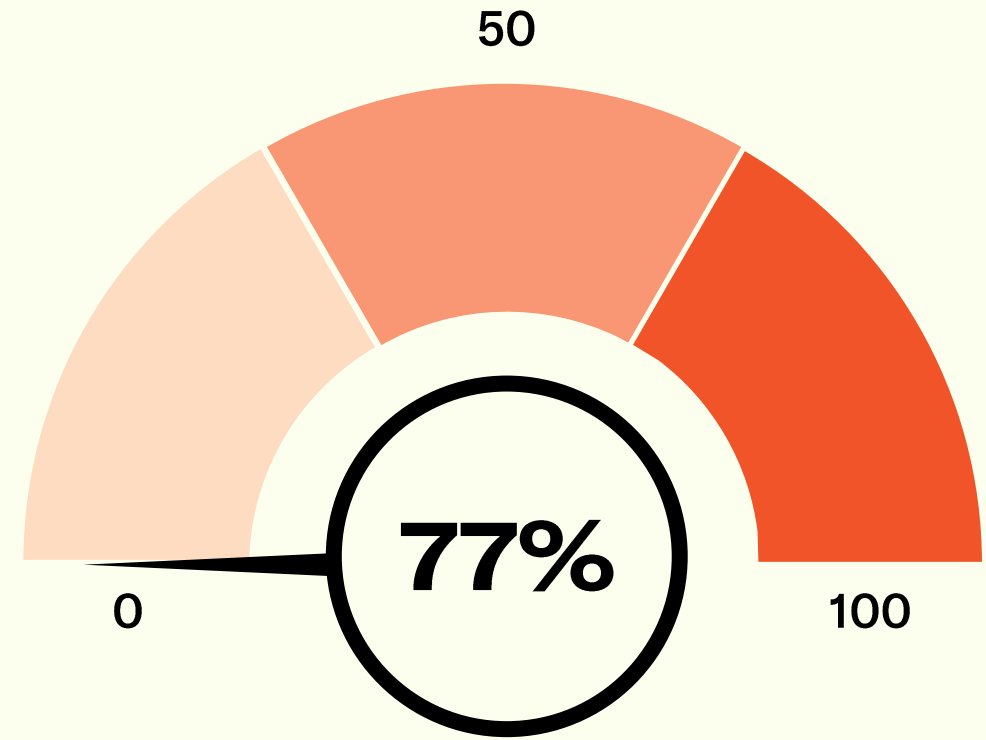
Life in Oregon



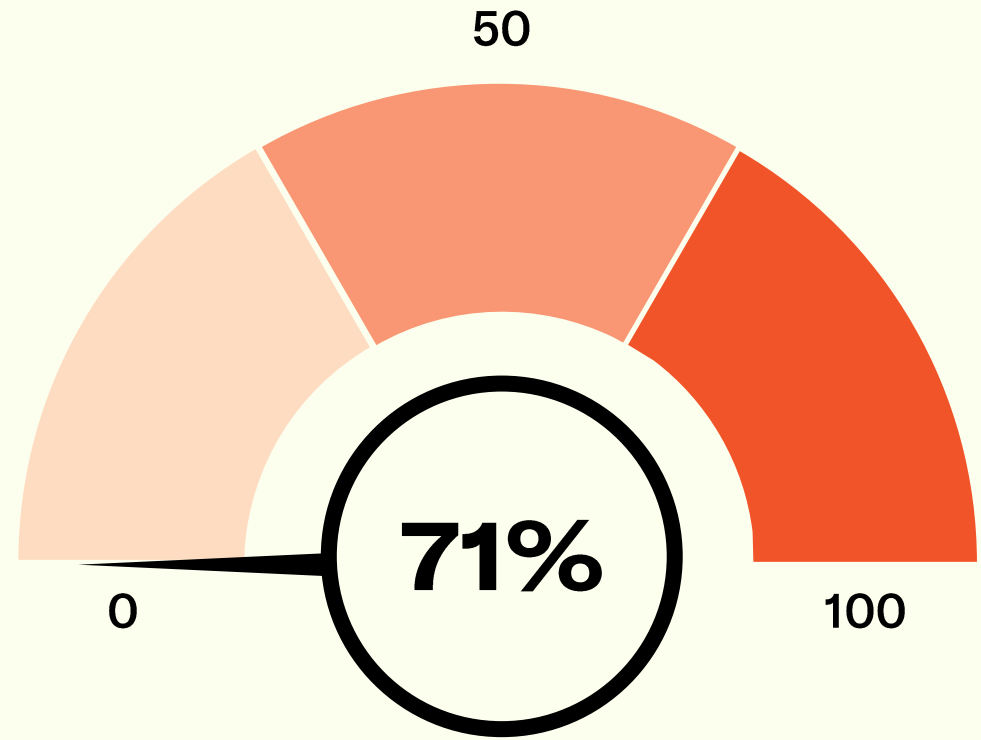
1

Pride is strong

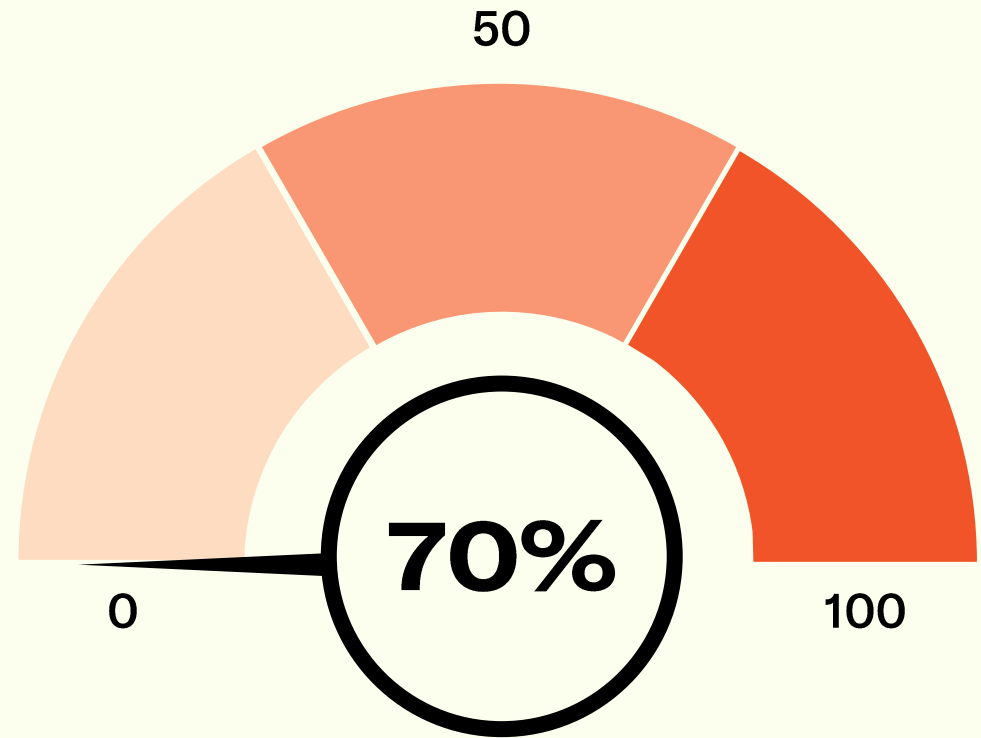
**‘I consider
myself an
Oregonian’**



**‘I am proud to
live in Oregon’**

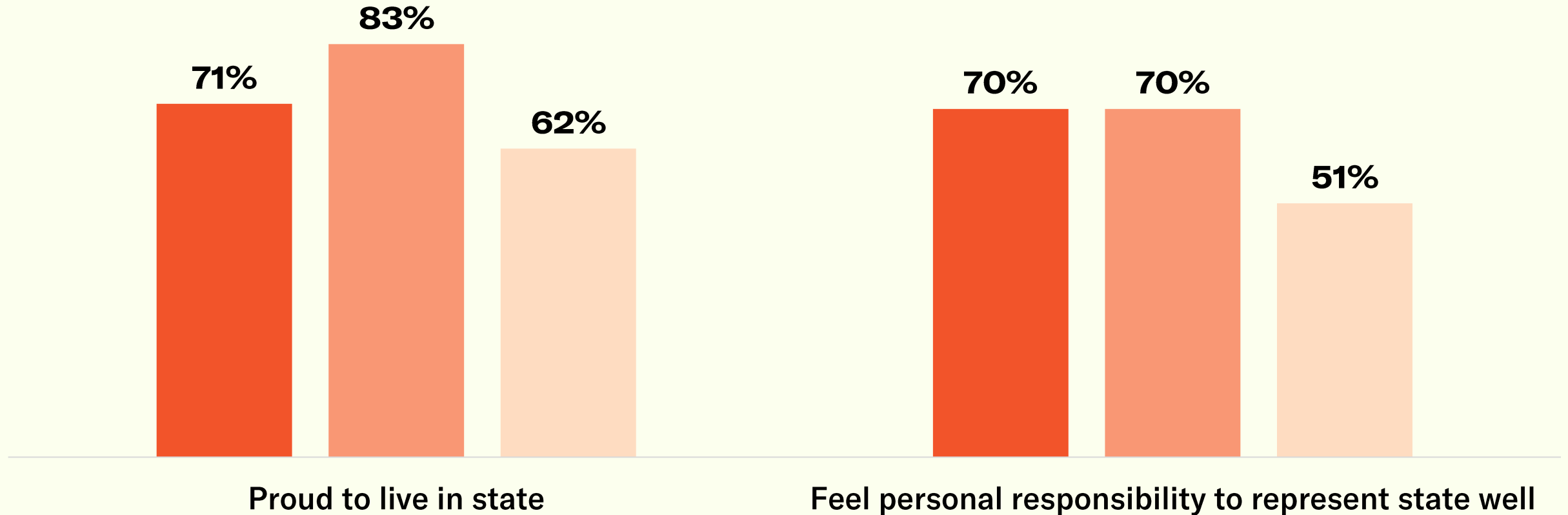


**‘I feel a personal
responsibility to
represent
Oregon well’**



There is some room to improve pride for living in Oregon.

■ Oregon ■ Outdoor Focused State ■ Major Destination State





1

Pride is strong



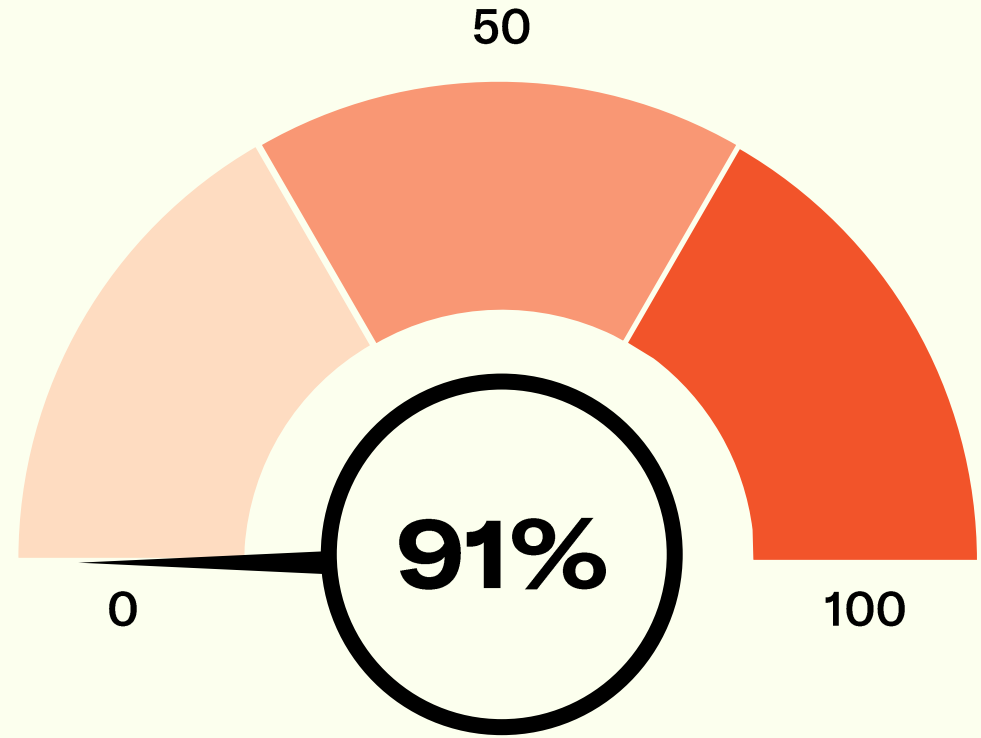
1

Pride is strong

2

**Outdoors are
greatest asset**

**Oregon has easy
access to the
outdoors and
green space**



Oregon Residents'

Top Reasons for Living in Oregon



59%

Landscape/
natural features



57%

Proximity to
friends/family



49%

Climate/weather



48%

Summer
recreational
activities



1

Pride is strong

2

**Outdoors are
greatest asset**



1

Pride is strong

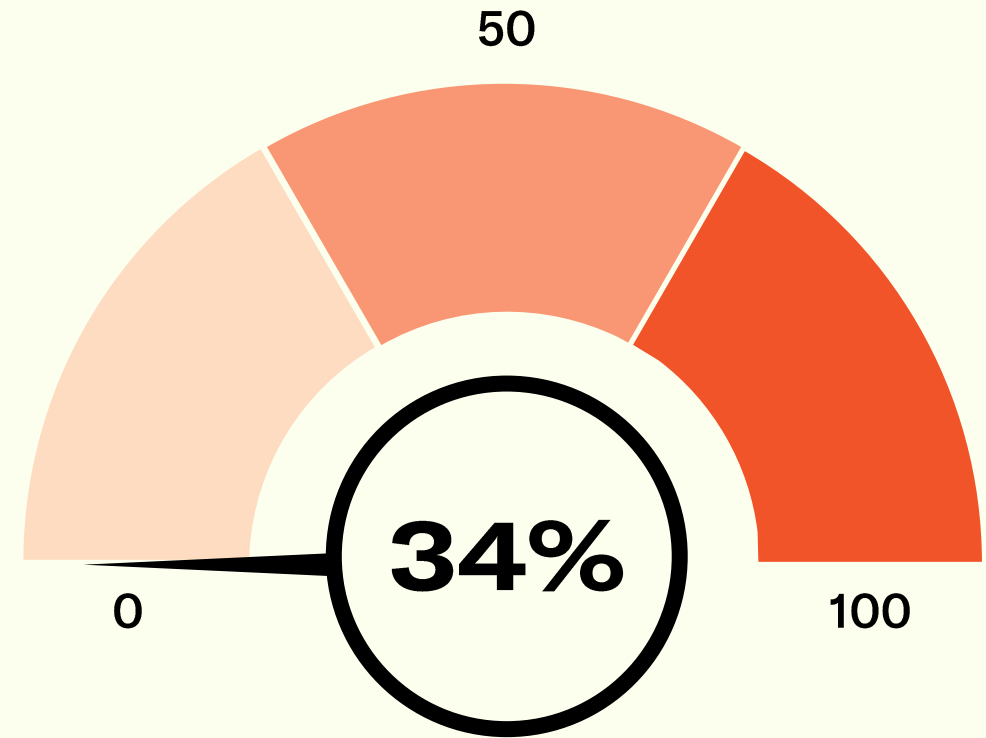
2

**Outdoors are
greatest asset**

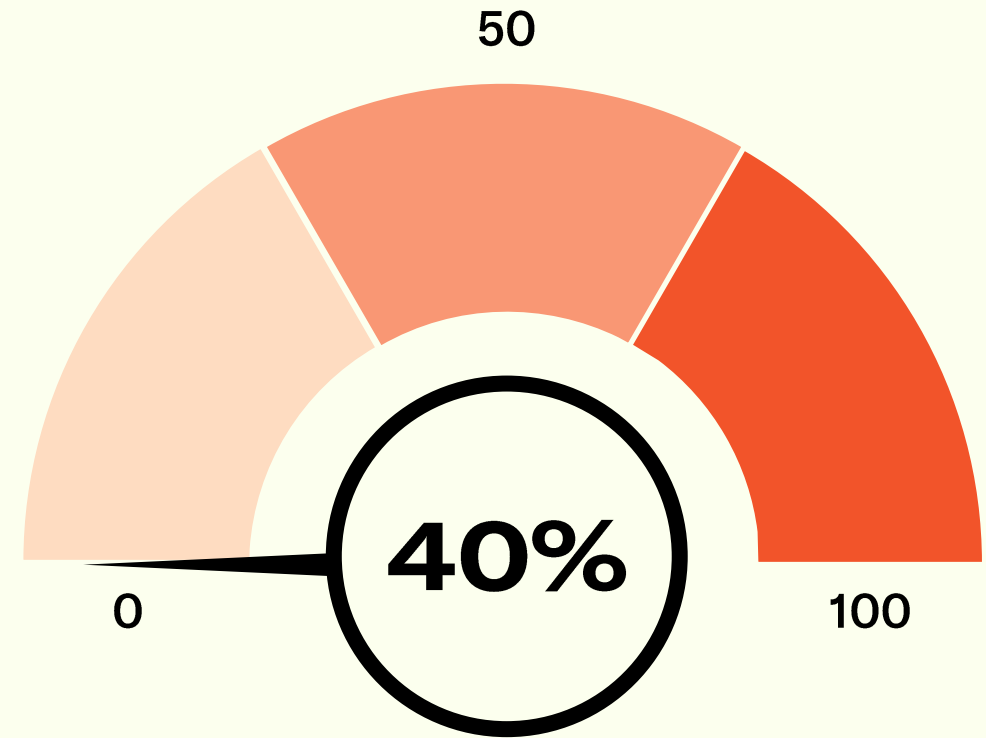
3

**Quality of life is a
concern**

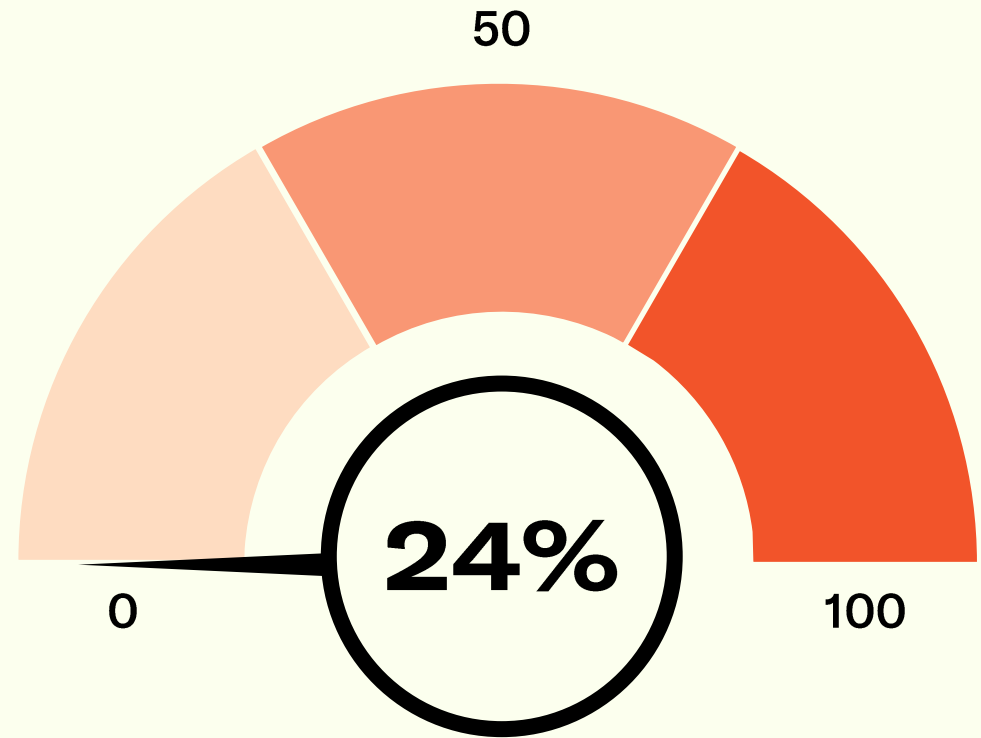
**Quality of life is
better compared
to one year ago**



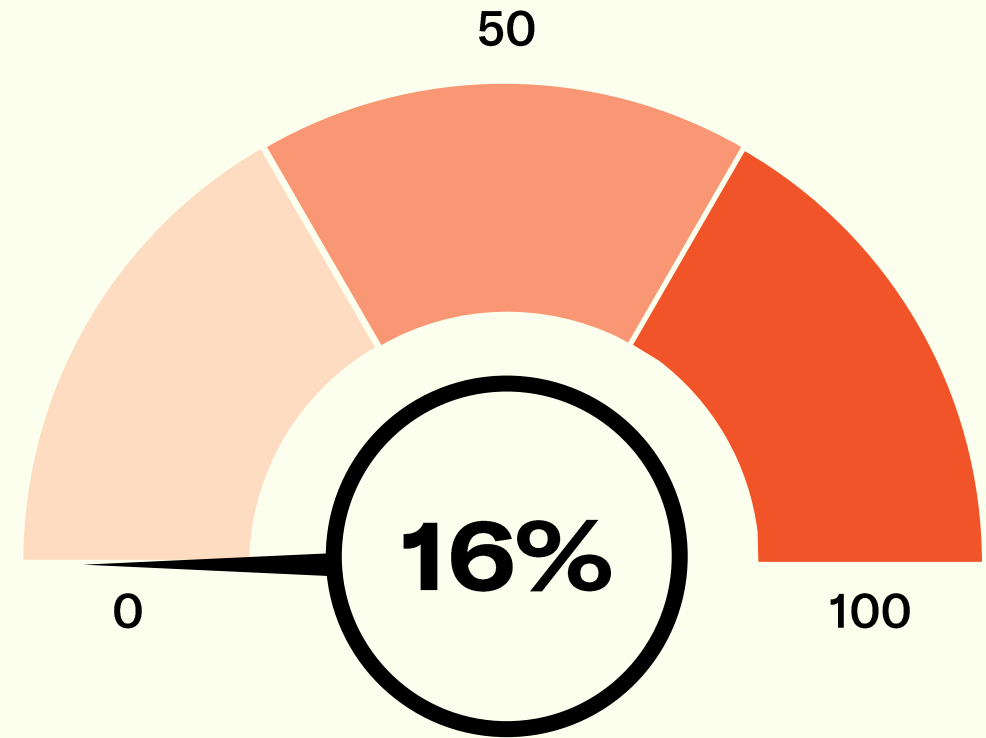
**Has many jobs
available at all
skill and income
levels**



**The cost of living
is affordable**

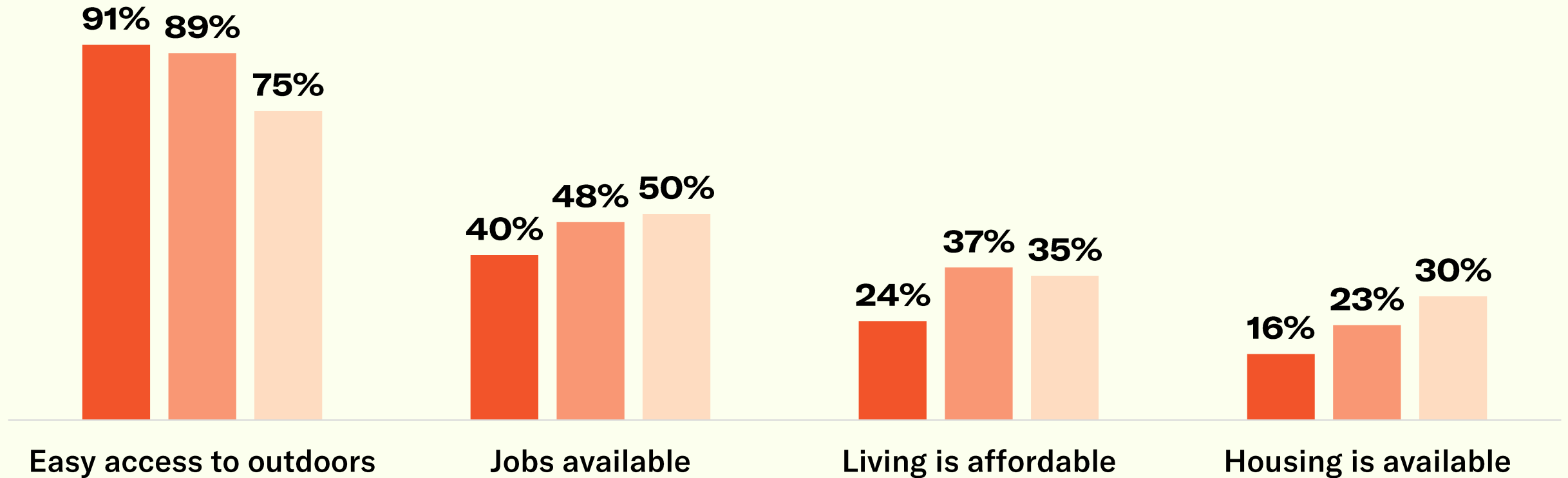


**Oregon has a
variety of
housing
available for all
income levels**



Jobs, housing, and cost of living perceptions have room to grow.

■ Oregon ■ Outdoor Focused State ■ Major Destination State





1

Pride is strong

2

**Outdoors are
greatest asset**

3

**Quality of life is a
concern**



1

Pride is strong

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**Outdoors are
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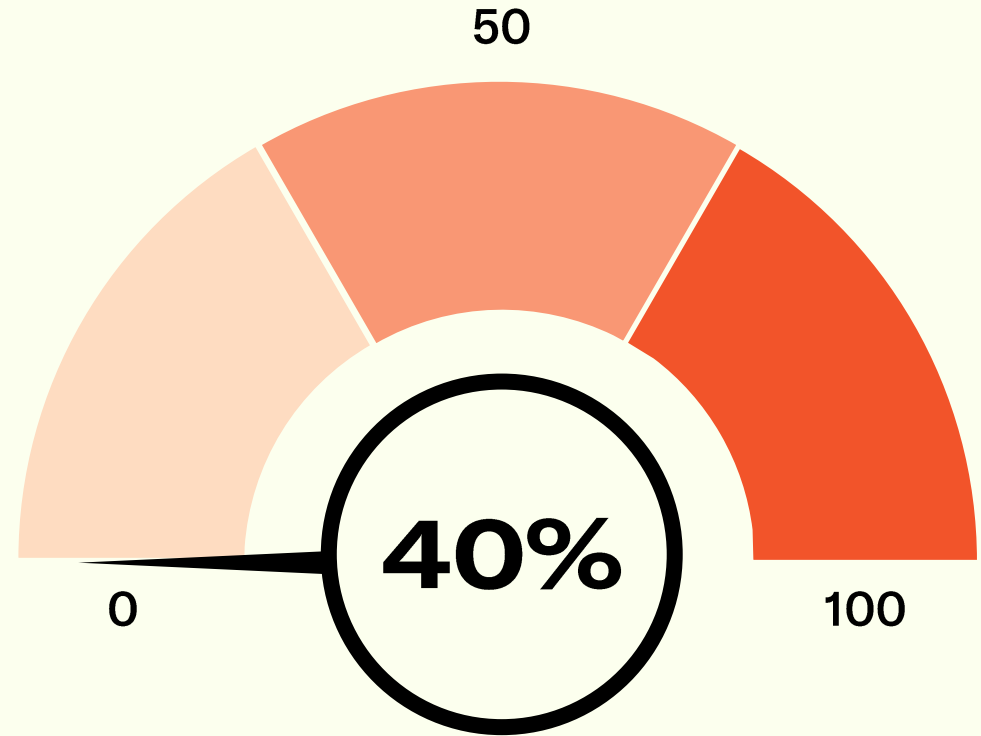
**Quality of life is a
concern**

4

**Oregonians are
optimistic**

**Expects quality
of life to be
better in the
year ahead**

Only 14% feel it will be worse



Tourism Employment



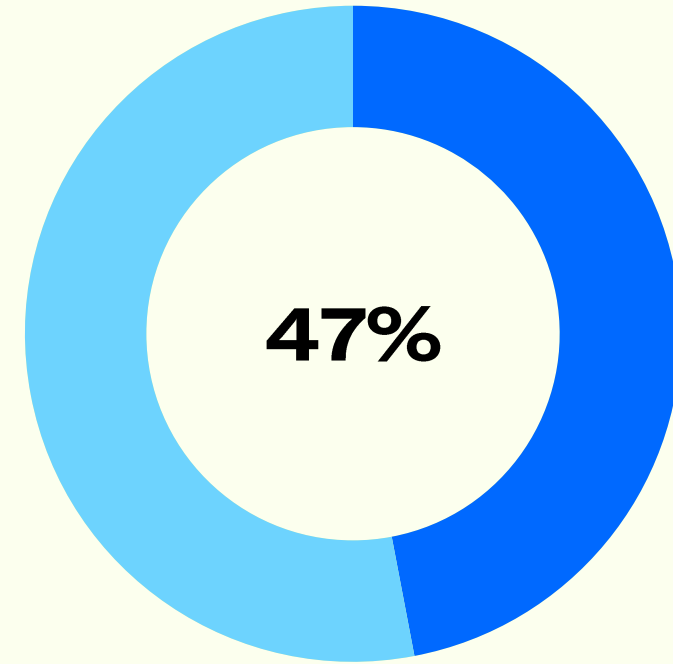
Credit: VanWeelden

1

Tourism is a key employer



Credit: VanWeelden



Of respondents are currently working or have worked in roles supporting Oregon's tourism industry



“From the hotel industry, catering industry, entertainment industry, transportation industry... all aspects of tourism need a large number of human resources to support it, which provides local residents with a wealth of employment options.”



‘Tourism provides much needed jobs, as we are moving away from timber, fishing and natural resource jobs.’



‘I live in a part of Oregon where tourism is a crucial part to our local economy. Our small businesses rely heavily on tourism, and the local government has made efforts to keep small businesses here, rather than let corporations come in to benefit from the tourism instead. Tourism really drives income for the majority of people who live and work here.’



Credit: VanWeelden

1

Tourism is a key employer



Credit: VanWeelden

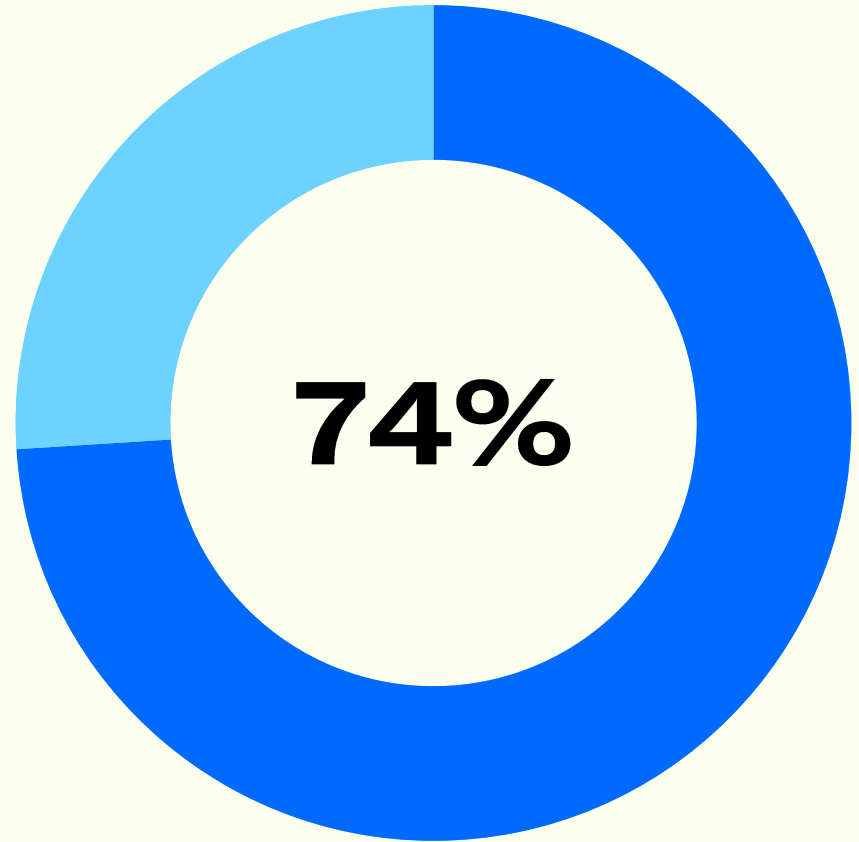
1

Tourism is a key employer

2

Tourism is a year-round employer

**Employed
full-time
year-round**





‘Because of tourism, many of the people in my town are employed continually every year, since we have tourists year-round. Our community relies on tourism, and without it, our economy would break. We wouldn’t have jobs, or hobbies.’



Credit: VanWeelden

‘Being a small town and a large tourist attraction, having tourist stop and stay overnight helps support many businesses in the area our residents would not be able to support on their own. This helps our own neighbors and builds a stronger and more diverse community. More businesses equals more jobs.’



Credit: VanWeelden

1

Tourism is a key employer

2

Tourism is a year-round employer



Credit: VanWeelden

1

Tourism is a key employer

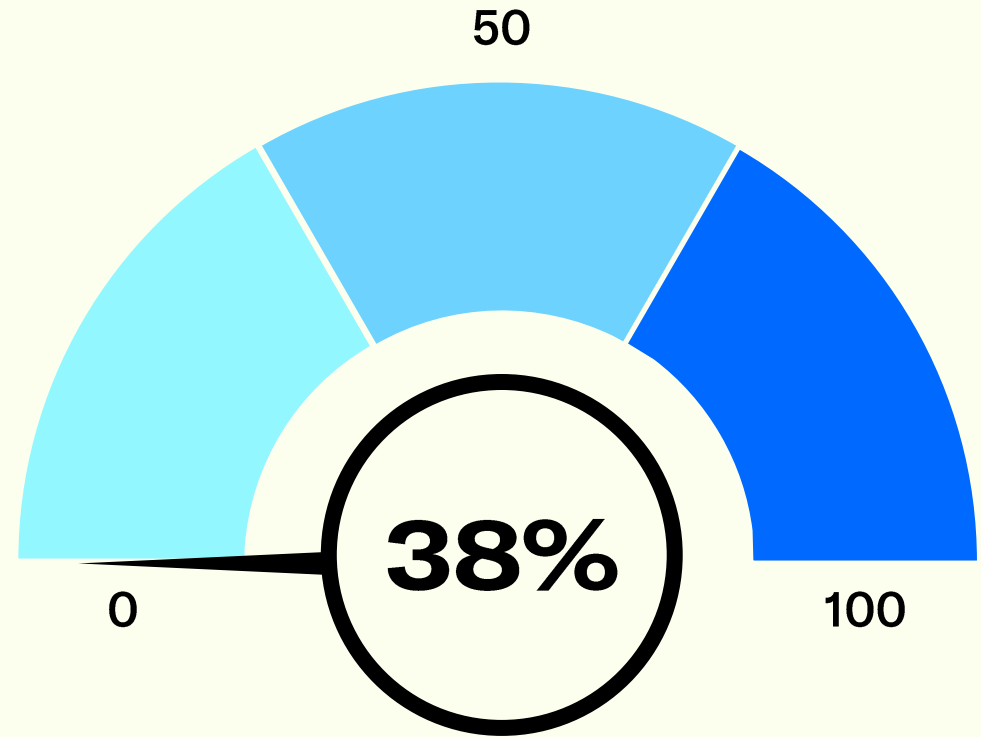
2

Tourism is a year-round employer

3

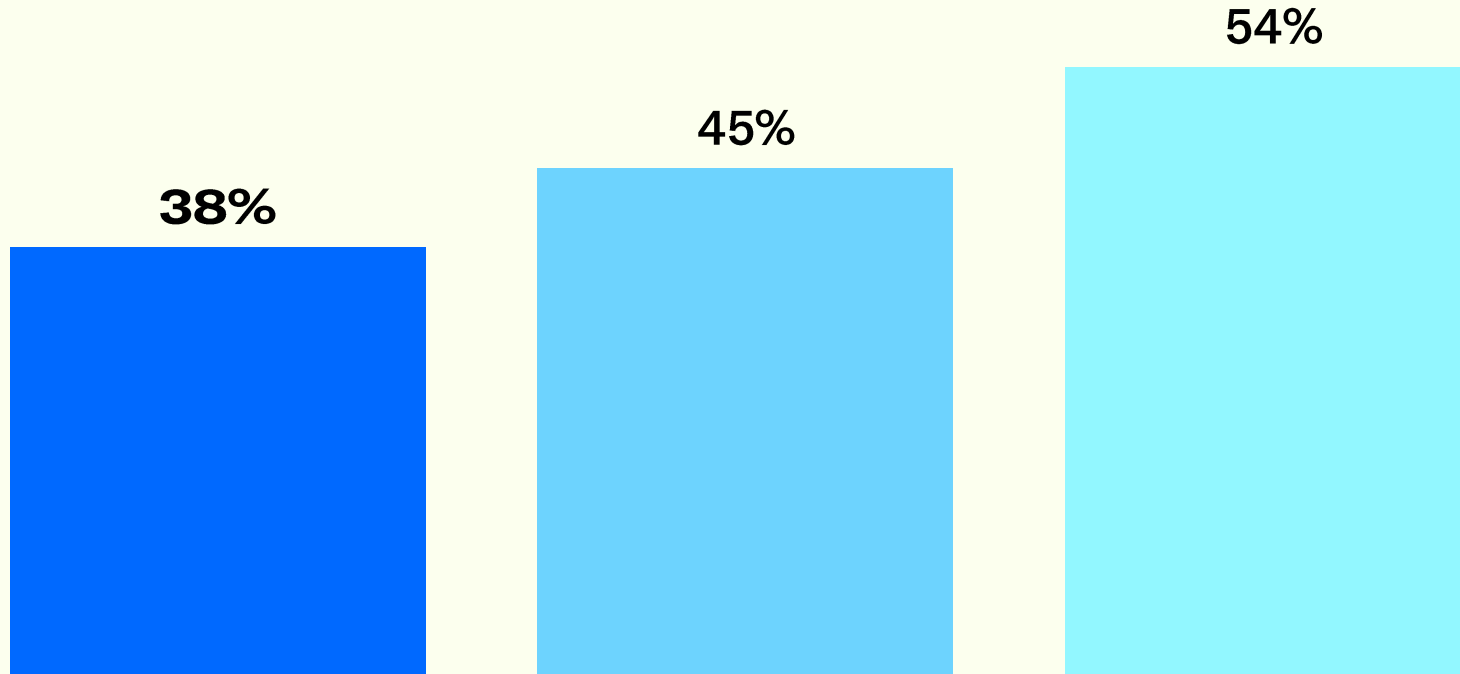
Employment satisfaction has room for growth

**Very/ extremely
satisfied working
in Oregon's
tourism industry**



Satisfaction working in tourism is lower in Oregon.

■ Oregon ■ Outdoor Focused State ■ Major Destination State



Tourism Industry Employment Satisfaction



Credit: VanWeelden

“Tourism creates jobs, although it tends to create a lot of low-paying seasonal jobs that people can't depend on.”

Tourism Perceptions



1

Economic

Positive Economic Sentiment

Important to success of local business

78%

Creates new amenities

71%

Important to local area economy

70%

More employment opportunities

69%

Negative Economic Sentiment

Increases cost of living

44%

Unreliable employment

33%

Dependency on few industries

29%

1

Economic





1

Economic

2

Environmental

**Positive Environmental
Sentiment**

Preserves historic sites

59%

Improves physical appearance

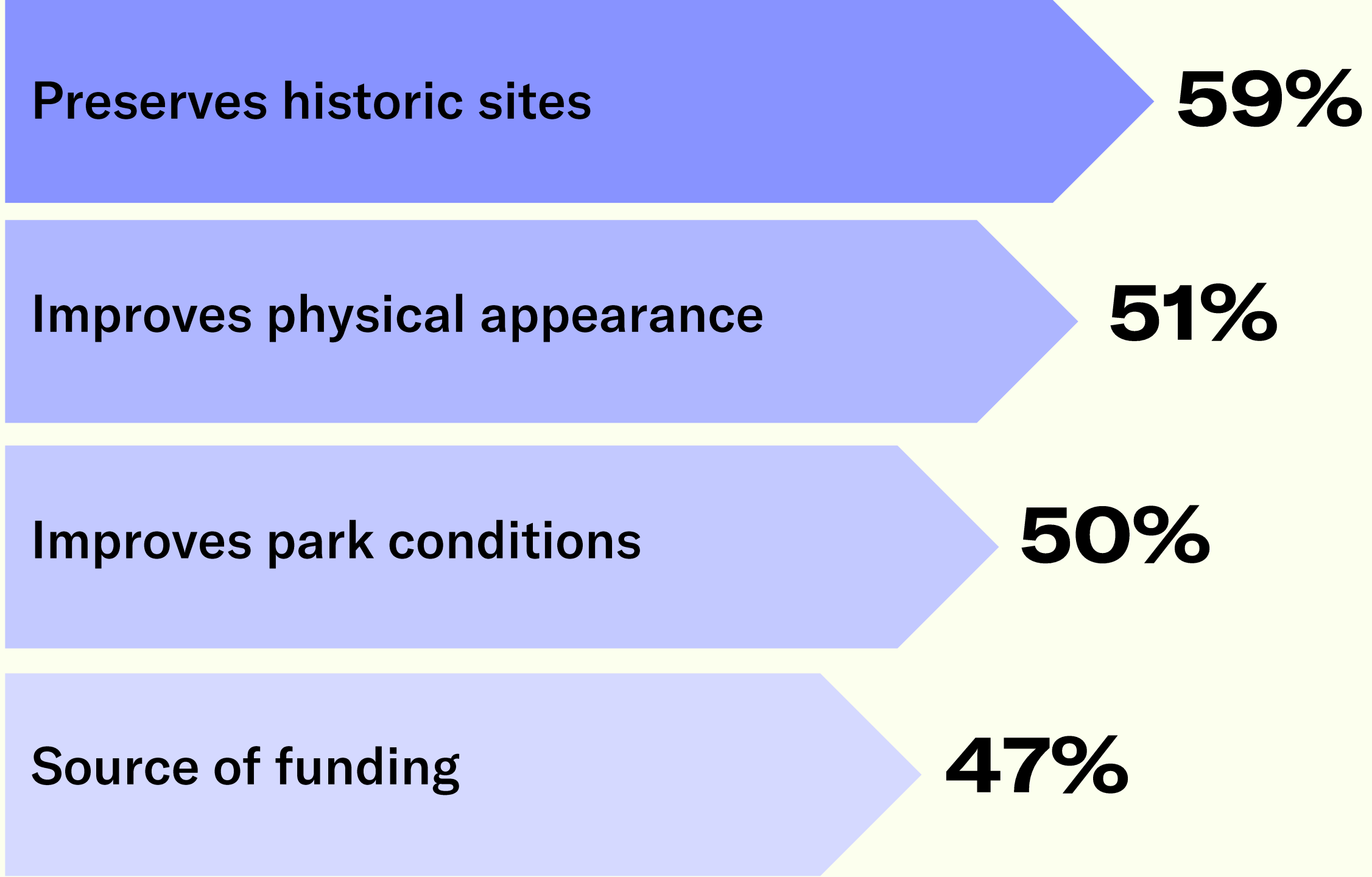
51%

Improves park conditions

50%

Source of funding

47%



**Negative Environmental
Sentiment**

Increases litter and waste

61%

Disrupts natural habitats

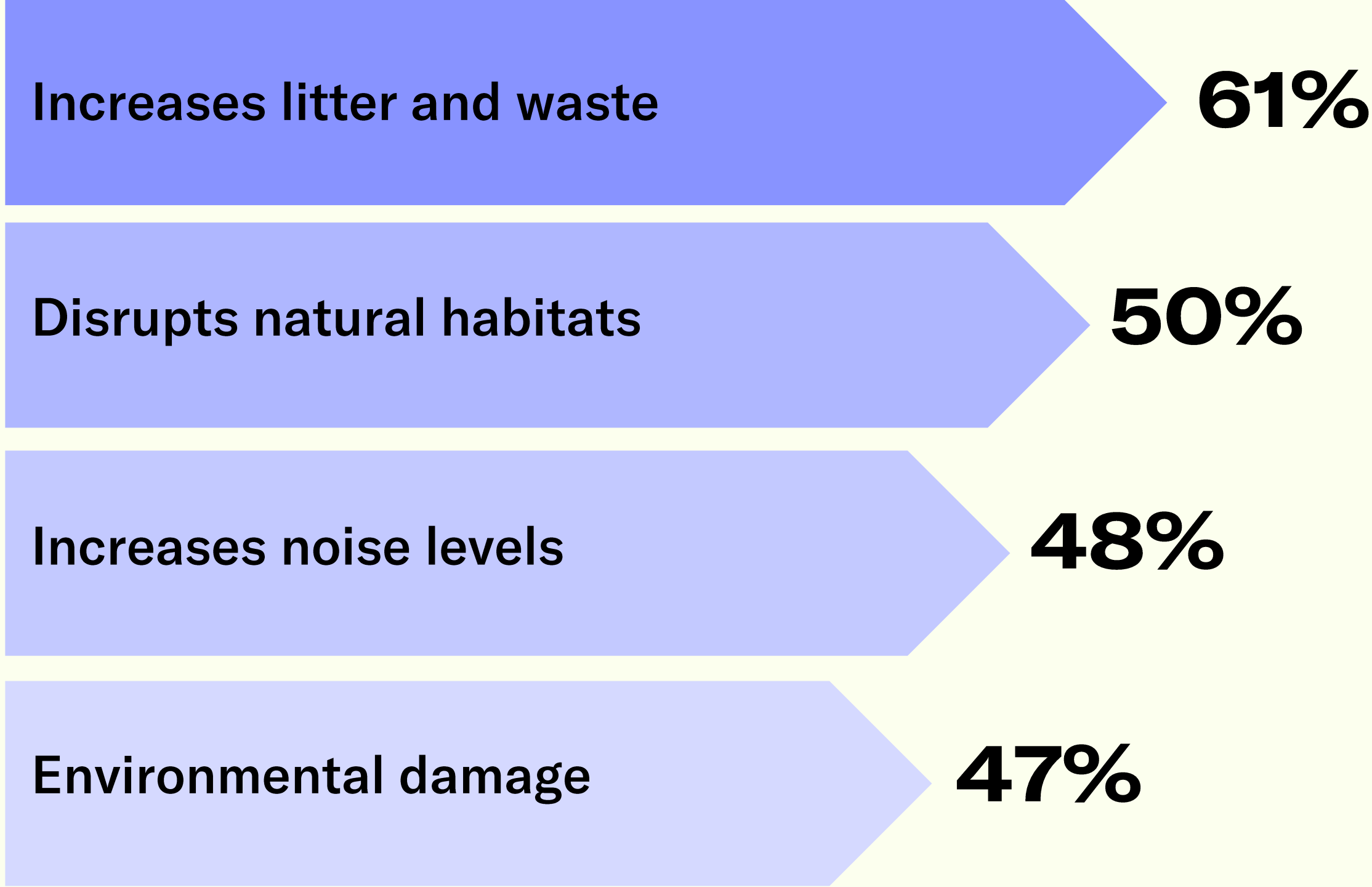
50%

Increases noise levels

48%

Environmental damage

47%





1

Economic

2

Environmental



1

Economic

2

Environmental

3

Cultural

Positive Cultural Sentiment

Encourages cultural activities

75%

Increases recreational/entertainment options

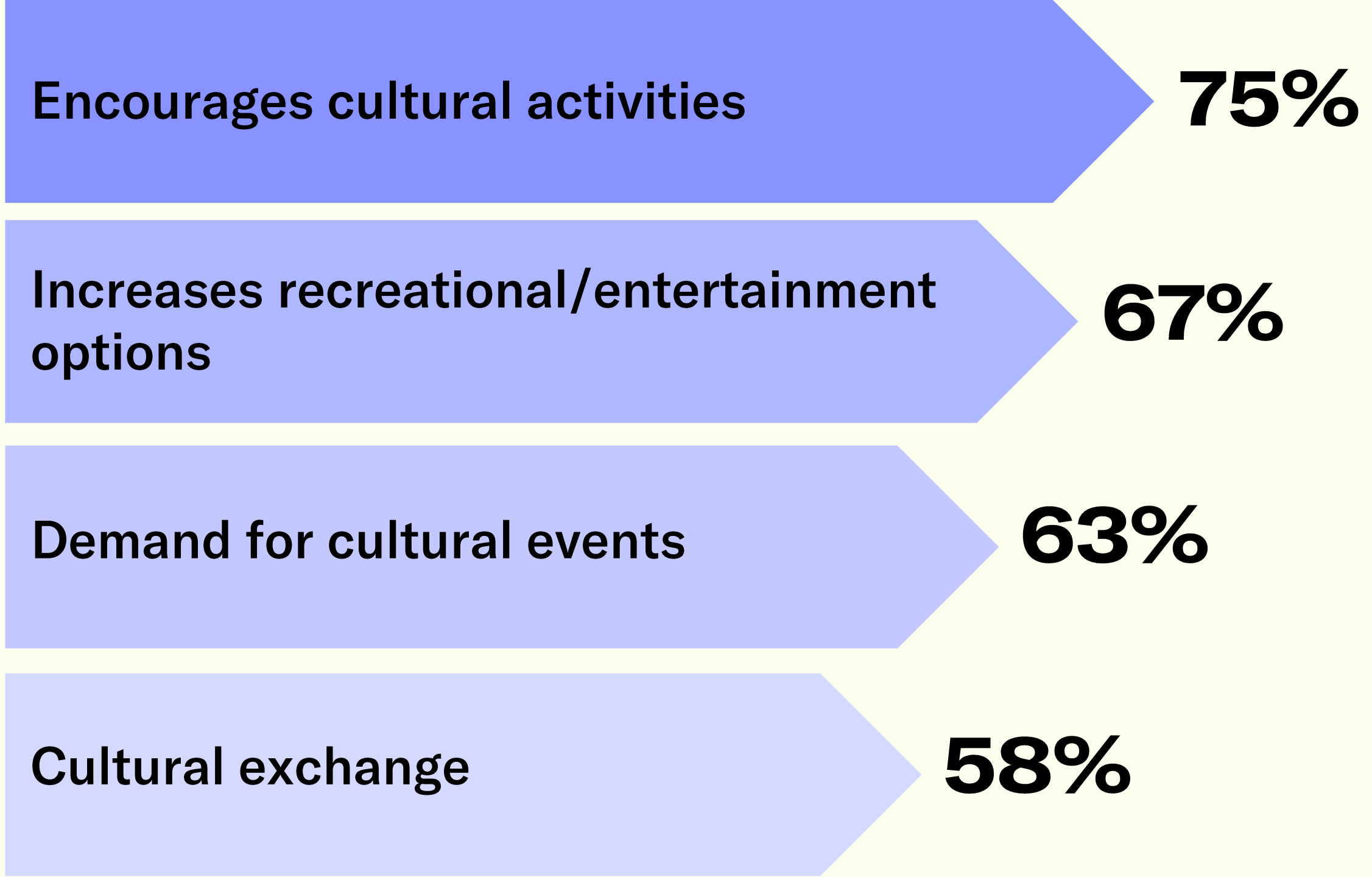
67%

Demand for cultural events

63%

Cultural exchange

58%



Negative Cultural Sentiment

Disturbs locals' way of life

40%

Commodifies local culture

37%



1

Economic

2

Environmental

3

Cultural



1

Economic

2

Environmental

3

Cultural

4

Social

Positive Social Sentiment

More media visibility

70%

Global recognition

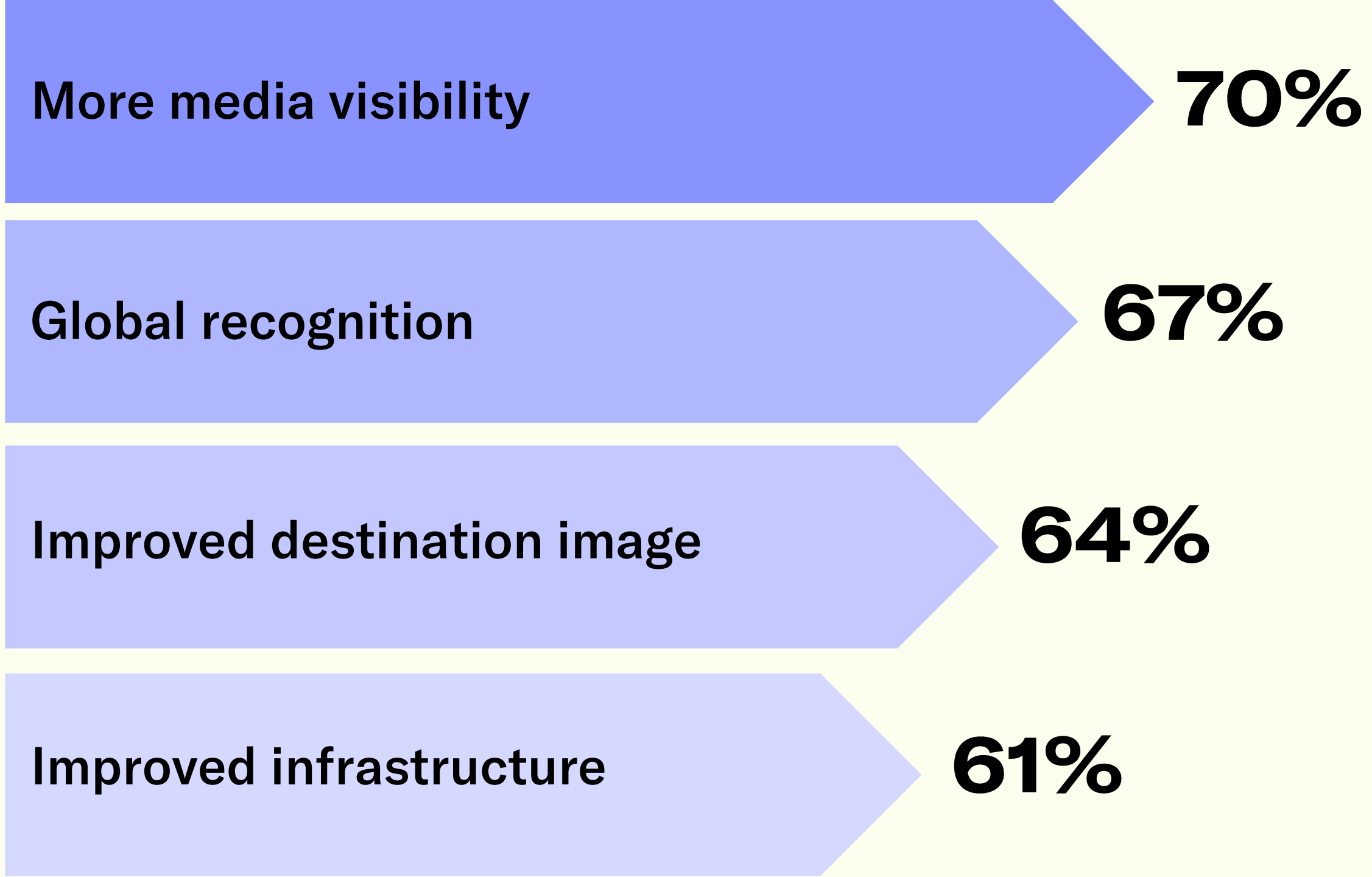
67%

Improved destination image

64%

Improved infrastructure

61%



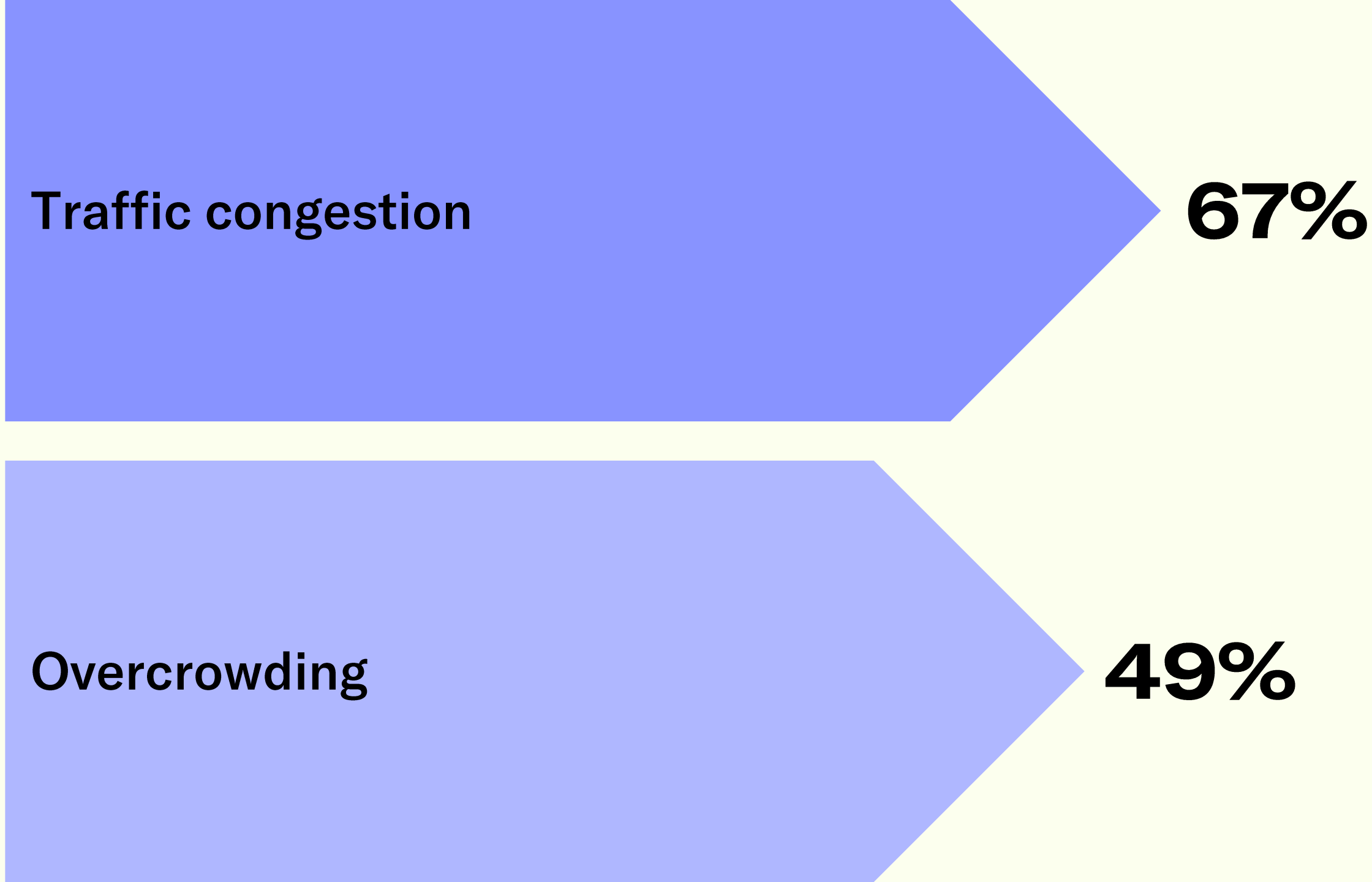
Negative Social Sentiment

Traffic congestion

67%

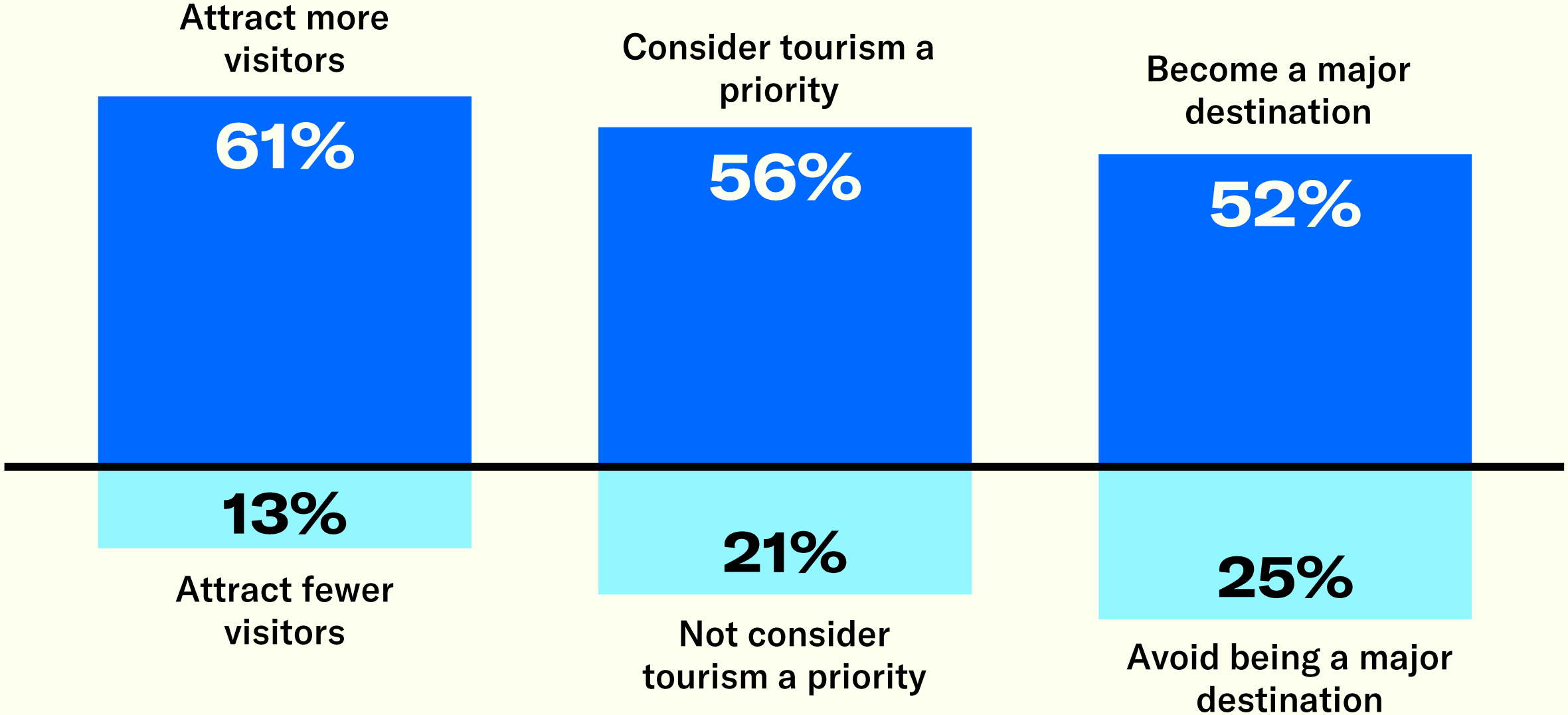
Overcrowding

49%



Tourism Support

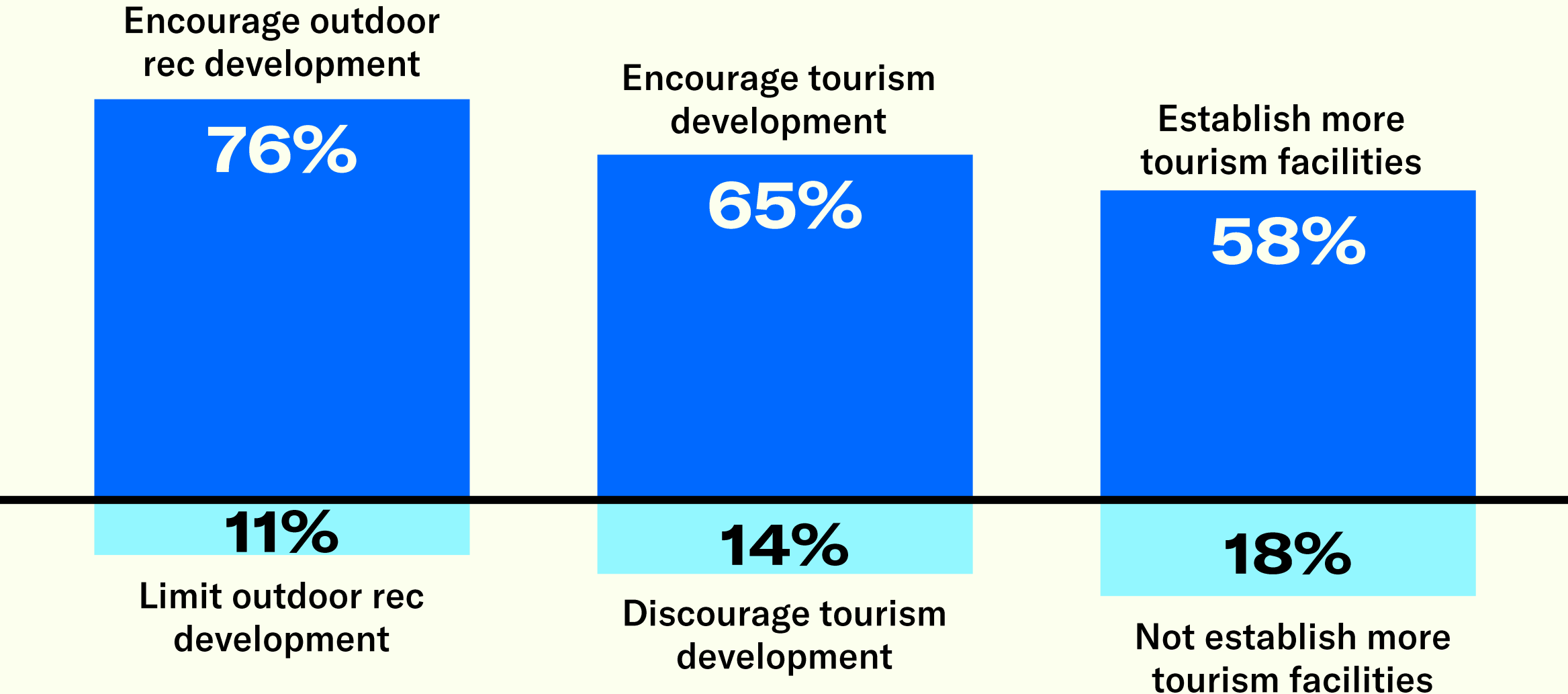
Oregon should...



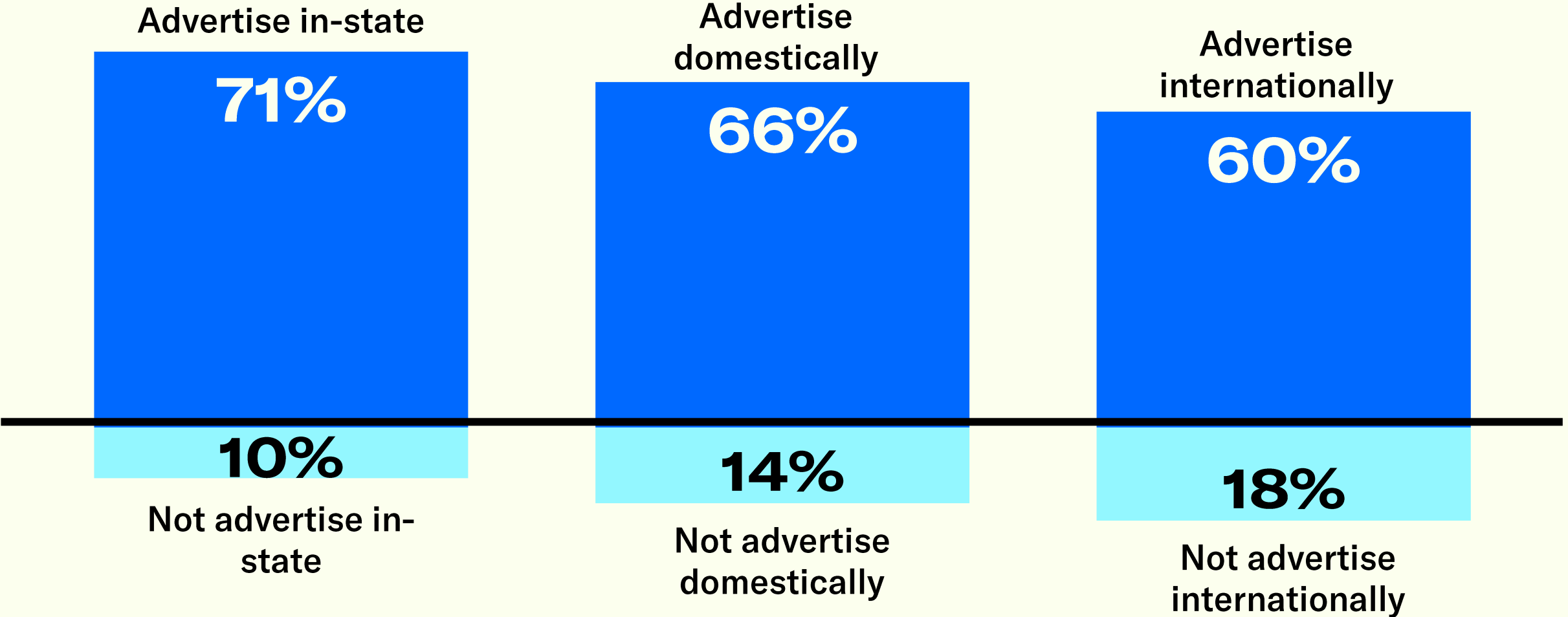


'I hear complaints about how Bend used to be—how it was better when... But communities either grow or die. There is no stagnant perfect period. I'd rather see our community grow because it is a destination, rather than wither away.'

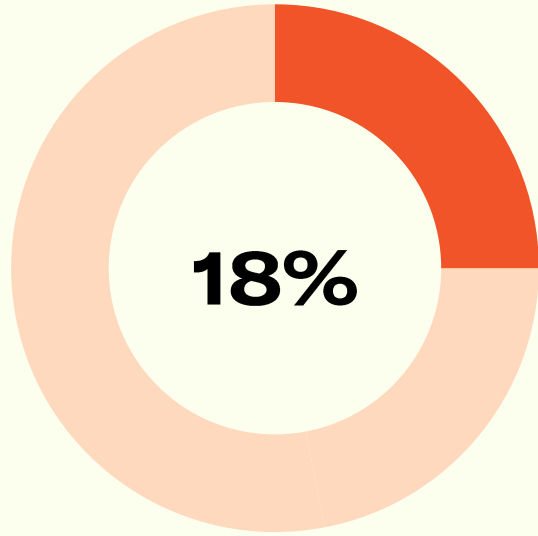
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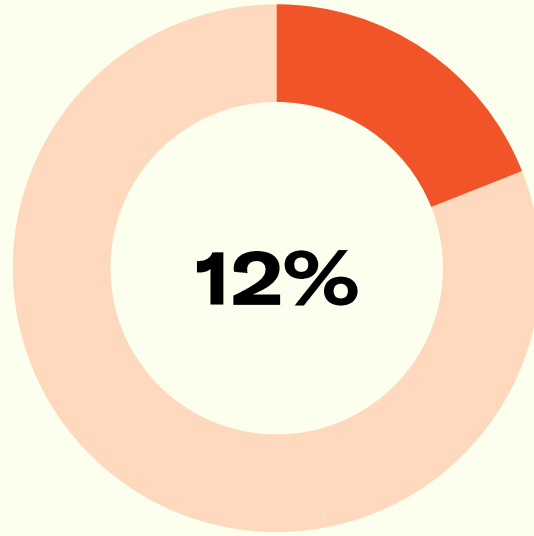
Oregon should...



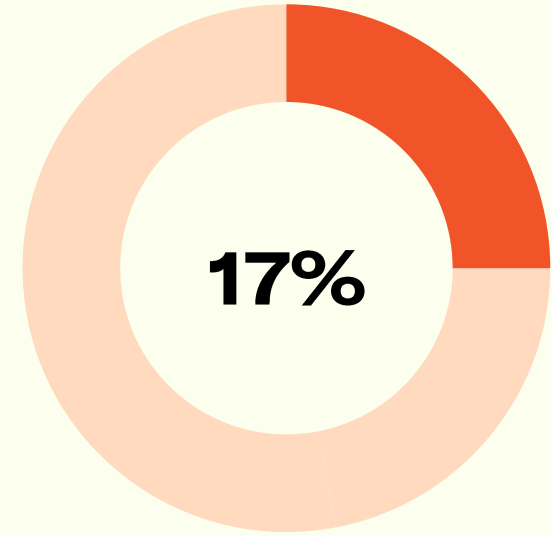
Diverse Residents



BIPOC



LGBTQ+



**People with
Disabilities**

BIPOC Respondents



Much more likely to want Travel Oregon to prioritize DEI training funding for industry

More negative about the economic impacts of tourism

More likely to own or work at a business that serves the tourism industry

More likely to stay in Oregon due to education and cost of living, less likely to stay due to climate or outdoors

More positive about life in Oregon and their future outlook



LGBTQ+ Respondents

More likely to stay in Oregon due to political climate education, entertainment options

More negative about the economic, environmental, and cultural impacts of tourism

Much more likely to want Travel Oregon to prioritize DEI training funding for industry and making destinations more accessible

Much more positive about life in Oregon and their future outlook

More likely to own or work at a business that serves the tourism industry

People With Disabilities

More likely to stay in Oregon due to familial responsibilities and cost of living

More likely to own a business that serves the tourism industry, but less likely to be employed by a tourism business

More negative about the cultural and social impacts of tourism

Much more likely to want Travel Oregon to use funding to make destinations more accessible

Key Takeaways

The benefits of tourism currently outweigh the negatives, however increasing pressure on traffic, housing, and jobs may have long term impacts on resident sentiment.

Oregonians value the state's natural resources and feel a personal responsibility to protect and share them.

Most Oregonians agree that increased media awareness benefits Oregon and the state should promote itself.

Future Partners