

DESTINATION SCAN

SISTERS COUNTRY, OREGON | September 2021



DESTINATION SCAN

SISTERS, OREGON

As part of the destination management initiative for Sisters Country, Crosscurrent has undertaken a 'destination scan' including the following activities:

- Conducting a desk review of previous and current planning activities related to travel/tourism and outdoor recreation, local and regional visitor and outdoor recreation data as available, and history of TRT spending.
- Conducting six interviews with key stakeholders and two focus groups from the community and surrounding region to better understand current sentiments on how the community is managing outdoor recreation and tourism.
- Creating a summary presentation deck that can be used as a presentation tool during community workshops.



SISTERS DESTINATION SCAN

TABLE OF CONTENTS

The destination scan includes the following segments:

- Destination overview
 - Geography, history, top industries/employers
 - Relevant demographic trends
 - Outdoor recreation – key assets
 - Visitor impacts
 - History of TLT spending
- Local perspectives (interview + focus group results)
- Community plan and report highlights
- Visitor data highlights – state economic impact and regional visitor profile

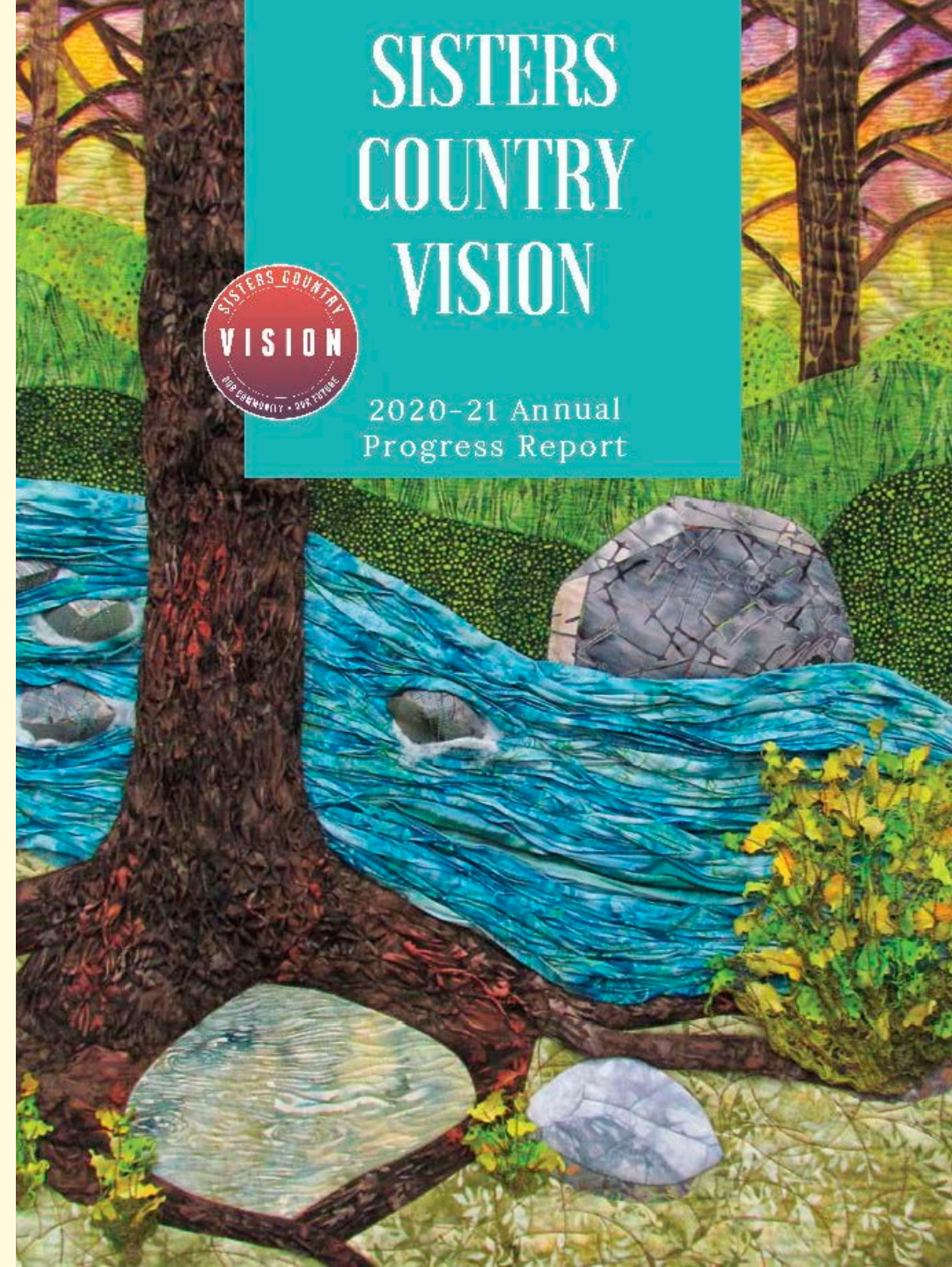


SISTERS DESTINATION SCAN

REPORTS REVIEWED

Crosscurrent reviewed dozens of useful reports and plans provided by the city and community stakeholders. Below is a list of the most relevant plans.

- Community Asset Committee Handout (2015)
- City Business Survey (2018)
- City Business Survey (2020)
- City Parks Master Plan (2016)
- City Public Safety Survey (2019)
- Downtown Sisters Urban Renewal Plan (2020)
- EDCO Central Oregon Profile (2021)
- EDCO Sisters Profile (2021)
- Sisters Trails Alliance Presentation (2021)
- Sisters Country Vision & '20-'21 Annual Progress Report
- Transportation System Plan Refinement (2018)
- Urban Area Comprehensive Plan (2020)
- USFS Deschutes Forest Plan & Amendments (2017)



DESTINATION OVERVIEW

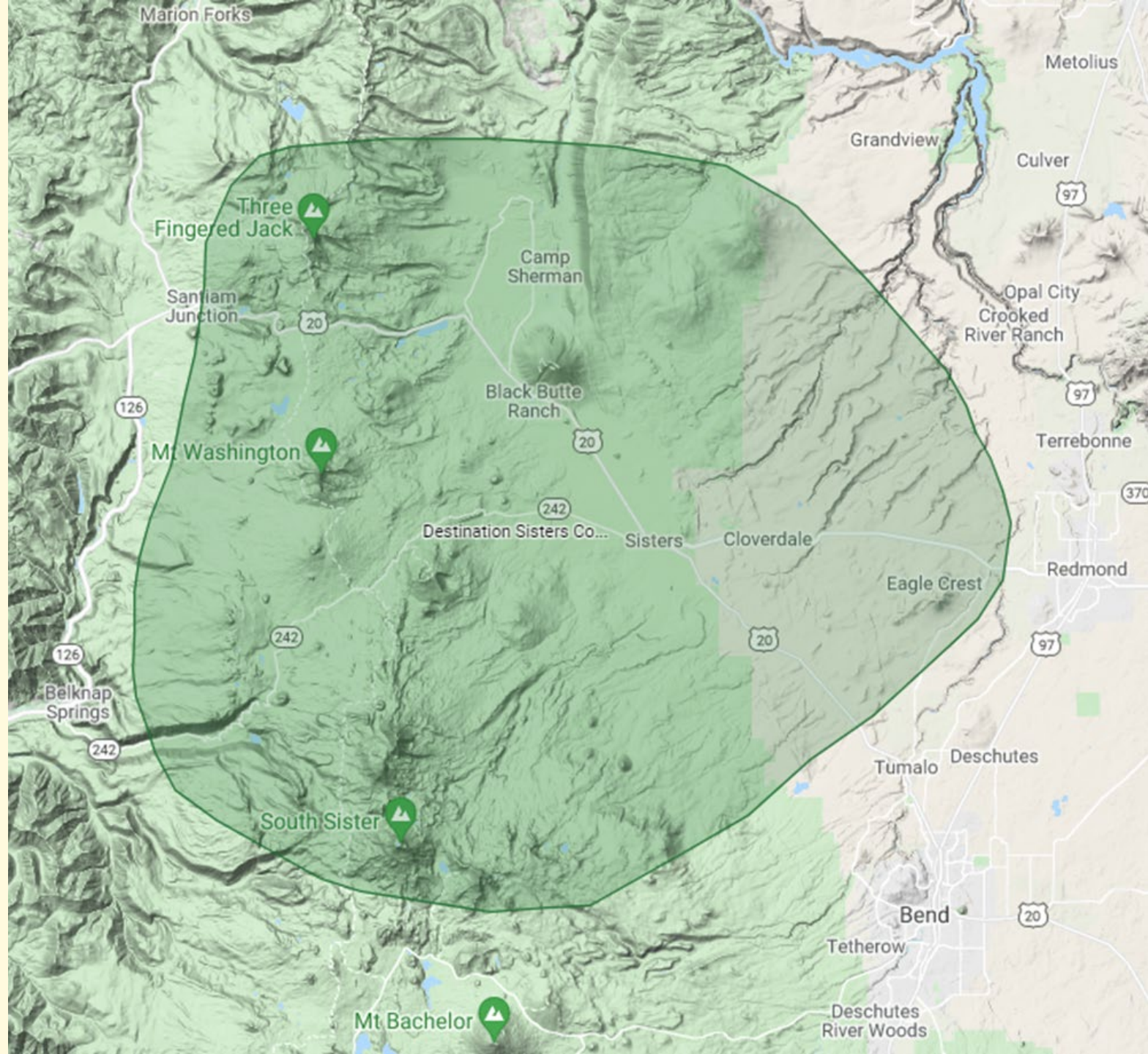
SISTERS COUNTRY

SISTERS DESTINATION

Situated at the eastern base of Cascade Range, "Sisters Country" is the widely used name for a much loved, stunningly beautiful part of Deschutes County, Oregon.

The majestic Three Sisters peaks – just miles from the city of Sisters and visible from almost every part of the region – lend the region its name and help define its lifestyles, identity and brand.

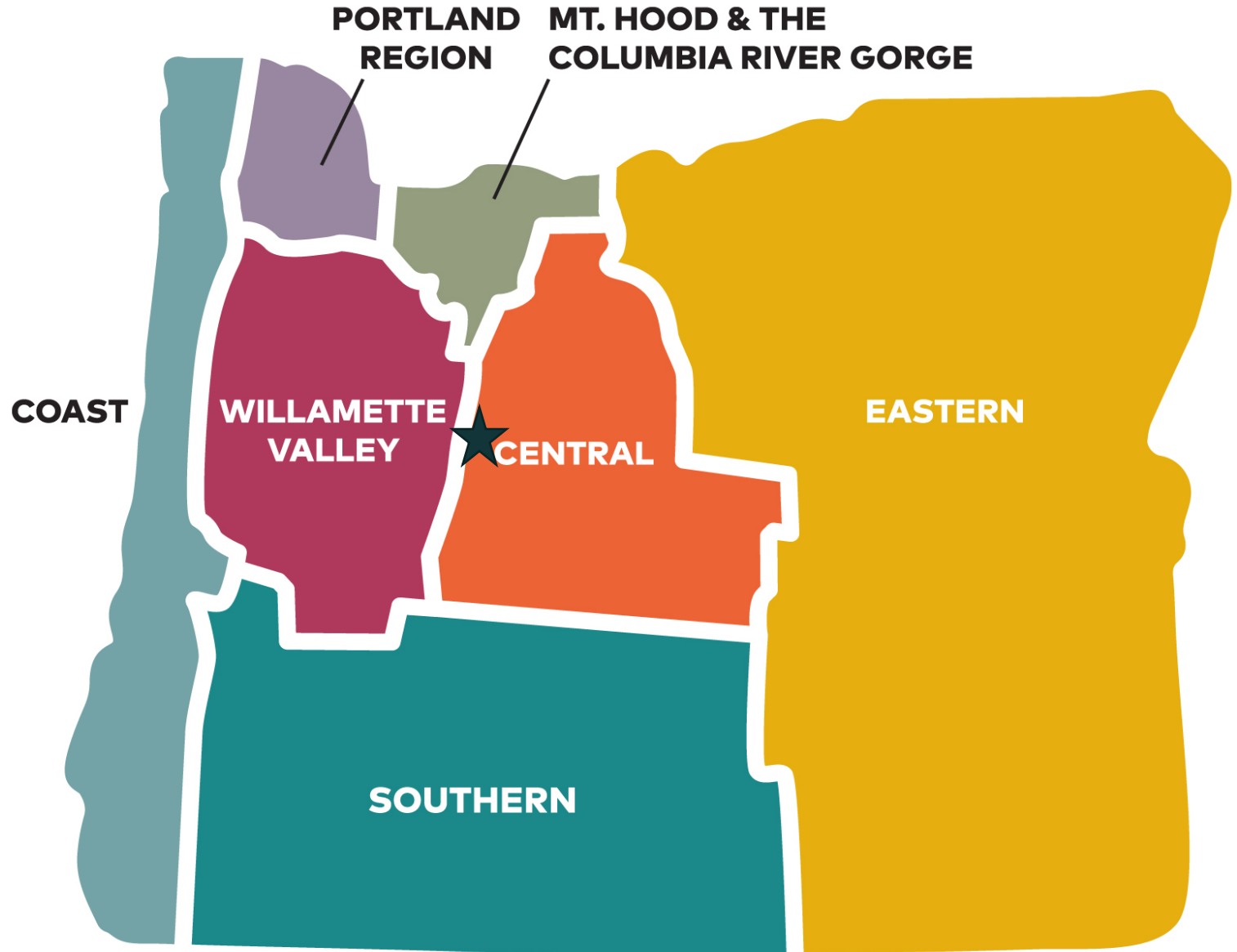
As the heart of Sisters Country, the city of Sisters lies where the Santiam and McKenzie highways converge at the west end of town to form Cascade Avenue and separate again on their way to Bend and Redmond to the east.



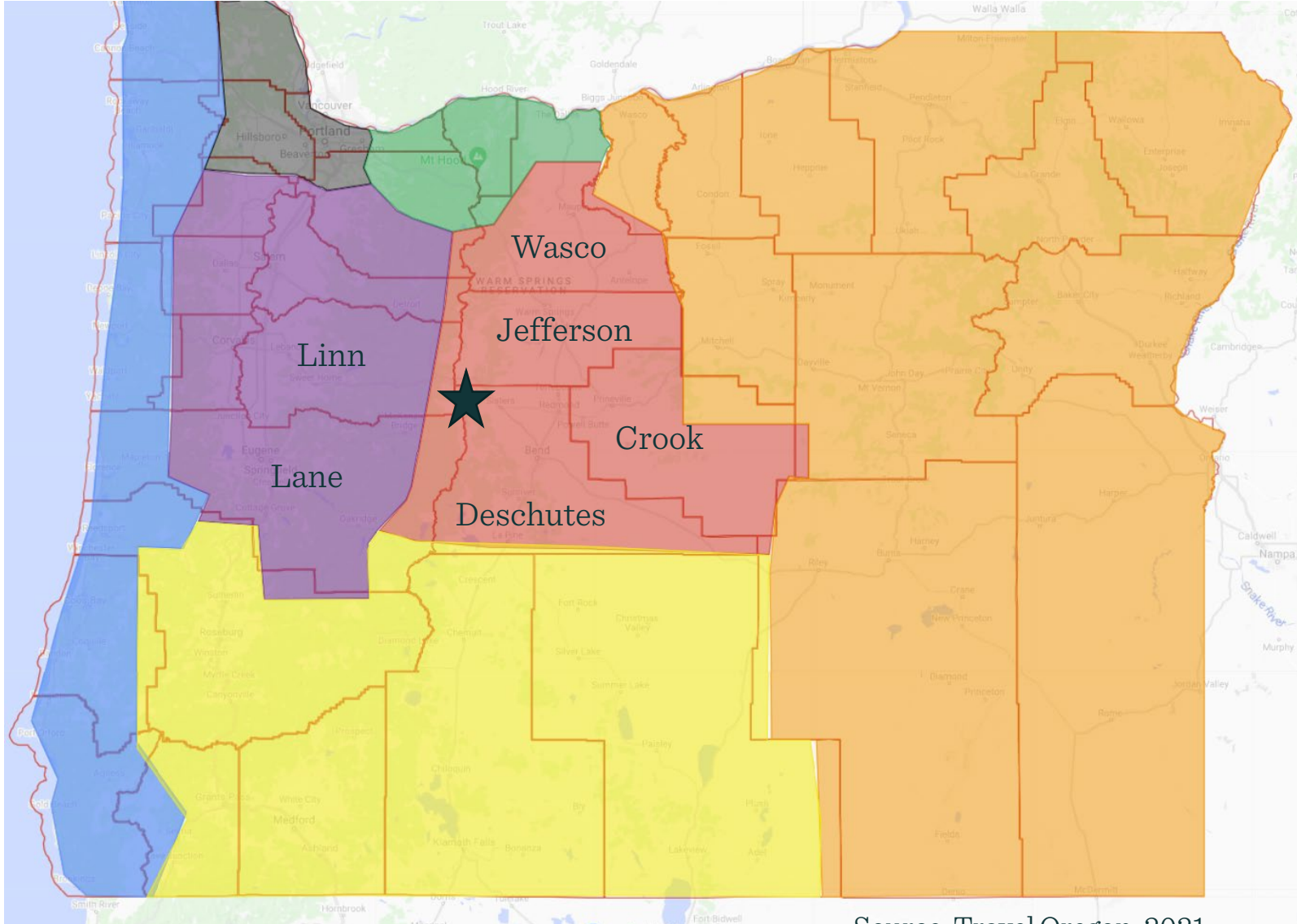
TRAVEL OREGON REGIONS

Sisters Country largely falls within Travel Oregon's Central Oregon Region

Central Oregon is branded as a *high-desert playground for everything under the sun—skiing, hiking, climbing, cycling, fishing, rafting, golf—and in the shade too.*



TRAVEL OREGON REGIONS + COUNTIES



Source: Travel Oregon, 2021



HISTORY OF SISTERS

After an informal history of serving passing travelers and tradesmen, Sisters was formally established in 1901.

- Early growth in Sisters came from the lumber industry. By 1930, Sisters was primarily known as a lumber-producing town and was incorporated in 1946, pop. 500.
- Gradually, however, **lumber production fell off** and in **1963 the last mill in Sisters was closed** and the plant subsequently dismantled. Soon thereafter the population began to decline.
- As highways were constructed and improved, **tourist-related travel to the area increased**. Sisters became known as the **Gateway to the Cascades**.
- The **population stabilized** as Sisters capitalized on the beauty of the area's natural environment and the early **development of Black Butte Ranch**.
- In the 1970s the City Council adopted **the 1880s style storefront as part of its zoning ordinance**.
- Today Sisters is recognized as a hub for outdoor recreation, a destination for events that celebrate the local culture, and a great place to stop with its unique shops and galleries.

Retrieved and adapted from [Chamber history page](#).

Attributed to Raymond R. Hatton, Author of Oregon's Sisters Country - A Portrait of its Lands, Water, People (1996) and Sisters Country Weather and Climate (1994). Photo from Oregon Historical Society, circa 1900.

SISTERS IS GROWING

Population has increased by 58% since 2010, surpassing Bend, the county, and the state average.

SISTERS COUNTRY POPULATION

Estimated that 2/3 of "Sisters Country" lives outside the city limits

Calculated at 7,796 in 2016

Source: *Sisters Country Vision, 2019*

Median income has grown, but slower than other areas.

POPULATION	2020	% Change (2010-20)
Sisters	3,220	+58.0%
Bend	92,840	+21.0%
Deschutes County	197,015	+24.9%
Oregon	4,268,055	+11.4%

Source: [Annual Population Report Tables \(2020\)](#) Portland State Population Resource Center

MEDIAN INCOME	2019	% Change (2015-'19)
Sisters	\$60,318	+19.9%
Bend	\$65,662	+23.9%
Deschutes County	\$67,043	+30.9%
Oregon	\$67,058	+23.8%

Source: [Dateusa.io](#) - Sisters Profile

SISTERS IS BECOMING MORE DIVERSE

Sisters is becoming more racially diverse as it grows.

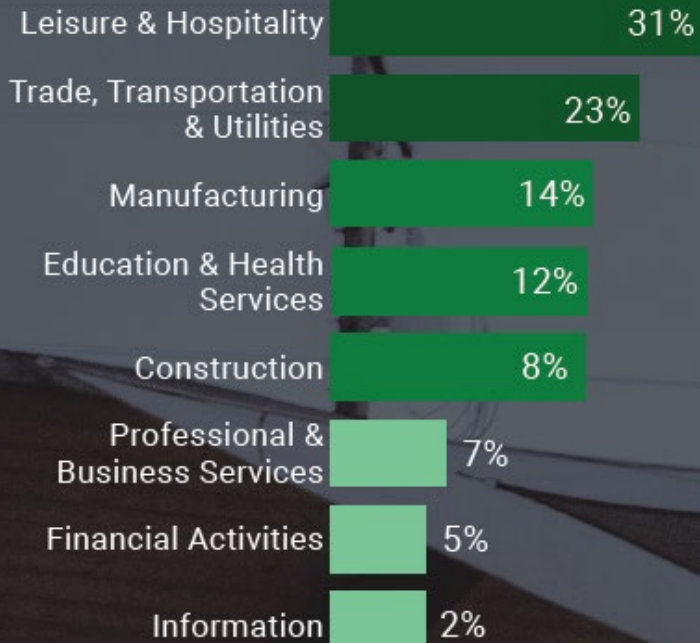
RACE FOR POP. OVER 18 YRS	5-Year Change	2020	2010
Total population	+64%	2,466	1,502
Pop. of one race	+55%	2,293	1,482
White alone	+55%	2,218	1,431
Black or African American alone	~	0	0
American Indian + Alaska Native alone	-22%	14	18
Asian alone	+214%	22	7
Native Hawaiian and Other Pacific Islander alone	~	2	0
Some other race alone	+42.3	37	26
Pop. of two or more races	+765%	173	20

Source: U.S. Census Bureau

SISTERS TOP INDUSTRIES + EMPLOYERS

2019 Sisters Industry Composition

Private by Employment



Source: State of Oregon Employment Department, 2020

Rank		2021 Sisters Largest 10 Public & Private Employers	Employees	
2021	2020		2021	2020
1	1	Black Butte Ranch	375	369
2	2	Sisters School District	147	145
3	3	Laird Superfood	132	87
4	4	Ray's Food Place	53	51
5	NC	Three Creeks Brewing	50	NC
6	4	Sisters Coffee Company	46	56
7	9	Metabolic Maintenance	39	40
T-8	T-7	FivePine Lodge & Conference Center	38	41
T-8	T-7	McDonald's	38	41
10	10	Bi-Mart	37	37

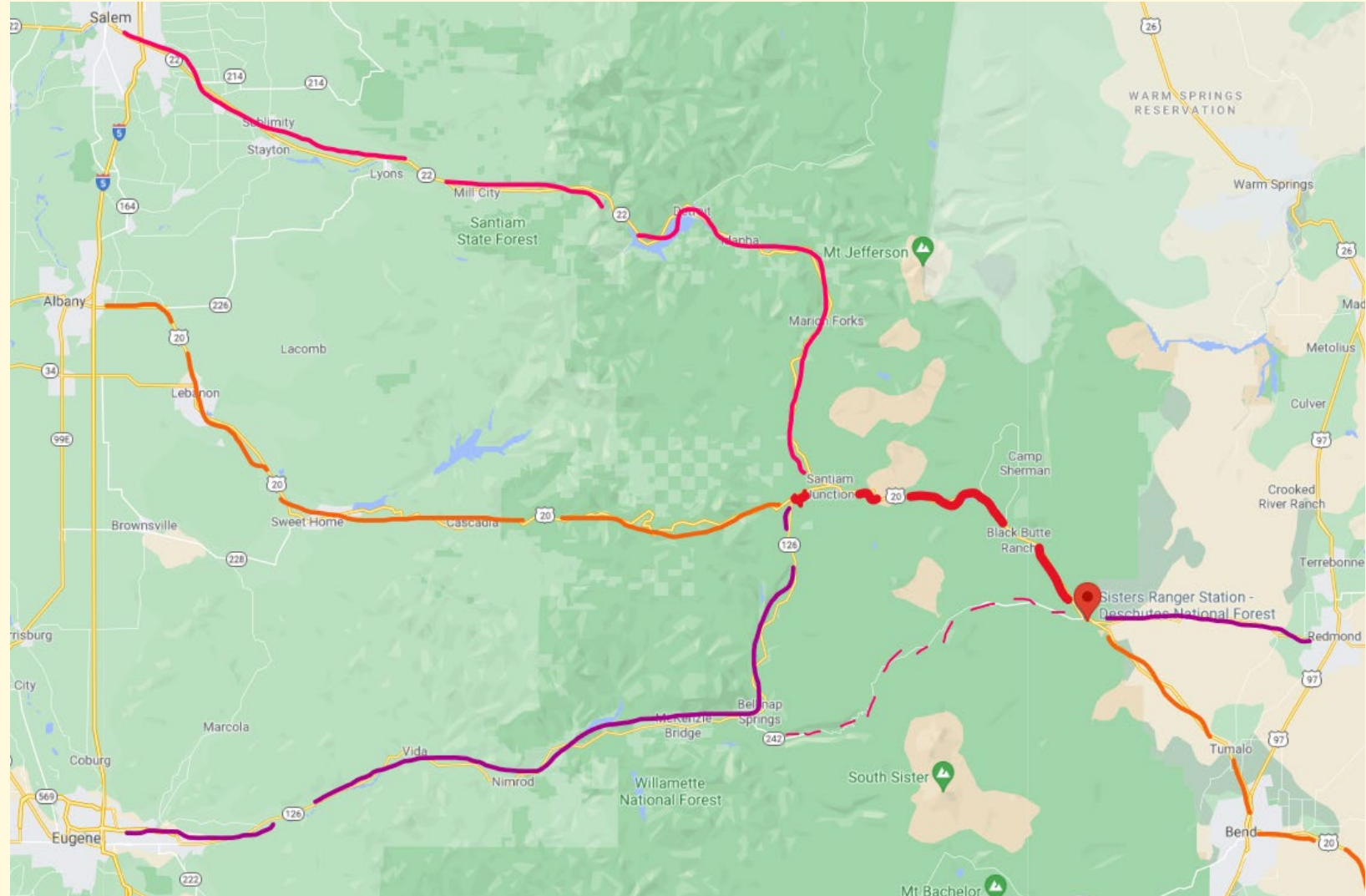
NL = Not Listed | NC = Not Collected | T = Tied

HIGHWAYS FUNNEL VISITATION THROUGH SISTERS

Hwy 22 – from Salem
Hwy 20 – from Albany
Hwy 126 – from Eugene

Converge into the 20 and go through Sisters

These feeder routes funnel people from Portland-metro, the Oregon coast and the Willamette Valley regions through to Central Oregon.



DRIVE TIME

Redmond	25 minutes
Bend	30 minutes
Eugene/Corvallis/Albany/Salem	~2 hours
Portland	2.75 hours

TRANSPORTATION SERVICES

SISTERS, OREGON

AIR SERVICE

- International: Portland & Medford
- Other: Eugene, Bend, Redmond
- RDM added new flights in 19/20 pre-covid

TRANSIT CONNECTIONS

- Bus: Amtrak, Greyhound
- Shuttle Oregon is the main transit service

SCENIC BYWAYS IN AREA

- McKenzie Pass and Santiam Junction Scenic Byway
- Near West Cascade Scenic Byway

KEY BIKE ROUTES

- ACA TransAmerica Trail (Astoria, OR to Yorktown, VA)
- Oregon Scenic Bikeway - Sisters to Smith Rock
- Oregon Timber Trail



ECONOMIC IMPACT OF TOURISM

SISTERS + DESCHUTES COUNTY

While Travel Oregon provides data for regional- and county-level tourism impacts, most local data for Sisters must be separately calculated.

2019-2020	Sisters	Deschutes County
Total Visitor Spend	-	\$503 Million
Transient Lodging Tax	\$617,713	\$16 Million
Average Spend (per day/person) on overnight trips	\$89 *	\$119
Employment	31% of workforce **	6,610 jobs
Visitor Volume	-	6,590,100 person-nights

Sources: Oregon Travel Impacts 2003-2020

* Sisters Country Visitor Opportunities Study, 2021

** EDCO Sisters Profile, 2021



TRANSIENT LODGING TAX

LOCAL AND REGIONAL TLT COLLECTIONS

Location	Curent Rate	FY '20/21	FY '19/20	FY '18/19	FY '17/18
Sisters	8.99%	\$ 901,628	\$617,713	\$638,430	\$599,104
Redmond	9%	\$1,132,816	\$891,565	\$1,060,753	\$983,0008
Bend	10.4%	\$11,075,116	\$8,774,457	\$10,173,649	\$9,392,551
Unincorporated Deschutes County	8%	\$11,485,626	\$7,560,817	\$7,829,494	\$7,035,998

Source: COVA Transient Room Tax Collection (2021)

TRANSIENT LODGING TAX

SISTERS HISTORY

TLT RATE CHANGES OVER TIME

1997	+8% (City)
-------------	------------

2003	+1% (State)
-------------	-------------

2016	+.99% (City)
-------------	--------------

	+.8% (State)
--	--------------

2020	-.3% (State)
-------------	--------------

Current 2021 TLT Collection Rates

- 1.5% for State
- 8.99% for City
- 8% unincorporated Deschutes County

TRANSIENT LODGING TAX

PERCENTAGE TO TOURISM PROMOTIONS — CITY COMPARISONS

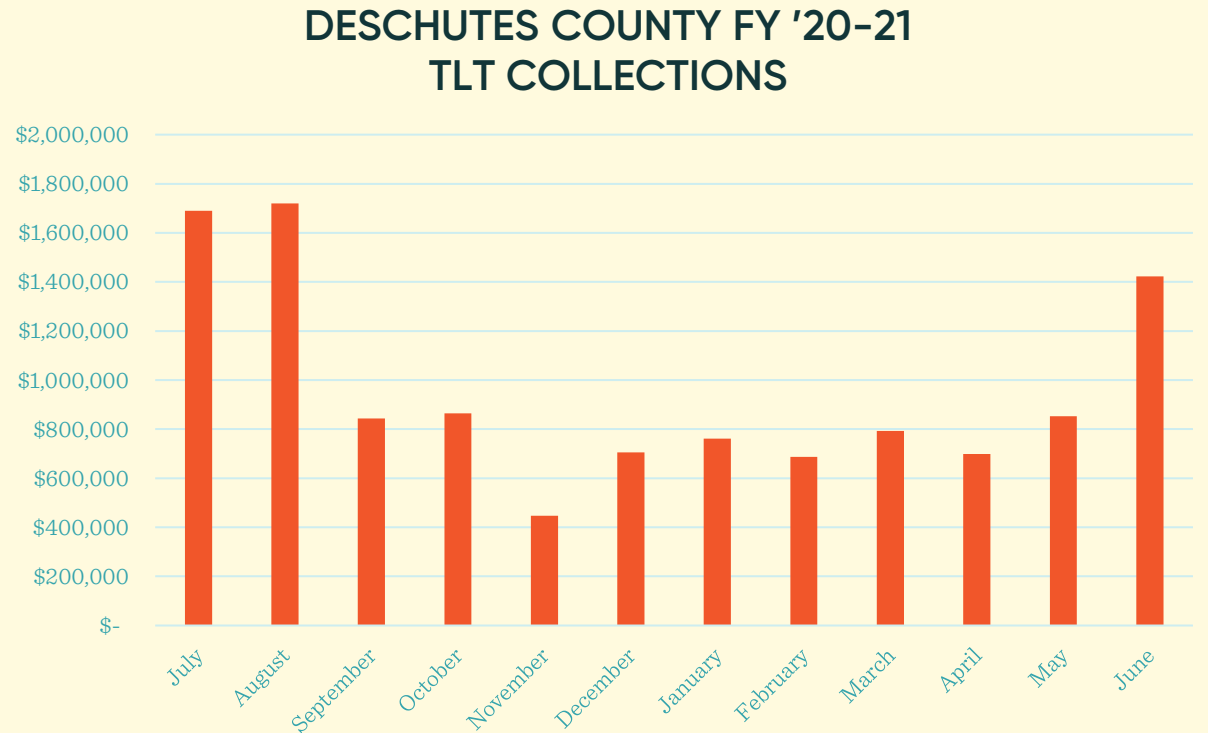
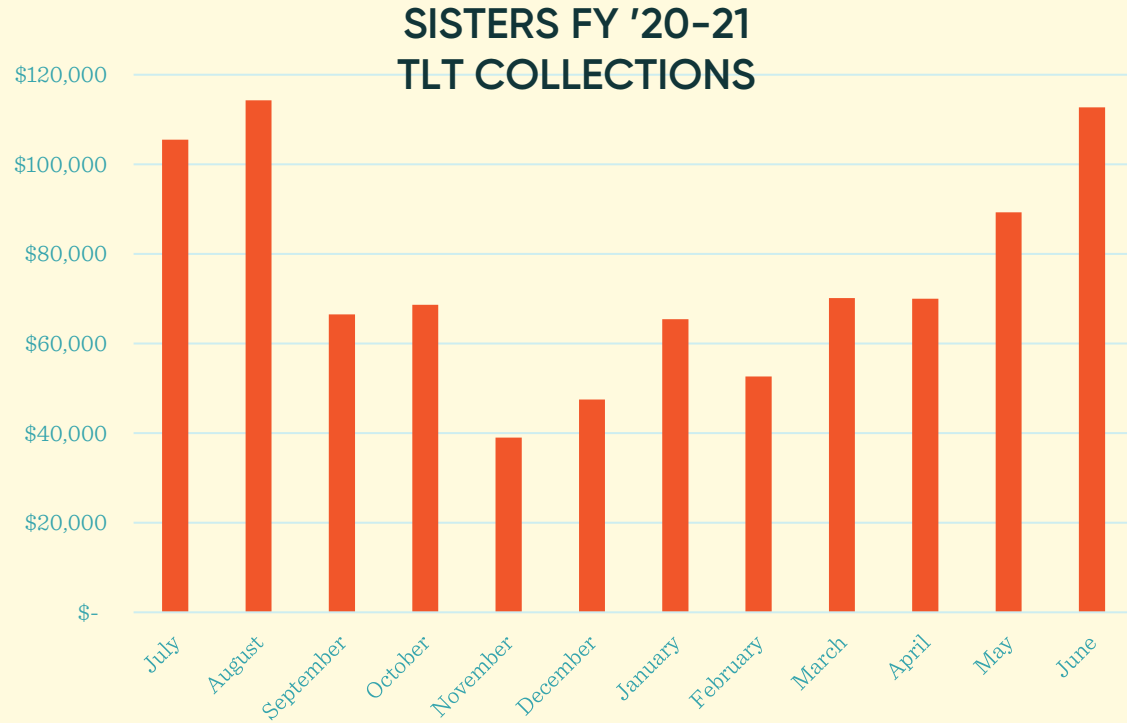
City	TLT Collected FY 2017-18	Percentage of TLT to 'tourism promotions'	Amount/Where
Sisters	\$599,104	~42%	\$250,000 to Chamber
Redmond*	\$995,754	~26%	\$258,972 to City
Bend	\$9,392,551	~29%	~\$2,700,000 to Visit Bend
Hood River (2019)	\$1,557,097	~34%	\$522,154 to Chamber
Cannon Beach	\$4,270,546	~10%	\$440,000 to Chamber

SISTERS CHAMBER TLT ALLOCATION

1999	25% by resolution
2006-7	29% (\$50,742)
2016-17	52% (\$277,531)
2017-20	Fixed (\$250,000)
2020-21	32% (\$294,376)
2021-22	Fixed (\$200,000)

TRANSIENT LODGING TAX

SEASONAL VARIABILITY



Source: Transient Room Tax Collection (2021)

OUTDOOR RECREATION

AMENITY OVERVIEW

Sisters reputation is squarely positioned around outdoor activities.

The City of Sisters itself is located within the Deschutes National Forest, but the greater destination area borders Willamette NF and includes multiple Wilderness areas.

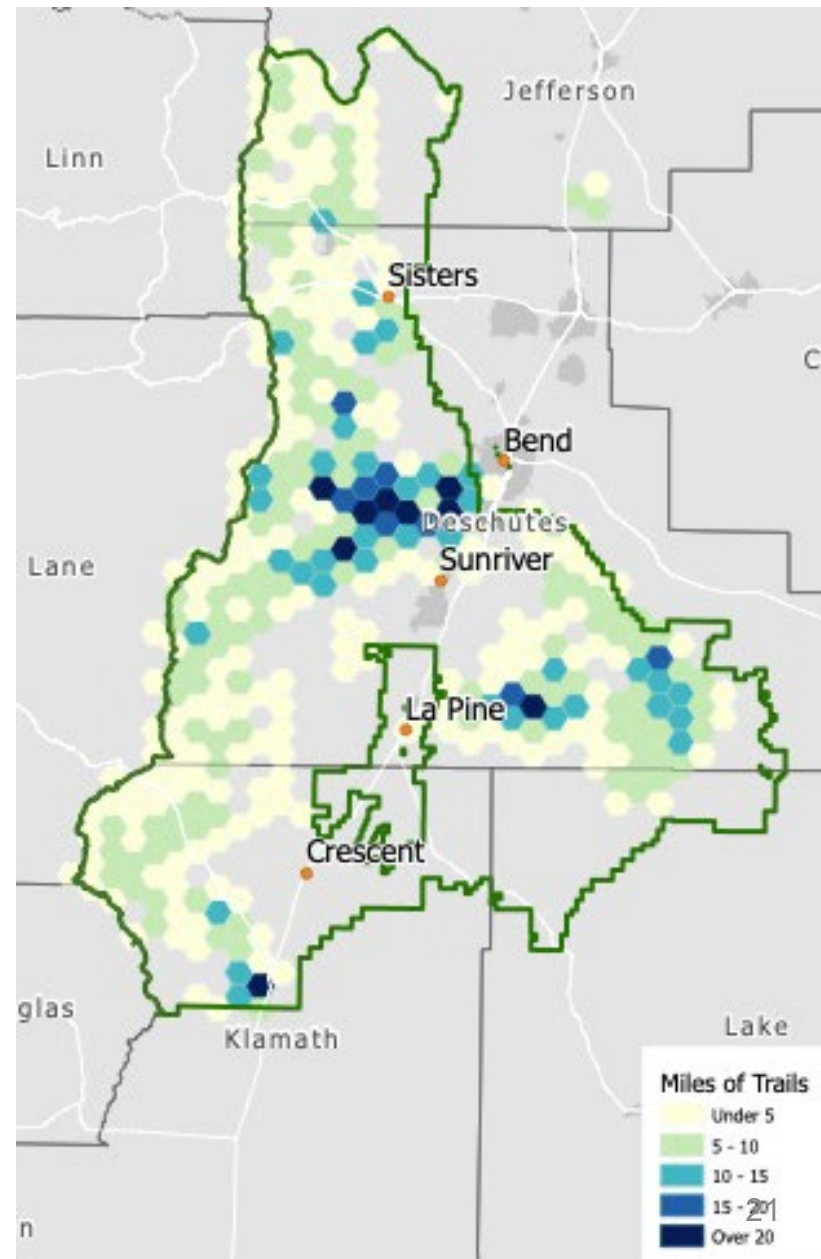
DESCHUTES NATIONAL FOREST

- 2,087,000 visits in 2018
- Over 50% from within 50 miles
- Top 4 'main activities':
 - Hiking/walking
 - Downhill skiing
 - Bicycling
 - Viewing natural features
- 38% rented a private home for lodging.

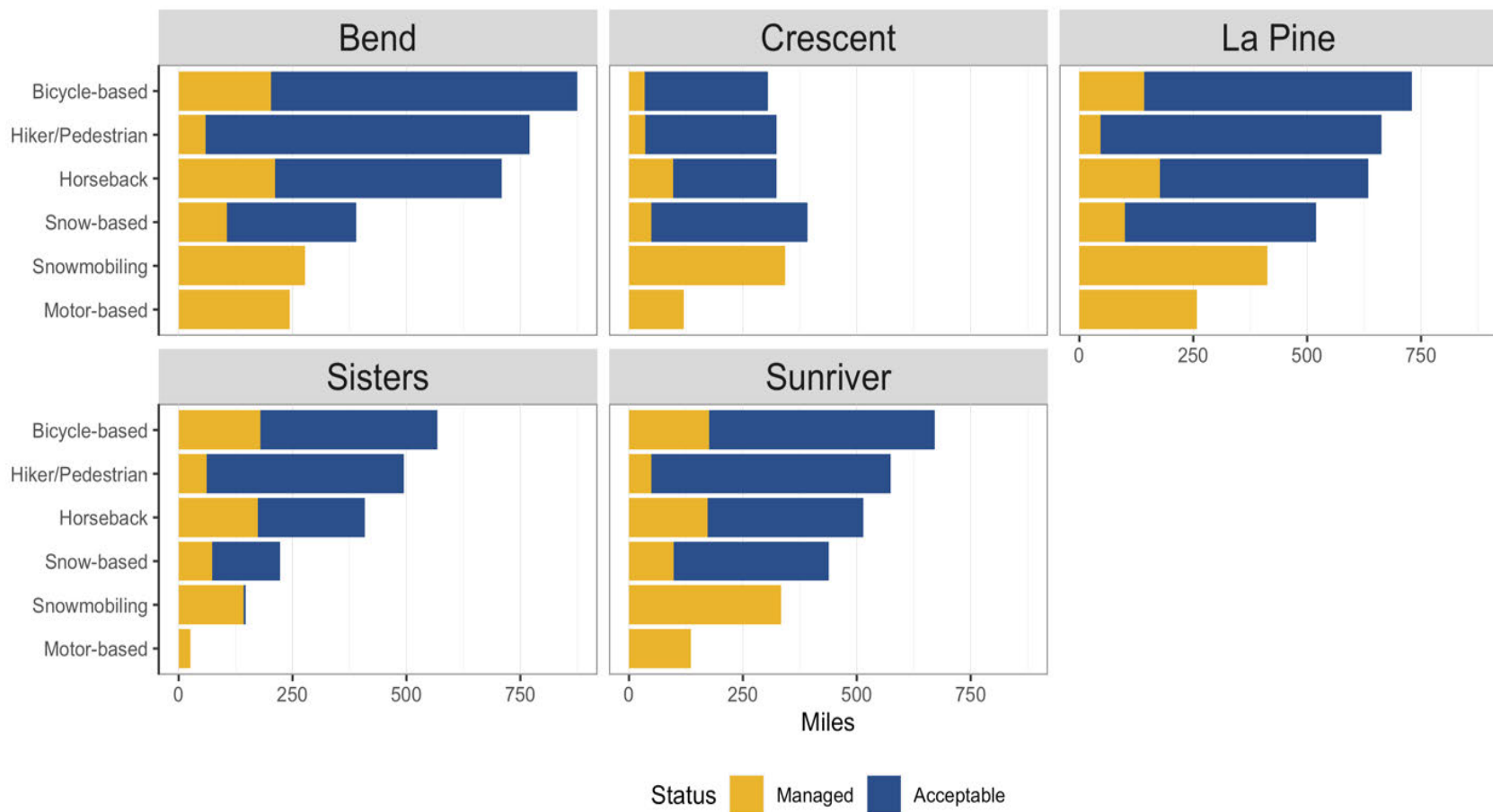


Deschutes National Forest Trail Overview

- ~2,200 Trail Miles
- More than 80 Campgrounds
- 5 Wilderness Areas
- 60 Water Activity Locations
- 47 Trailheads
- Densest trail network close to Bend, some hot spots near Newberry and Chemult in the south



Trail miles by community (60-minute drive)



Trails across primary uses are accessible from the major communities near DNF

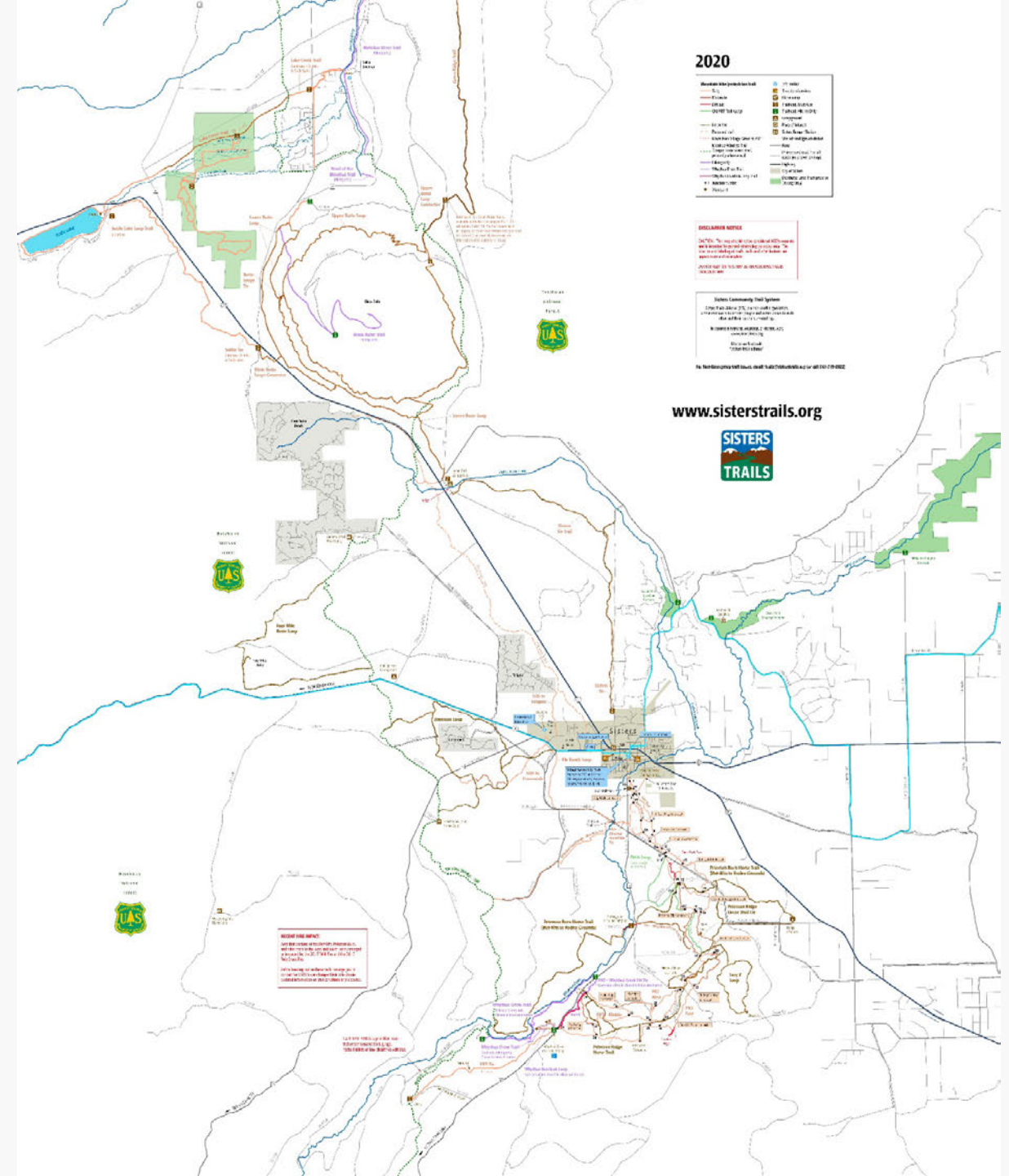
SISTERS TRAILS ALLIANCE

Sisters has a trails organization that was born out of the community visioning work in 2007.

ABOUT: The Sisters Trails Alliance is a non-profit organization, whose mission is to connect people and communities to each other and their natural surroundings. We plan, build and maintain multi-user, non-motorized trails in and around Sisters, Oregon.

In addition to trail advocacy, they [traditionally] hold quarterly talks on trails, outdoor recreation, conservation, water and the environment as well as volunteer work party events.

Map Source: [Sisters Trails Alliance](http://www.sisterstrails.org)



SISTERS RECREATION TRAILS

Sixty-one trails available in the Sisters area through AllTrails.com.

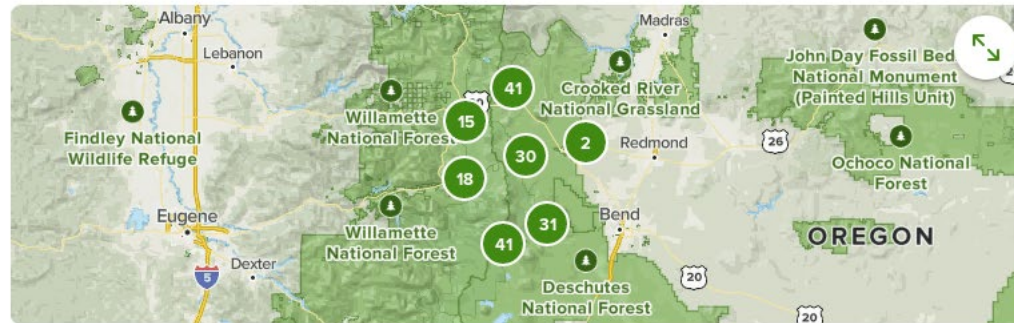


Best Trails in Sisters

★★★★☆ 6,170 Reviews

Looking for a great trail near Sisters, Oregon? AllTrails has 61 great hiking trails, trail running trails, mountain biking trails and more, with hand-curated trail maps and driving directions as well as detailed reviews and photos from hikers, campers, and nature lovers like you. If you're lookin...

Show more



Directions



Share

- Difficulty ▾
- Length ▾
- Elevation gain ▾
- Route type ▾
- Rating ▾
- More filters ▾

Top trails (61)

SISTERS RECREATION TRAILS

Trails provide access to the incredible outdoor experiences.

Difficulty ▾ Length ▾ Elevation gain ▾ Route type ▾ Rating ▾ More filters ▾

Top trails (61)



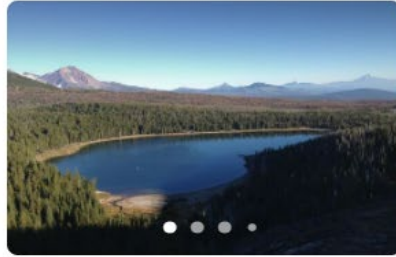
#1 - South Sister Trail

Three Sisters Wilderness

hard ★★★★★ (1659)

Length: 11.6 mi • Est. 8 h 3 m

South Sister is the third tallest mountain in Oregon and the tallest of the famous three-sister chain. The trail enters the Three Sisters Wilderness shortly after leaving the trailhead. [Show more](#)



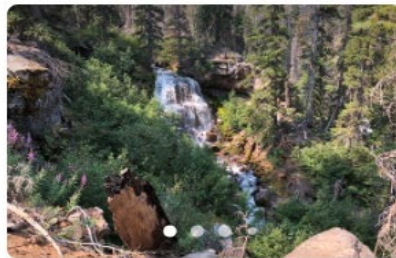
#2 - Tam McArthur Rim Trail

Deschutes National Forest

moderate ★★★★★ (455)

Length: 5.3 mi • Est. 2 h 59 m

You will need an America the Beautiful pass (\$80), Northwest Forest pass (\$30) or pre-purchase a day pass (\$5) before you arrive as there is no fee box at the trailhead. There is limited [Show more](#)



#3 - Upper Chush Falls via Whychus Creek Falls Trail

Deschutes National Forest

moderate ★★★★★ (396)

Length: 5.8 mi • Est. 2 h 53 m



#4 - Broken Top Loop Trail

Three Sisters Wilderness

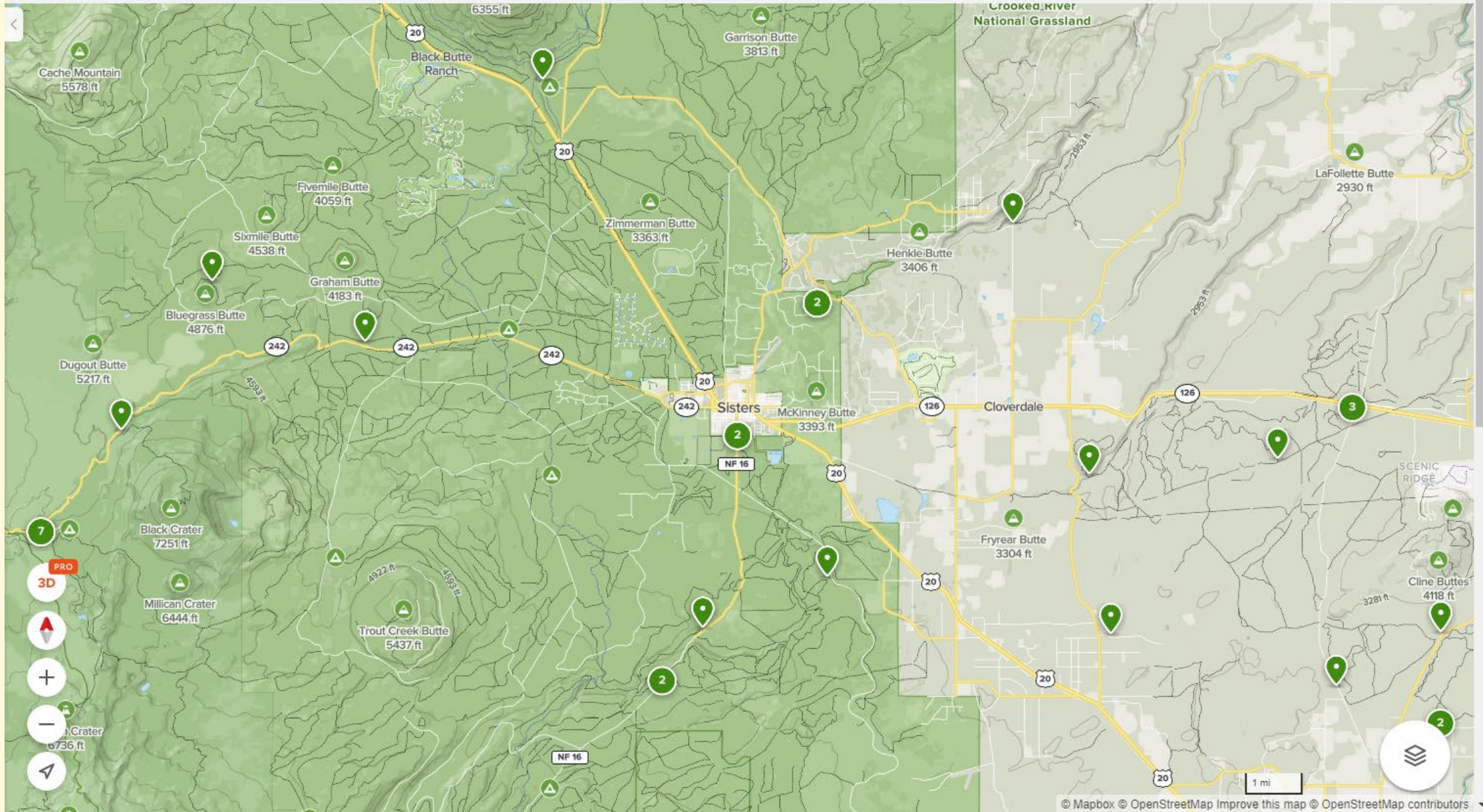
hard ★★★★★ (167)

Length: 25.0 mi • Est. Multi-day

When determining which direction to hike this loop here are some things to consider in addition to more info in the reviews. There are some advantages and disadvantages of doing [Show more](#)

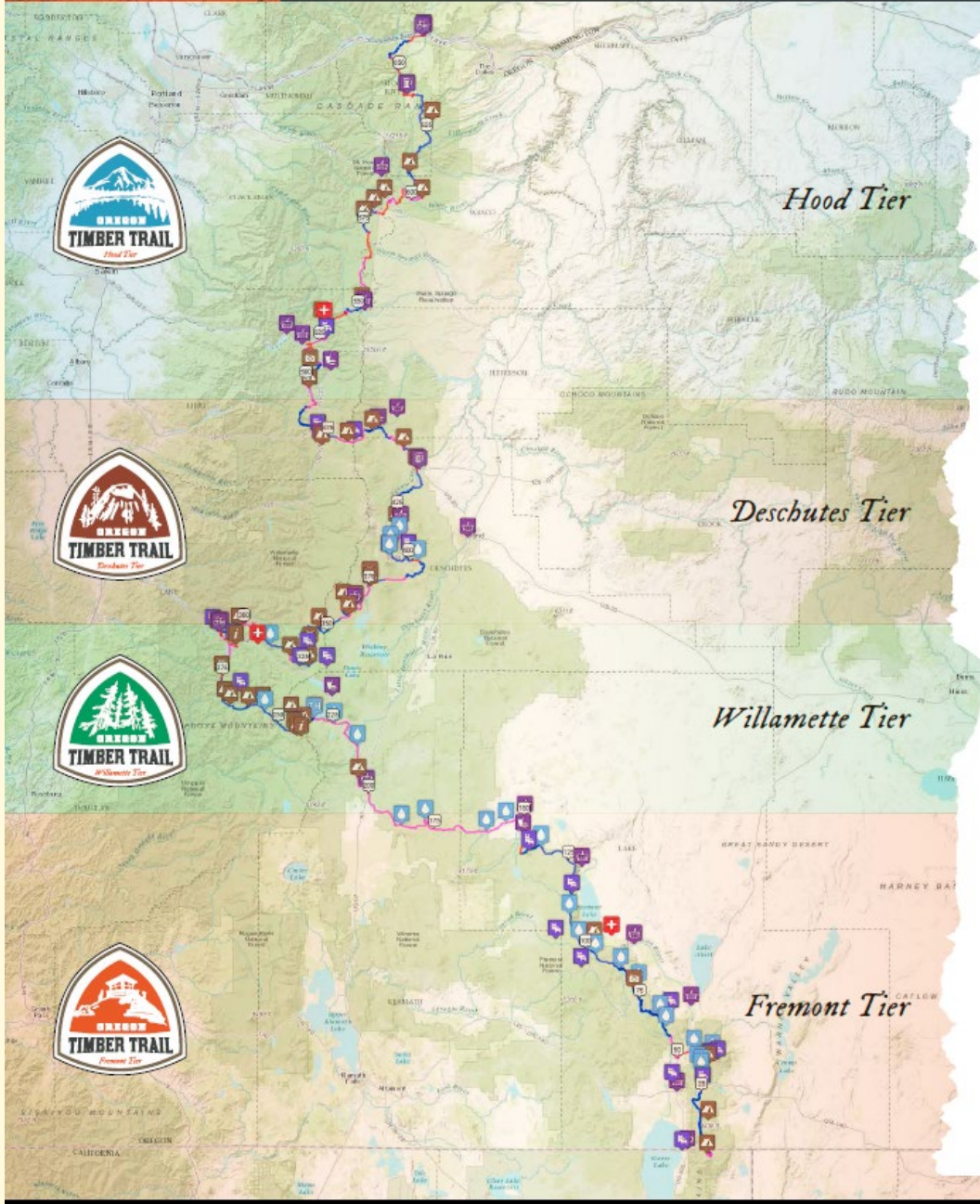


Difficulty ▾ Length ▾ Elevation gain ▾ Time ▾ Route type ▾ Rating ▾ More filters ▾



OREGON TIMBER TRAIL

4 TIERS 670 MILES 66K' ELV GAIN 90% UNPAVED 51% SINGLETRACK 20-30 DAYS



OREGON TIMBER TRAIL

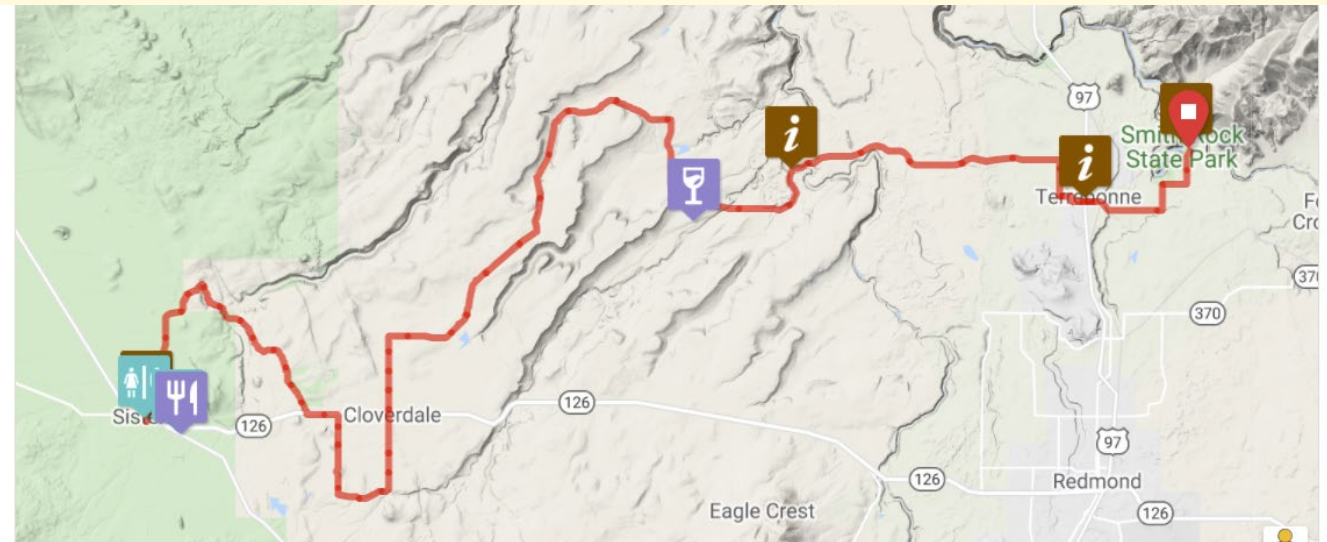
- 670 Miles (51% single track)
- Runs border to border north to south
- Aspirational trail conceptualized for mountain bikers
- Four distinct Tiers
- Links 9 gateway rural communities



SISTERS TO SMITH ROCK

OREGON SCENIC BIKEWAY

- Starts in Sisters
- Route ends at Smith Rock State Park
- 37-mile road cycling route
- Difficulty rated as 'moderate'
- Detailed info:
TravelOregon.com/ScenicBikeways





TransAmerica Trail



TRANS-AMERICAN TRAIL

ADVENTURE CYCLING ASSOCIATION

- Starts in Astoria, Oregon; ends in Yorktown, VA
- Passes right through Sisters
- 4,218-mile road cycling route
- Aspirational, launched in 1976
- Classic route to cross America by bicycle
- Detailed info at:
www.adventurecycling.org



LOCAL PERSPECTIVES

INTERVIEW + FOCUS GROUP RESULTS

SISTERS DESTINATION SCAN

INTERVIEWS

As part of this scan, Crosscurrent conducted one-hour interviews during the summer of 2021 to get a better understanding of local sentiments about the future of tourism.

INTERVIEWS

- Nancy Connolly, City Council, City of Sisters
- Greg Willitts, Five Pines Lodge
- Sue Boettner, Sisters Folk Festival / Bend Parks and Recreation
- Ian Reid, U.S. Forest Service
- Judy Trego, Sisters Chamber of Commerce
- Erin Borla, Roundhouse Foundation



Photo credit: Kristin Dahl

SISTERS DESTINATION SCAN

FOCUS GROUPS

Crosscurrent also conducted 90-minute focus groups to get a better understanding of local sentiments about the future of tourism.

FOCUS GROUPS

General Business

- Javier Luna, Rancho Viejo
- Danny St. Lawrence, Boone Dog Pizza / The Barn
- Rosie Horton, Common Threads

Outdoor Recreation

- Casey Meudt, Blazin' Saddles Bike Shop
- Jeff Perin, Fly Fishers' Place
- Chuck Shepard, Hoodoo Ski Area (invited)





DESTINATION SCAN

INTERVIEWS + FOCUS GROUPS

Interviewees and focus group attendees were asked the following questions:

1. What would a successful tourism and outdoor recreation economy look like in Sisters?
2. What do you believe needs to change in order to have a thriving, successful and sustainable tourism economy?
3. What are the opportunities that you see immediately on the horizon for this region (related to the tourism and outdoor recreation economy)?
4. What initiatives/programs/projects are already underway that a destination strategy could uplift?
5. What might stand in the way? What challenges do you feel may be ahead for the community/region for realizing these opportunities?
6. What do you believe are the community's strongest assets that can be used for advancing this vision of success for the area's tourism and outdoor rec sectors?
7. What are the most important local values that you want to maintain?

VISIONS OF SUCCESS

INTERVIEWS + FOCUS GROUPS

Question 1: What would a successful tourism and outdoor recreation economy look like in Sisters?

What we are known for

- We are a destination that attracts and celebrates diverse visitors
- Sisters is known on its own as a quality destination for winter sports and summer outdoor recreation
- Winter attractions/experiences/events drive off-season visitation

Community's role in the tourism economy

- We have a thriving visitor economy that enhances our way of life – “the importance of locals is recognized in our strategy”
- Community is having a dialogue with one another about tourism – to celebrate success and grapple with the challenges
- Proponents of the visitor economy have more tools to demonstrate the economic return of certain investments (events, trails, etc.)
- We've solved the housing crisis.



Photo credit: Kristin Dahl

VISIONS OF SUCCESS

INTERVIEWS + FOCUS GROUPS

Question 1: What would a successful tourism and outdoor recreation economy look like in sisters?

Outdoor recreation:

- Interconnected and diverse trail system – one that connects users to a diversity of experiences from user types (hiking, biking, equestrian, motorized) to different levels of expertise (easy to difficult) to different landscape experiences (wilderness/backcountry to front country). Key attractions are connected by walking and biking routes/paths.
- Visitor management systems are in place (more widely) to limit and manage use of our resources during peak periods



Photo credit: Kristin Dahl

VISIONS OF SUCCESS

INTERVIEWS + FOCUS GROUPS

Question 1: What would a successful tourism and outdoor recreation economy look like in sisters?

Improved visitor services

- We offer a diversity of guided experiences through local guides and outfitters as well as inbound tour operators
- Higher quality food and service in restaurants
 - More take-away options to support outdoor rec missions
- We have expanded our overnight offerings from more camping options to middle-range/boutique hotels
- More integration of the arts (local talent) into visitor experiences across the board



Photo credit: Kristin Dahl

VISIONS OF SUCCESS

INTERVIEWS + FOCUS GROUPS

Question 1: What would a successful tourism and outdoor recreation economy look like in sisters?

“Something needs to be done to capture more of the salmon on the salmon run. Create eddies or pools for them to circulate around. It would benefit everyone to create more reasons to stop and hang in Sisters. There’s a way to create more opportunities for people to stay.”

~ Business Focus Group



Photo credit: Kerry Prosser, City of Sisters



WHAT NEEDS TO CHANGE?

INTERVIEWS + FOCUS GROUPS

Question 2: What do you believe needs to change in order to have a thriving, successful and sustainable tourism economy?

Downtown / business environment

- City needs to evaluate its codes for new business permitting and new business support. The City could better support new businesses to open and locate within the City limits.
- Options for getting high-quality food needs to be diversified/improved.
- Limitations on restaurant capacity / service needs to be addressed.
- The supply of affordable housing needs to increase.
- Divert the thoroughfare that runs right through the middle of our town. The state highway is a massive divide. This needs to be taken care of.

"Main street needs to be a regular street, not a freeway."



WHAT NEEDS TO CHANGE?

INTERVIEWS + FOCUS GROUPS

Question 2: What do you believe needs to change in order to have a thriving, successful and sustainable tourism economy?

Improve + diversify outdoor recreation experiences

- “In some ways, we are pretty close to our vision!”
- Opportunity to evaluate our infrastructure and opportunities and find ways to ensure we are able to welcome and accommodate diverse users
- Trails - we need more trail options to have a diversity of experiences available from town
- Visitor management systems
- Guides and outfitters - we need them
- Visitor education



WHAT NEEDS TO CHANGE?

INTERVIEWS + FOCUS GROUPS

Question 2: What do you believe needs to change in order to have a thriving, successful and sustainable tourism economy?

Champion the value of tourism

- We need to tell the story better about why tourism is important to this community
- Create a strategy for tourism (management), commit resource and stick with it
- Involve stakeholders

OPPORTUNITIES ON HORIZON

INTERVIEWS + FOCUS GROUPS

Question 3: What are the opportunities that you see immediately on the horizon for this region (related to the tourism and outdoor recreation economy)?

Outdoor Recreation

- Showcase winter outdoor recreation that can be done right now – its not well advertised
- An indoor facility for winter recreation and events
- Developing more and more diverse trail opportunities
- Development of guide services + tour operators
- Create new low-cost recreation amenities in the City

Other

- Develop ‘low-hanging fruit’ experiential opportunities around town to engage people and encourage them to stay
 - Examples: More free music, fly-casting demonstrations
 - Infuse Sisters’ unique artistry throughout experiences



Photo credit: Kristin Dahl

OTHER PLANS + INITIATIVES

INTERVIEWS + FOCUS GROUPS

Question 4: What initiatives/programs/projects are already underway that a destination strategy could uplift?

- The opening of The Barn food cart pod concept
- Bike park revamp through Sisters Parks + Rec
- Sisters' new Parks and Recreation Plan – many good things in there
- Visit Bend's Sustainability Fund – opportunity to fund projects in the County or neighboring areas at least
- The work of Discovery Your Forest to educate visitors and raise money through its \$1 for Trails program
- The re-visioning of outdoor recreation amenities in the burned areas of the USFS Sisters Dist. (winter 2021-22)
- USFS Metolius Management Plan revisions – working on dispersed camping and boater registration
- USFS Review of the Sisters Wilderness permit system (winter 2021-22)
- New USFS ranger station is being planned for the Sisters District (est. opening 2024)





WHAT MIGHT STAND IN THE WAY?

INTERVIEWS + FOCUS GROUPS

Question 5: What might stand in the way? What challenges do you feel may be ahead for the community/region for realizing these opportunities?

- People in the community opposing good ideas because they're afraid of change
- Our inability to develop more experiences with our assets to meet the increased demand in our area
- Lack of focus and not having a good strategy in place
- Changeover with city staff/city leadership
- Despite the increased funding coming in from TLT, not seeing strong leadership
- Rapid growth in the community, many fed up – weary of more marketing
- Affordable housing
- Public land managers deciding to limit access rather than address negative visitor behavior proactively

COMMUNITY'S STRONGEST ASSETS

INTERVIEWS + FOCUS GROUPS

Question 6: What do you believe are the community's strongest assets that can be used for advancing this vision of success for the area's tourism and outdoor rec sectors?

- We have a genuine tourist economy
- Outdoor stuff!
- Businesses that are unique to Sisters
- Events that are unique to Sisters
- Folk music / music vibes
- The quilting thing
- Food innovation
- We have real funding for programming here
- Roundhouse Foundation
- Commitment from community



SISTERS FARMERS MARKET

BY SEED TO TABLE



FIR STREET PARK
SUNDAYS 11-2PM
JUNE 6-OCTOBER 3



SISTERSFARMERSMARKET.COM

art by Aly Miller @aly_illustrations

LOCAL VALUES TO RETAIN

INTERVIEWS + FOCUS GROUPS

Question 7: What are the most important local values that you want to retain?

- Small town vibe
- Our vibrancy!
- Connectedness / community feeling
- Can-do spirit
- The places we cherish are not overrun and remain enjoyable places
- Being open to change / open to growth
- Our love and appreciation for the arts, music, outdoor recreation and our Western heritage



SUMMARY

INTERVIEWS + FOCUS GROUPS

A few observations in summary

- You have a community with a lot of heart, soul and character
- Everyone I spoke with is passionate about this place – there is a deep and genuine love for Sisters Country
- But there is also deep concern about where the City is headed – big issues – growth, affordable housing, the community sentiment getting in its own way
- People are ready to roll up their sleeves to work on setting the future direction for tourism and outdoor recreation

COMMUNITY REPORT & PLAN REVIEW

HIGHLIGHTS

REPORTS OVERVIEW

Report Name	Topic	Date	Author
Arts, Culture and Oregon's Economy	Arts & Economy	December 2012	ECONorthwest
Arts & Economic Prosperity 5 (Central Oregon)	Arts & Economy	2017	Americans for the Arts
Chamber Strategic Plan	Chamber	2021-2023	Sisters Area Chamber
Chamber Contract + Extension	Chamber	6/2020 & 6/2021	City + Chamber
Chamber Report and Member Update	Chamber	2019	Sisters Area Chamber
Sisters Committee on Tourism Background Information	Chamber	2021?~	Sisters Area Chamber
"What does the Chamber do" flyer	Chamber	??	Sisters Area Chamber
Public Safety Survey: Report of Results	City	October 2019	City
Transportation System Plan Refinement	City	June 2018	City + Kittelson & Associates + ODOT
Local Business Owners Survey: Report of Results	City	August 2018	City
2020 Business Survey: Report of Results	City	January 2021	City
Proposed Budget Fiscal Year 2021/22	City	2021	City
Parks Master Plan	City	Adopted 2011, Updated 2016	City
Urban Area Comprehensive Plan	City	Adopted 2005, Update: April 2020	City
Transient Room Tax Form	City (TLT)		City
TLT History	City (TLT)		City

REPORTS OVERVIEW

CONTINUED

Report Name	Topic	Date	Author
TLT History – Timeline (Excel)	City (TLT)	2021	City Staff
Community Assets Committee: All Projects (PowerPoint)	City (Committee)		Community Asset Committee (CAC)
Community Asset Committee: Handout (pdf)	City (Committee)		Community Asset Committee (CAC)
2021 Central Oregon Economic Profile	Economy	2021	EDCO
2021 Sisters Economic Profile	Economy	2021	EDCO
Oregon Statewide Comprehensive Outdoor Recreation Plan (SCORP) 2019-2023	Recreation	2019-2023	Oregon Parks and Recreation Department
Trails as an Economic Driver: Case Study – Sisters Oregon	Recreation	2012	EDCO: Sisters – Caprielle A Lewis
Downtown Sisters Urban Renewal Plan	Urban Renewal	Adopted 2003; Updated September 2020	Urban Renewal Plan Advisory Committee
URA – Updated Project List	Urban Renewal	2020	Urban Renewal Plan Advisory Committee
Sisters Country Vision: Action Plan	Vision	June 2019	Sisters Country Horizons
Sisters Country Vision: Annual Progress Report 2020-2021	Vision	2021	Sisters Country Horizons

EXPERIENCE DEVELOPMENT - GENERAL

STRATEGIC FOCUS AREA

Activities and attractions form the backbone of the visitor experience, so strong tourism leadership benefits from an inventory of community assets and the evaluation of their quality, some Sisters initiatives are already underway.

PROJECT HIGHLIGHTS

- **Community Asset Committee** – evaluation of; Field House; Winter Sports Park; Art, History, and Science Center ; Convention Center; and Combo project.
- Vision – Develop Arts as an Economic Sector
- Vision – Artist Studio Tour
- Vision – Inventory of Community Assets



EXPERIENCE DEVELOPMENT - RECREATION

STRATEGIC FOCUS AREA

Recreation and Outdoor experiences are a popular and growing segment of activities. Sisters is also located conveniently close to Bend, which has a strong reputation for recreation activities and manufacturing.

PROJECT HIGHLIGHTS

- City Parks Master Plan – Develop wayfinding; and install interpretive signage in parks
- Community Asset Committee – Field House, Winter Sports Park, and Combo project all emphasize recreation
- Vision – County Rural Trails System
- Vision – Creekside Riparian
- Vision – Mt. Jefferson trail bridge



EXPERIENCE DEVELOPMENT - WINTER

STRATEGIC FOCUS AREA

Diversifying experiences to increase winter visitation is a key topic for Sisters stakeholders, as it would help reduce seasonal economic fluctuation.

PROJECT HIGHLIGHTS

- Community Asset Committee – all projects were positioned as assets for winter months
- Vision- Winter Event development
- Vision – Multi-use Community Center



VISITOR MANAGEMENT

STRATEGIC FOCUS AREA

Management is a core foundational activity that ensures best practices are identified and used by local tourism leadership organizations, core competencies are developed, and steps are taken to identify and minimize negative from visitation

PROJECT HIGHLIGHTS

- USFS Wilderness Permit Program
- Vision – Monthly ‘Let’s Talk!’ meetings
- Vision – Sisters Housing Plan
- UAC – Parking space & facility planning



IMPROVING BUSINESS CLIMATE

STRATEGIC FOCUS AREA

One of the most effective ways to create and improve visitor experiences and create a robust tourism economy is to improve the capacity and skills of local businesses, as well as create a supportive and sustainable climate for them.

PROJECT HIGHLIGHTS

- EDCO – Sisters Economic Development loan fund and incentive programs
- UAC – Urban Renewal District & TIF funding
- Vision – Inventory & Siting needs for light industry
- Vision – Youth Career Connect in Sisters
- Vision – Makers District & Marketing
- Vision – Sisters Housing Plan Update



TRANSPORTATION

STRATEGIC FOCUS AREA

While not always immediately top of mind, Transportation is an important topic. Public transit can reduce visitor congestion and increase visitation. Trails and walking paths can serve as activities and increase business patronage. And traffic patterns have a large impact on visitor and local sentiment.

PROJECT HIGHLIGHTS

Walkability & Cycling

- UAC: Spot Improvement program
- UAC : Construct additional pedestrian and bicycle paths and trails
- Vision - Pine Street pathway project

Rerouting Highway 20

- UAC – Special Transportation Area designation for Highway 20



TOURISM DATA

STATEWIDE HIGHLIGHTS

The Economic Impact of Travel

EXECUTIVE SUMMARY

Oregon

2020 Preliminary

April 2021

PREPARED FOR



State Impacts / Key Statistics

State Travel Impacts



49.5% Decrease in Travel Spending

Total direct travel spending in the state declined 49.5% from \$12.8 billion in 2019 to \$6.5 billion in 2020.



26,200 Jobs Lost

Employment directly related to travel declined by 22.1% from an average of approximately 118,500 jobs in 2019 to 92,300 jobs in 2020.



19.3% Reduction in Travel Earnings

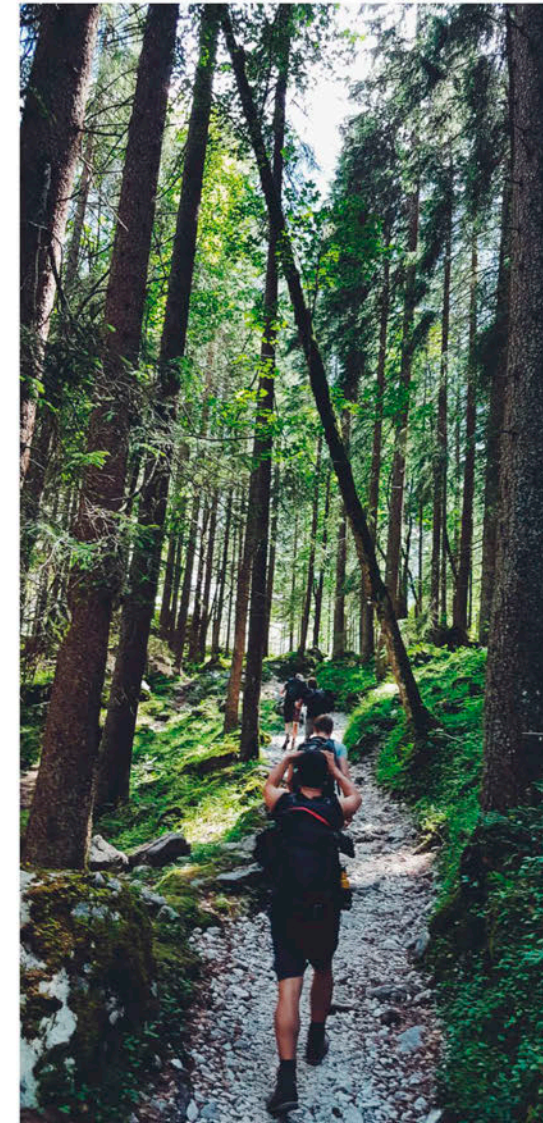
Earnings directly related to travel declined by 19.3% from \$3.8 billion in 2019 to \$3.1 billion in 2020.



27.8% Decrease in Tax Revenue

Taxes directly related to travel declined by 27.8% from approximately \$1.3 billion in 2019 to \$967 million in 2020.

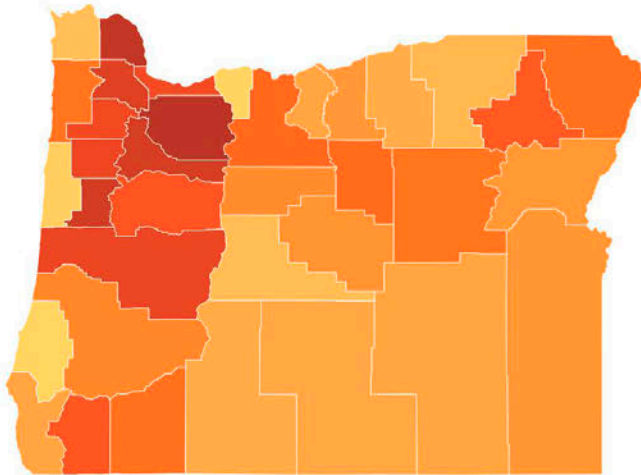
These preliminary estimates for Oregon are subject to revision as more complete source data become available.



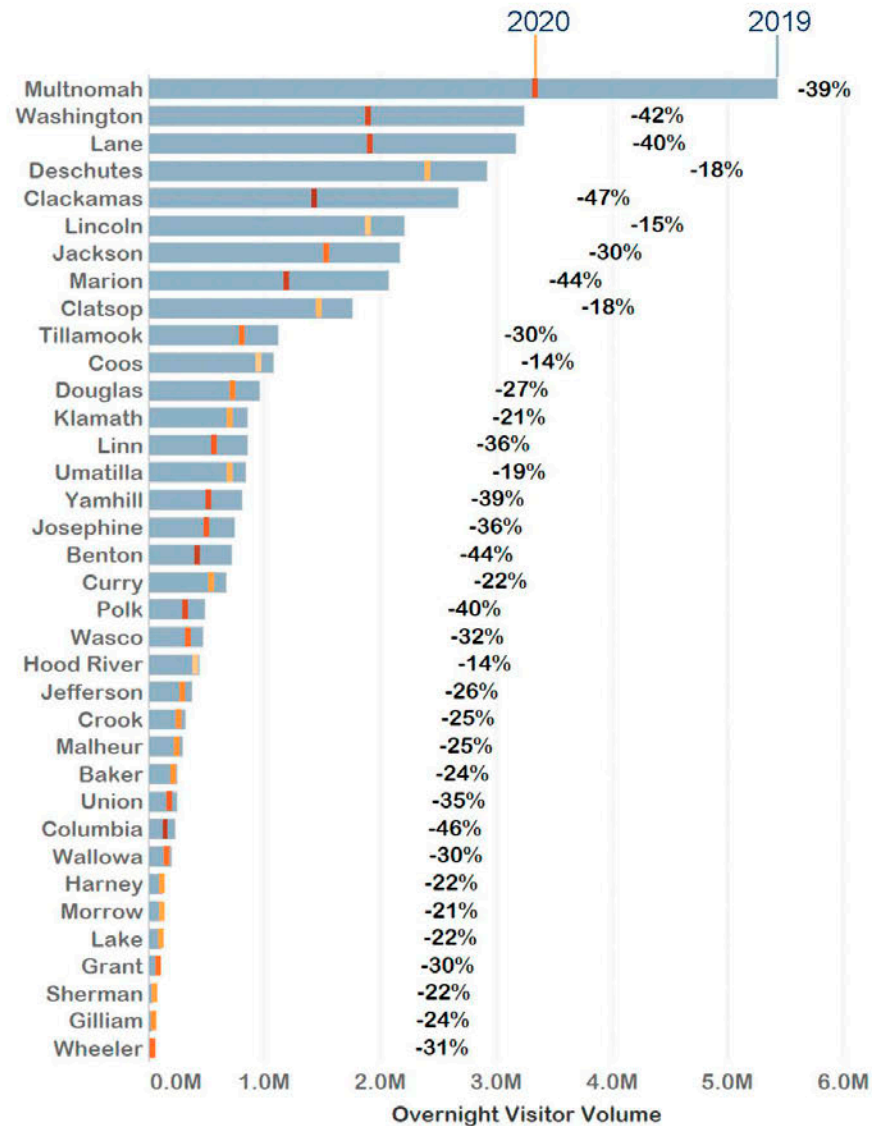
State Impacts / Key Statistics

County Visitation

Across the state, 2020 was a challenging year for the travel industry. Statewide actions to limit the spread of the COVID-19 virus began in March 2020 and were in effect to some degree for most of 2020. **Oregon received an estimated 20.2 million visitors in 2020, 32% lower than in 2019.** Trips were especially down in urban areas, as air visitation to Oregon airports declined sharply and travelers pursued lesser risk rural settings.



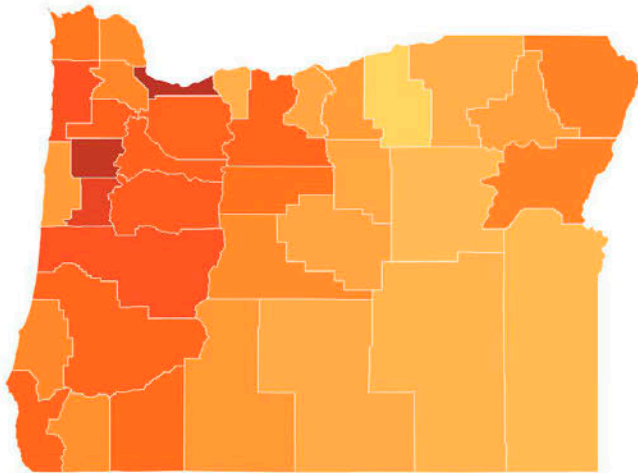
Change in Visitor Volume
-47.2% -14.0%



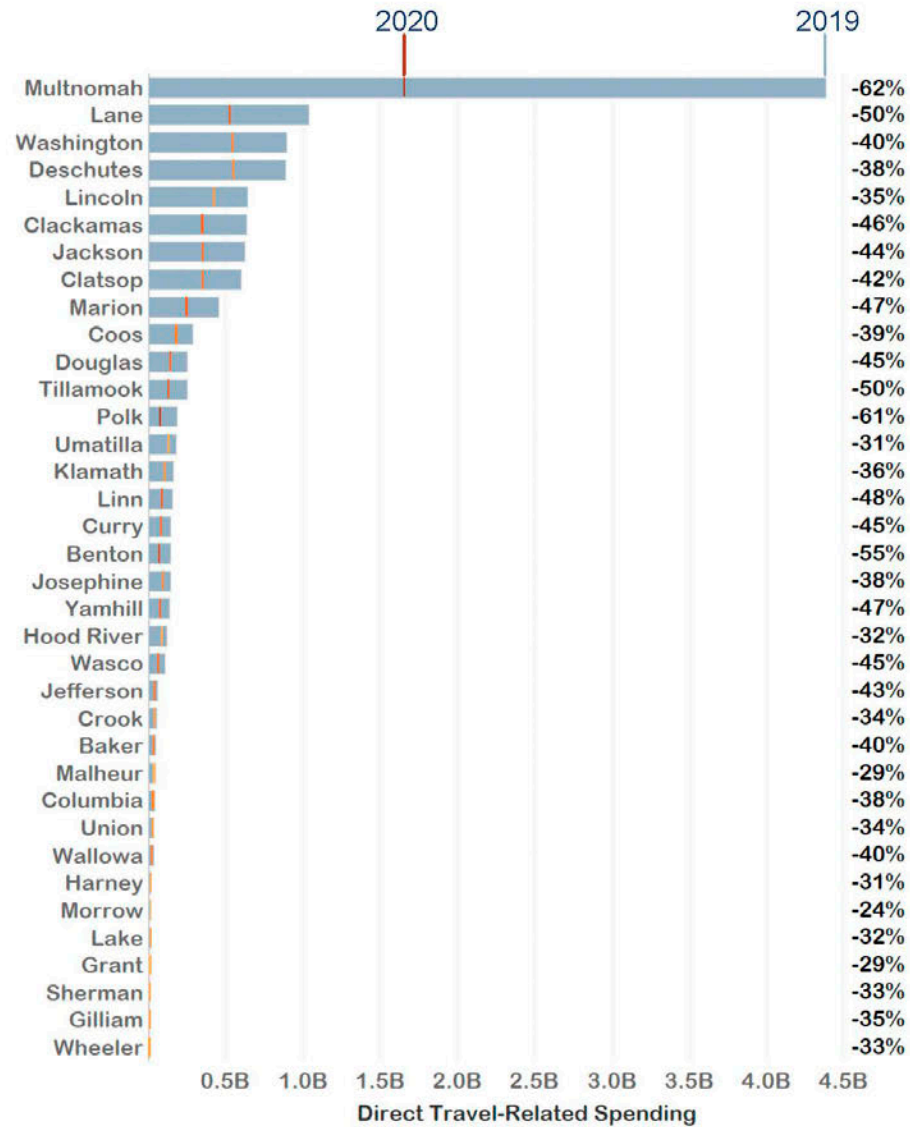
State Impacts / Key Statistics

County Travel Spending

Similar to visitation across the state, direct travel-related spending decreased significantly in 2020. Decreases in spending ranged from -62.3% for Multnomah County to -24.2% for rural Morrow County.



© 2021 Mapbox © OpenStreetMap



TOURISM CONTEXT

Central Oregon Region



Deschutes County



Sisters Country



Municipal Sisters

Sisters is located within Deschutes County, a core part of the Central Oregon Tourism Region

Dean Runyan provides annual data on State, Region, and County travel impacts, but City level data is not provided.

Tourism Lodging Tax (TLT) collection info is available at a city level.

Oregon / Tourism Regions

- Central Coast**
 - West Douglas
 - West Lane
 - Lincoln
- Central Oregon**
 - Crook
 - Deschutes
 - Jefferson
 - South Wasco
- Eastern Oregon**
 - Baker
 - Gilliam
 - Grant
 - Harney
 - Malheur
 - Morrow
 - Sherman
 - Umatilla
 - Union
 - Wallowa
 - Wheeler
- Mt. Hood & Columbia River Gorge**
 - East Clackamas
 - Hood River
 - East Multnomah
 - North Wasco
- North Coast**
 - Clatsop
- Tillamook**
- Portland Region**
 - West Clackamas
 - Columbia
 - West Multnomah
 - Washington
- South Coast**
 - Coos
 - Curry
- Southern Oregon**
 - East Douglas
 - Jackson
 - Josephine
 - Klamath
 - Lake
- Willamette Valley**
 - Benton
 - South Clackamas
 - East Lane
 - Linn
 - Marion
 - Polk
 - Yamhill





**TRAVEL
OREGON**

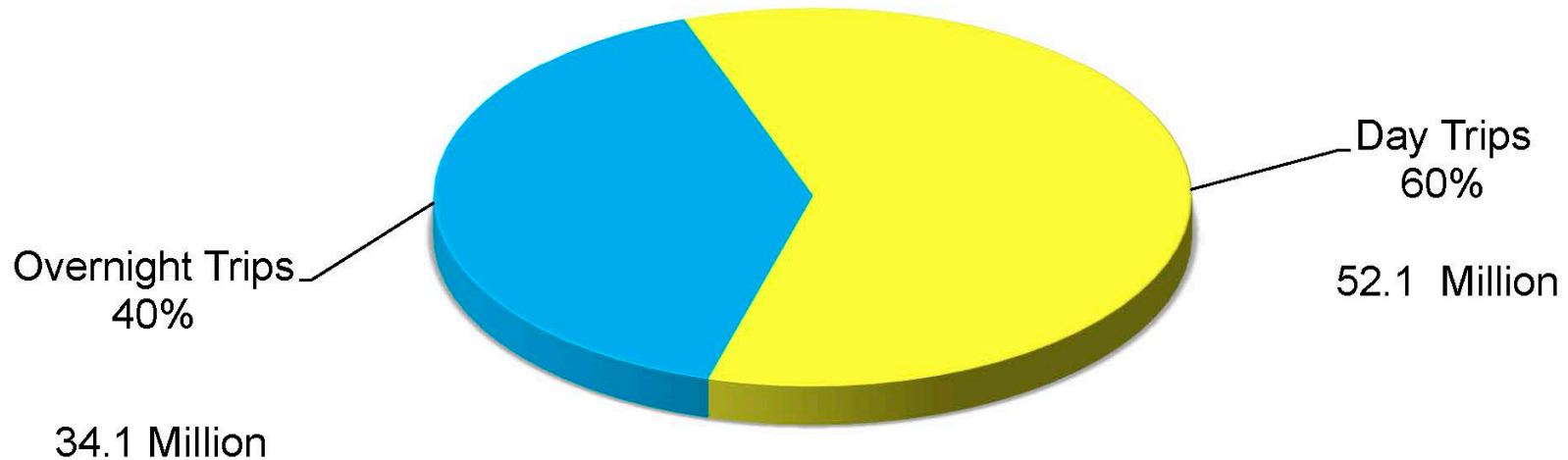
Oregon 2017 Visitor Research



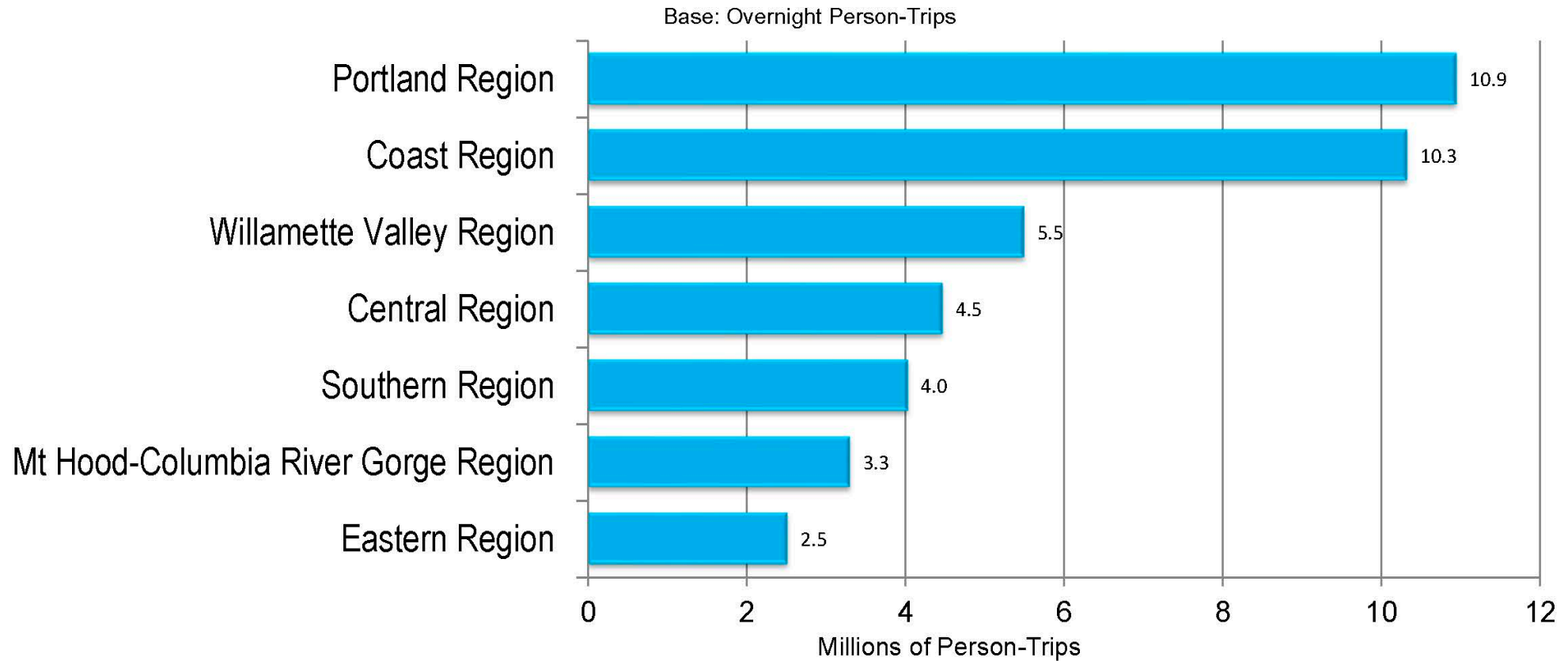
Total Size of Oregon 2017 Domestic Travel Market

Total Person-Trips = 86.2 Million

+3.9% vs. 2015



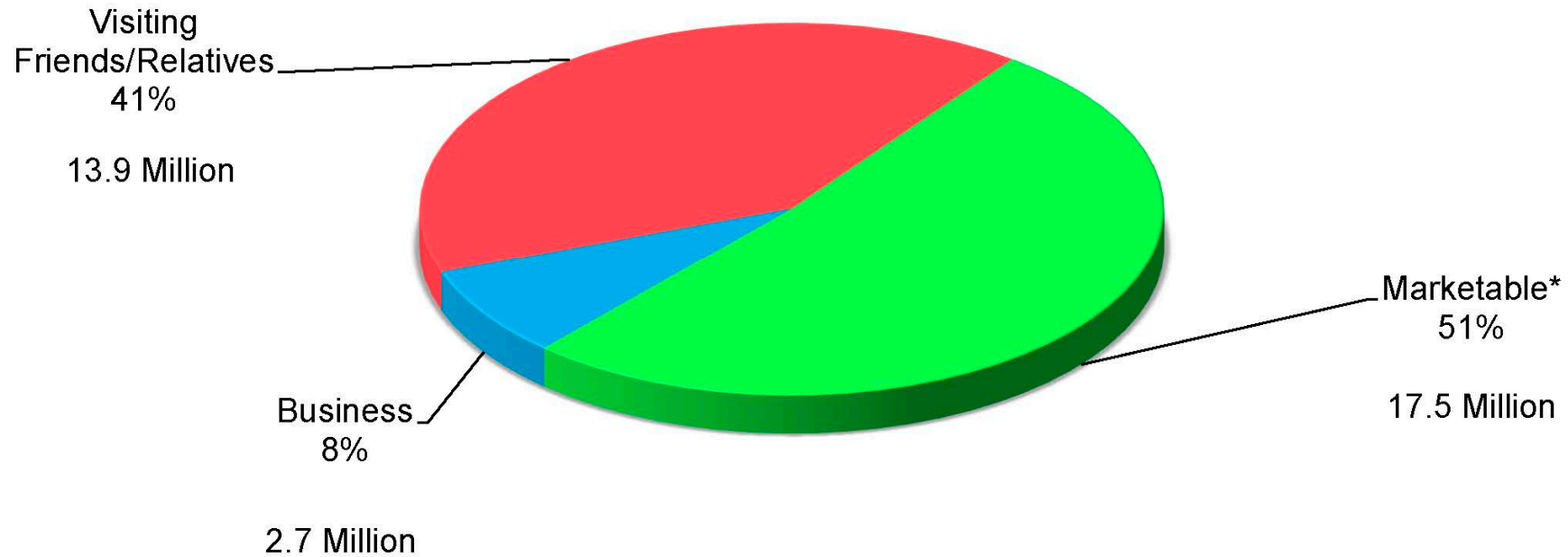
Oregon Regional Overnight Travel Volume*



*Adds to more than total state overnight volume because people may visit more than one region on a trip

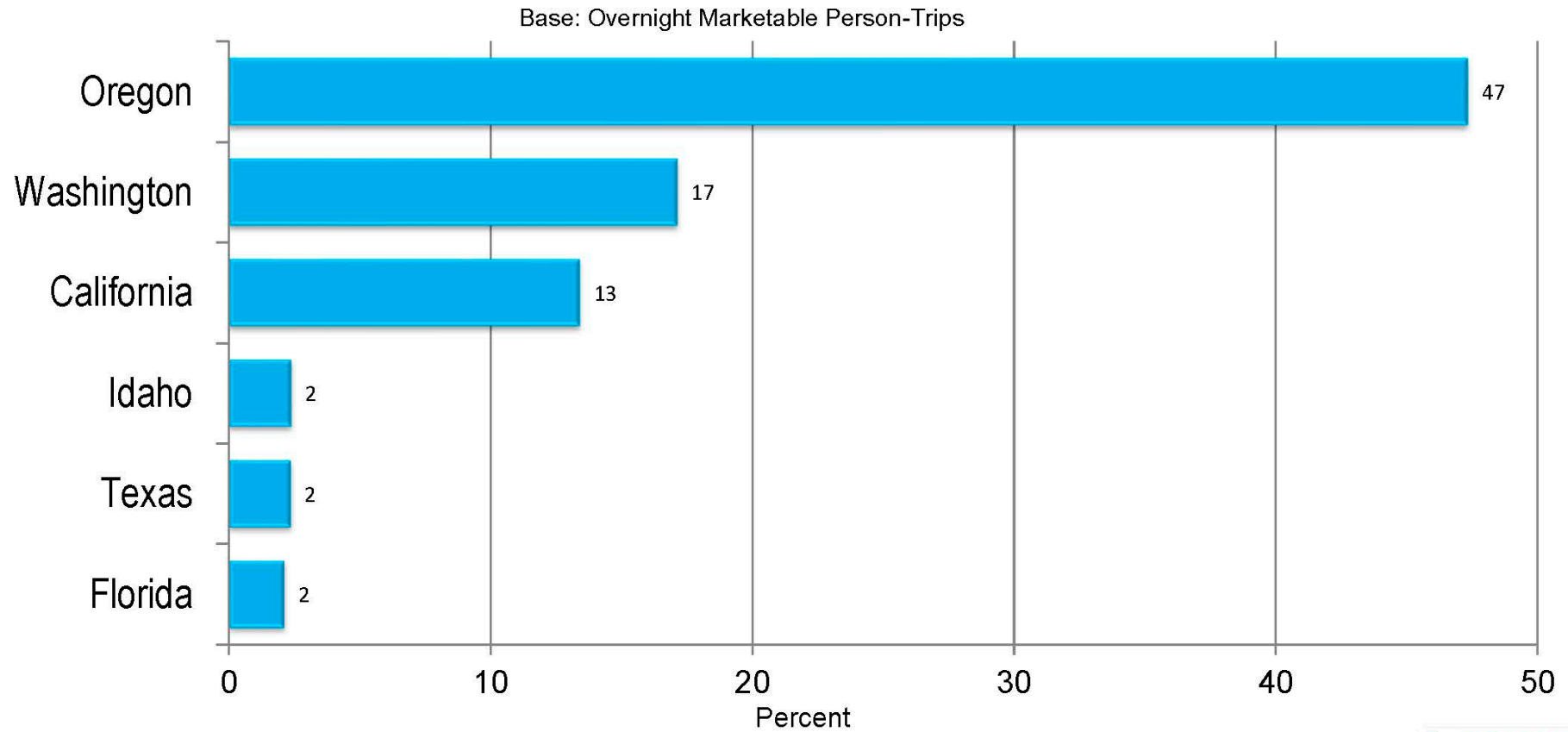
Oregon Overnight Travel Market — by Main Trip Purpose

Total Overnight Person-Trips = 34.1 Million

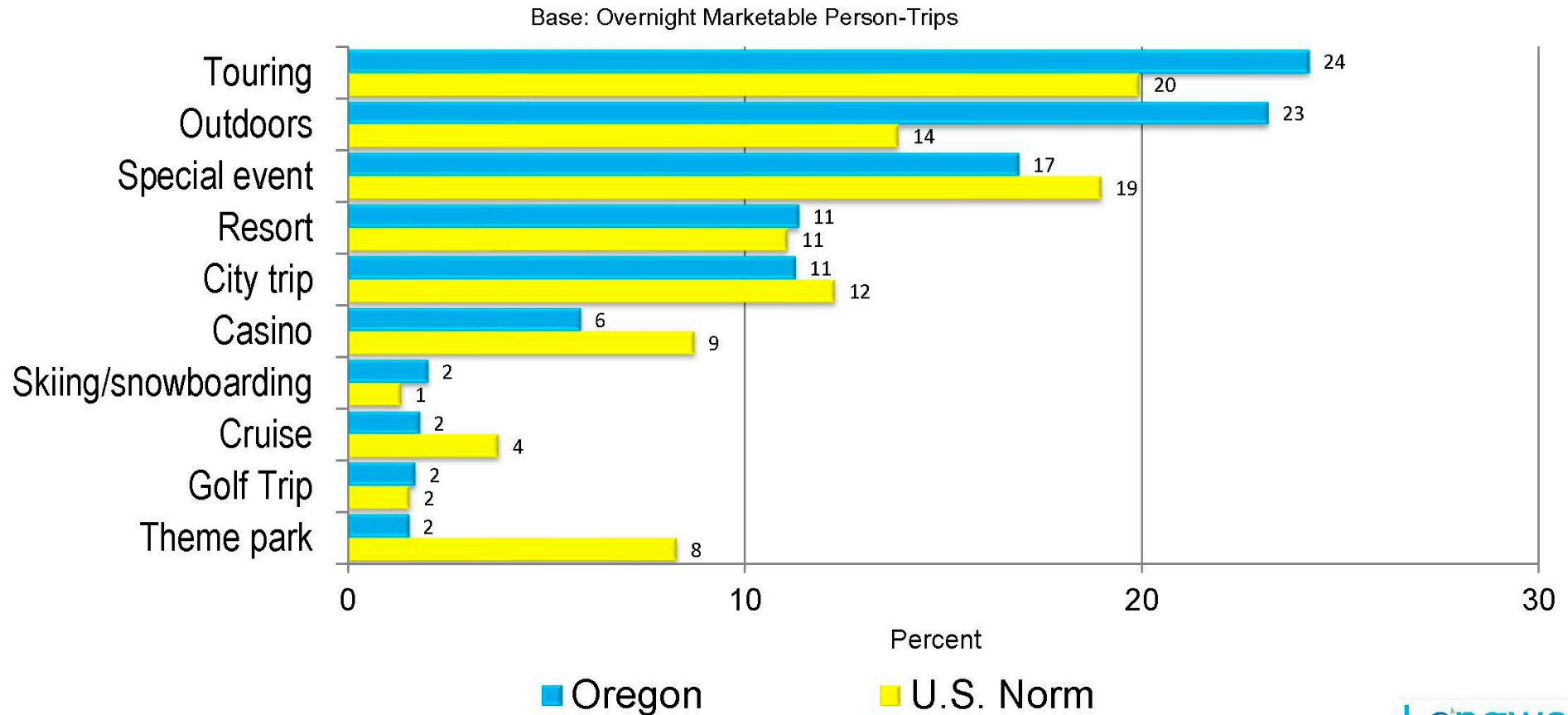


*Marketable includes Business-Leisure

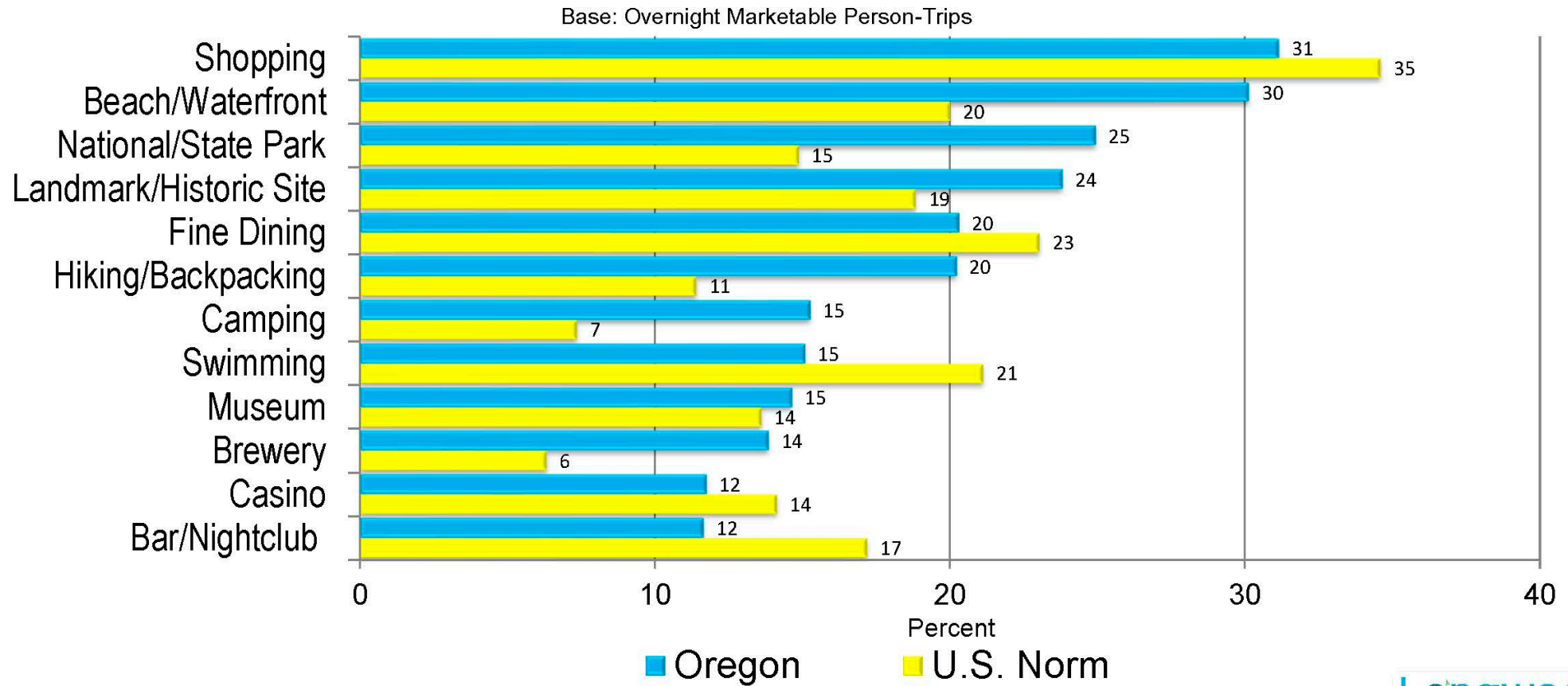
State Origin Of Trip



Main Purpose of Marketable Trip – Oregon vs. National Norm



Activities and Experiences



TOURISM DATA

REGIONAL — CENTRAL OREGON



TARGET AUDIENCE

Research Results

WHAT THE NUMBERS TELL US...

COVA's consumer research tells us that while we welcome visitors from around the globe, over 70% of Central Oregon's primary audience lives on the West Coast: **Oregon (40%), California (19%), Washington (13%)**.

Our research also shows that while the average household income in the U.S. is \$52,700, the average household income of COVA's target consumer is significantly higher, **with over 60% making more than \$100,000 annually**.

No matter from whence they travel, **Central Oregon visitors love recreation and seek unique experiences**. COVA's annual research affirms that hiking, rafting, golf and visiting museums and art galleries are some of our consumers' favorite activities.

PSYCHOGRAPHICS

Outdoor enthusiasts with a high propensity for recreation. Discriminating travelers who prefer finer brands and activities and want their own unique experiences as opposed to a pre-packaged "cruise ship" trip.



DEMOGRAPHICS

Adults between the ages of 35-64. Families with children still in the home (30%). Couples with no children or with children living outside the home (50%). Annual household income above \$100,000.



TARGET AUDIENCE

Personas



WORKING PROFESSIONALS
for whom vacations and experiences are key



FAMILIES
and multi-generational travelers making lifetime memories



ASPIRATIONALISTS
who seek experiences surrounded by the outdoors, without giving up amenities



ADVENTURERS
interested in active experiences



EMPTY NESTERS
with the freedom to travel spontaneously and frequently



TARGET AUDIENCE

Personas



Marcus, 34

BUDDY TRIP GOLF PROFILE / MILLENNIALS

Home: Los Angeles, California
Household Income: \$100,000
Occupation: Account Executive
Family Status: Single

Marcus is an up and coming Account Executive. He is single and has some disposable income which he uses to travel and have authentic, unique experiences. Marcus is organizing a buddies golf trip to Central Oregon this year for the first time. He narrowed down his list and chose this destination due to direct flights, other available activities and best shoulder season rates.

Marcus has many interests, one of which is golf. He chose Central Oregon because of the great golf product, but also the many different post-round activities that are available. Marcus does almost all of his research and booking online. He uses social media to view the courses and post-round activity and sites like Yelp and Trip Advisor to review the courses and lodging. Marcus is connected to his world through social media and uses it as a way to journal and create memories that he can share with his friends and family.

Marcus loves to travel and while he will continue to visit and explore new destinations, his experience during this trip will determine whether he will become a repeat visitor.



3 Night stay in September

Lodging	\$ 600.00
Recreation	\$ 500.00
Food & Beverage	\$ 400.00
Retail	\$ 300.00
	\$1,800.00

*Overnight golfers in Central Oregon spend an average of \$264 per day - 87% more than the average overnight visitor.



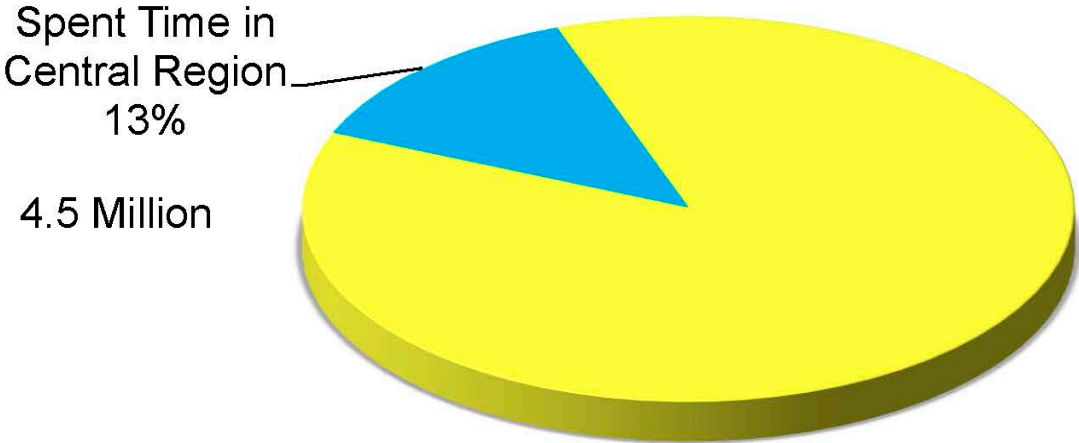
**TRAVEL
OREGON**

Oregon 2017 Regional Visitor Report Central Region



Size of the Central Region's Overnight Travel Market

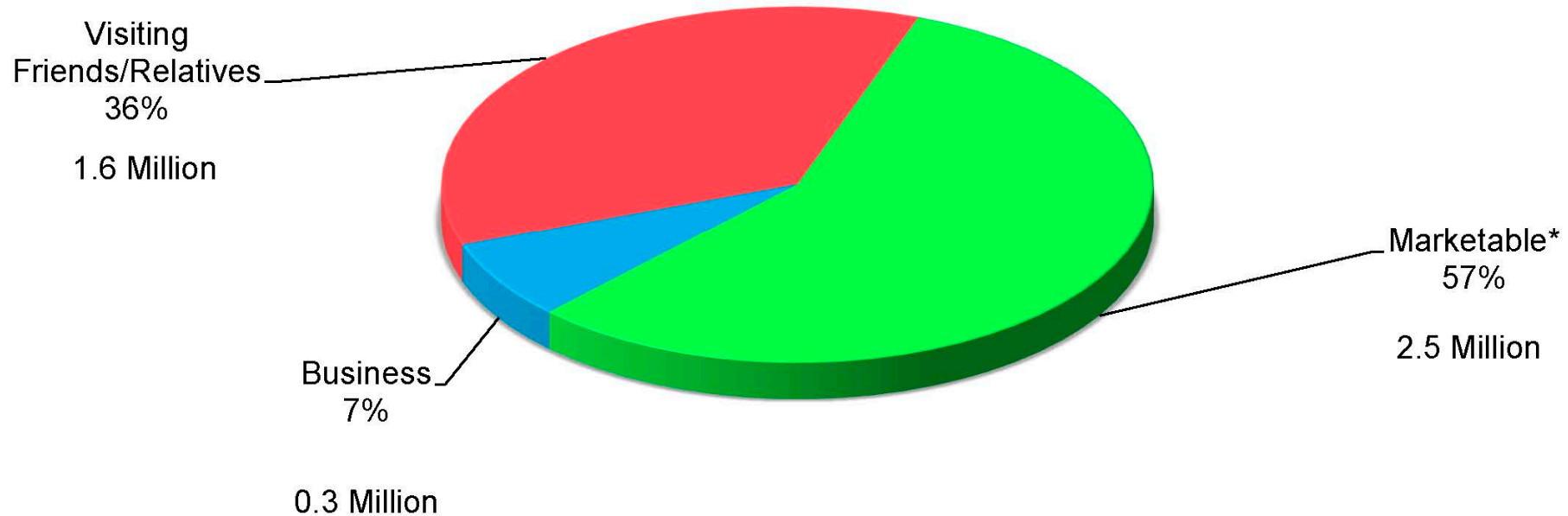
Total Overnight Trips to Oregon* = 34.1 Million



*Includes both adults and children

The Central Region's Overnight Travel Market — by Main Trip Purpose

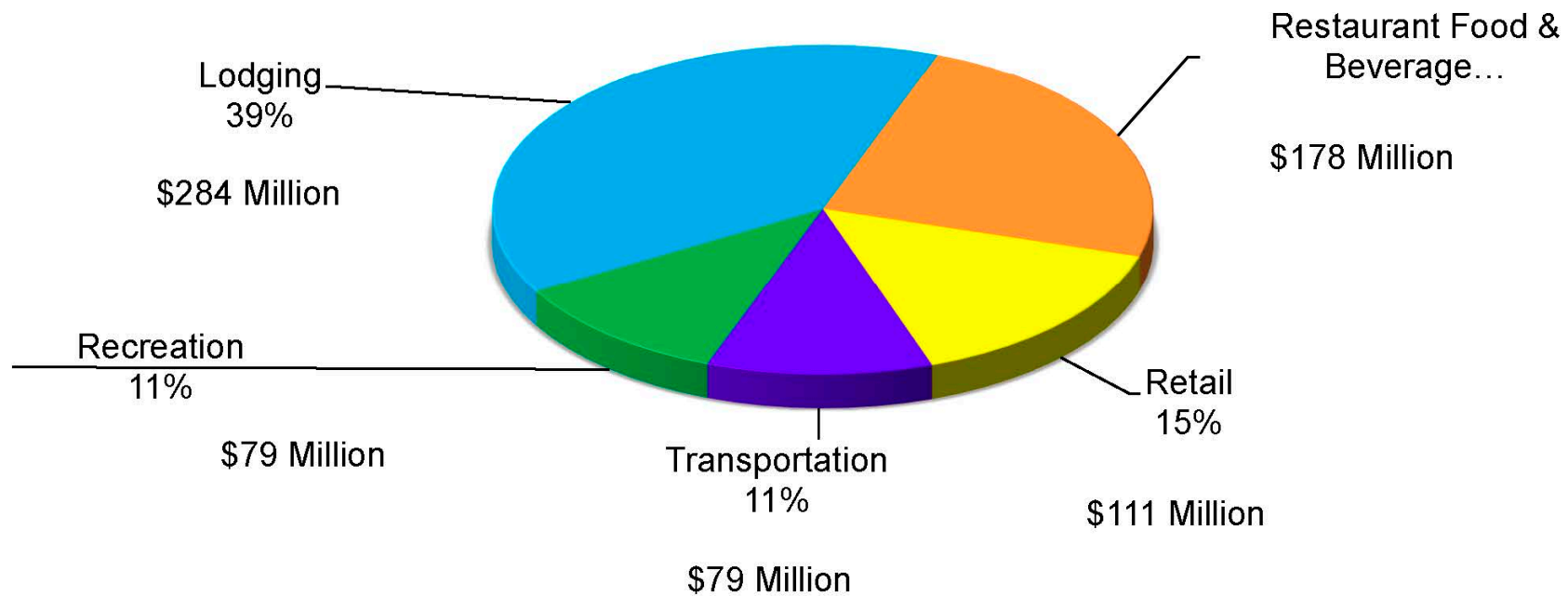
Total Overnight Trips to the Central Region = 4.5 Million



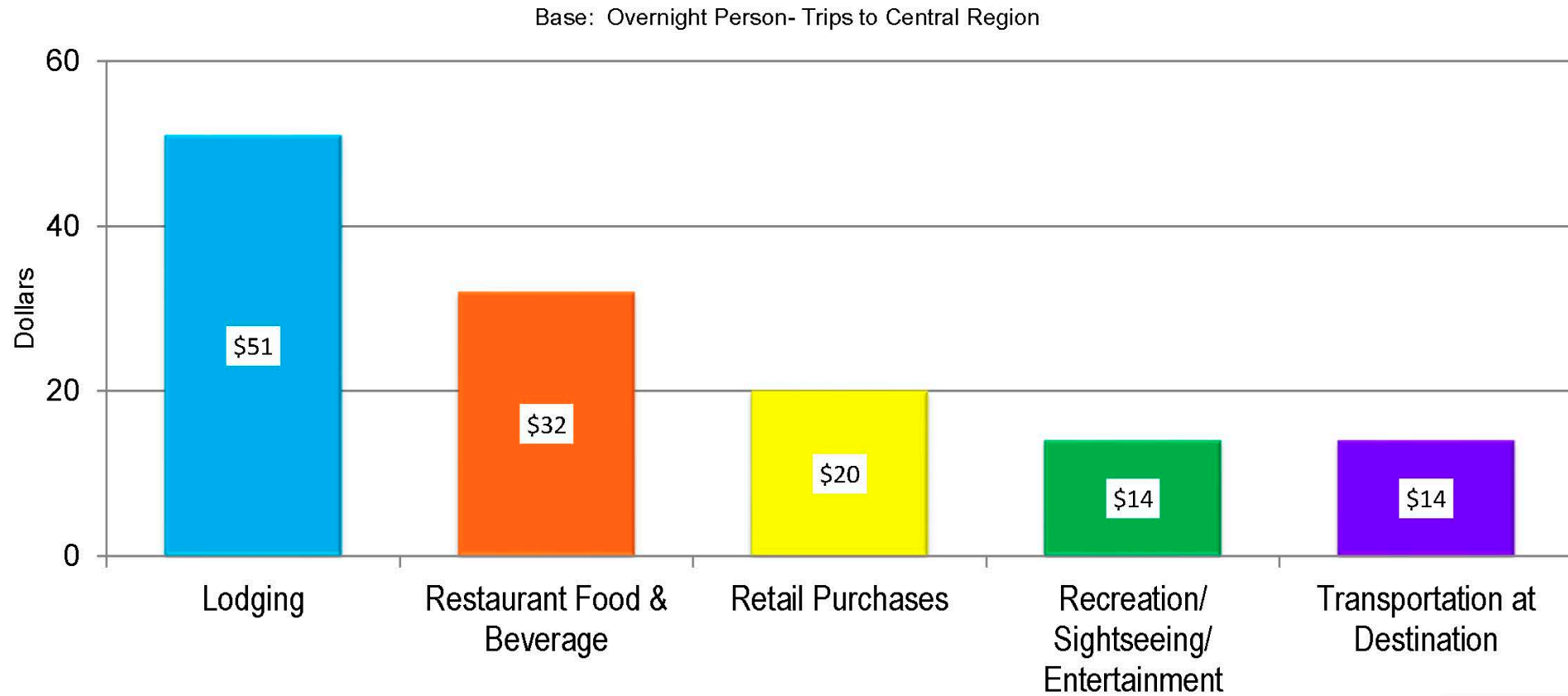
*Marketable includes Business-Leisure

2017 Overnight Expenditures — by Sector

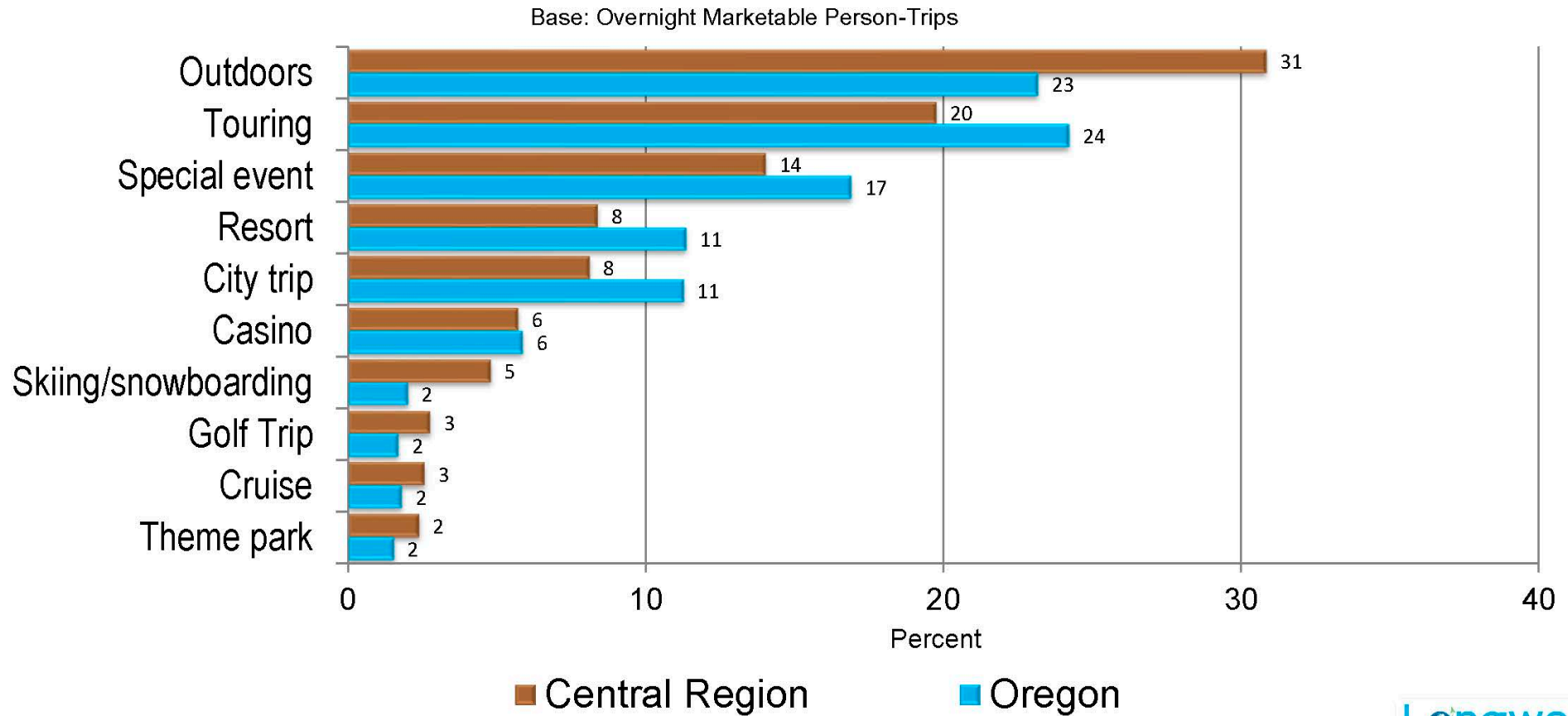
2017 Central Region Spending = \$731 Million



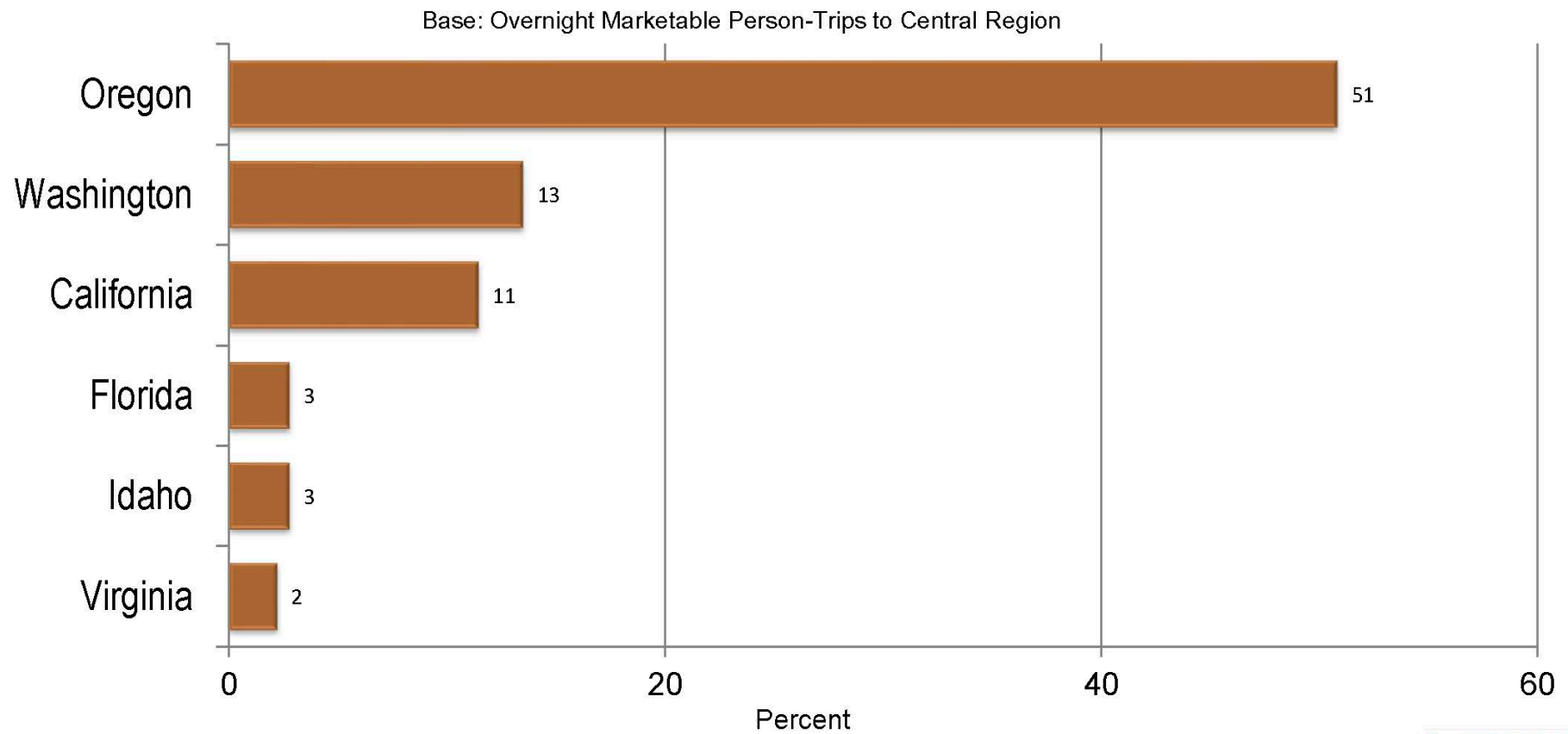
Average Per Person Expenditures on Overnight Trips — By Sector



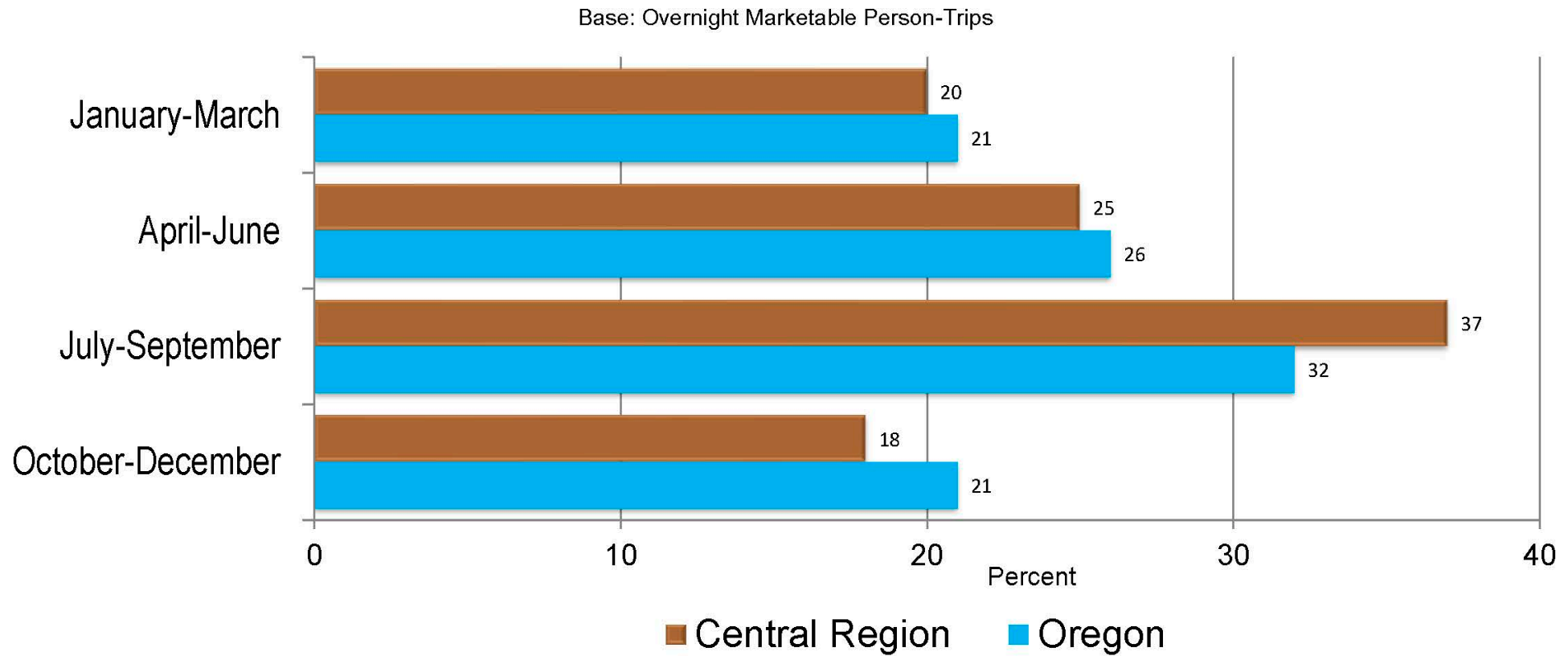
Main Purpose of Marketable Trip – The Central Region vs. State Norm



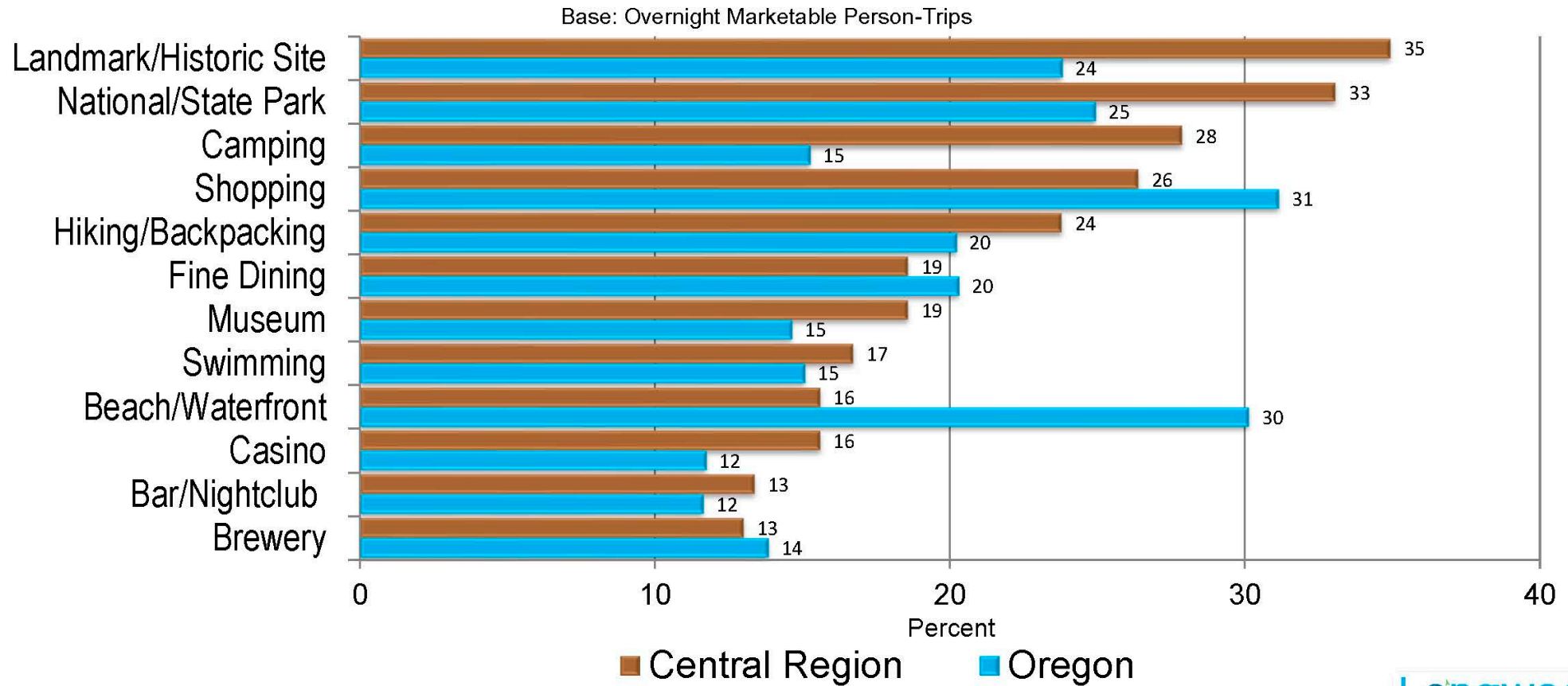
State Origin Of Trip



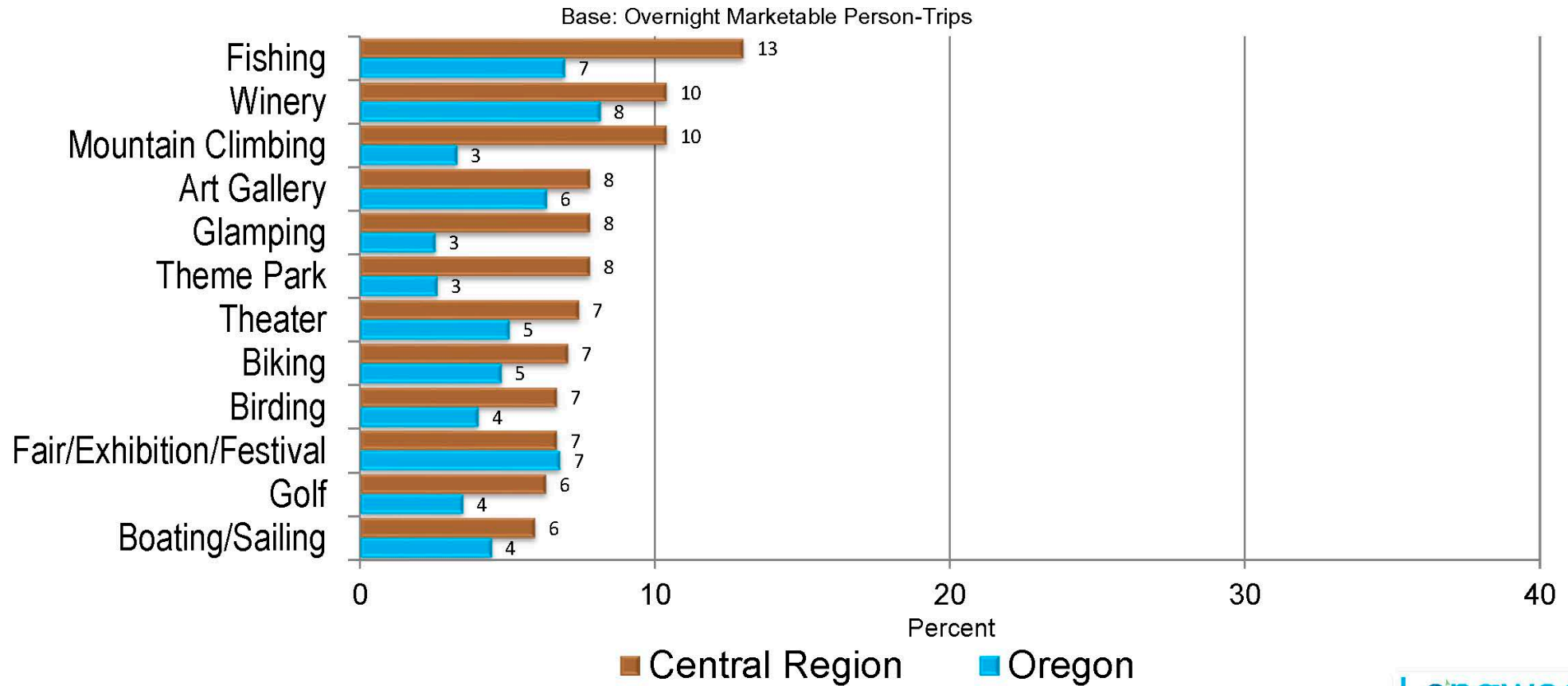
Season of Trip



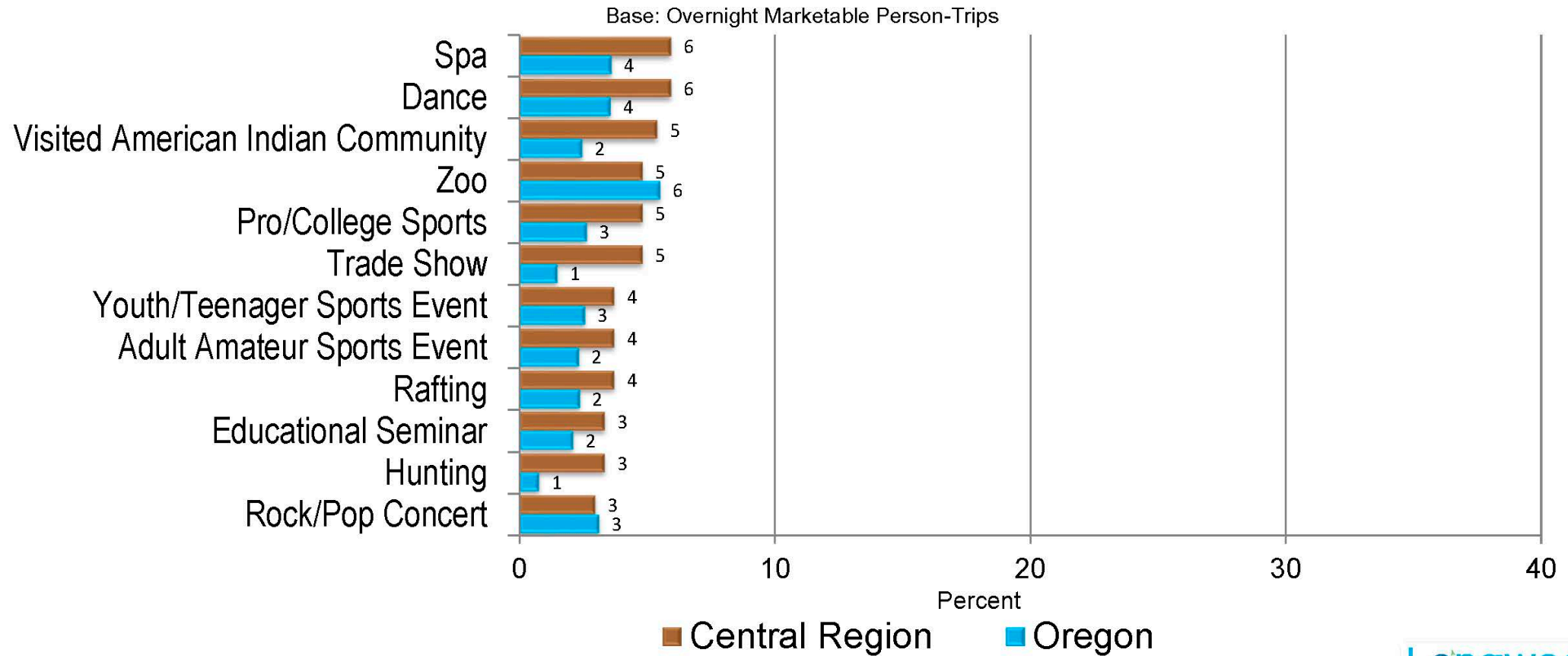
Activities and Experiences



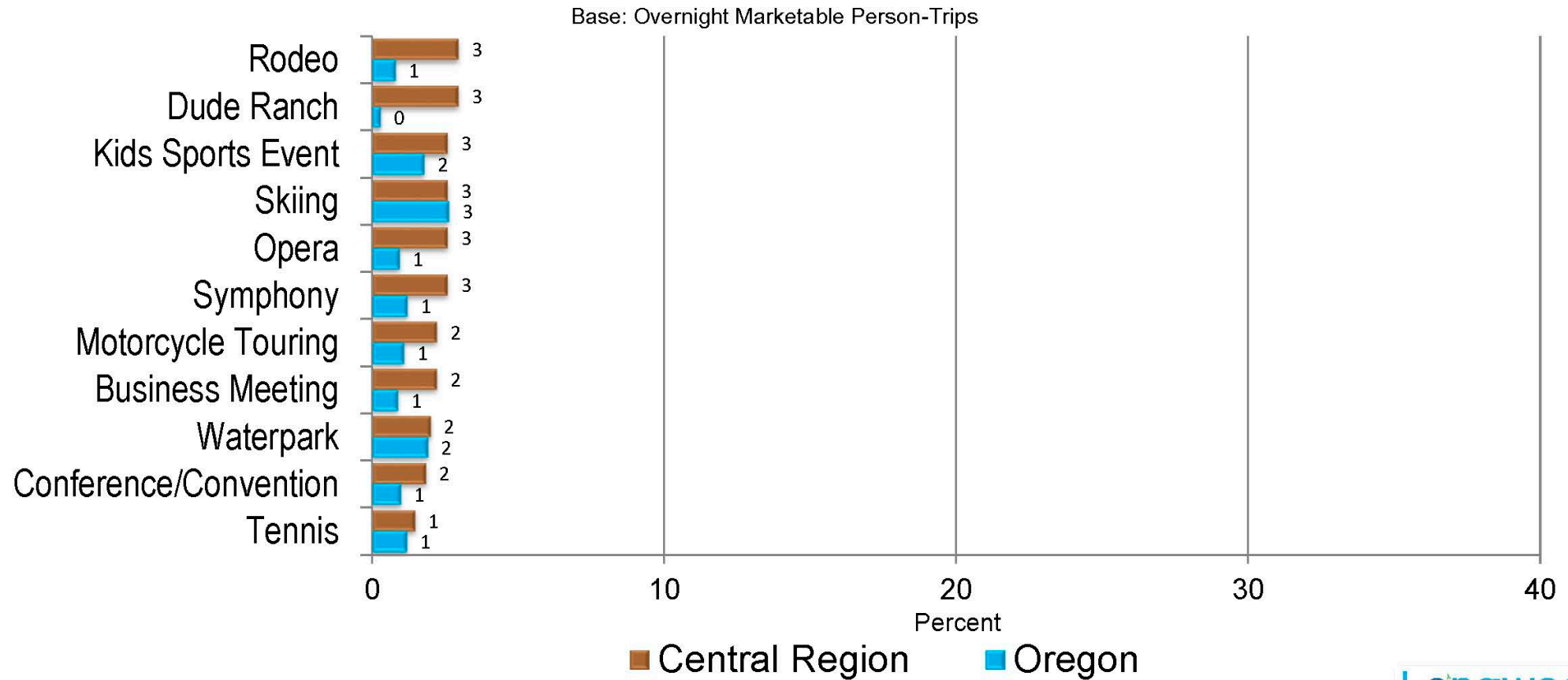
Activities and Experiences (Cont'd)



Activities and Experiences (Cont'd)



Activities and Experiences (Cont'd)



CENTRAL OREGON VISITOR PROFILE

IN SUMMARY

- Male 59% | Female 41%
- Married 69%
- No Children 48%
- Age 25-54
- Average Household Income \$72,435
- Portland 31%; Eugene 10%; Seattle-Tacoma 8%



THANK YOU!

Kristin Dahl, Founder/CEO
Crosscurrent Collective
Kristin@CrosscurrentCollective.com
(503) 784-1072



DEMOGRAPHICS

SISTERS & CENTRAL OREGON

SISTERS IS BECOMING MORE DIVERSE

Sisters is becoming more racially diverse. Hispanic population has nearly doubled in size, nearly double the concentration of Bend.

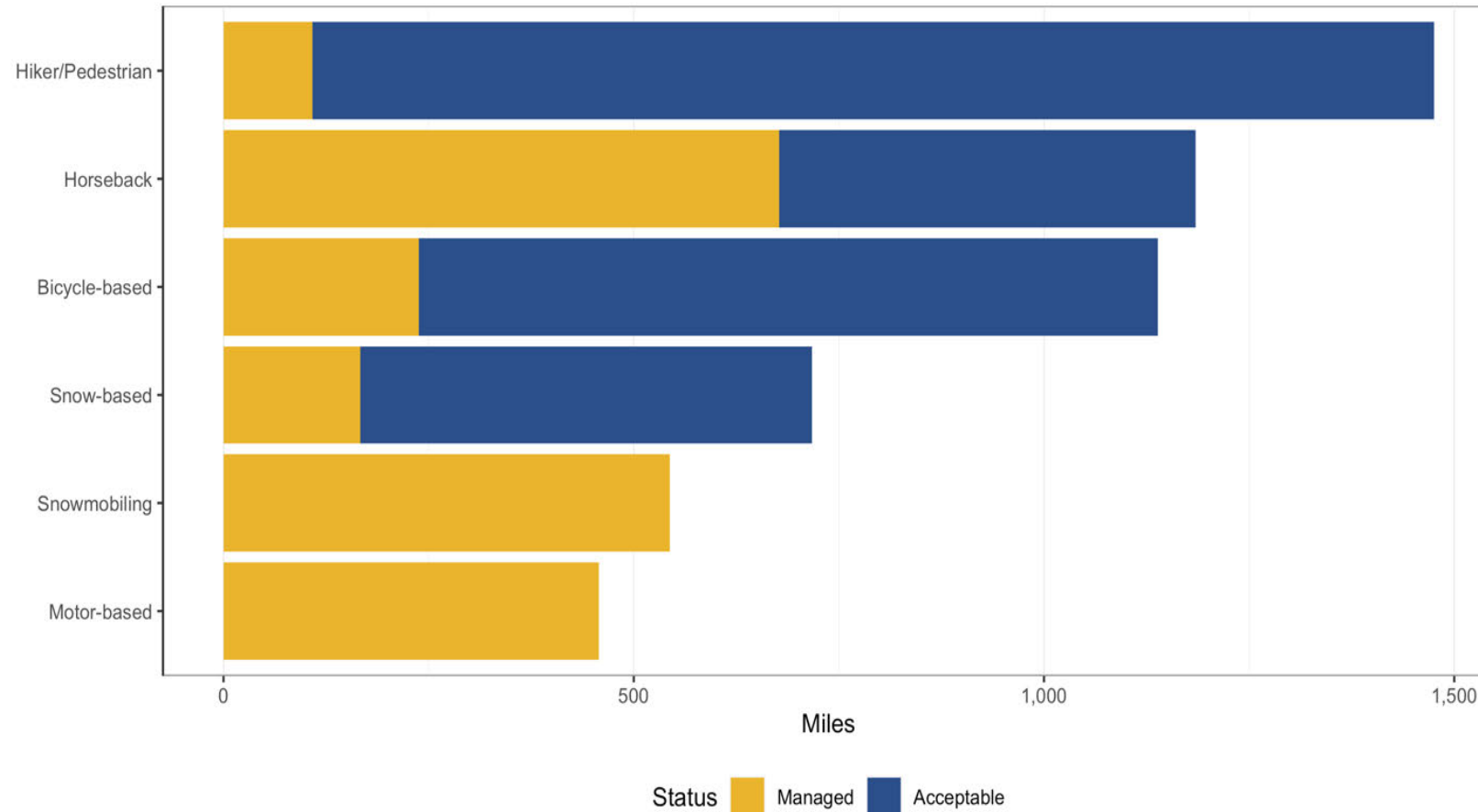
RACE + ETHNICITY	5-Year Change	2019	2014
White (non-Hispanic)	-5.80%	81.6% (2,160)	87.4% (1,950)
White (Hispanic)	+4.86%	9.8% (259)	4.94% (110)
Multiracial (Hispanic)	-	2.99% (79)	<i>no data</i>
Multiracial (non-Hispanic)	+0.50%	2.61% (69)	2.11% (47)
Other (Hispanic)	-1.97%	1.44% (38)	3.41% (76)
American Indian & Alaskan Native (non-Hispanic)	+0.20%	1.1% (29)	0.898% (20)
Other (Non-Hispanic)	-	0.265% (7)	<i>no data</i>
Asian (Non-Hispanic)	-0.80%	0.189% (5)	0.988% (22)

Source: [Dateusa.io](https://dateusa.io) - Sisters Profile

OUTDOOR RECREATION DATA

SISTERS & CENTRAL OREGON

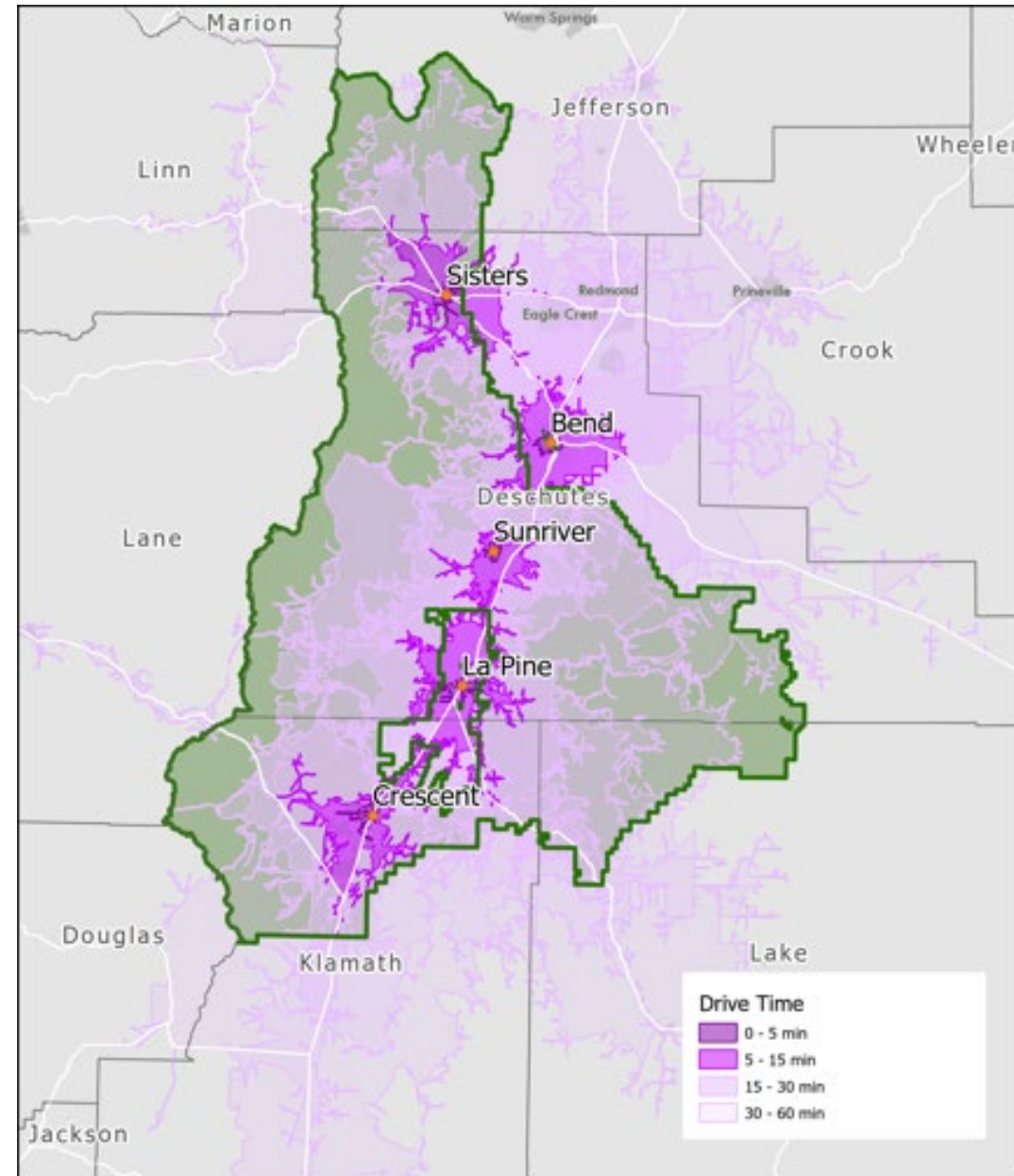
Trail Miles on DNF by Primary Uses



Trails available to hikers are the most numerous.
Horseback has the most managed trail miles.

Trail Network Overview Maps

Most of the forest is within a 60-minute drive of one of the neighboring communities



DESCHUTES NATIONAL FOREST — VISITATION

Table 2. Annual Visitation Estimate

Visit Type	Visits (1,000s)	90% Confidence Level (%)#
Total Estimated Site Visits*	3,206	±9.7
→ Day Use Developed Site Visits	1,773	±10.9
→ Overnight Use Developed Site Visits	248	±12.1
→ General Forest Area Visits	1,086	±21.9
→ Designated Wilderness Visits†	99	±32.7
Total Estimated National Forest Visits§	2,087	±10.0
→ Special Events and Organized Camp Use‡	0	±0.0

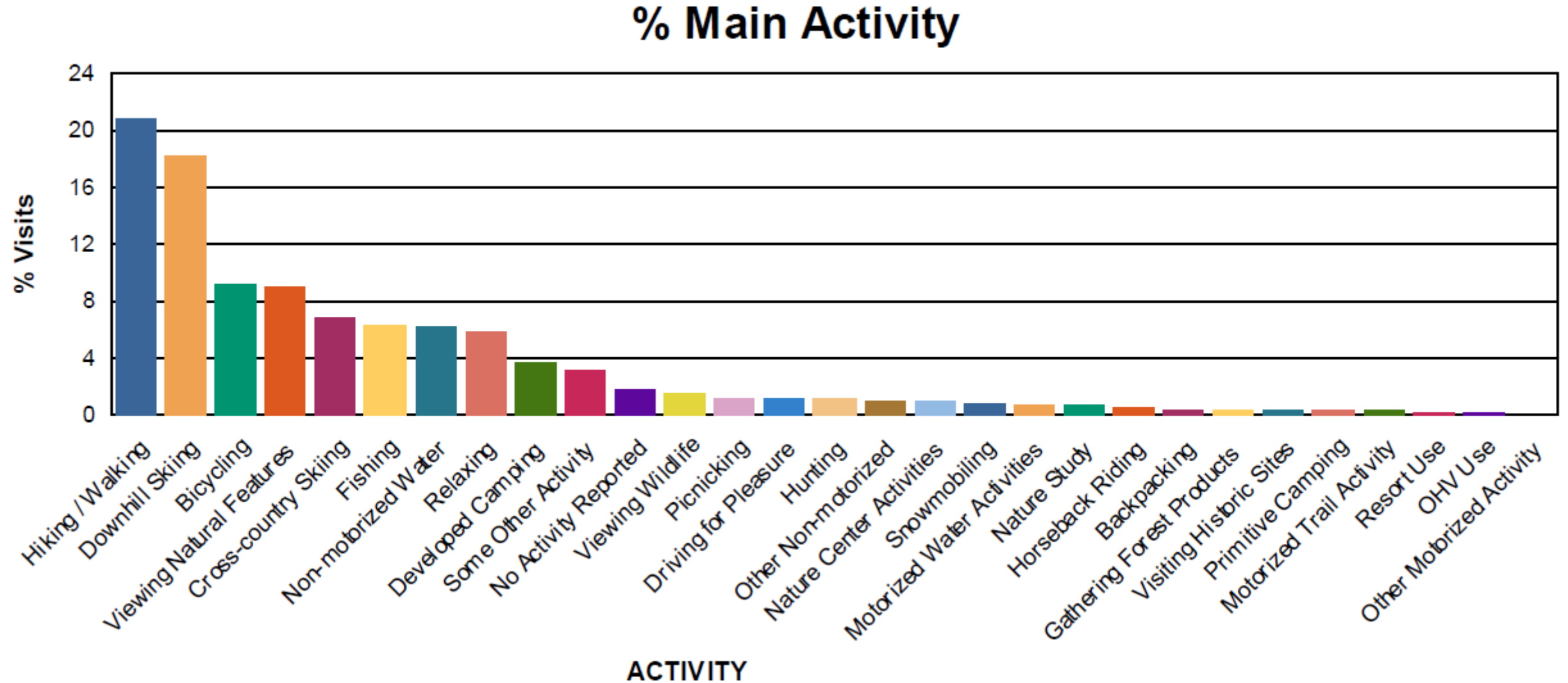
* A Site Visit is the entry of one person onto a National Forest site or area to participate in recreation activities for an unspecified period of time.

DESCHUTES NATIONAL FOREST — TRAVEL DISTANCE

Table 9. Percent of National Forest Visits* by Distance Traveled

Miles from Survey Respondent's Home to Interview Location†	National Forest Visits (%)
0 - 25 miles	35.9
26 - 50 miles	14.9
51 - 75 miles	2.0
76 - 100 miles	2.3
101 - 200 miles	19.0
201 - 500 miles	10.8
Over 500 miles	15.2
Total	100.1

DESCHUTES NATIONAL FOREST — MAIN ACTIVITIES



DESCHUTES NATIONAL FOREST — SITE TYPES

Special Facility or Area	% of National Forest Visits†
Developed Swimming Site	16.0
Scenic Byway	51.9
Visitor Center or Museum	21.0
Designated ORV Area	1.6
Forest Roads	6.1
Interpretive Displays	16.3
Information Sites	11.9
Developed Fishing Site	12.7
Motorized Single Track Trails	1.4
Motorized Dual Track Trails	1.4
None of these Facilities	31.7

* A National Forest Visit is defined as the entry of one person upon a national forest to participate in recreation activities for an unspecified period of time. A National Forest Visit can be composed of multiple Site Visits.

† Survey respondents could select as many or as few special facilities or areas as appropriate.

DESCHUTES NATIONAL FOREST — SPEND & LODGING

Table 16. Trip Spending and Lodging Usage

Trip Spending	Value
Average Total Trip Spending per Party	\$719
Median Total Trip Spending per Party	\$85
% NF Visits made on trip with overnight stay away from home	46.7%
% NF Visits with overnight stay within 50 miles of NF	44.8%
Mean nights/visit within 50 miles of NF	6.0
Area Lodging Use	% Visits with Nights Near Forest
NFS Campground on this NF	20.5%
Undeveloped Camping in this NF	4.5%
NFS Cabin	5.3%
Other Public Campground	7.2%
Private Campground	2.6%
Rented Private Home	38.8%
Home of Friends/Family	13.1%
Own Home	8.5%
Other Lodging	0.5%