

Future Partners

A group of four older men are hiking on a dirt trail in a natural, hilly setting. The man in the foreground on the left is a Black man with a white beard, wearing a grey t-shirt and a green backpack, holding a trekking pole. Next to him is a man with a white beard wearing a blue jacket and a grey hat. To the right is a man in a white shirt and grey jacket, also holding a trekking pole. In the background on the right is a man in a blue t-shirt and a grey hat. The overall scene is bright and outdoorsy.

Travel Oregon 2023 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 6,800 responses were collected across Oregon's seven tourism regions between January and February 2024 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: 1,813 responses
- Central: 820 responses
- Portland Region: 1,518 responses
- Eastern: 614 responses
- Willamette Valley: 1,041 responses
- Mt. Hood/Gorge: 168 responses
- Southern: 890 responses



Topline Findings

Oregon Residents Demographic Snapshot

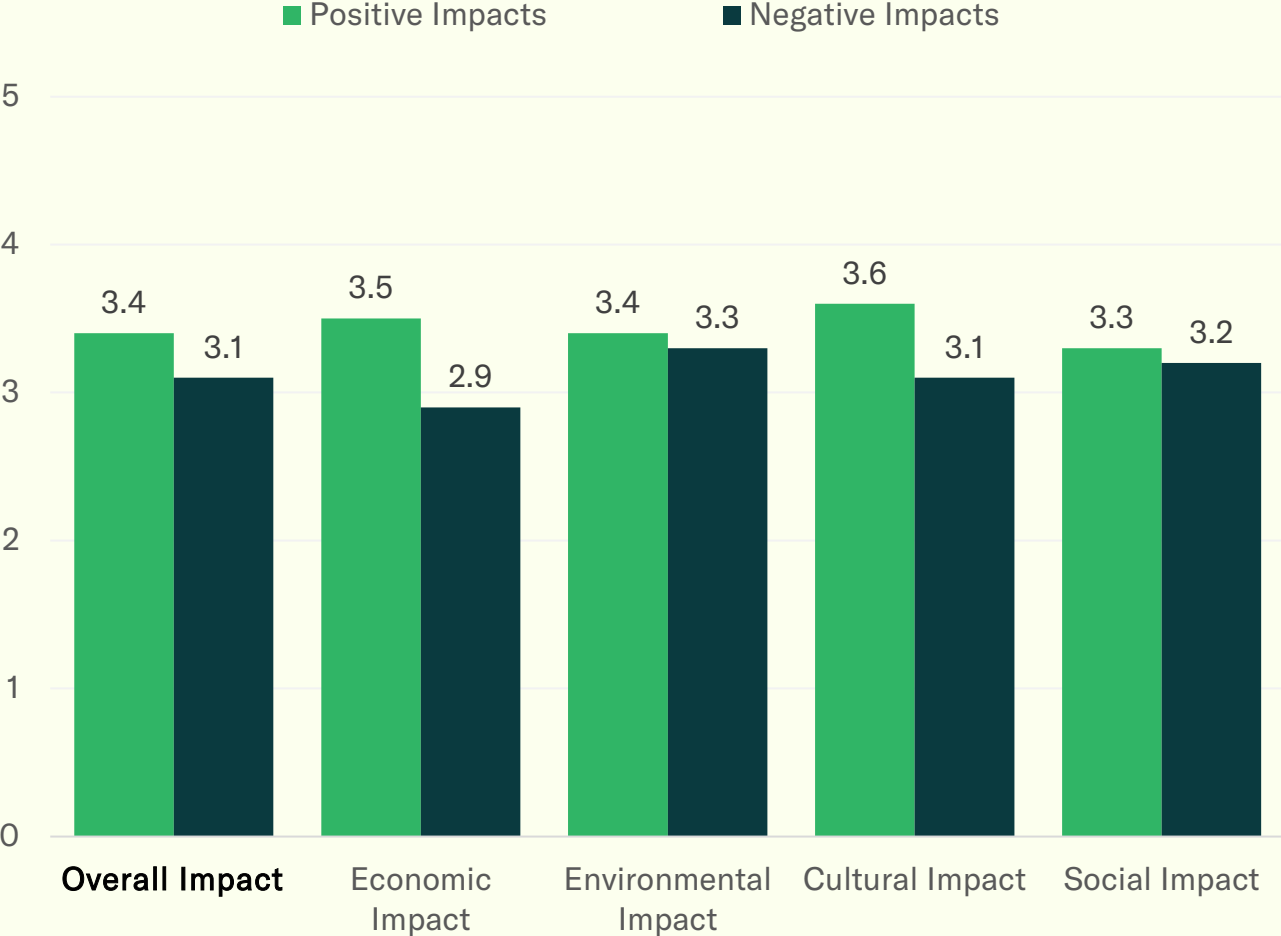
Total residents surveyed:	6,864
Average age:	50 years old
Average household income:	\$87,706
Employed:	63%
College graduate:	59%
Married/domestic partnership:	62%
Have children in household:	27%
Ethnicity*	
• White/Caucasian:	86%
• Hispanic/Latino:	6%
• Asian, Native Hawaiian, or Pacific Islander	5%
• Native American, Alaskan Native	4%
• African American/Black	4%
• Other	2%
LGBTQ+:	12%
Accessibility needs in household:	17%

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



Topline Findings

Index of Residents' Perceptions of Tourism Impacts



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.

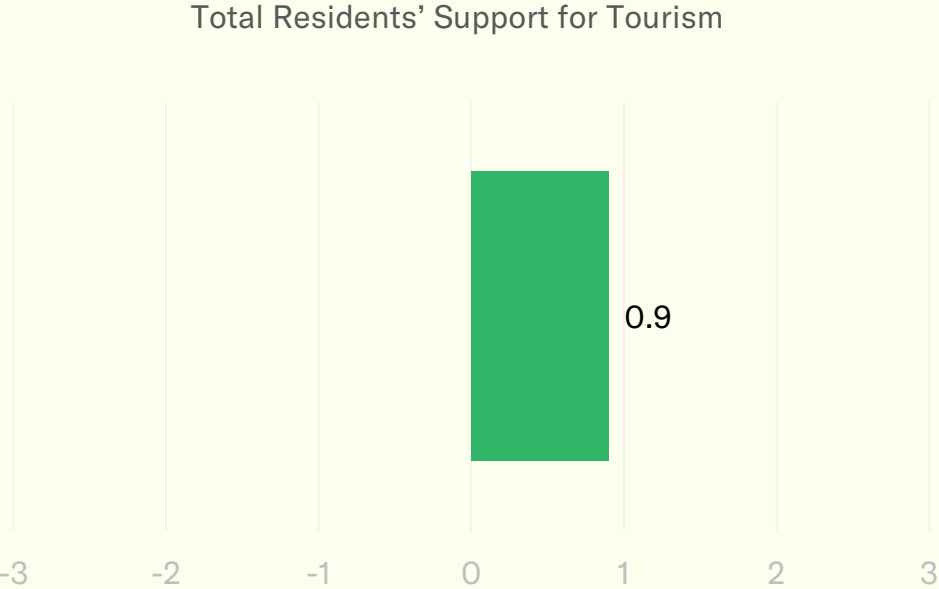
Based on this index, Oregonians’ positive perceptions of tourism’s impacts consistently outweigh the negative across all dimensions. The largest positive/negative gap occurs in the economic impact (3.5 vs. 2.9, a 0.6-point gap) and the cultural impact (3.6 vs. 3.1, a 0.5-point gap). These two measures 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 outpaced by positive impacts.

Base: Oregon residents. 6,864 completed surveys.

Topline Findings

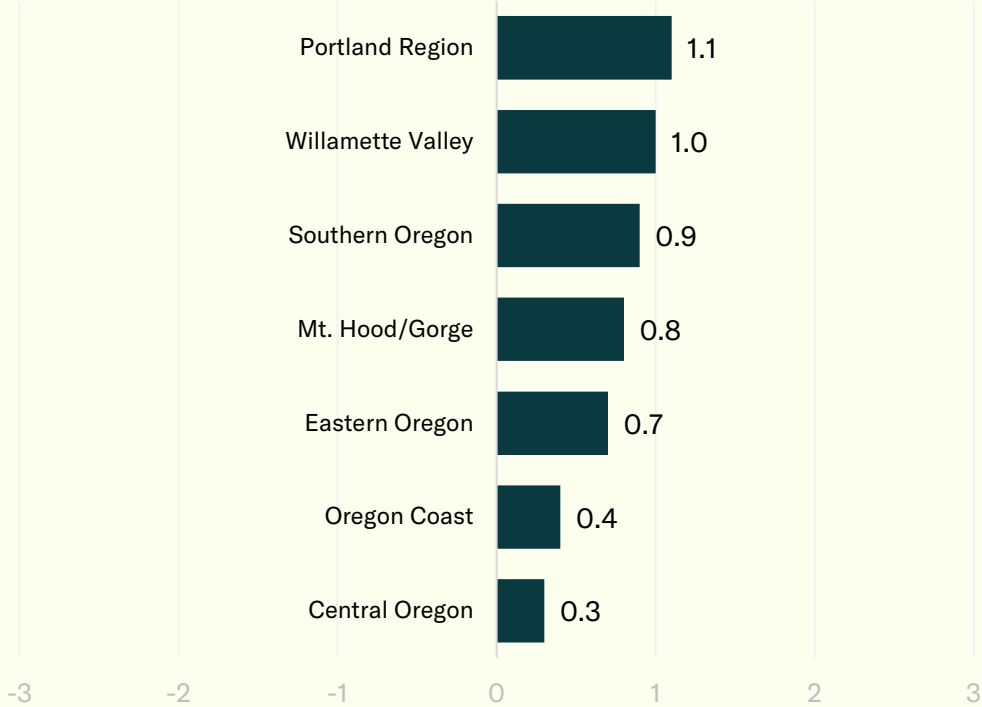
Residents widely support tourism in Oregon, but only a minority want the state to depend on the industry more. In terms of overall support for tourism, total Oregon residents scored 0.9 out of a maximum possible mean score of 3. Most Oregon residents support every potential option for improving tourism. At least three in five agree that Oregon should encourage outdoor recreation development (76%), advertise in-state (71%), advertise domestically (66%), encourage tourism development (65%), attract more visitors (61%), and advertise internationally (60%).

Overall Support for Tourism Mean Score*



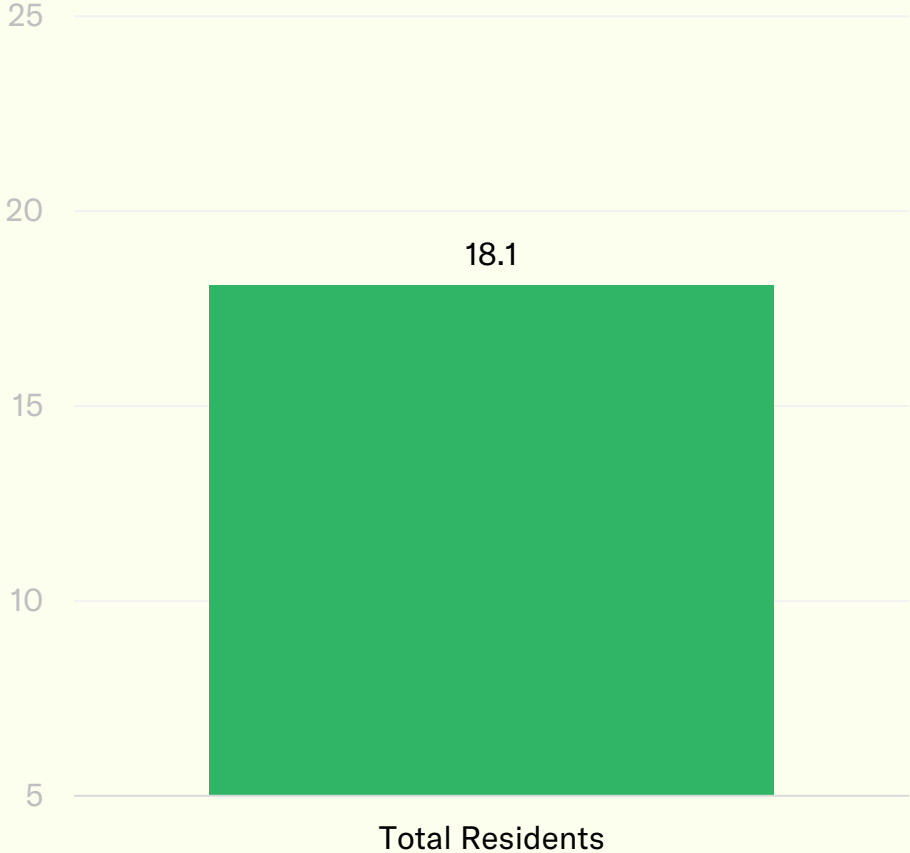
* Calculated as the mean scores for statements included in the index, with a minimum possible mean score of -3 and a maximum possible mean score of 3. See page 30 for detailed scores for each included statement.

Overall Support for Tourism Mean Score by Tourism Region



Topline Findings

Perceived Quality of Life Score*



Overall, Oregon residents score highly on the Perceived Quality of Life index, scoring 18.1 points out of a possible 25. In research, higher levels of perceived quality of life have been associated with improved perceptions of tourism impacts. Over two-thirds are “satisfied with my life in Oregon” (72% agree or strongly agree) and feel they have “gotten the important things I want in life” (71%). Importantly, nearly as many agree that “my life in Oregon is close to ideal” (64%) and “conditions of my life in Oregon are excellent” (61%). However, fewer than half “would change almost nothing” (43%).

*Calculated as a sum of the mean scores for five statements included in the index, with a minimum possible score of 5 (extremely dissatisfied) and a maximum possible score of 25 (extremely satisfied).

Key Insights

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

Residents are cognizant that the economic benefits of tourism also go hand-in-hand with issues like crowding, increased cost of living, and environmental impacts. There is a strong awareness of the overall economic value that tourism brings to Oregon and a sense that tourism improves the cultural vibrance of communities. However, many residents feel that crowding from tourism detracts from the assets that led many Oregonians to move to the state, such as the natural areas they enjoy.

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). In the words of one resident, *"Tourism encourages local residents to take pride of ownership of [their] community and hopefully improve maintenance of privately owned properties along with public facilities."* Conversely, the gap between positive and negative impacts for the environmental and social dimensions of tourism in Oregon is marginal (+0.1 points for both).

2. Oregonians have a high perceived quality of life in the state, and four in 10 expect their quality of life to improve in the next year.

Over two-thirds are satisfied with their life in Oregon (72%), and nearly as many say their life in Oregon is close to ideal (64%) and that the conditions of their life in Oregon are excellent (61%). However, among Native American/Alaskan Native residents and African American/Black residents of the state, perceived quality of life is notably lower.

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

The state's landscapes and natural features are by far the top motivators for residents to continue living in the state (59%), and the vast majority of residents feel that it is important to them that visitors not harm natural areas, saying they want visitors to respect the wildlife (95%) and leave no trace (84%).

In line with these environmental concerns, nearly half agree that tourism leads to the disruption of natural habitats (49%) and increased environmental damage (47%). One resident wrote in, *"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."* Another said, *"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."*

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

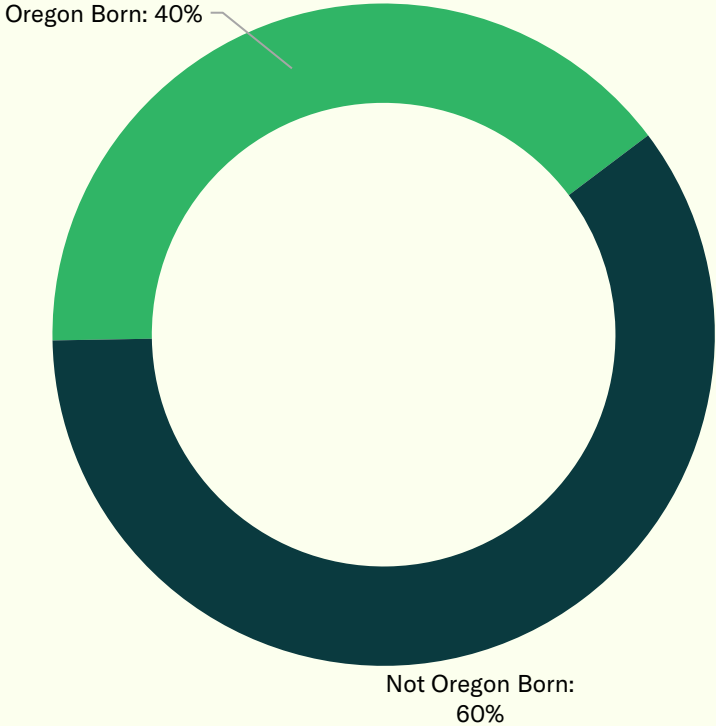
The majority of residents say that the state should advertise in-state (71%), domestically (66%), and internationally (60%). In a similar vein, most Oregonians feel that the state should attract more visitors (61%), consider tourism a priority (56%), and become a major destination (52%). But residents are skittish about depending more on tourism, with only 38% saying this is something Oregon should do. This echoes concerns about the negative impact of tourism on congestion, cost of living, and housing.

Detailed Findings: Life in Oregon

Only a small minority of Oregon residents are recent transplants.

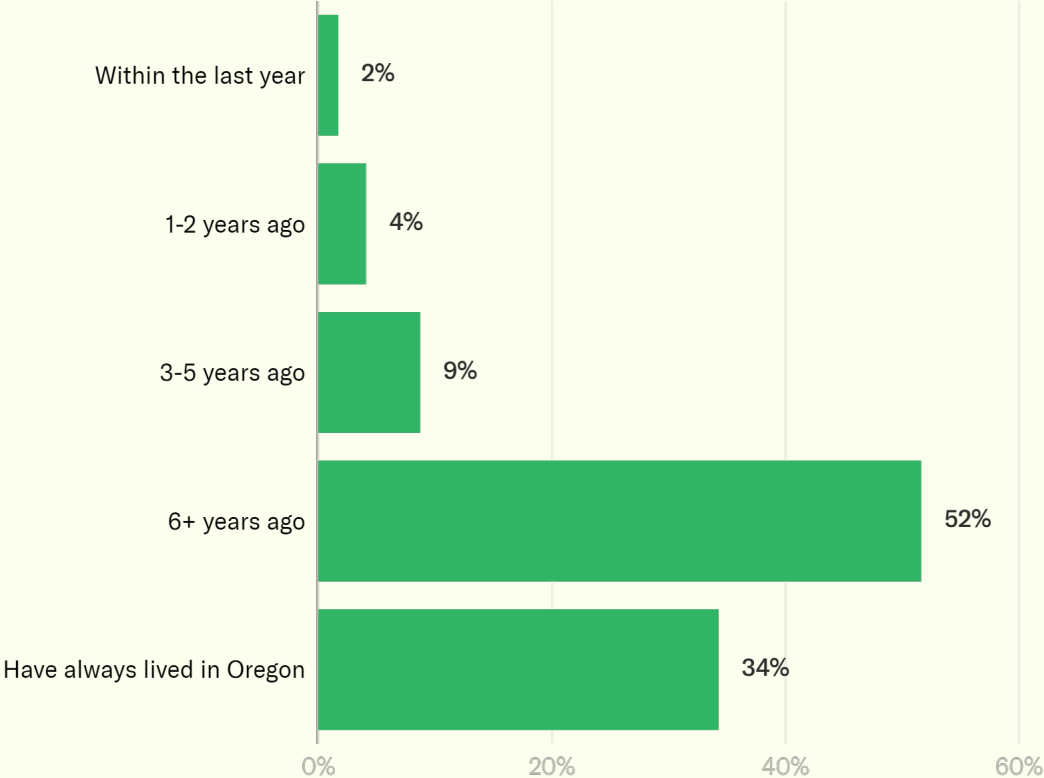
The majority of Oregon residents surveyed were not born in Oregon (60%). More than half of Oregon residents have been living in the state for more than 6 years (52%), while about a third have lived their entire lives in the state (34%). Just 6% moved to Oregon within the last 2 years, indicating that most residents are long-term Oregonians.

Place of Birth



Question: Were you born in Oregon?
Base: Total Oregon residents. 6,864 completed surveys.

Years Lived in Oregon

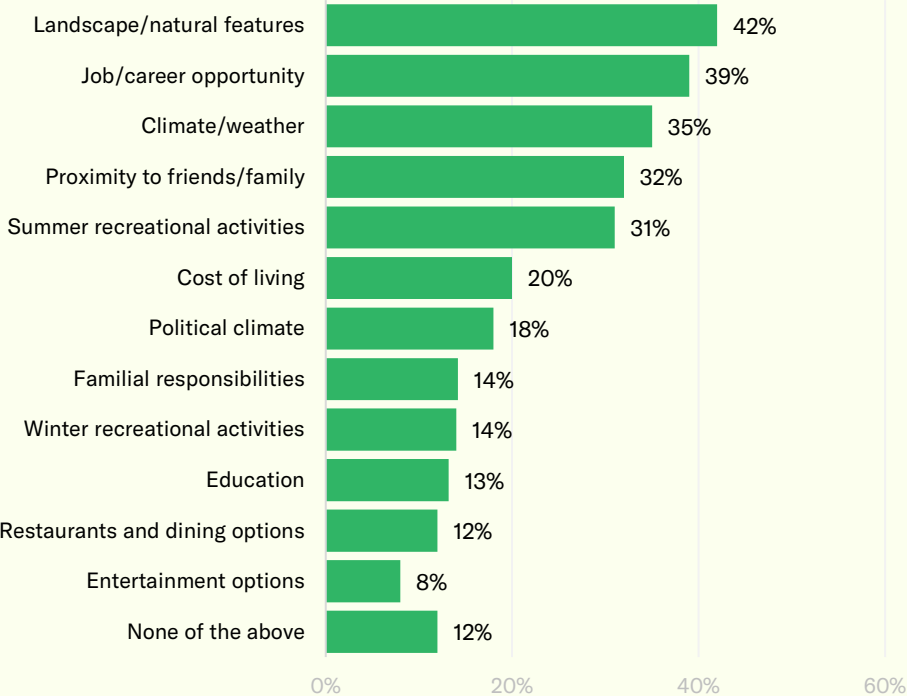


Question: How long ago did you move to Oregon?
Base: Total Oregon residents. 6,864 completed surveys.

The attributes that inspired residents to move to Oregon also drive continued residency, particularly landscape, climate, and summer recreational activities.

The landscape/natural features of Oregon top the list of reasons to live in Oregon, not just as a reason to move to the state (42%), and even more so as the top reason people have continued to live in Oregon (59%). Although they are ranked differently, the same top five features that brought people to live in the state are the reasons residents have stayed in Oregon. Specifically, nearly as many residents emphasize proximity to friends/family (57%) as the landscape (59%), while that attribute ranks fourth among why transplants have moved to Oregon (32%). In contrast, while transplants mention job/career opportunity (39%) as their second-place reason for moving to Oregon, it ranks fifth among the reasons residents continue to live in Oregon (40%). Climate ranks third for reasons to move to Oregon (35%) and reasons to stay in Oregon (49%). Summer recreational activities were a strong driver for moving to (31%) but are an even more significant driver for staying in Oregon (48%).

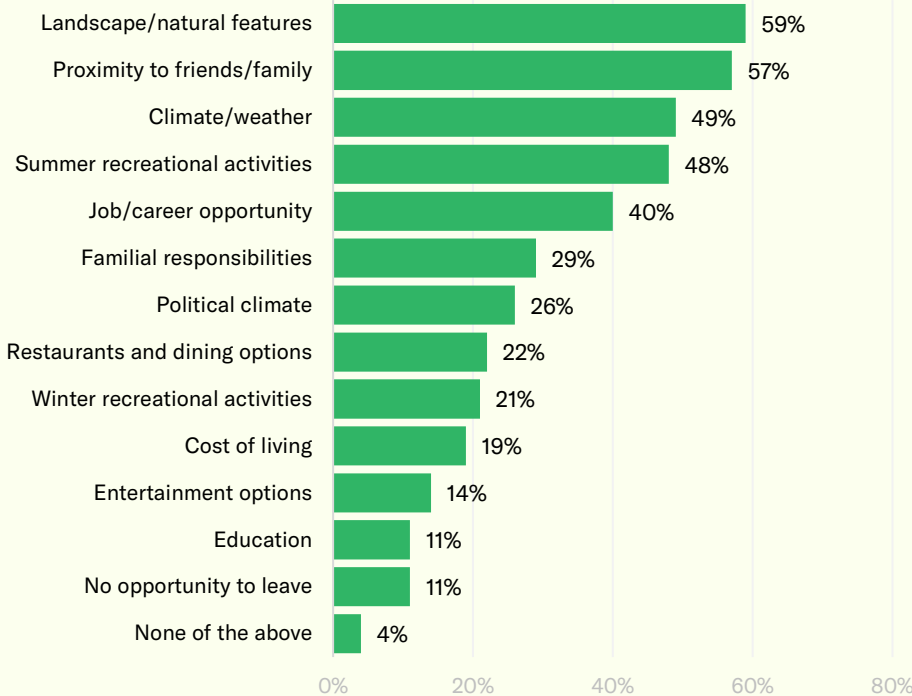
Reasons for Moving to Oregon



Question: Which of the following were reasons you originally moved to Oregon? (Select all that apply)

Base: Oregon residents who have not lived in Oregon all their lives. 4,688 completed surveys.

Reasons for Staying in Oregon



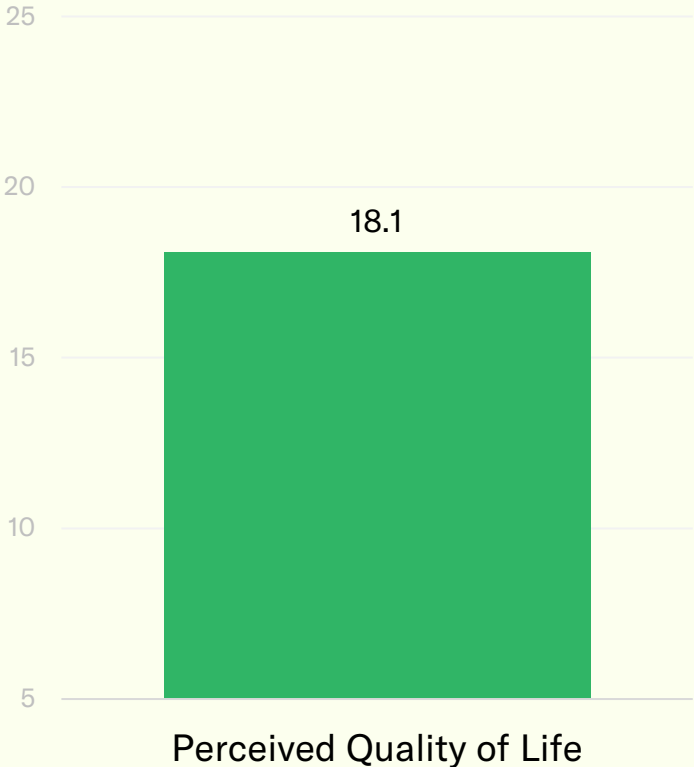
Question: Which of the following reasons have kept you living in Oregon? (Select all that apply)

Base: Total Oregon residents. 6,864 completed surveys.

Oregon residents as a whole have a high perceived quality of life.

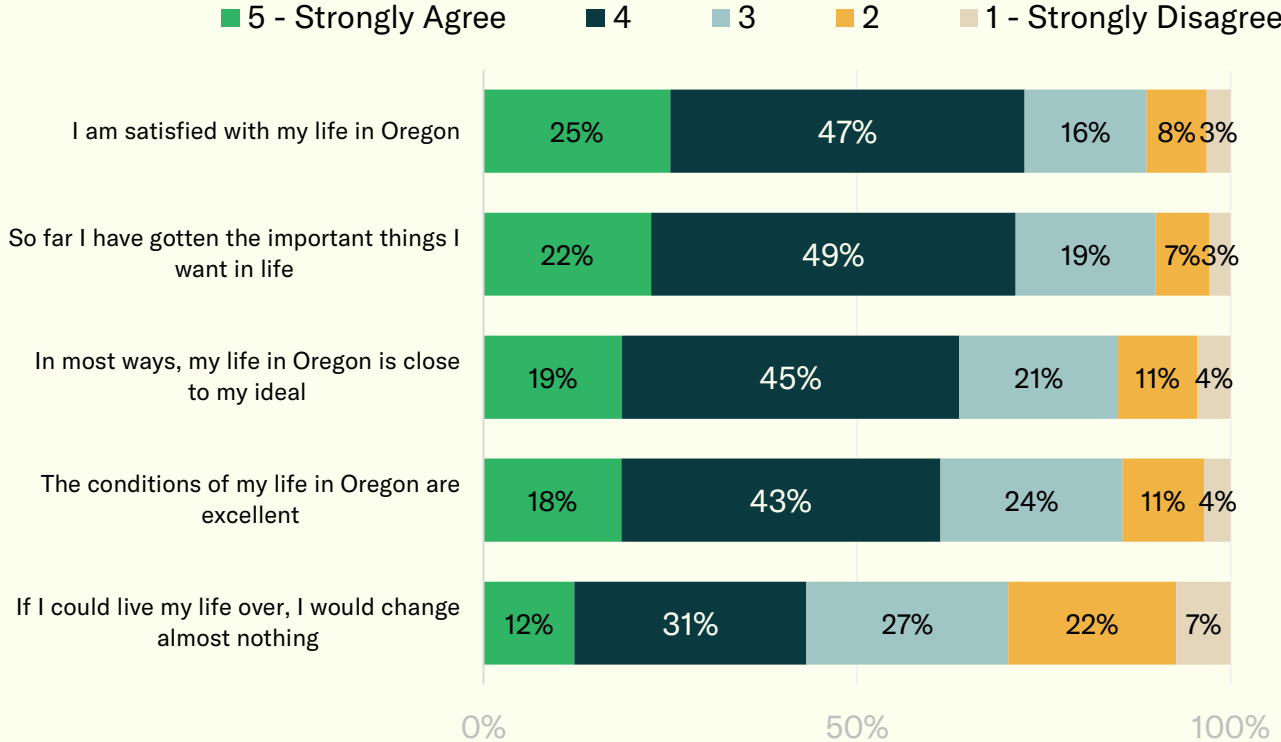
Overall, residents claim to be quite satisfied with their quality of life (18.1 out of a possible 25). Over two-thirds are “satisfied with my life in Oregon” (72% agree or strongly disagree) and feel they have “gotten the important things I want in life” (71%). Importantly, nearly as many agree that “my life in Oregon is close to ideal” (64%) and “conditions of my life in Oregon are excellent” (61%).

Total Oregon Residents’ Score*



*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 5 (extremely dissatisfied) and a maximum possible score of 25 (extremely satisfied).

Perceived Quality-of-Life Statements Included in Score



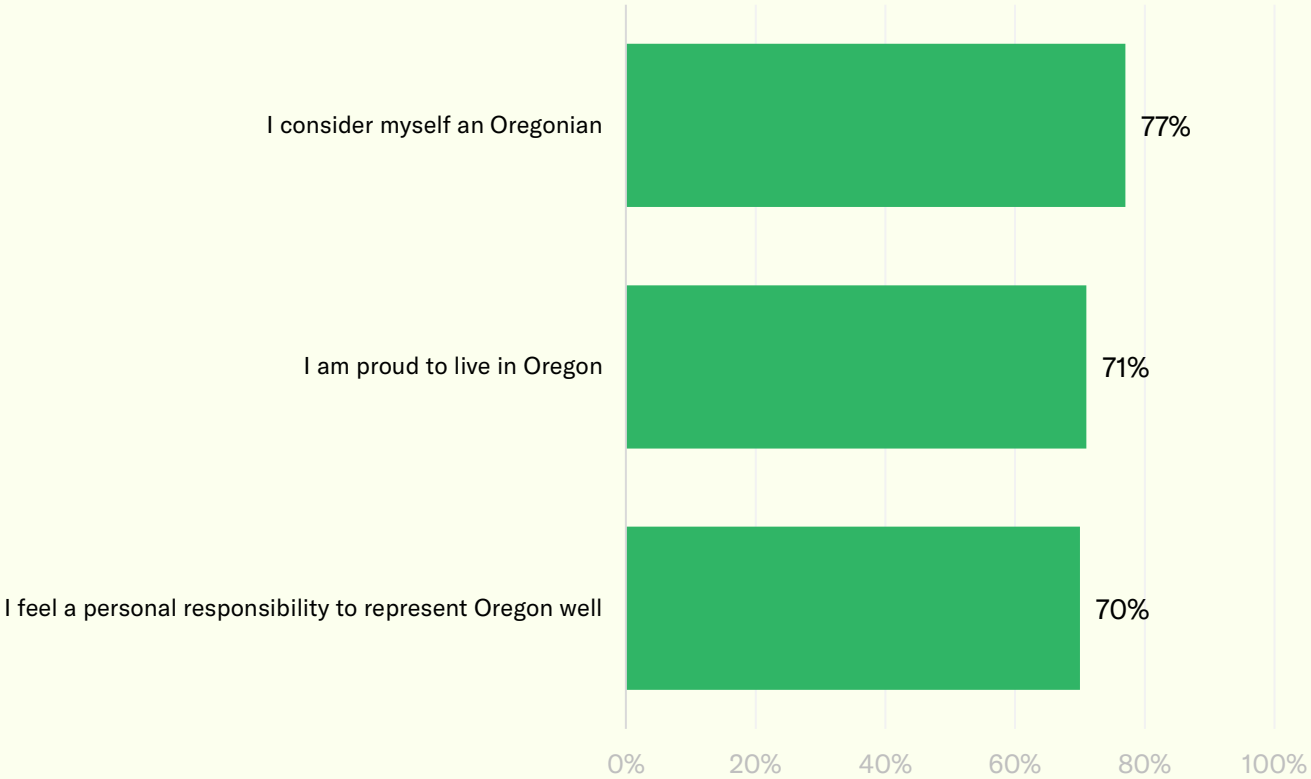
Note: Percentages may not sum to 100% due to rounding.
 Question: Please rate your level of agreement with the following statements.
 Base: Oregon residents. 6,864 completed surveys.

Seven in 10 Oregonians have a sense of community pride.

Most residents identify with being an Oregonian (77%) and are proud to live there (71%). More than two-thirds also feel a personal responsibility to represent Oregon well (70%). These indicate that, at the state level, residents have a general sense of community pride about living in Oregon.

Perceptions of Personal Life in Oregon

(% Selected "Agree" or "Strongly Agree")



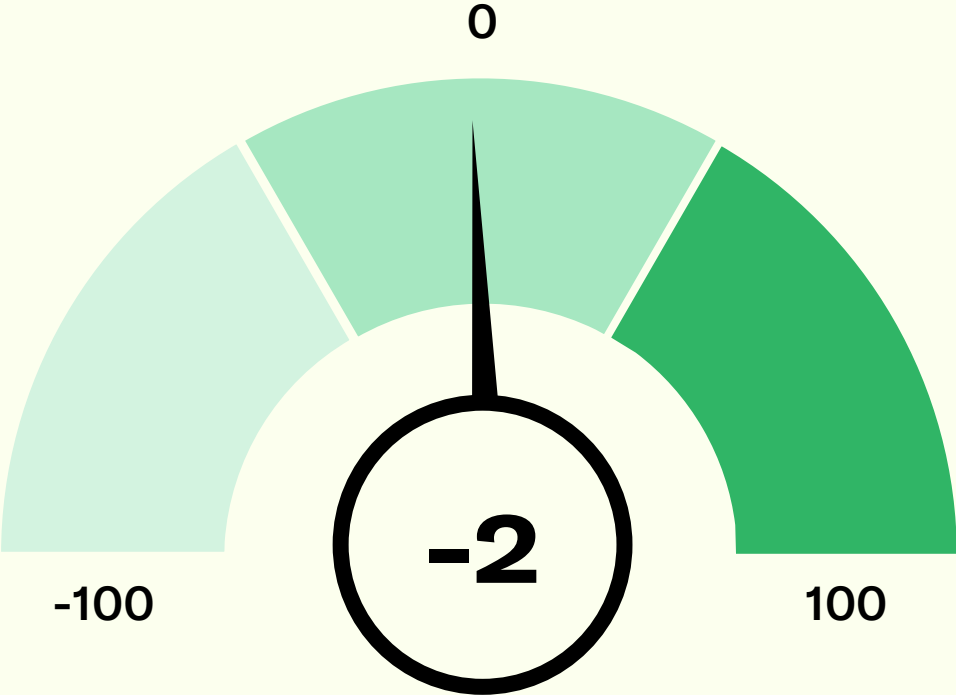
Question: Please rate your level of agreement with the following statements.

Base: Total Oregon residents. 6,864 completed surveys.

More than half of Oregonians are likely to recommend their community as a tourism destination.

More than a third of Oregon residents are promoters of their local community as a tourism destination (36% 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 -2.

Likelihood to Recommend Local Community as a Tourism Destination



Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

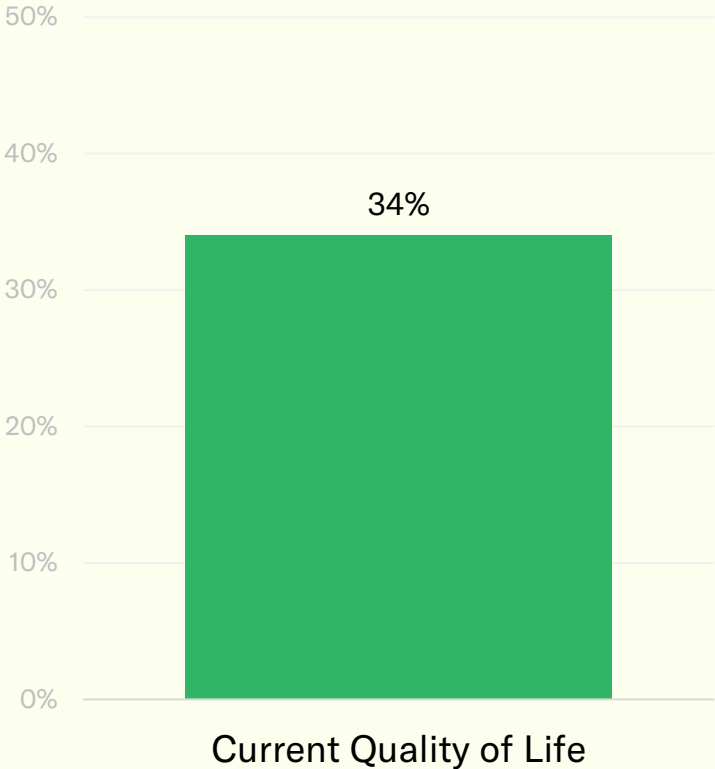
Base: Total Oregon residents. 6,864 completed surveys.

Optimism about future quality of life outpaces the share of those who feel their current quality of life has improved compared to last year.

A third of Oregon residents feel that their current quality of life has improved from a year ago (34% somewhat better or much better). They most commonly feel it has not changed (42%), while nearly one in four feel it has become worse (24%, not shown). More positively, their expectations for the future are brighter, with two in five expecting improvement in the future (40%) and only one in seven expecting it to worsen (14%, not shown).

Current Quality of Life

(Top 2 Box Score - % Selected "Somewhat better" or "Much better")

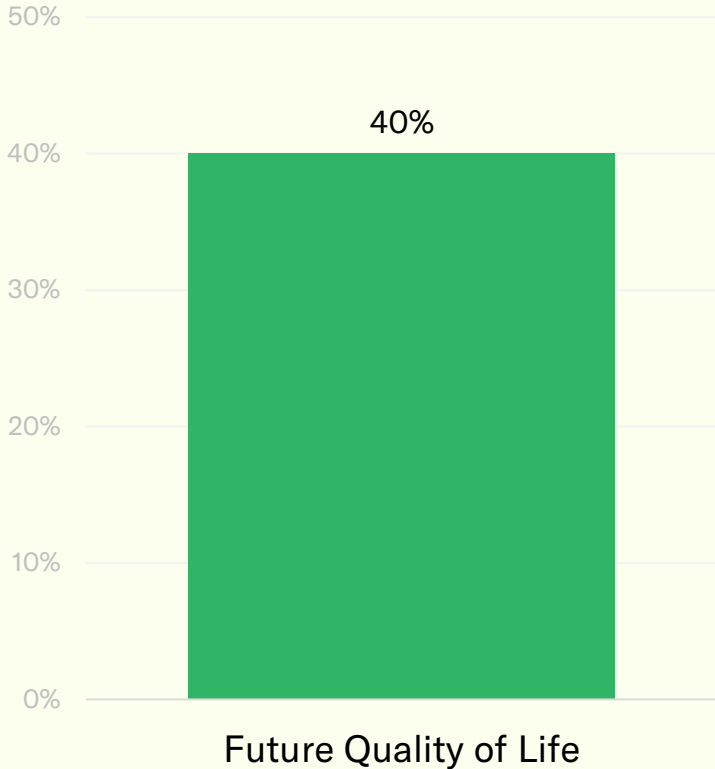


Question: Compared to one year ago, how would you rate your personal quality of life in Oregon?

Base: Total Oregon residents. 6,864 completed surveys.

Future Quality of Life

(Top 2 Box Score - % Selected "Somewhat better" or "Much better")



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

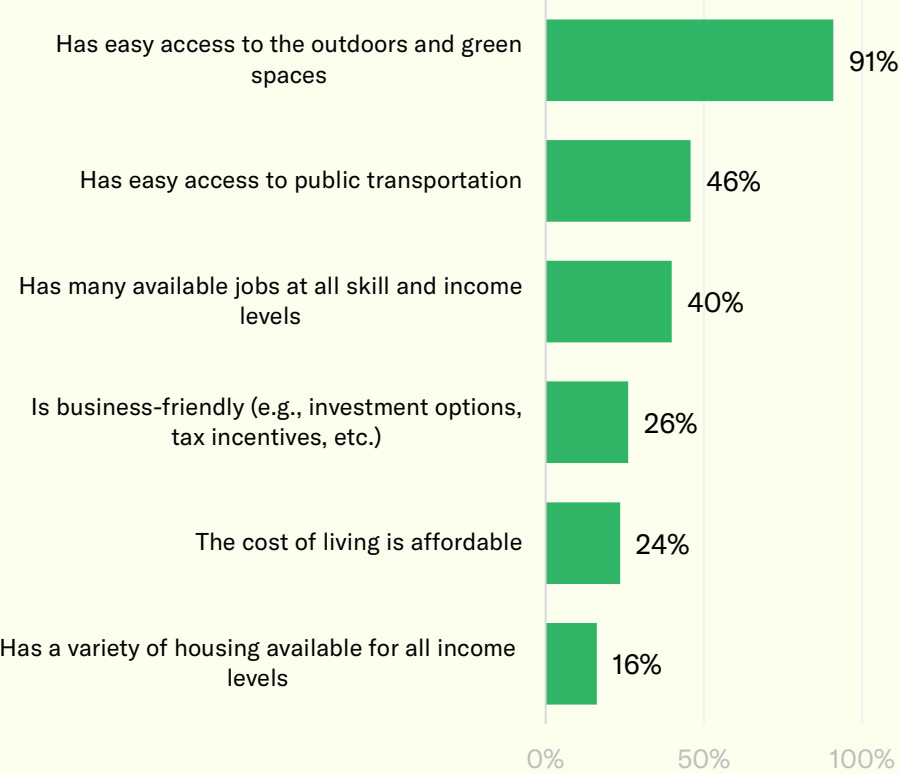
Base: Total Oregon residents. 6,864 completed surveys.

Nearly all residents agree that they have easy access to the outdoors/green spaces, reflecting top reasons for staying in Oregon.

Mirroring the reasons they live there, nearly all residents feel that one of the top assets available for Oregonians is easy access to outdoors/green spaces (91%). Public transportation (46%) and a variety of available jobs (40%) rank a distant second and third, cited by fewer than half as an available asset for residents. Only a quarter or fewer residents agree that Oregon is business-friendly, has an affordable cost of living, or has a variety of housing available for different income levels.

Resident Assets Rating

(% Selected "Agree" or "Strongly Agree")



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

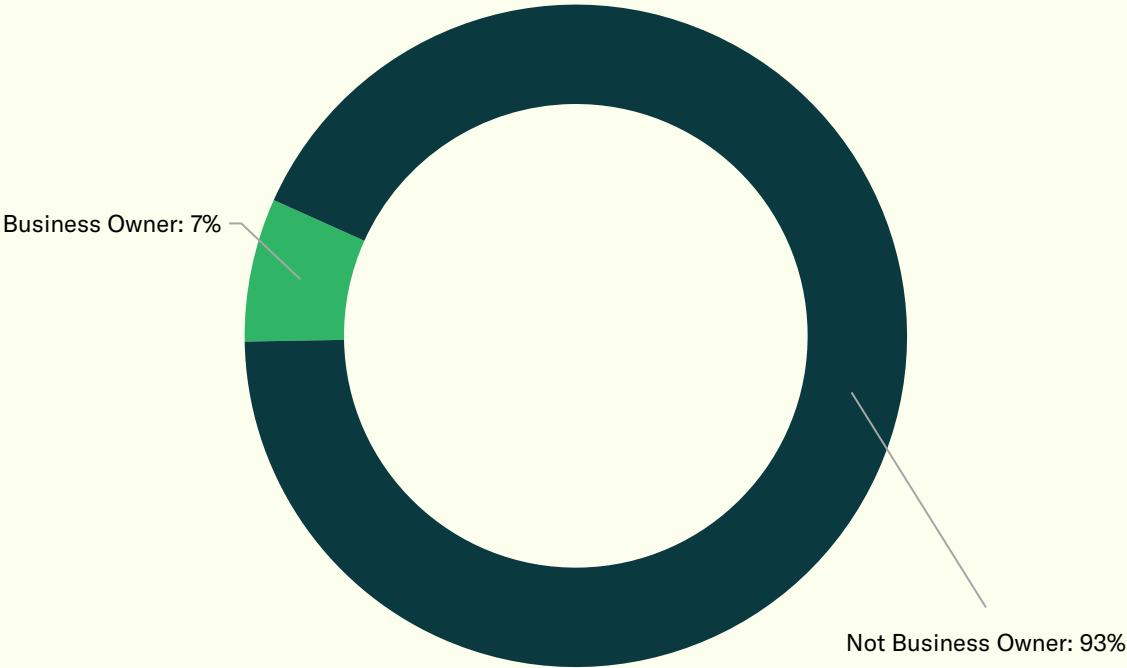
Base: Total Oregon residents. 6,864 completed surveys.

Detailed Findings: Tourism Employment

A small minority of Oregon residents own a business that serves tourism, of which 25% are vacation-rental owners.

Very few Oregon residents own a tourism-industry business (7%). Of those tourism businesses owned, accommodation-vacation rentals represent the largest share (25%). Other accommodations (hotels/motels/hostels at 8%) boost total non-camping accommodations to a third of all business types (33%). Next in line are restaurants (13%), attractions/activities (12%), and retail/shopping (11%). No other business exceeds 10%.

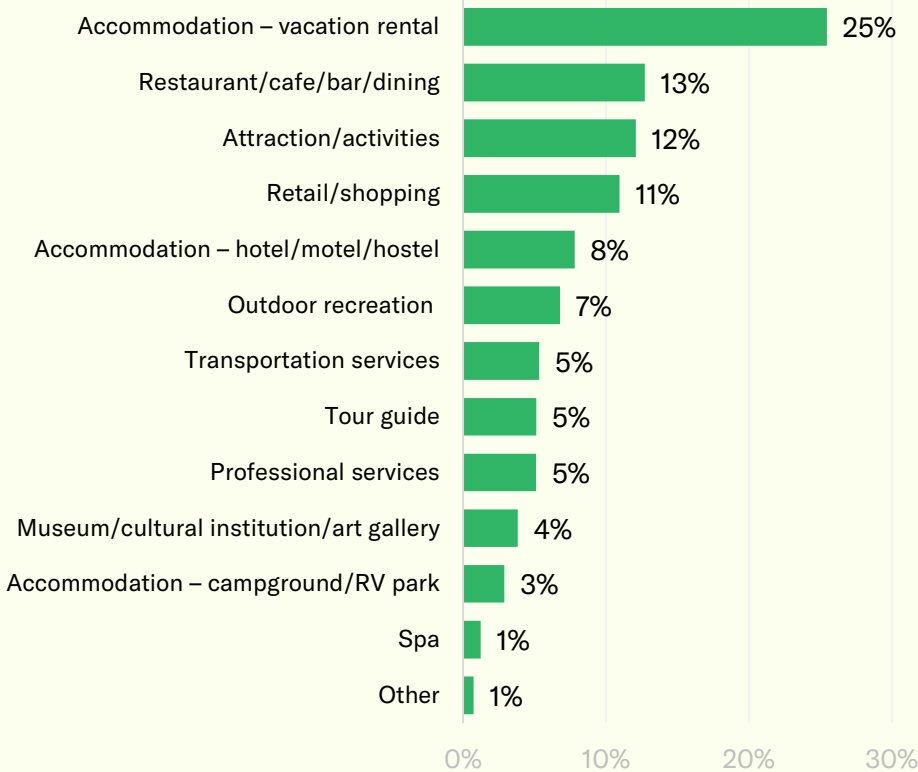
Tourism-Industry Business Owners



Question: Do you own a business that serves Oregon’s tourism industry?

Base: Total Oregon residents. 6,864 completed surveys.

Type of Business Owned



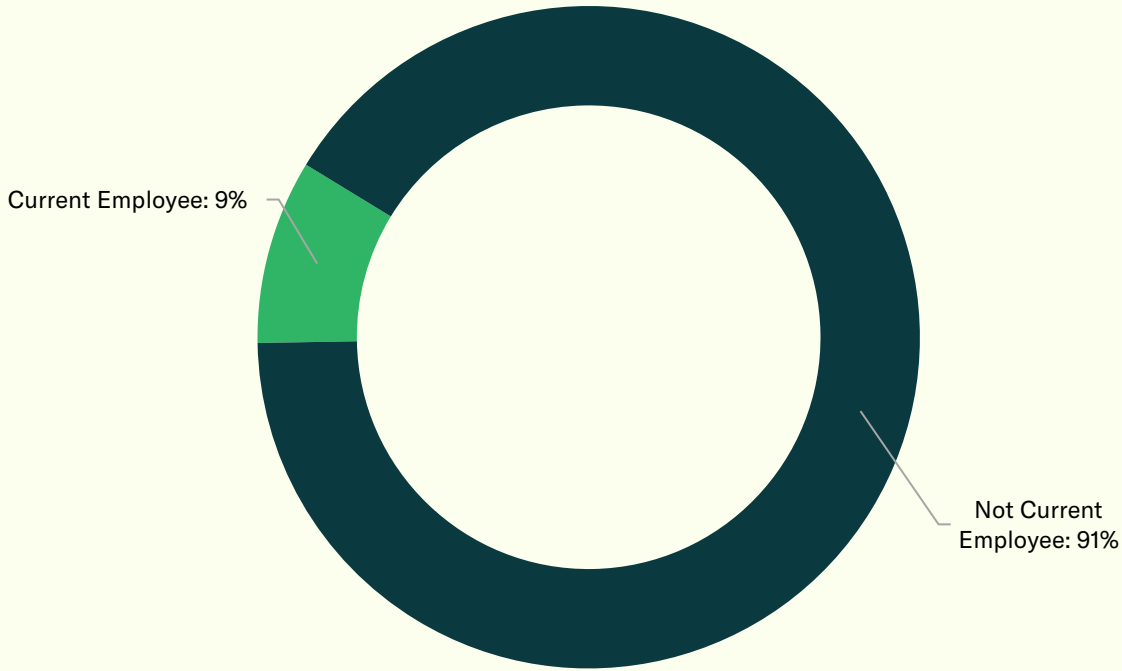
Question: Which of the following best describes your business?

Base: Oregon residents who own a business that serves the tourism industry. 779 completed surveys.

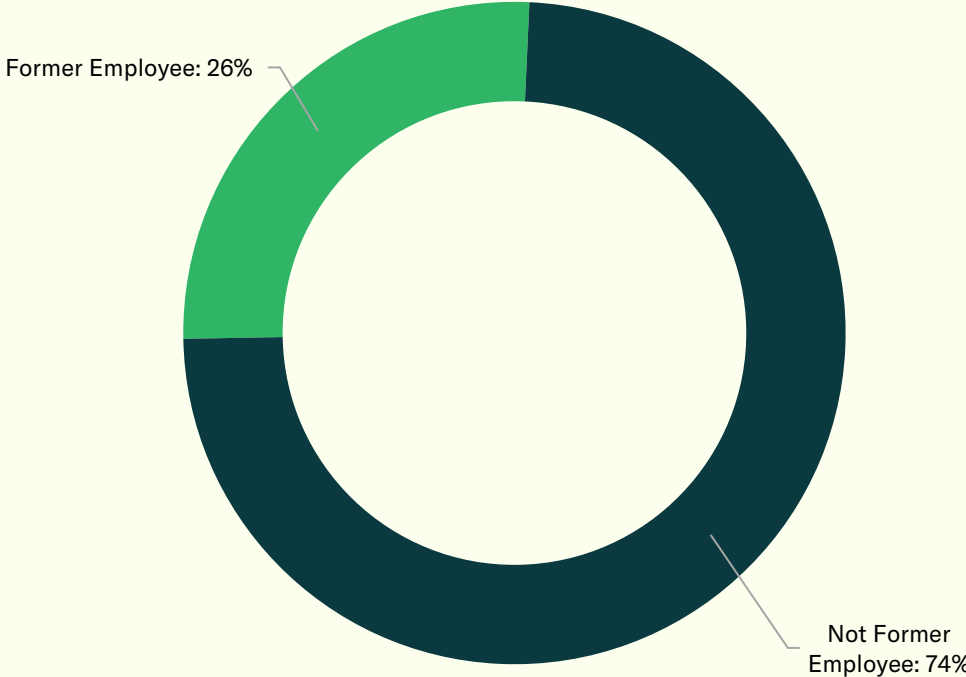
Among non-business owners, one in 10 residents are currently employed in the Oregon tourism industry.

Almost one in 10 Oregon residents indicate that they are currently employed in the tourism industry (9%). Additionally, more than a quarter (26%) of residents not currently employed in the tourism industry have worked in the industry in the past, accentuating the impact of tourism on the lives of those who live there.

Current Employment in the Tourism Industry



Former Employment in the Tourism Industry



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. 6,085 completed surveys.

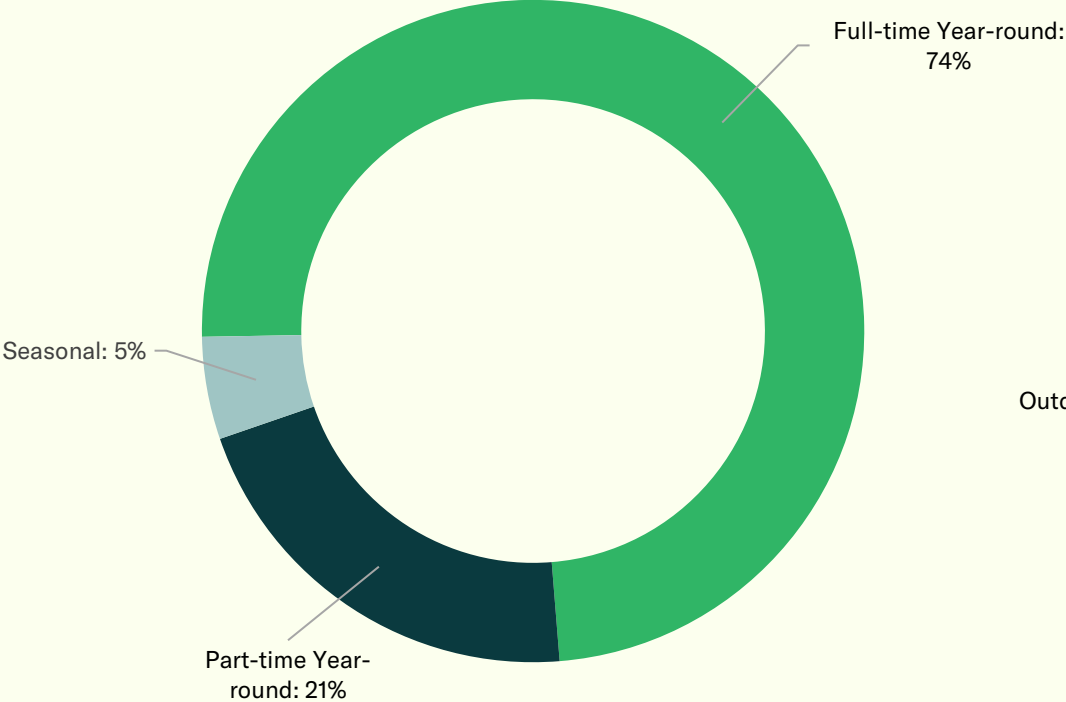
Question: Have you ever been employed by a business/company that interacts with Oregon’s tourists (e.g., restaurants/bars, food and beverage stores, accommodations, conventions and trade shows, outdoor recreation stores/rentals, etc.)?

Base: Oregon residents not currently employed by a tourism business. 5,064 completed surveys.

The majority of current tourism employees work full-time year-round, with only one-fifth saying they work part-time in the industry.

Three-quarters of current tourism employees work full-time year-round (74%). Four types of businesses dominate the tourism environment: professional services* (18%), restaurant/cafe/bar (16%), retail/shopping (14%), and attractions/activities (13%). Relatively few represent any other type of business (<1%).

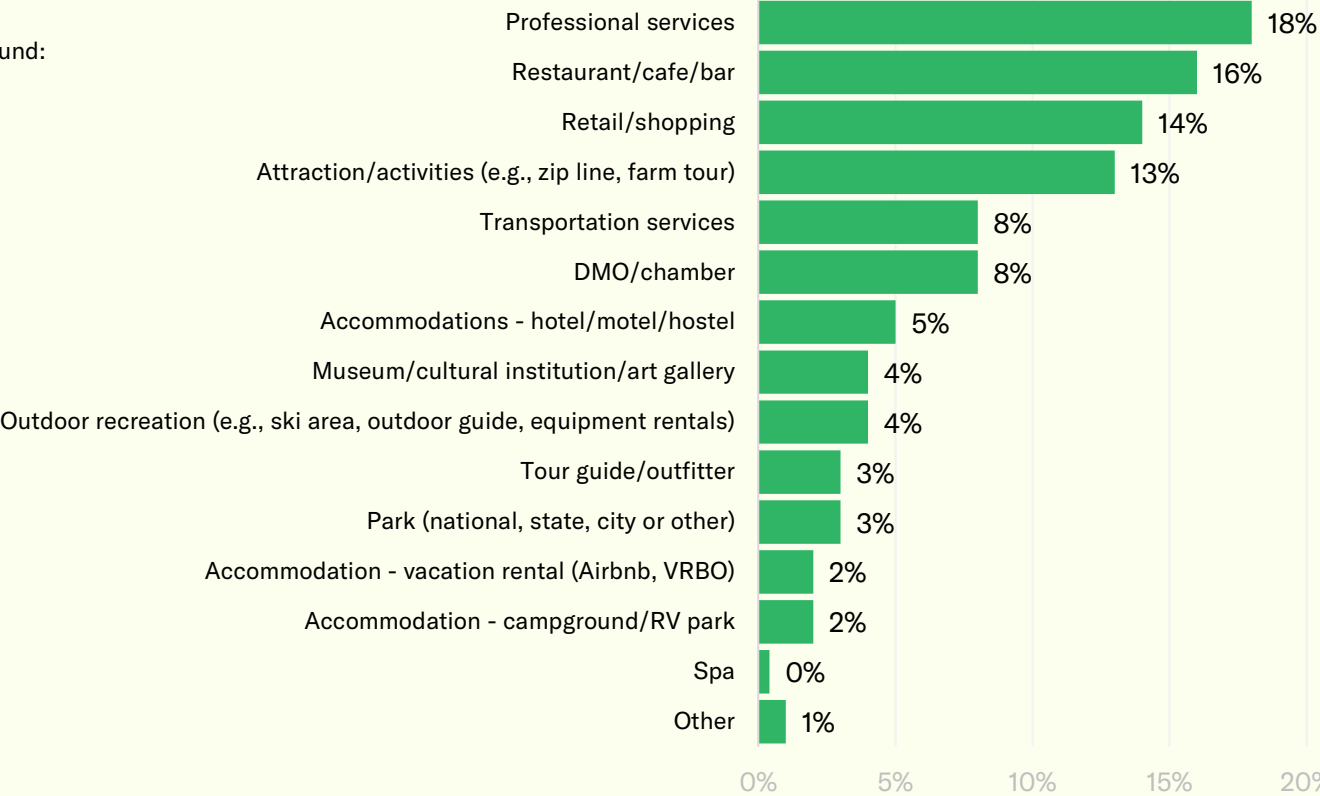
Current Employees: Employment Type



Question: Are you currently employed...?

Base: Current tourism business employees. 1,021 completed surveys.

Place of Employment



Question: Which of the following best describes your current place of employment?

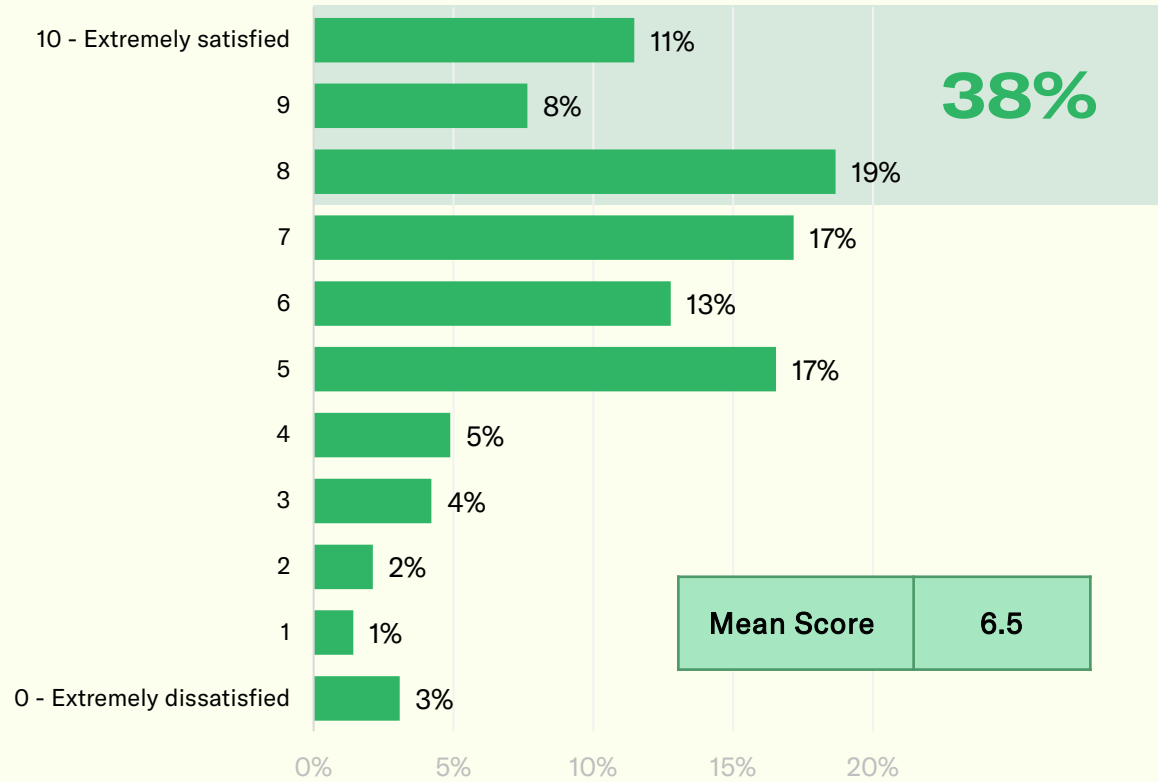
Base: Current tourism business employees. 1,021 completed surveys

*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.

Of current tourism employees and business owners, 38% reported worker satisfaction levels at an eight or higher on an 11-point scale.

More than a third of tourism workers feel quite satisfied by their employment (38%, top 3 box). The average score across current workers was 6.5 out on a 0- to 10-point scale. Workers most commonly rate their satisfaction in the mid-range (47%, rating 5-7). About one in six feel at least somewhat dissatisfied (15%, rating 0-4).

Tourism Industry Worker Satisfaction



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

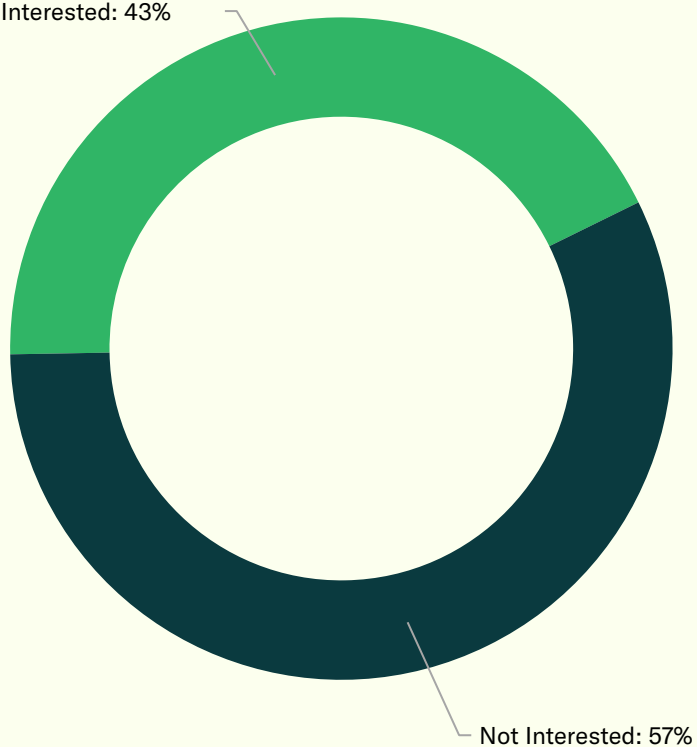
Question: How would you rate your overall satisfaction with working in Oregon's tourism industry?

Base: Total Oregon residents who currently work for or own a tourism business or have worked in the industry in the past. 3,211 completed surveys.

A healthy share of non-tourism-employed Oregon residents would consider working in the industry.

Just under half of non-currently-tourism-employed residents would consider tourism employment in the future (43%).

Tourism Industry Future Employment Interest



Question: Would you ever consider working in Oregon's tourism industry in the future?

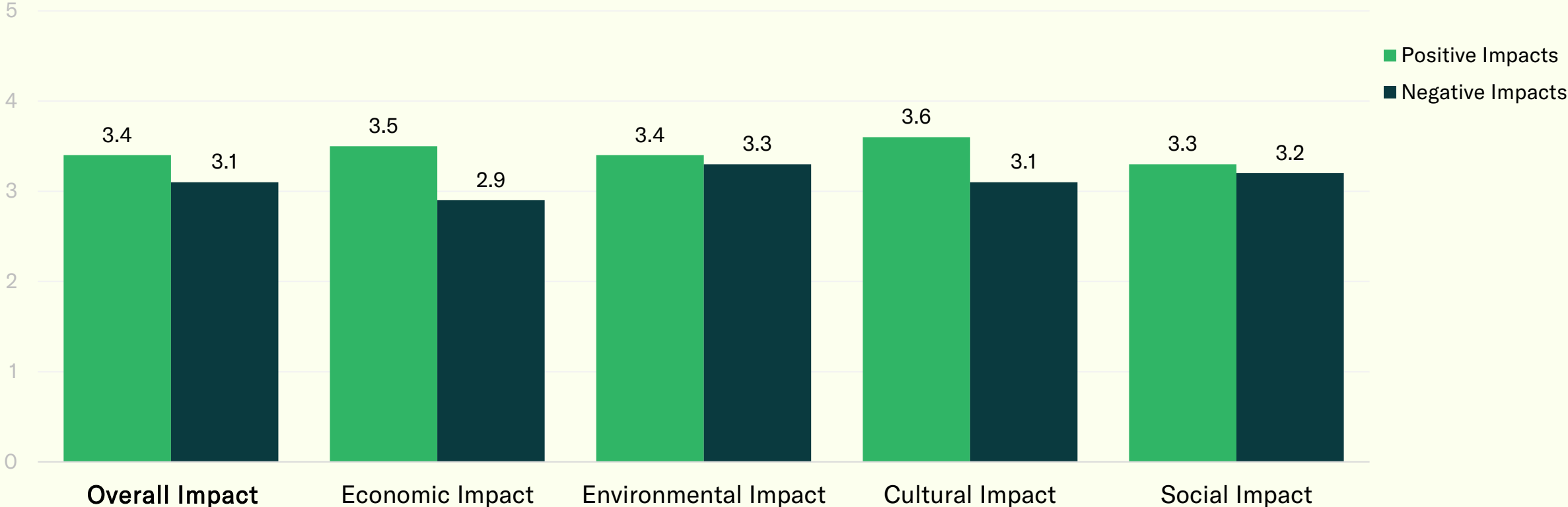
Base: Residents who do not currently own or work for a tourism business. 5,064 completed surveys.

Detailed Findings: Tourism Perceptions

Oregonians' positive perceptions of tourism's impacts outweigh the negative across all dimensions.

Residents consistently feel the positive outweighs the negative impacts of tourism. The largest positive/negative gap occurs in the economic impact (3.5 vs. 2.9, a 0.6-point gap) and the cultural impact (3.6 vs. 3.1, a 0.5-point gap). These two measures also reflect the highest positive scores as well. On the other hand, there is a higher overall agreement with the negative impacts of tourism's environmental and social dimensions, though these are still outpaced by the positive impacts.

Index of Residents' Perceptions of Tourism Impacts



Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements:
Base: Oregon residents. 6,864 completed surveys.

Oregonians see tourism as a positive economic resource that also stimulates local culture.

There is a strong awareness of the overall economic value that tourism brings to Oregon, especially in terms of the funding it allows for community development and employment. Additionally, there is a sense that tourism improves the cultural vibrance of communities, whether by bringing in different perspectives from visitors or by enhancing local cultural heritage through visibility and creating a sense of pride in community. 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.

“I appreciate the mix of vibes and stories and cultural variety that travelers bring in. It's like our little corner of the world becomes this melting pot of cultures.”

“[It] encourages local residents to take pride of ownership of [their] community and hopefully improve maintenance of privately owned properties along with public facilities.”

“All aspects of tourism need a large number of human resources to support it, which provides local residents with a wealth of employment options.”

“The income it brings into the communities, albeit mostly for service jobs. Also, increased visibility that forces community leaders to at least attempt to do a better job.”

Question: What is the biggest benefit of tourism to your community?

Base: Oregon residents. 6,864 completed surveys.

Concerns about congestion and negative environmental impacts are at the forefront of perceived drawbacks of tourism.

There is an overwhelming sense that tourism brings too many people, which detracts from the reasons that many Oregonians moved to the state, such as the natural areas they enjoy. Residents are cognizant that the economic benefits of tourism also go hand-in-hand with issues like crowding, increased cost of living, and environmental impacts. 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.”

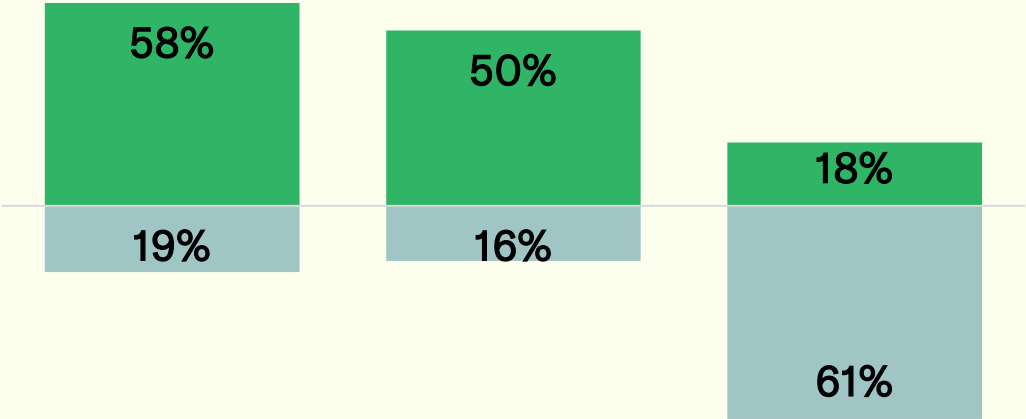
Question: What is the biggest drawback of tourism to your community?
Base: Oregon residents. 6,864 completed surveys.

Residents generally have a positive perception of tourism’s impacts on their own lives, though most disagree that their personal income benefits from tourism.

Oregon residents acknowledge the benefits of tourism, especially being able to enjoy local tourism businesses/attractions (58%). Half also mention that they enjoy having tourists in their area (50%). Less than a third of residents complain about disruptive tourist traffic (29%), and even fewer complain about the negative impact on their day-to-day life (16%).

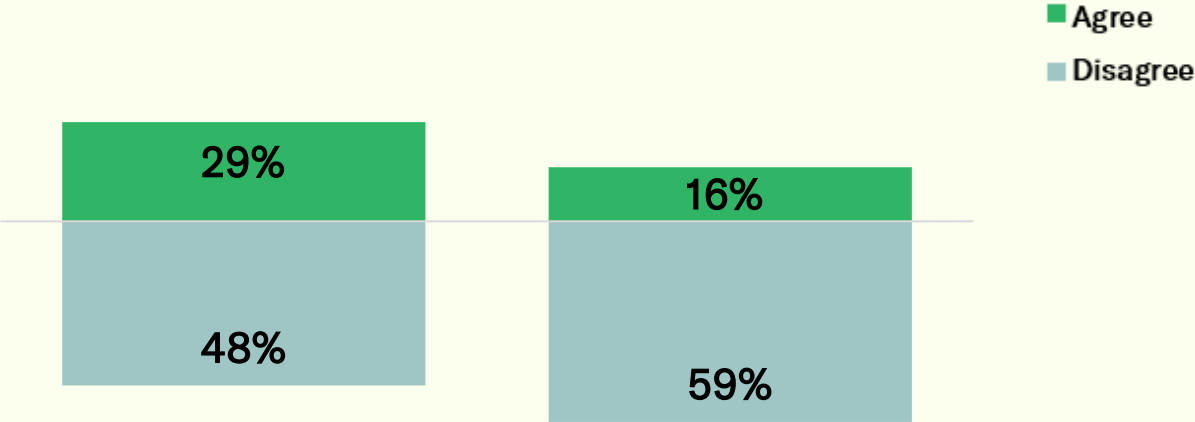
Residents' Perceptions of Positive Local Tourism Personal Impacts

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



Residents' Perceptions of Negative Local Tourism Personal Impacts

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



I often visit local tourism businesses (attractions, museums, parks, etc.)

I like having tourists in my area.

My personal income and livelihood are supported by money tourists spend in our local economy.

Traffic from tourists disrupts my daily routine.

Tourists negatively impact my day-to-day life.

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. 6,864 completed surveys.

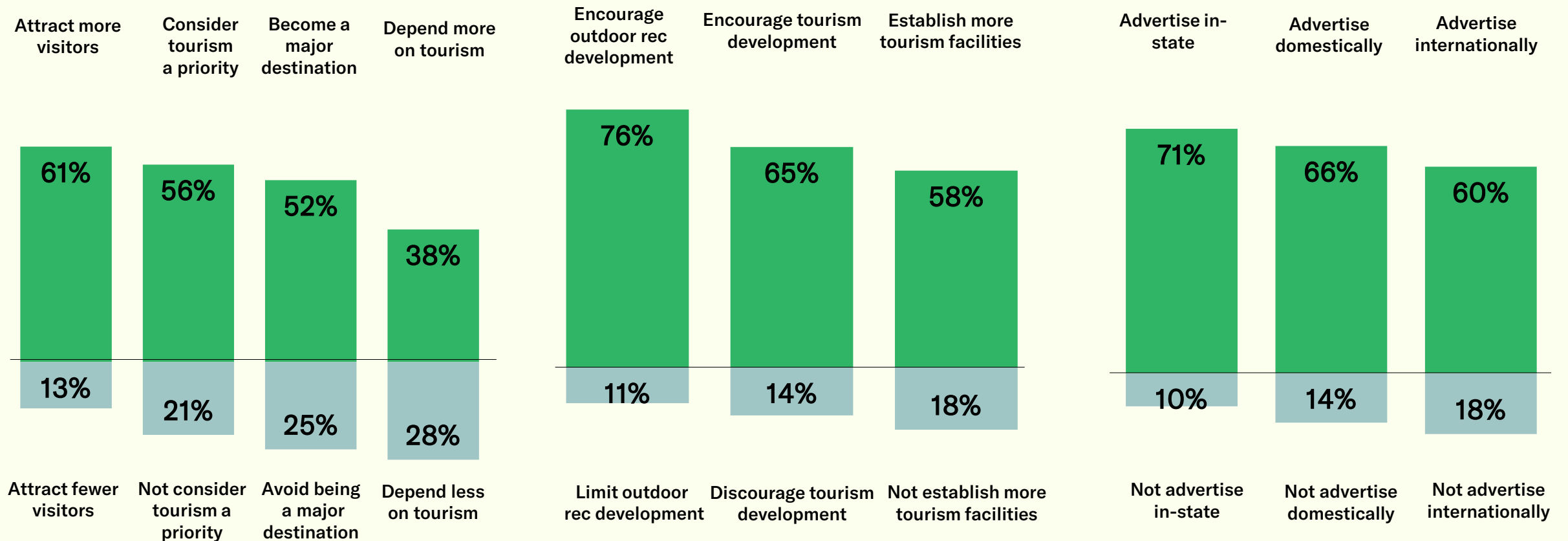
Residents widely support tourism in Oregon, but only a minority want the state to depend on the industry more.

In terms of overall support for tourism, calculated as the mean score for across all 10 statements shown below, total Oregon residents scored 4.9 out of a maximum possible mean score of 7.0. A majority of Oregon residents supports every potential option for improving tourism. At least three in five agree that Oregon should encourage outdoor recreation development (76%), advertise in-state (71%), advertise domestically (66%), encourage tourism development (65%), attract more visitors (61%), and advertise internationally (60%).

Support for Tourism – “Oregon should...”

(On a 7-point scale)

■ Positive Score (5-7)
■ Negative Score (1-3)



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...

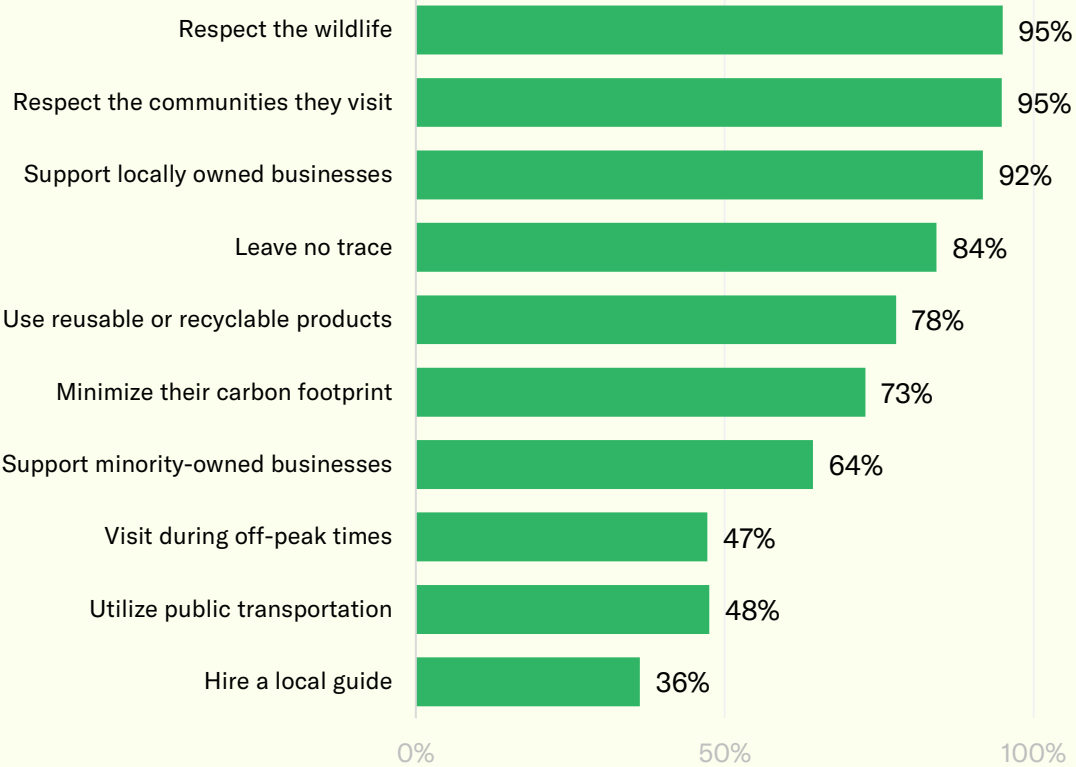
Base: Oregon residents. 6,864 completed surveys.

Above all, residents want visitors to show respect for and support of local communities and wildlife in Oregon.

Essentially all Oregon residents want respect from visitors; notably, respect for the wildlife (95%) and respect for the communities they visit (95%). Support for locally owned businesses is deemed nearly as important (92%). At least three in four also want visitors to be environmentally careful; specifically, to leave no trace (84%), use reusable/recyclable products (78%), and minimize their carbon footprint (73%).

Visitor Behavior Importance

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



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

Base: Total Oregon residents. 6,864 completed surveys.

BIPOC Residents

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

- They are more likely to say they have stayed in Oregon due to education and cost of living but less likely to report staying due to the climate or the outdoors.
- These residents are more likely to own or work at a business that serves the tourism industry.
- They are much more likely to want Travel Oregon to prioritize funding DEI training for the industry.

Looking at differences across specific ethnic groups, Native American/Alaskan Native (16.8 score) as well as African American/Black residents (17.5) had the lowest Perceived Quality of Life scores compared to the total resident score of 18.1. On the other hand, white/Caucasian residents outperformed the total resident score at 18.3.

When comparing the impact index scores for individual ethnic groups, again we see that Native American/Alaskan Native and African American/Black residents have slightly lower positive-impact scores across all indexes and higher negative-impact scores. In particular, Native American/Alaskan Native residents had a significantly higher negative score for the Environmental Impact index (3.7 vs. 3.3 for total residents), while African American/Black residents had a significantly higher negative score for the Economic Impact index (3.3 vs. 2.9 for total residents).



LGBTQ+ Residents

Among LGBTQ+ residents, the following differences emerged:

- They are more likely to say that they have stayed in Oregon due to the political climate, education, and entertainment options.
- They are more likely to own or work at a business that serves the tourism industry.
- They are much more likely to want Travel Oregon to prioritize funding DEI training for the industry.

When comparing the impact index scores for LGBTQ+ residents against total residents, we see that Oregon residents who identify as LGBTQ+ are more likely to have a slightly higher negative score for the Economic, Environmental, and Cultural Impact indexes. In particular, they are more likely to perceive tourism's environmental impacts to be negative (3.5 vs. 3.3 for total residents), though their positive index score still outpaces the negative.



Residents With Disabilities

Among Oregon residents with disabilities, the following differences emerged:

- They are more likely to say that they have stayed in Oregon due to familial responsibilities and the cost of living.
- They are more likely to own a business that serves the tourism industry but less likely to be employed by a tourism business.
- They are much more likely to want Travel Oregon to use funding to make destinations more accessible.

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 higher negative score for all tourism impact indexes (Economic, Environmental, Cultural, Social). In particular, they are more likely to perceive tourism's environmental impacts to be negative (3.5 vs. 3.3 for total residents), which also outpaces their positive index score for tourism's environmental impacts (3.4).



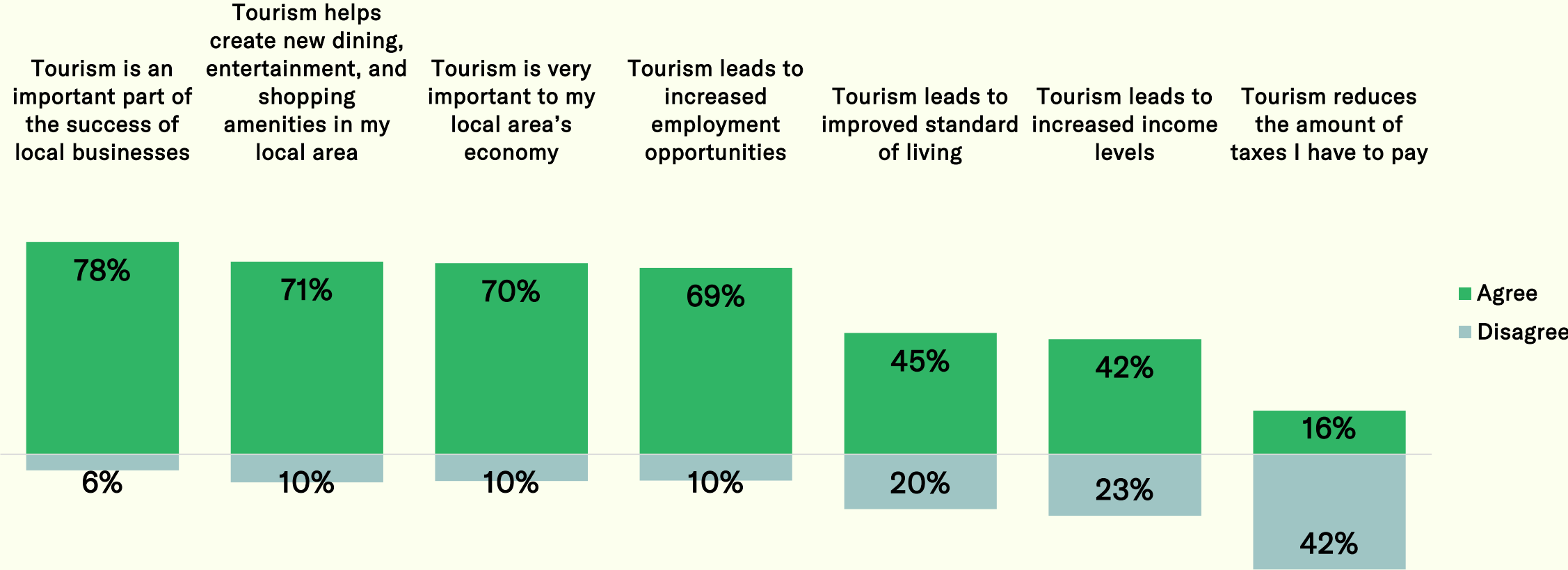
Economic

Residents agree that tourism benefits the local economy but are less likely to perceive its personal economic benefits.

Leading other economic benefits, three in four residents recognize the importance of tourism to the success of local businesses (78% agree). More than two-thirds also note that tourism adds to a variety of dining/entertainment options (71%), the local economy's health (70%), and employment (69%). Less striking but still positive, residents agree that tourism improves the standard of living (45%) and increases income (42%). Residents are skeptical that tourism reduces their taxes (42% disagree).

Residents' Perceptions of Tourism's Positive Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



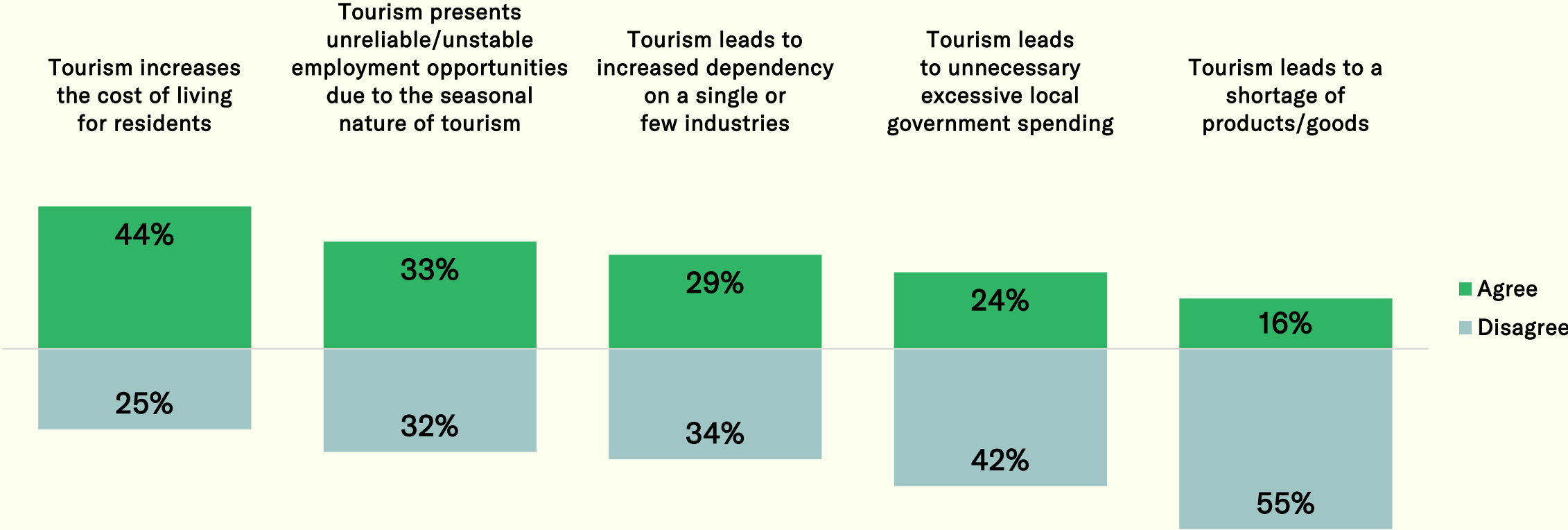
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements. Base: Oregon residents. 6,864 completed surveys.

Only a minority of total residents agree with tourism’s negative economic impacts, led by a perceived increased cost of living (44%).

Resultant increased cost of living leads other negative perceptions about tourism for Oregon residents (44%). More closely split between viewpoints are the unstable employment caused by seasonality (33% agree; 32% disagree) and increased dependency on a limited number of industries (29% agree; 34% disagree). Residents often do not agree that tourism leads to unnecessary/excessive local government spending (24% agree; 42% disagree) or, especially, shortages of products/goods (16% agree; 55% disagree).

Residents' Perceptions of Tourism’s Negative Economic Impacts

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



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. 6,864 completed surveys.

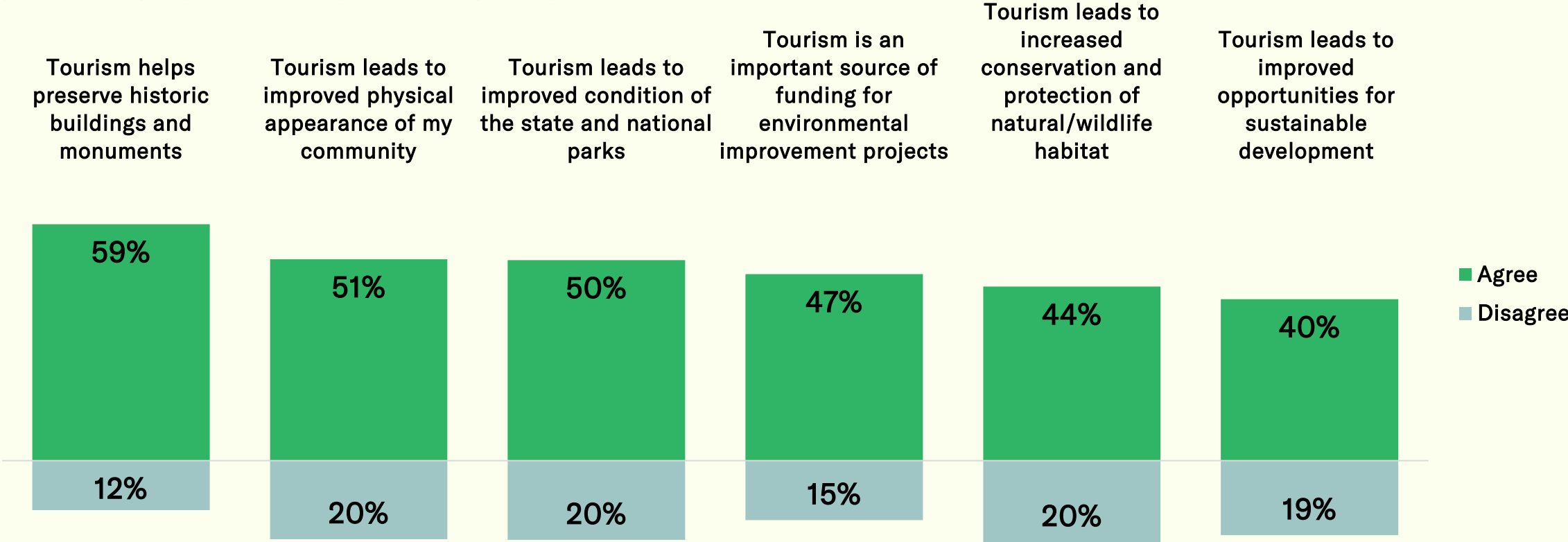
Environmental

A small majority of residents agree that tourism supports the maintenance of local communities and parks.

Three in five Oregon residents agree that tourism helps preserve their historic buildings/monuments (59%). Around half cite the improved physical appearance of their community (51%) and improved condition of state/national parks (50%), and note that tourism aids in funding for environmental improvements (47%). While still more positive than negative, fewer are convinced that tourism increases conservation/protection of natural/wildlife habitat (44%) or improves opportunities for sustainable development (40%).

Residents' Perceptions of Tourism's Positive Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



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.

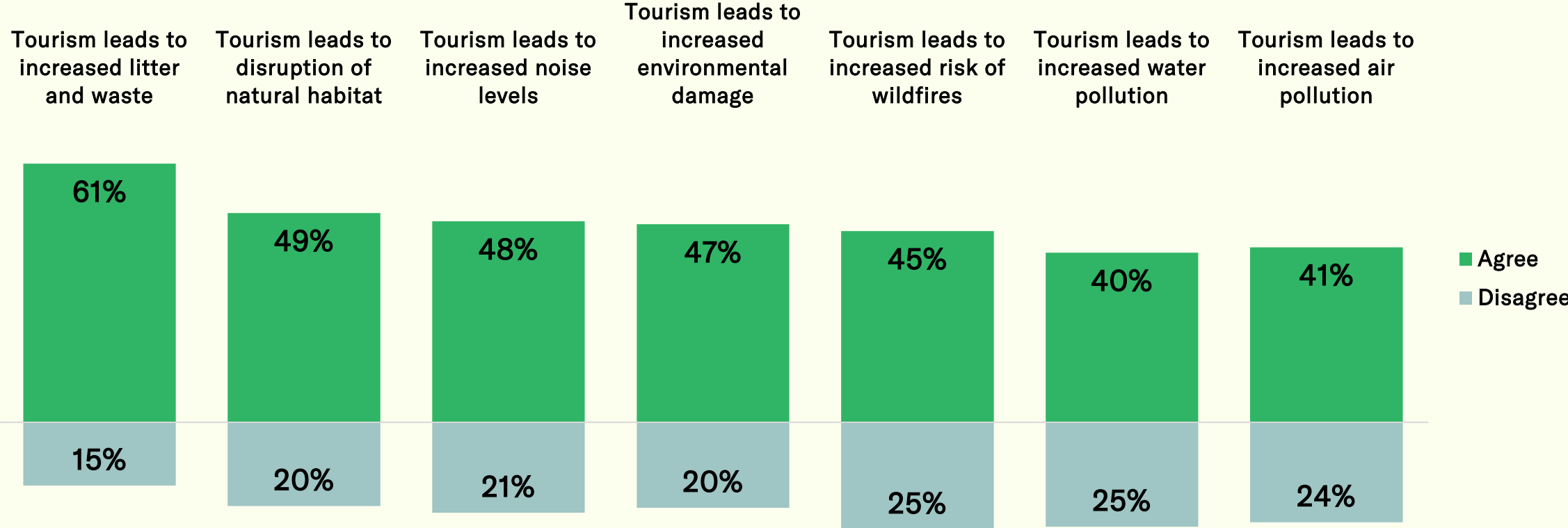
Base: Oregon residents. 6,864 completed surveys.

But a larger share of Oregonians agree that tourism increases waste, while nearly half agree that tourism disrupts the local environment.

Residents point to increased litter/waste as the biggest environmental drawback to tourism, by far (61%). About half complain about the disruption of natural habitat, increased noise, increased environmental damage, and increased risk of wildfires. Two in five are concerned about water and air pollution.

Residents' Perceptions of Tourism's Negative Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



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. 6,864 completed surveys.

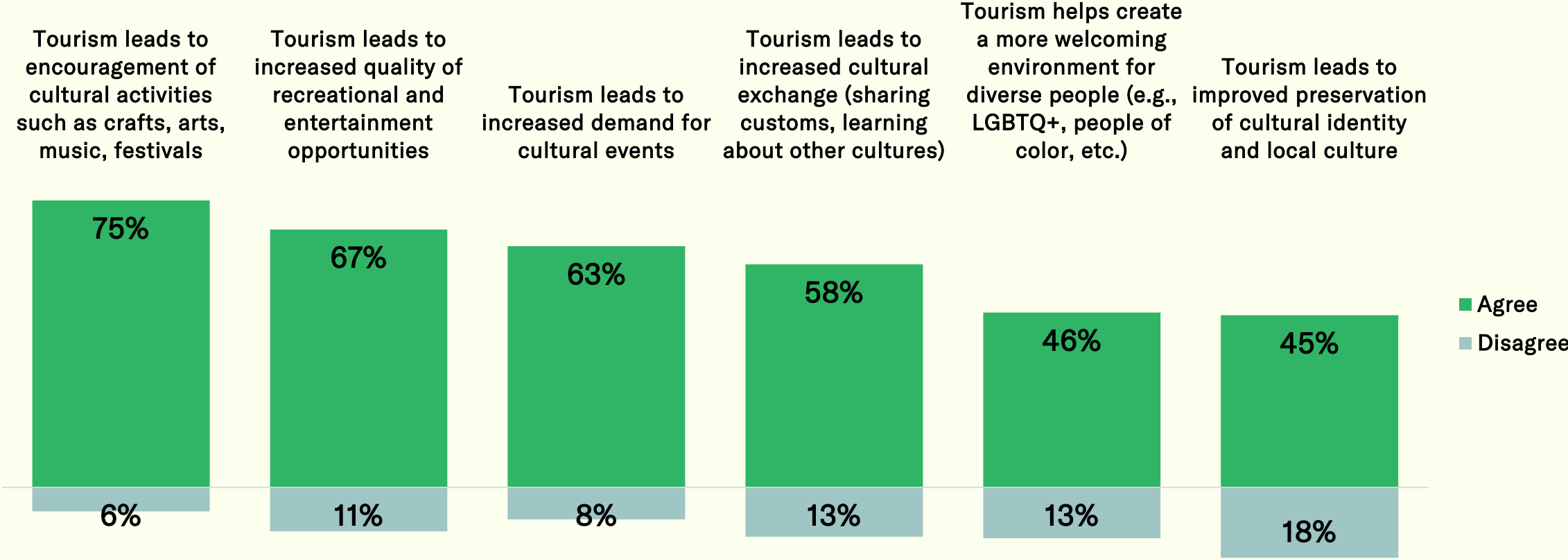
Cultural

Tourism is largely perceived to enhance local community life by encouraging cultural opportunities that residents can also enjoy.

Most residents appreciate many positive cultural benefits of tourism, especially the encouragement of activities such as crafts, arts, music, and festivals (75%). Two-thirds of residents agree that tourism increases recreational and entertainment options (67%). Almost as many agree that it increases demand for cultural events (63%) and cultural exchange (58%). Almost half agree that tourism helps to welcome diverse people and improves the preservation of cultural identity/local culture.

Residents' Perceptions of Tourism's Positive Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



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.

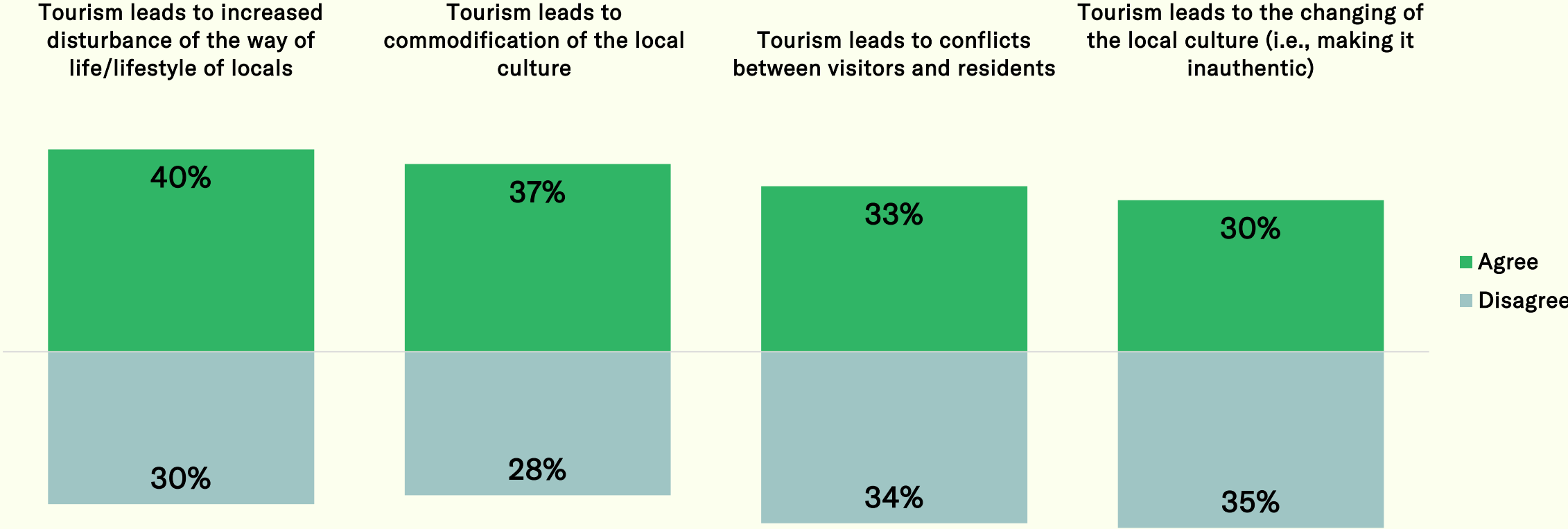
Base: Oregon residents. 6,864 completed surveys.

On the other side of the coin, four in 10 residents feel that tourism disrupts the local way of life, while a third feel it commodifies the local culture.

Residents view the primary negative impacts of tourism as the disturbance of their local life/lifestyles (40%) and commodification of the local culture (37%). They are less likely to agree that tourism leads to conflicts between tourists and residents and even more likely to disagree (35%) than agree (30%) that tourism changes the local culture.

Residents' Perceptions of Tourism's Negative Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



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. 6,864 completed surveys.

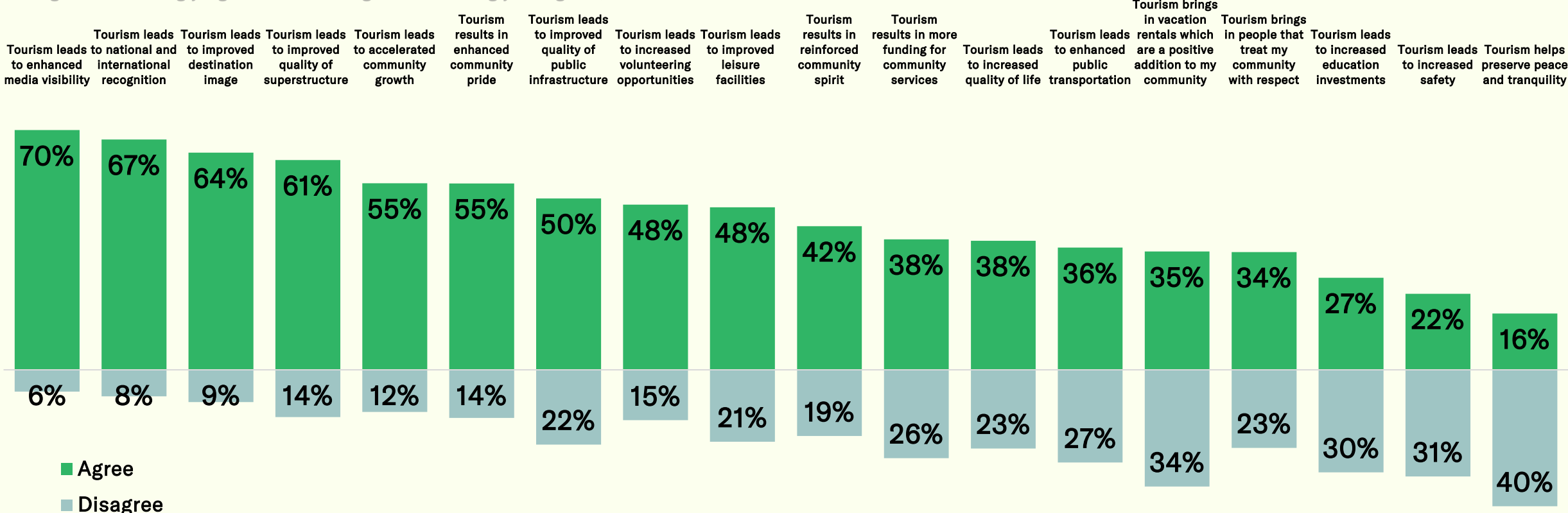
Social

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 superstructure (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. Sentiment is neutral around whether tourism brings vacation rentals that add positively to the community, with similar shares of residents agreeing and disagreeing with this statement (35% vs. 34%).

Residents' Perceptions of Tourism's Positive Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



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.

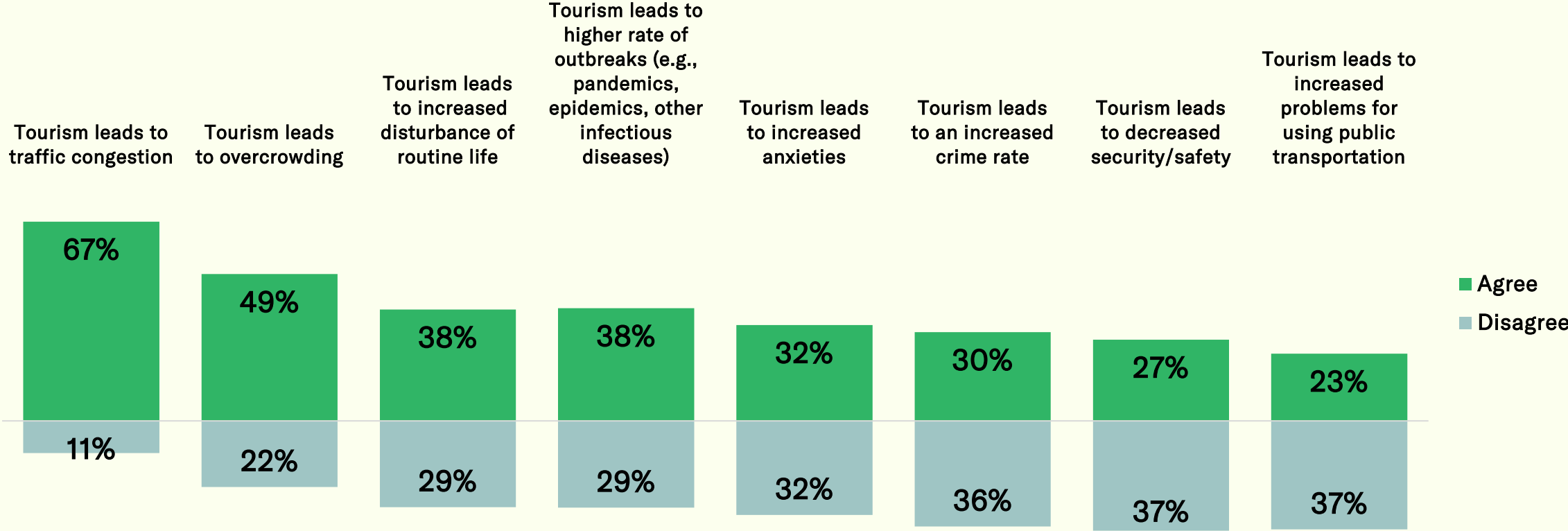
Base: Oregon residents. 6,864 completed surveys.

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).

Residents' Perceptions of Tourism's Negative Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



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. 6,864 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

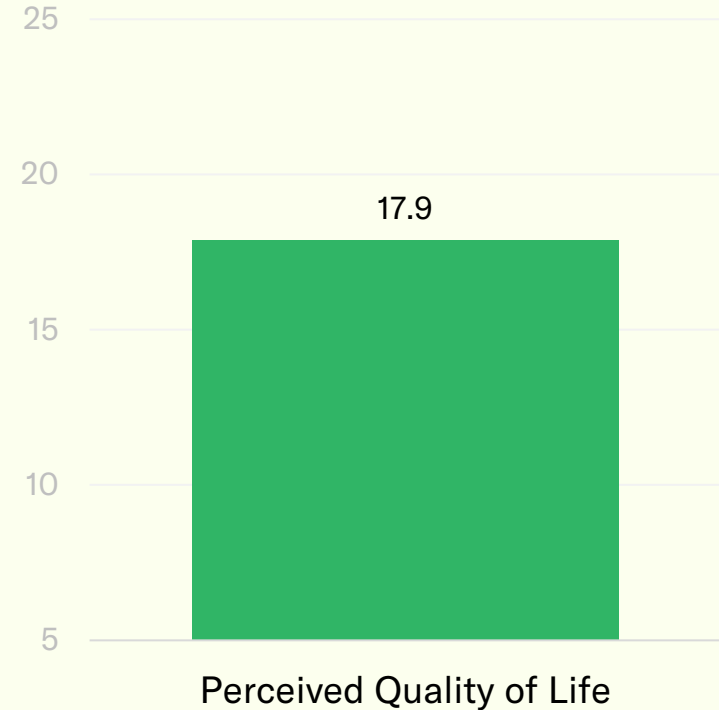
Total residents surveyed:	1,518
Average age:	48 years old
Average household income:	\$93,364
Employed:	67%
College graduate:	64%
Married/domestic partnership:	60%
Have children in household:	26%
BIPOC:	22%
LGBTQ+:	15%
Accessibility needs in household:	16%



Portland Region residents have a high perceived quality of life, on par with the rest of the state.

Of the seven Oregon regions, Portland residents place about average in overall perceived quality of life (17.9 vs. 18.1 overall state). Roughly a third feel that their quality of life has improved from a year ago (35%, very similar to the overall Oregon average of 34%). However, they are optimistic that will improve in the future (41%, similar to the overall average of 40%).

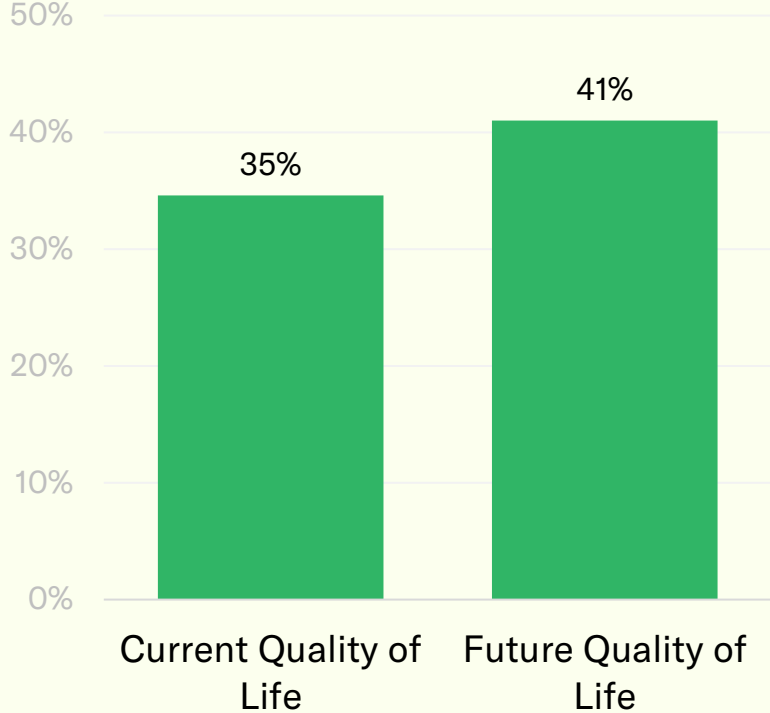
Portland Region Residents' Score*



*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 5 (extremely dissatisfied) and a maximum possible score of 25 (extremely satisfied).

Quality of Life

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



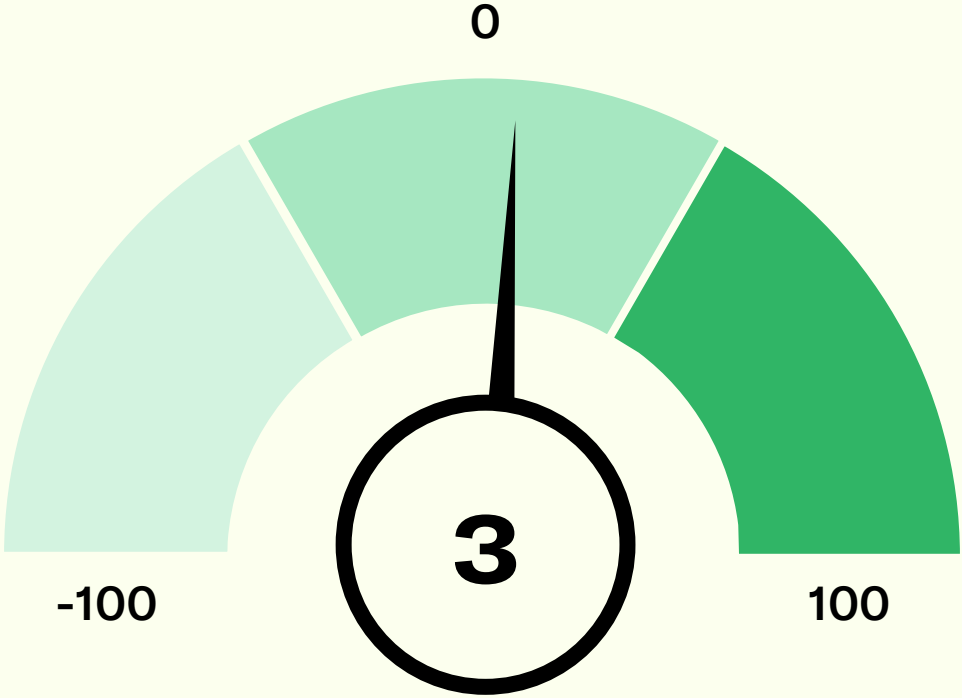
Questions: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?
Compared to one year ago, how would you rate your personal quality of life in Oregon?

Base: Portland Region residents. 1,518 completed surveys.

Portland Region residents slightly outpace overall Oregonians in likelihood to recommend Portland as a tourism destination.

More than a third of Portland Region residents are promoters of their local community as a tourism destination (37% 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 3, compared to the overall state score of -2.

Likelihood to Recommend Local Community as Tourism Destination



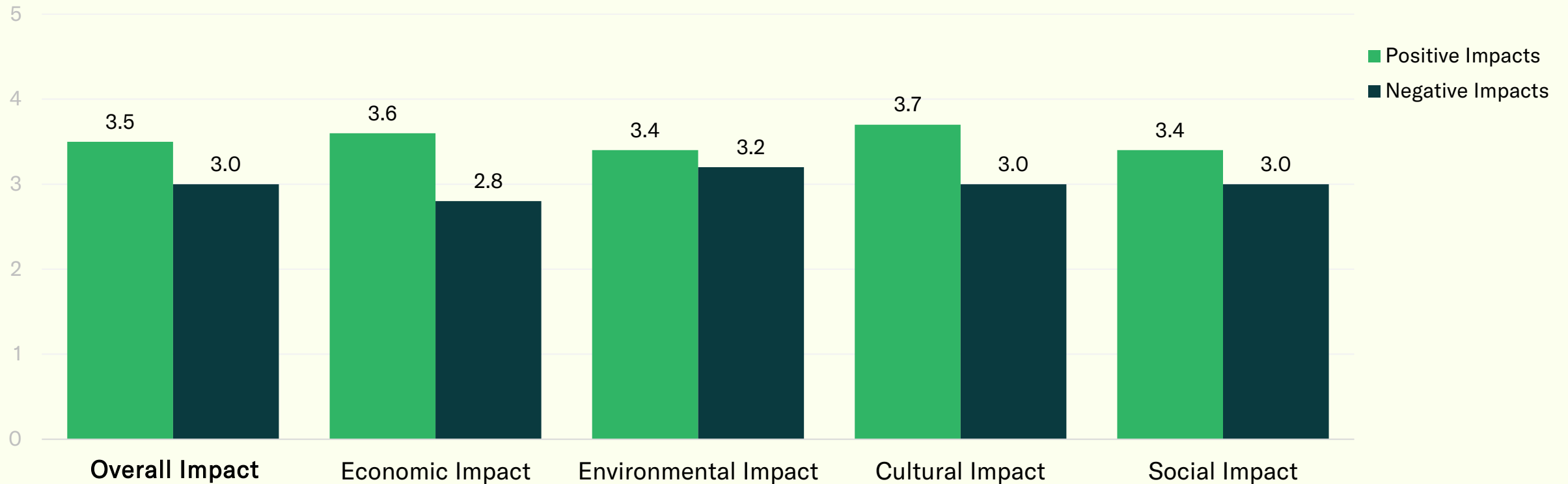
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

Base: Portland Region residents. 1,518 completed surveys.

Tourism's positive impacts outpace the negative to a higher degree among Portland residents versus overall Oregonians for all dimensions.

Portland residents consistently feel the positive outweighs the negative impacts of tourism. Further, Portland residents post the highest positive scores on every type of impact (economic, environmental, cultural, and social). Similar to the overall statewide results, the largest positive/negative gap occurs in the economic impact (3.6 vs. 2.8, a 0.8-point gap) and the cultural impact (3.7 vs. 3.0, a 0.7-point gap). These two measures reflect the highest positive scores as well. On the other hand, environmental and social impacts, while positive overall, face more criticism.

Index of Residents' Perceptions of Tourism Impacts



*See the appendix for the individual scores for statements included in each index.

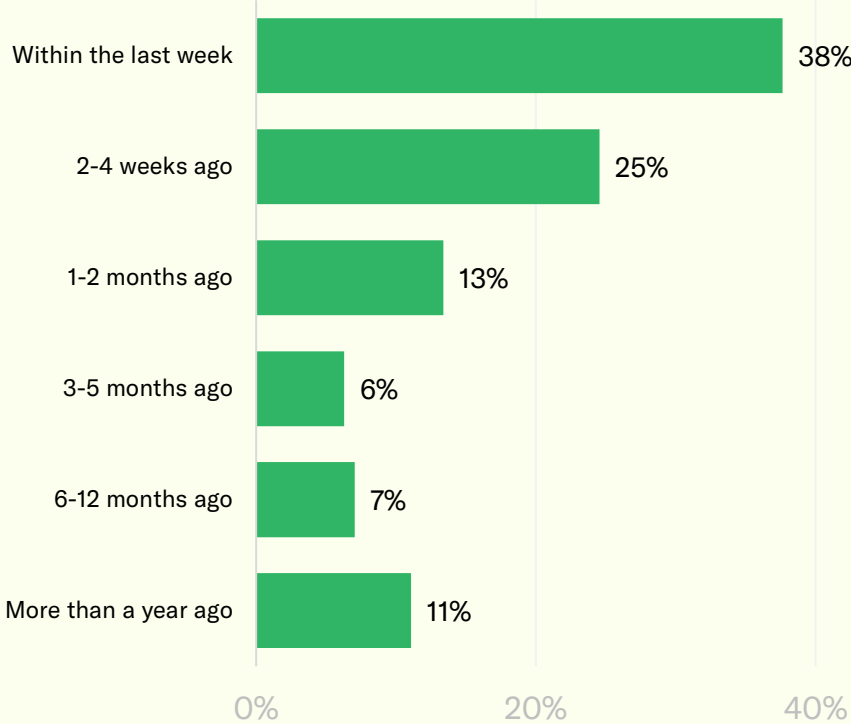
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Portland Region residents. 1,518 completed surveys.

Portland region residents are still visiting downtown Portland, with three-fourths visiting within the last two months.

Portland area residents have visited the downtown area recently. More than a third have been downtown in the past week (38%). Further, three-quarters have been downtown within the past two months (76%).

Last Visit to Downtown Portland

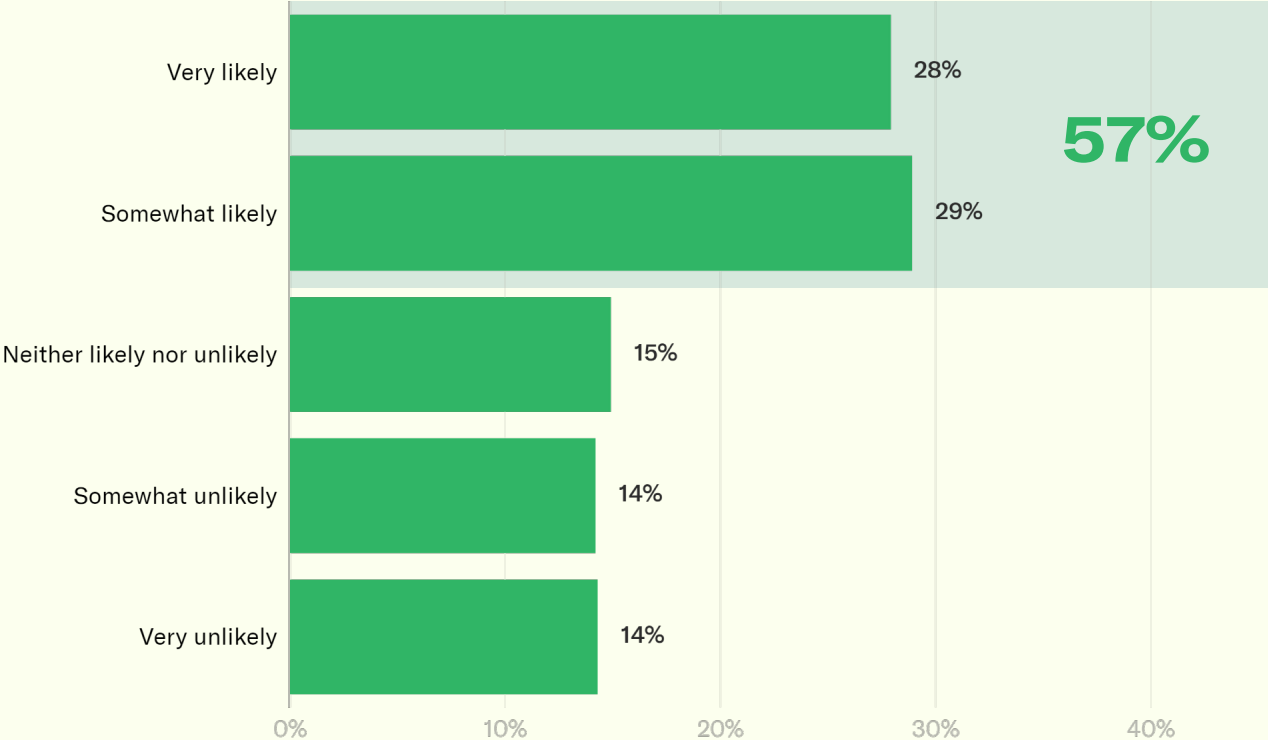


Question: When was your last visit to Downtown Portland?
Base: Total Portland region residents. 1,518 completed surveys.

Most residents would recommend Portland as a place to visit.

Portland appeals to its regional residents. Over half (57%) would likely recommend Portland as a place to visit (28% very likely, 20% somewhat likely). However, opportunities for improvement exist, with more than a quarter (28%) unlikely to recommend it.

Likelihood to Recommend Portland



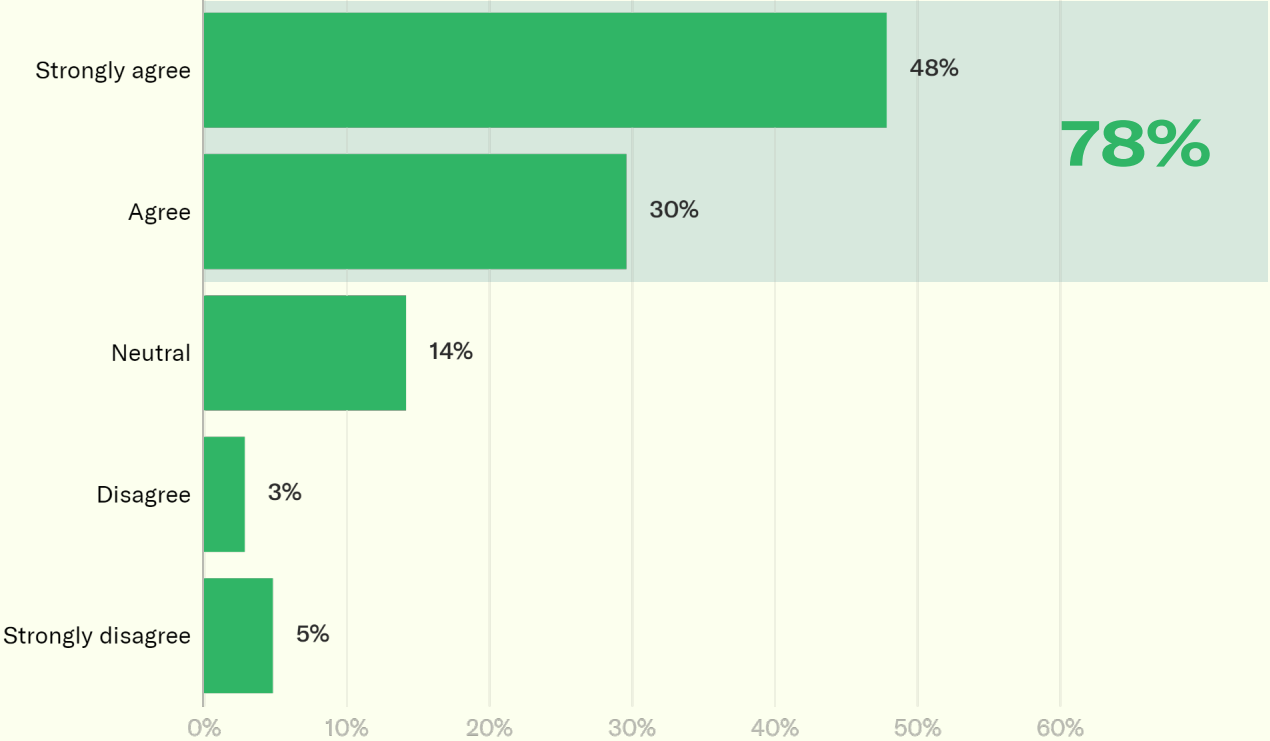
Question: How likely are you to recommend Portland as a place to visit?

Base: Total Portland region residents. 1,518 completed surveys.

PR and positive media coverage are considered important for bringing more visitors to Portland.

Three-quarters of Portland area residents believe Portland needs public relations/positive media coverage to attract visitors to the community (78%). Importantly, half “strongly agree” (48%).

Importance of PR & Positive Media for Community Tourism



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. 1,518 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

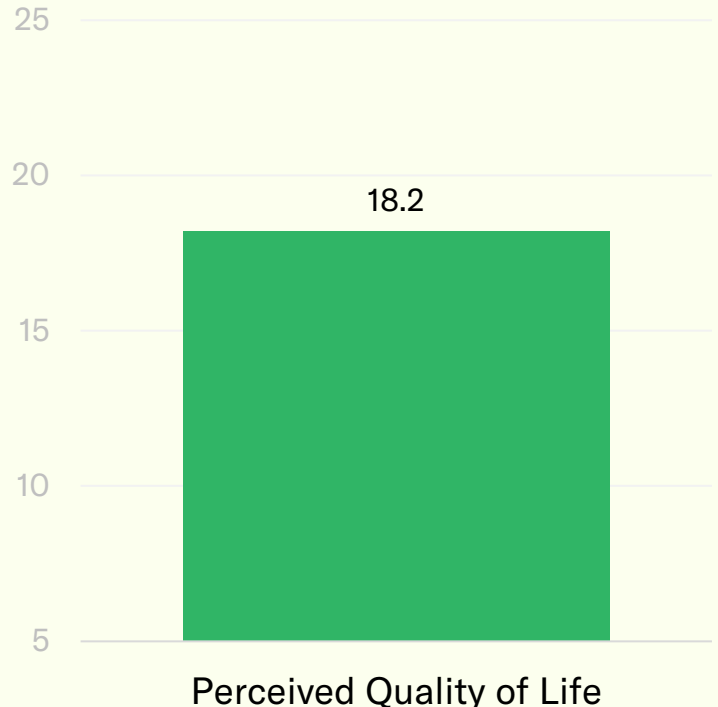
Total residents surveyed:	1,041
Average age:	49 years old
Average household income:	\$84,702
Employed:	62%
College graduate:	55%
Married/domestic partnership:	62%
Have children in household:	30%
BIPOC:	17%
LGBTQ+:	12%
Accessibility needs in household:	19%



Willamette Valley residents have a high perceived quality of life, similar to overall Oregonians.

Of the seven Oregon regions, Willamette Valley residents nearly match the Oregon average in overall perceived quality of life (18.2 vs. 18.1 overall). Roughly a third feel that their quality of life has improved from a year ago (35%, very similar to the overall average of 34%). However, they are optimistic that will improve in the future (42%, similar to the overall state average of 40%).

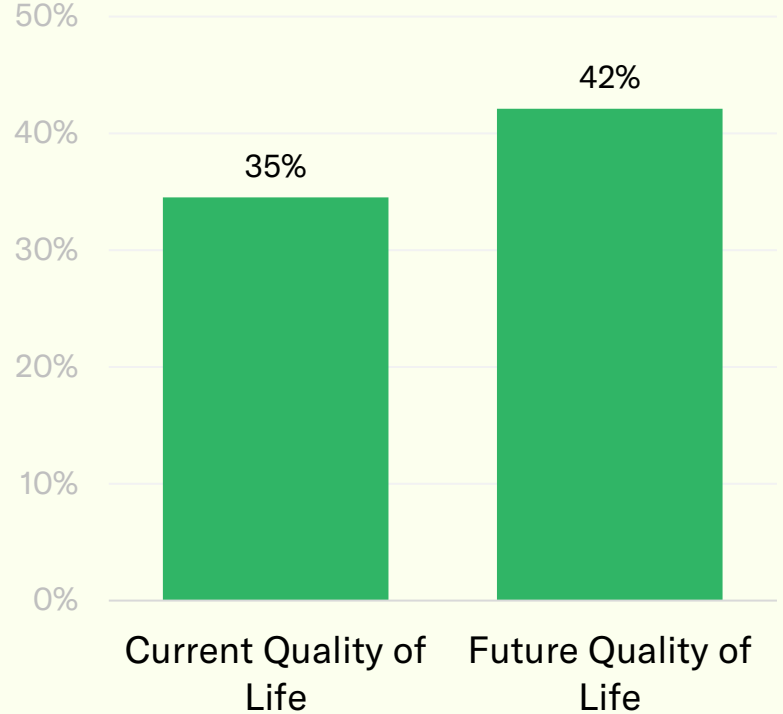
Willamette Valley Residents' Score*



*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 5 (extremely dissatisfied) and a maximum possible score of 25 (extremely satisfied).

Quality of Life

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



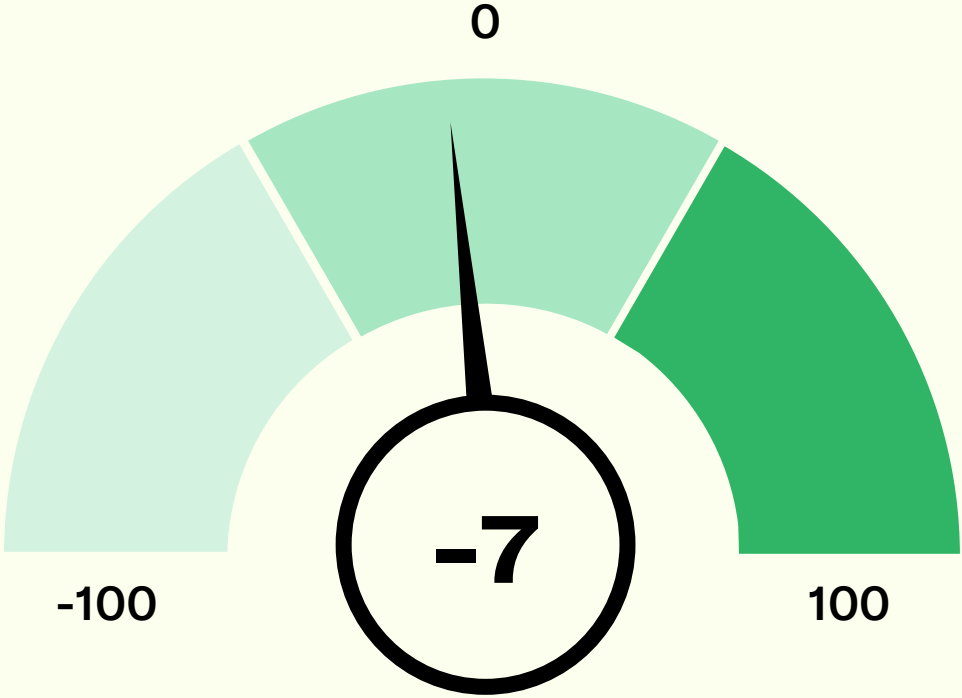
Questions: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?
Compared to one year ago, how would you rate your personal quality of life in Oregon?

Base: Willamette Valley residents. 1,041 completed surveys.

Nearly half of residents would recommend their local community as a tourism destination.

A third of Willamette Valley 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 Willamette Valley falls behind the state score (-7 vs. -2).

Likelihood to Recommend Local Community as Tourism Destination



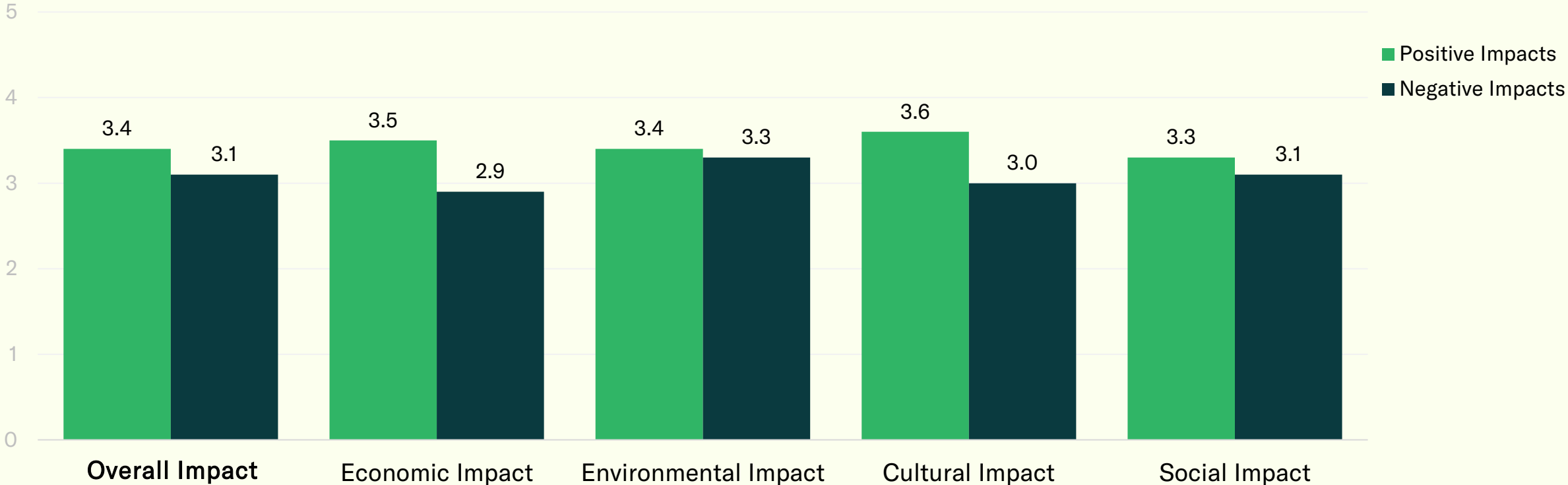
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

Base: Willamette Valley residents. 1,041 completed surveys.

Willamette Valley residents' perceptions of tourism's positive impacts outpace the negative, particularly for economic and cultural dimensions.

Willamette Valley residents consistently feel the positive outweighs the negative impacts of tourism. Further, the positive scores closely mirror the overall state averages. Similar to total Oregon results, the largest positive/negative gap occurs in the economic impact (3.5 vs. 2.9, a 0.6-point gap) and the cultural impact (3.6 vs. 3.0, a 0.6-point gap). These two measures reflect the highest positive scores as well. On the other hand, environmental and social impacts are just slightly more positive than negative.

Index of Residents' Perceptions of Tourism Impacts



*See the appendix for the individual scores for statements included in each index.

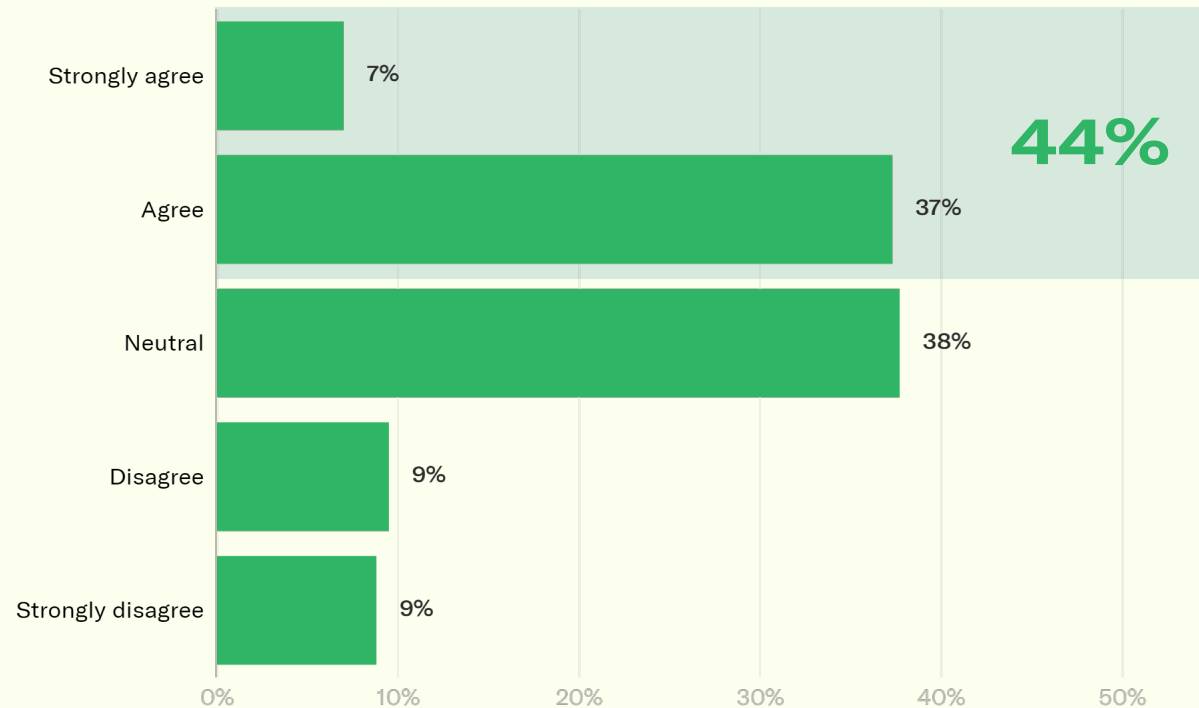
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Willamette Valley residents. 1,041 completed surveys.

There is opportunity for the WVVA to build trust among tourism-business owners.

After facing the global pandemic and a series of wildfires, just under half of tourism-business owners feel that the Willamette Valley Visitors Association will help their business or community in a time of crisis/recovery (44%). About a third feel neutral (38%) but, on a positive note, comparatively few (18%) disagree.

Willamette Valley Resident Perceptions



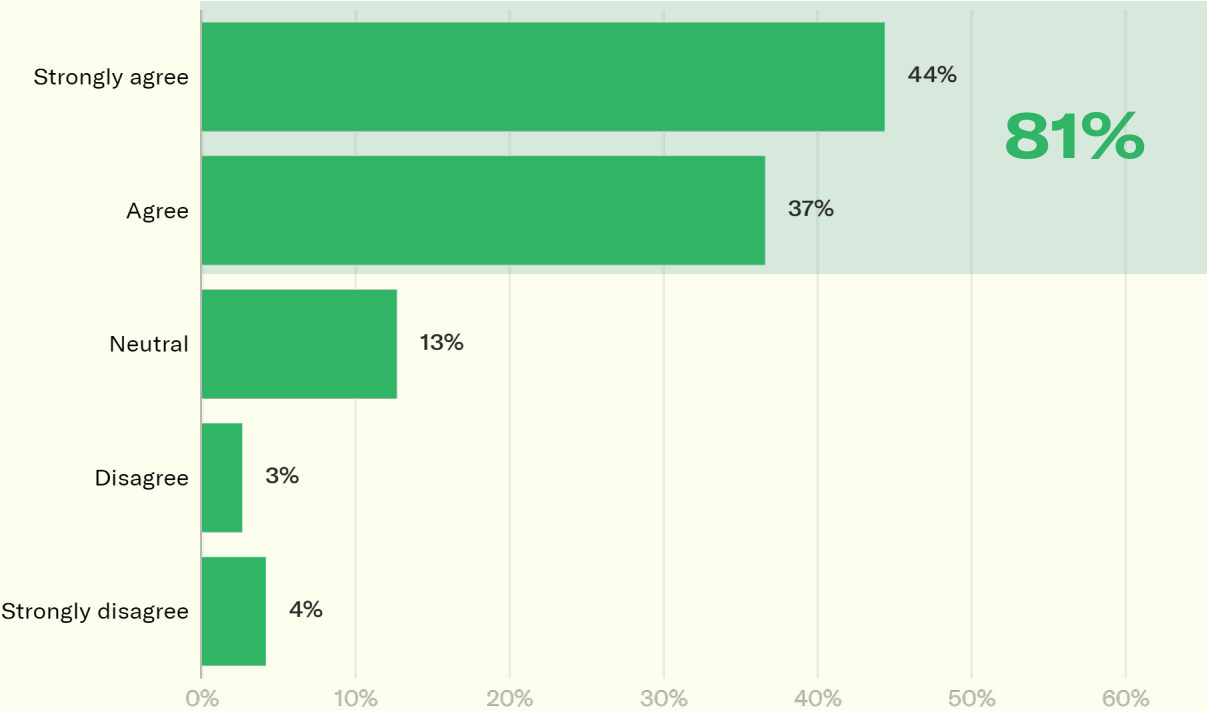
Question: After a global pandemic and multiple years of wildfires, I feel I can trust that the Willamette Valley Visitors Association, my regional destination management organization, will assist my business or community in a time of crisis and continued recovery.

Base: Willamette Valley residents who own a tourism business or are employed by such a business. 281 completed surveys.

Residents are proud of their community, with the vast majority agreeing that the Willamette Valley is a prime wine and culinary destination.

An indication of the pride of their region, more than four in five residents view the Willamette Valley as a prime wine/culinary destination (81%). Further, almost half strongly agree (44%).

Willamette Valley Resident Perceptions



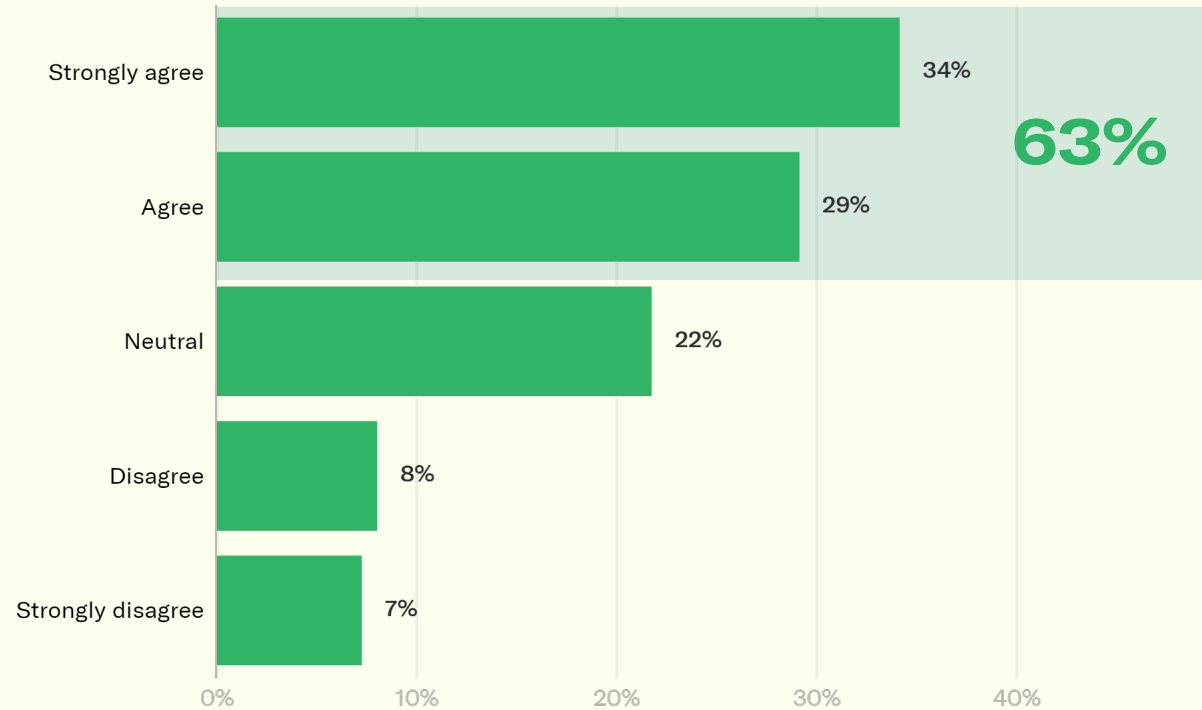
Question: Willamette Valley is a prime destination for wine and culinary experiences.

Base: Willamette Valley residents. 1,041 completed surveys.

Nearly two-thirds want the Willamette Valley to be positioned as a premier U.S. wine region.

Almost two in three would like to strengthen perceptions of their region (63%). They agree (29%) or strongly agree (34%) that the Willamette Valley could be positioned and marketed as a premier U.S. wine region, similar to Napa Valley or Sonoma.

Willamette Valley Resident Perceptions



Question: I would like to see the Willamette Valley positioned and marketed as a premier U.S. wine region like Napa Valley, Sonoma, Walla Walla, etc.

Base: Willamette Valley residents. 1,041 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

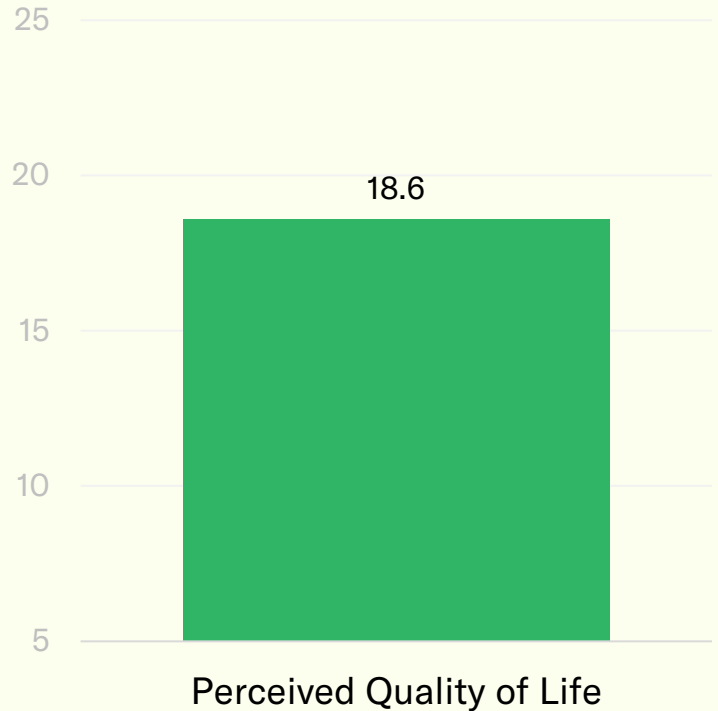
Total residents surveyed:	820
Average age:	50 years old
Average household income:	\$97,801
Employed:	63%
College graduate:	65%
Married/domestic partnership:	68%
Have children in household:	27%
BIPOC:	15%
LGBTQ+:	9%
Accessibility needs in household:	13%



Central Oregon residents have a higher perceived quality of life compared to overall state residents.

Of the seven Oregon regions, residents place Central Oregon ahead of overall Oregonians in overall perceived quality of life (18.6 vs. 18.1 overall). Roughly a third feel that their quality of life has improved from a year ago (34%, matching the overall average of 34%). They are slightly optimistic that will improve in the future (37%, just under the overall average of 40%).

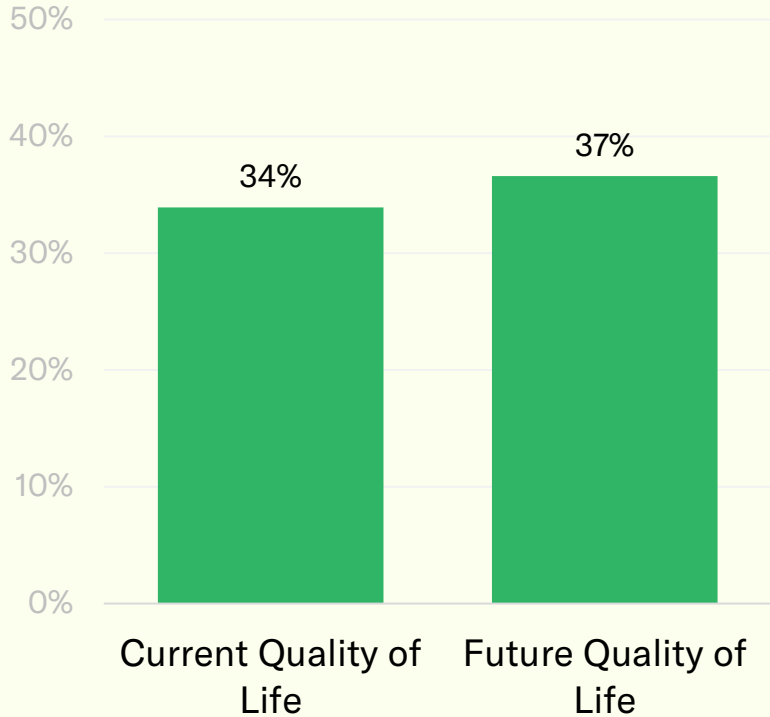
Central Oregon Residents' Score*



*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 5 (extremely dissatisfied) and a maximum possible score of 25 (extremely satisfied).

Quality of Life

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



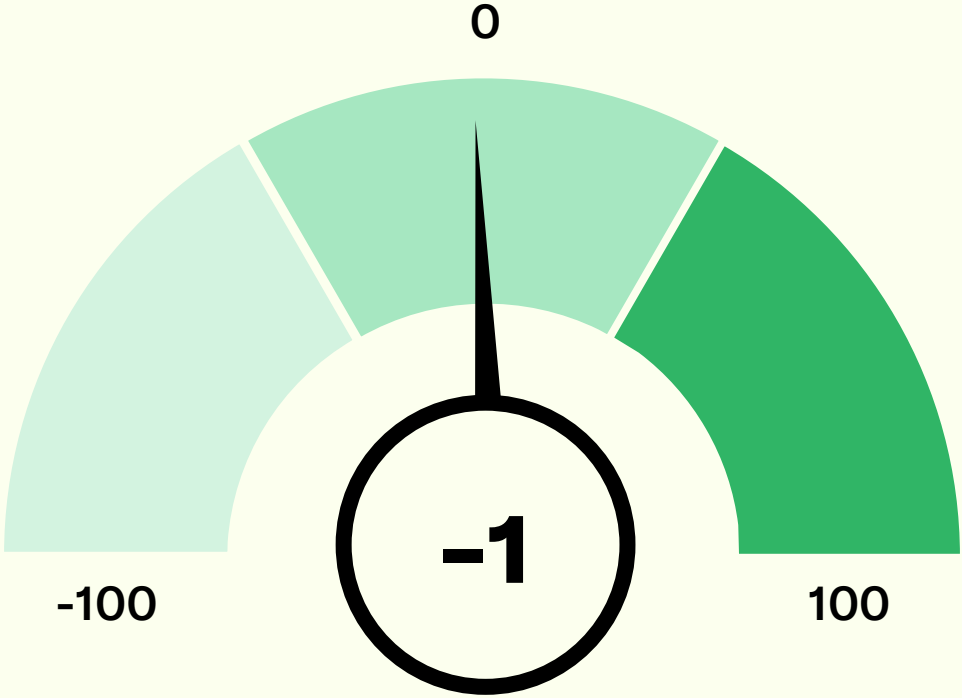
Questions: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?
Compared to one year ago, how would you rate your personal quality of life in Oregon?

Base: Central Oregon residents. 820 completed surveys.

Likelihood to recommend Central Oregon as a tourism destination is on par with the overall state rating.

More than a third of Central Oregon 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 Central Oregon region's likelihood-to-recommend score just outpaces the state's score, though still is in the negative (-1 vs. -2).

Likelihood to Recommend Local Community as Tourism Destination



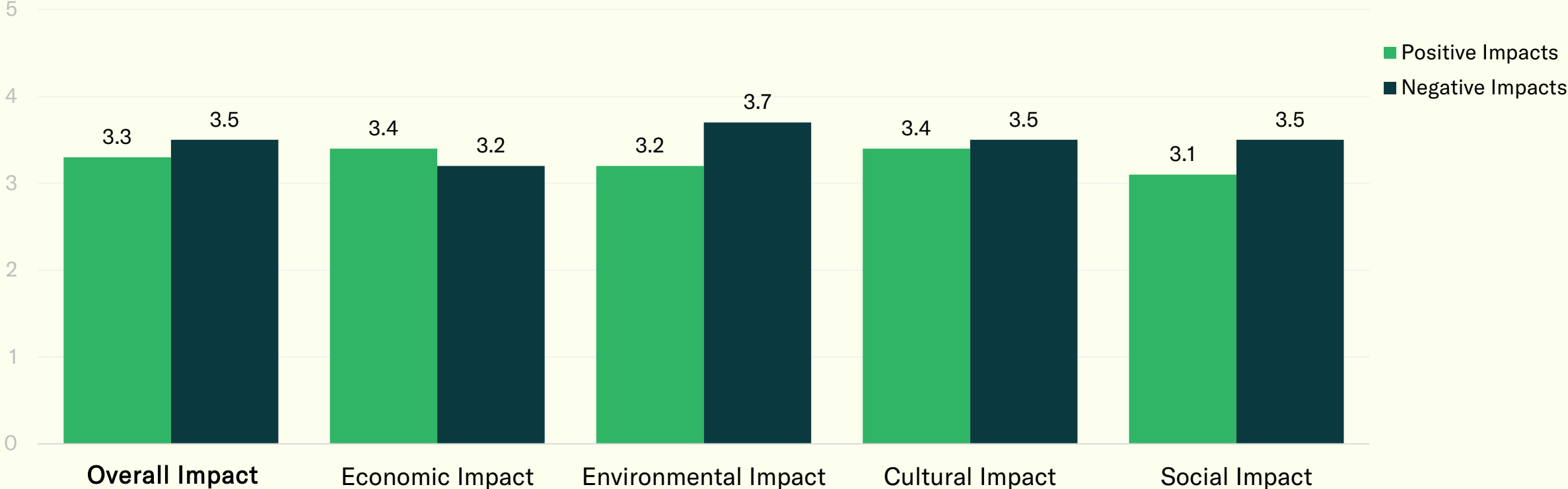
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

Base: Central Oregon residents. 820 completed surveys.

Perceptions of tourism’s negative impacts outweigh the positive for all dimensions except economic impact.

Central Oregon residents feel the positive outweighs the negative on only the economic impact of tourism, perceiving stronger negatives on the other types of impacts. Unlike the overall statewide results, the largest positive/negative gap occurs in the environmental impact as these residents cite a net negative result (3.2 vs. 3.7, a 0.5-point negative gap). The social impact posts the second largest negative gap (3.1 vs. 3.5, a 0.4-point gap). Meanwhile, the economic impact is slightly positive (3.4 vs. 3.2) and the cultural impact is slightly negative (3.4 vs. 3.5).

Index of Residents' Perceptions of Tourism Impacts



*See the appendix for the individual scores for statements included in each index.

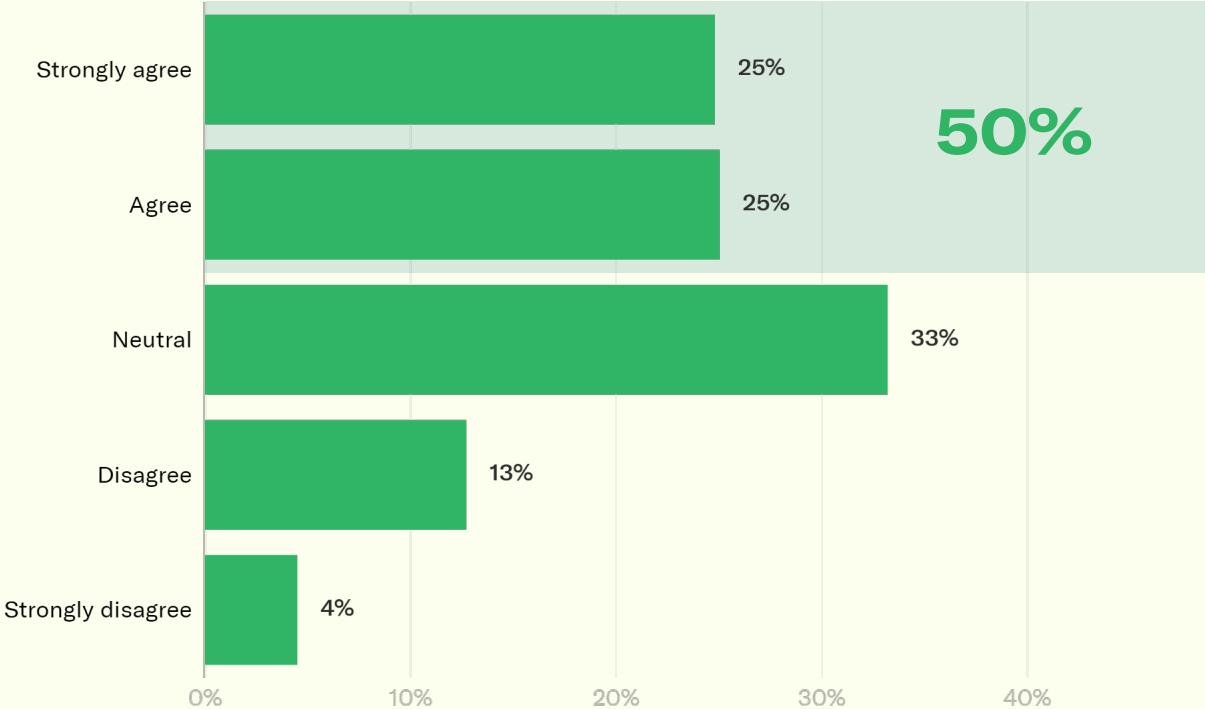
Question: Thinking about Oregon’s tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Central Oregon residents. 820 completed surveys.

There is opportunity for VCO to become a trusted resource among local tourism businesses.

Half of tourism-business owners trust that the Visit Central Oregon destination management organization would assist their business/community in a time of crisis/recovery (50%). About a third feel neutral (33%). Relatively few (17%) disagree.

Central Oregon Resident Perceptions

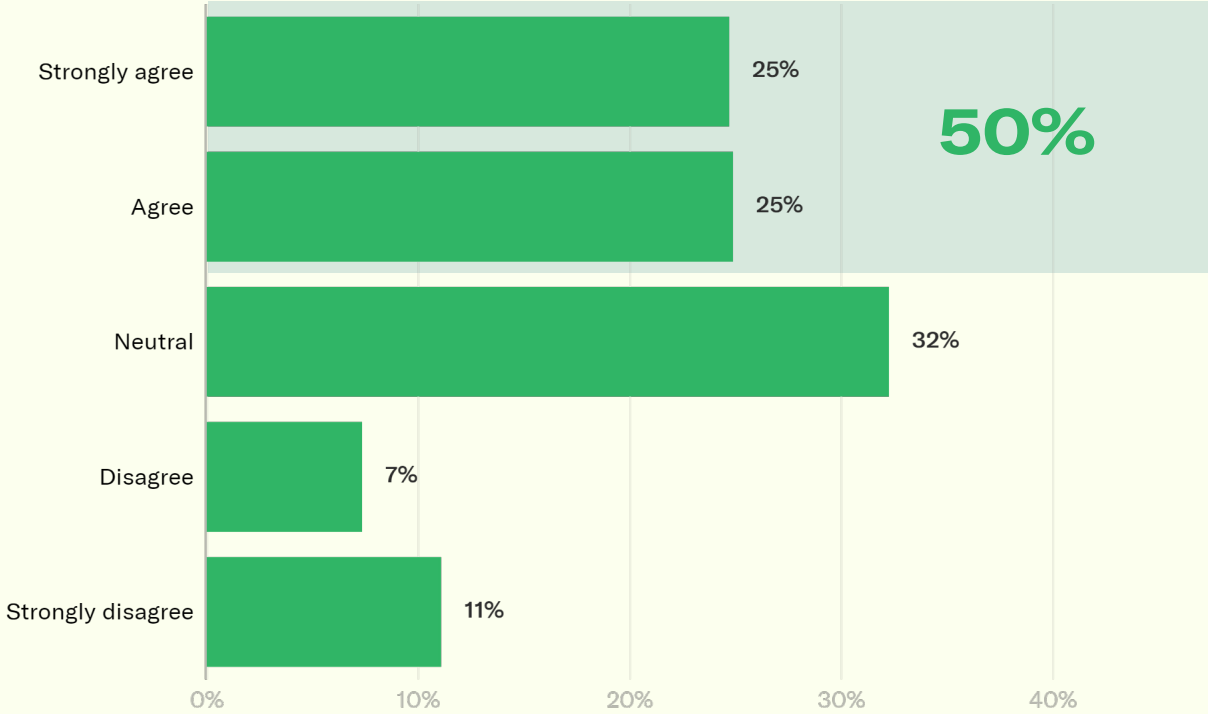


Question: I feel that Visit Central Oregon, my regional destination management organization, is a trusted local resource for assisting my business or community in a time of crisis and continued recovery.
Base: Central Oregon residents who own a tourism business or are employed by such a business. 251 completed surveys.

Half of Central Oregon residents agree that the destination should be more welcoming to diverse communities.

Half of Central Oregon residents believe that the destination needs to be more welcoming to Black, Indigenous, People of Color, and LGBTQIA+ (50%). They agree that shift would improve residents' and visitors' experiences in Central Oregon communities. About a third are neutral (32%) while relatively few (18%) disagree.

Central Oregon Resident Perceptions



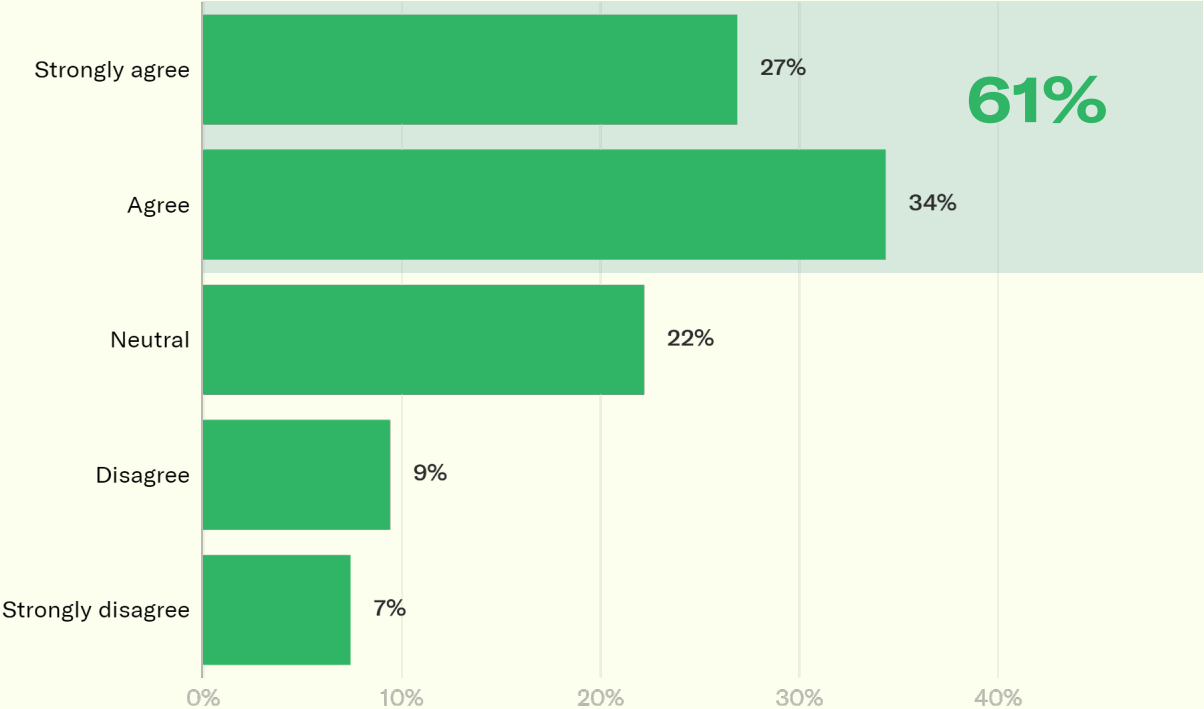
Question: I believe we need to be a more welcoming destination for Black, Indigenous, People of Color, LGTBTQIA+ communities to improve residents' and visitors' experiences in Central Oregon communities.

Base: Central Oregon residents. 820 completed surveys.

The majority agree that increased public transit in Central Oregon would benefit both residents and visitors.

Three in five tourism residents believe that increased public transportation routes and reach for Central Oregon communities would improve residents' and visitors' experiences (61%). One in five is neutral (22%) while relatively few (16%) disagree.

Central Oregon Resident Perceptions



Question: I believe increased public transportation routes and reach for Central Oregon communities will improve residents' and visitors' experiences.

Base: Central Oregon residents. 820 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

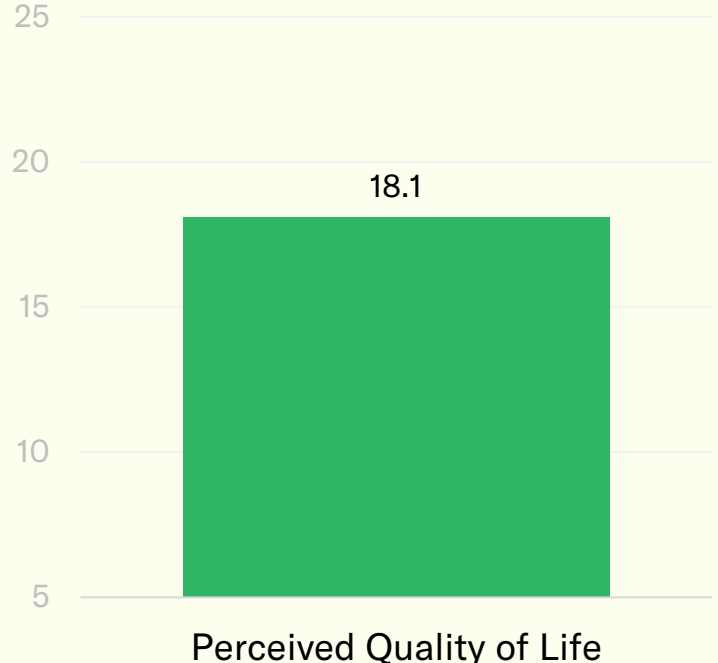
Total residents surveyed:	168
Average age:	47 years old
Average household income:	\$97,260
Employed:	70%
College graduate:	67%
Married/domestic partnership:	68%
Have children in household:	30%
BIPOC:	16%
LGBTQ+:	8%
Accessibility needs in household:	13%



Mt. Hood/CRG residents are likelier to feel that their quality of life is improved and will continue to be better in the next year.

Mt. Hood/Columbia River Gorge residents mirror the statewide Oregon average in overall perceived quality of life (18.1 vs. 18.1 overall). Two in five feel that their quality of life has improved from a year ago (41%, exceeding the overall average of 34%). Further, they tie the Southern Oregon Region residents as the most optimistic that life will improve in the future (44%, more than the overall average of 40%).

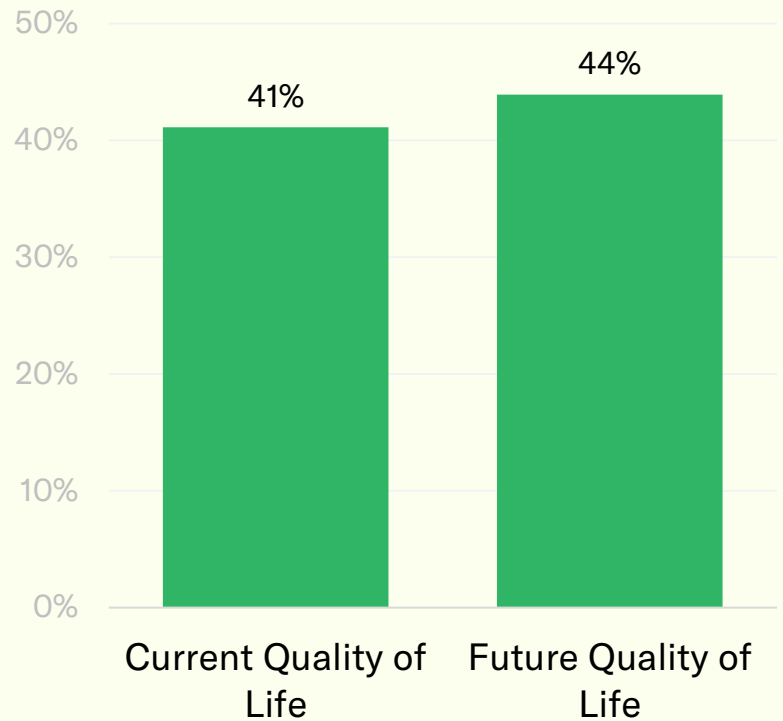
Mt. Hood/Gorge Residents' Score*



*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 5 (extremely dissatisfied) and a maximum possible score of 25 (extremely satisfied).

Quality of Life

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



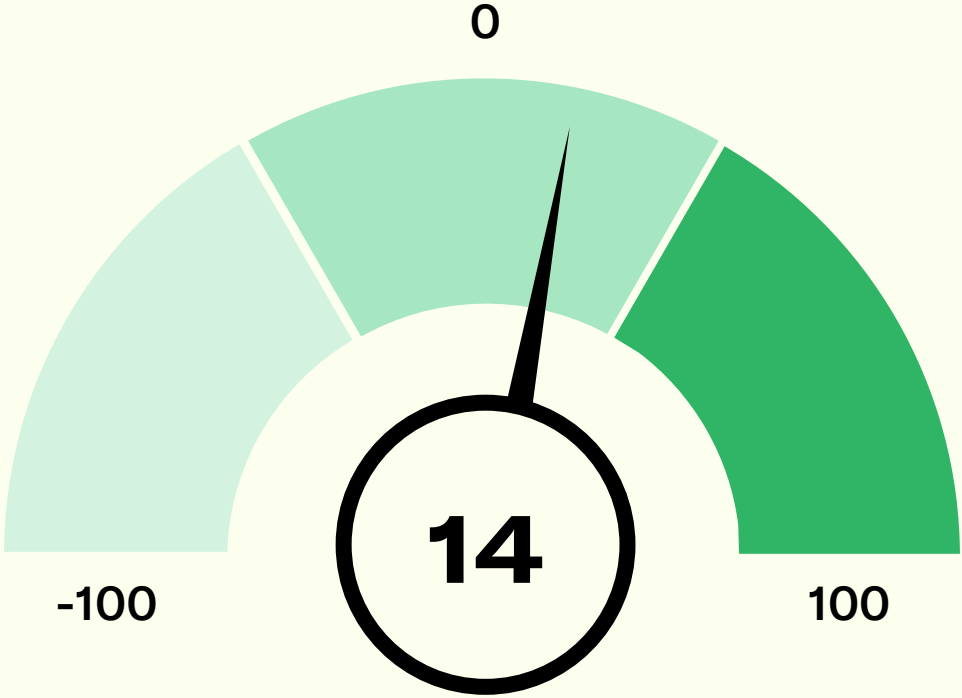
Questions: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?
Compared to one year ago, how would you rate your personal quality of life in Oregon?

Base: Mt. Hood/CRG residents. 168 completed surveys.

They are more likely than overall Oregonians to recommend their local community as a tourism destination.

More than four in 10 Mt. Hood/Columbia River Gorge residents are promoters of their local community as a tourism destination (41% 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 Mt. Hood/Columbia River Gorge has the highest likelihood-to-recommend score at 14 (vs. -2 for the overall state).

Likelihood to Recommend Local Community as Tourism Destination



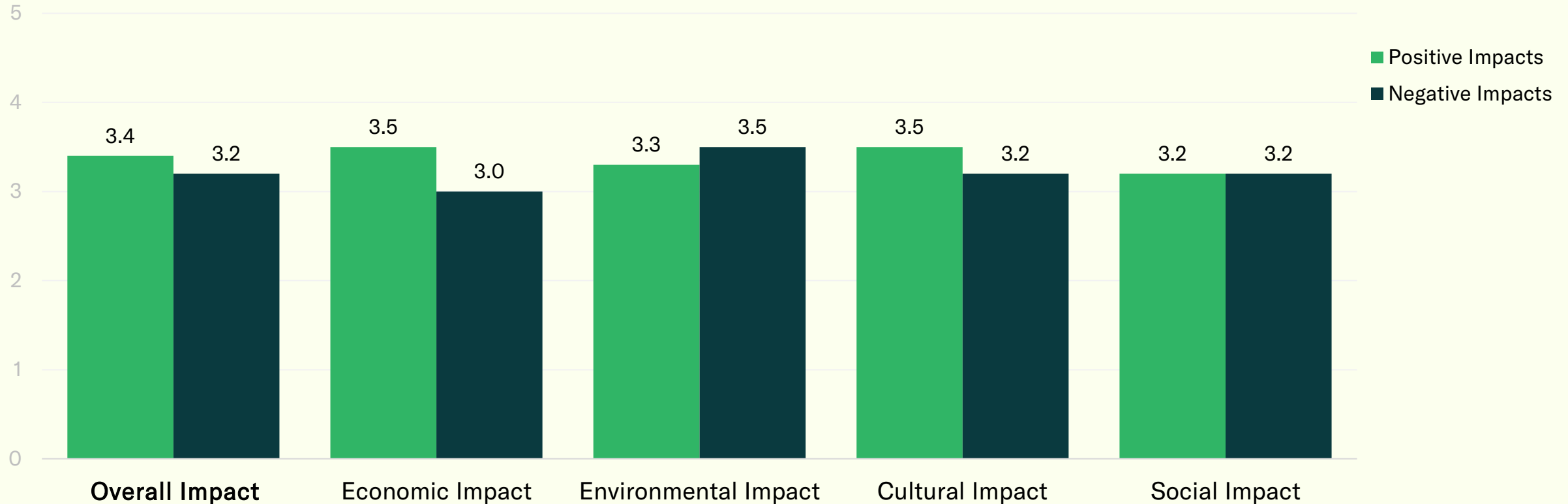
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

Base: Mt. Hood/CRG residents. 168 completed surveys.

Perceptions of tourism's negative environmental impact outweigh the positive for Mt. Hood/CRG residents.

Mt. Hood/Columbia River Gorge residents have mixed reactions on the impacts of tourism. Similar to the overall statewide results, they agree that the largest positive/negative gap occurs for the economic impact (3.5 vs. 3.0, a 0.6-point positive gap). Cultural impact perceptions are also more positive (3.5 vs. 3.2, a 0.3-point gap). The positive and negative social impacts offset each other (3.2 each), while these residents perceive the environmental impact to be negative (3.3 vs. 3.5, a 0.2-point negative gap).

Index of Residents' Perceptions of Tourism Impacts



*See the appendix for the individual scores for statements included in each index.

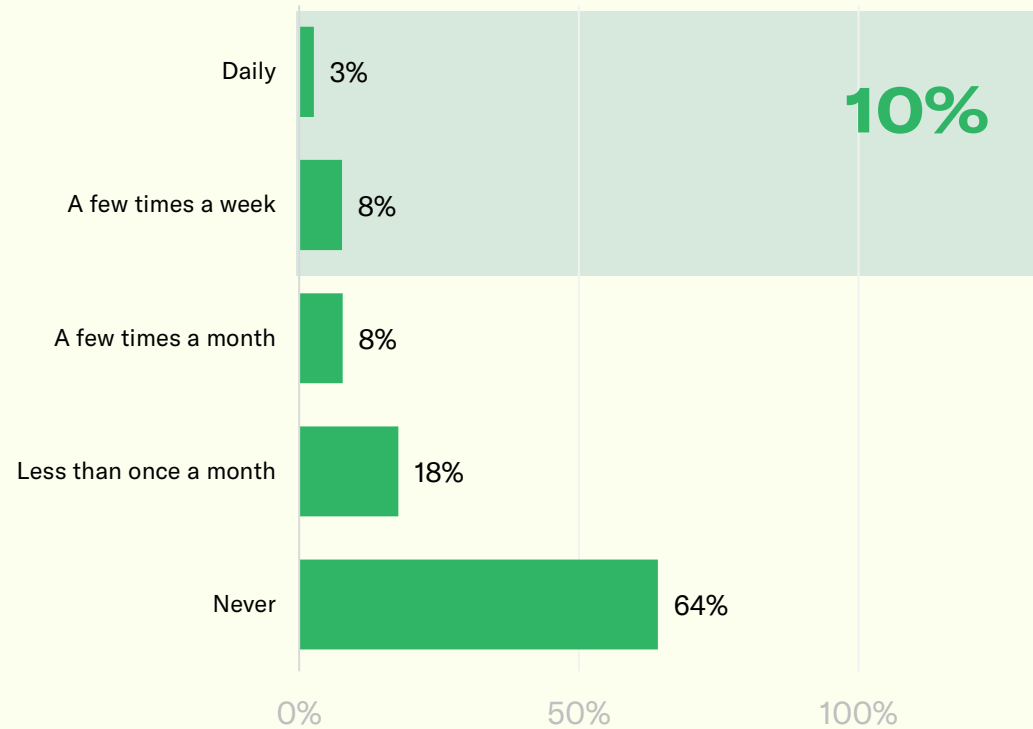
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Mt. Hood/CRG residents. 168 completed surveys.

Only one in 10 Mt. Hood/CRG residents use public transportation on a regular basis.

The majority of Mt. Hood/Columbia River Gorge residents say they never use public transportation (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 (18%).

Mt. Hood/Columbia River Gorge Resident Perceptions



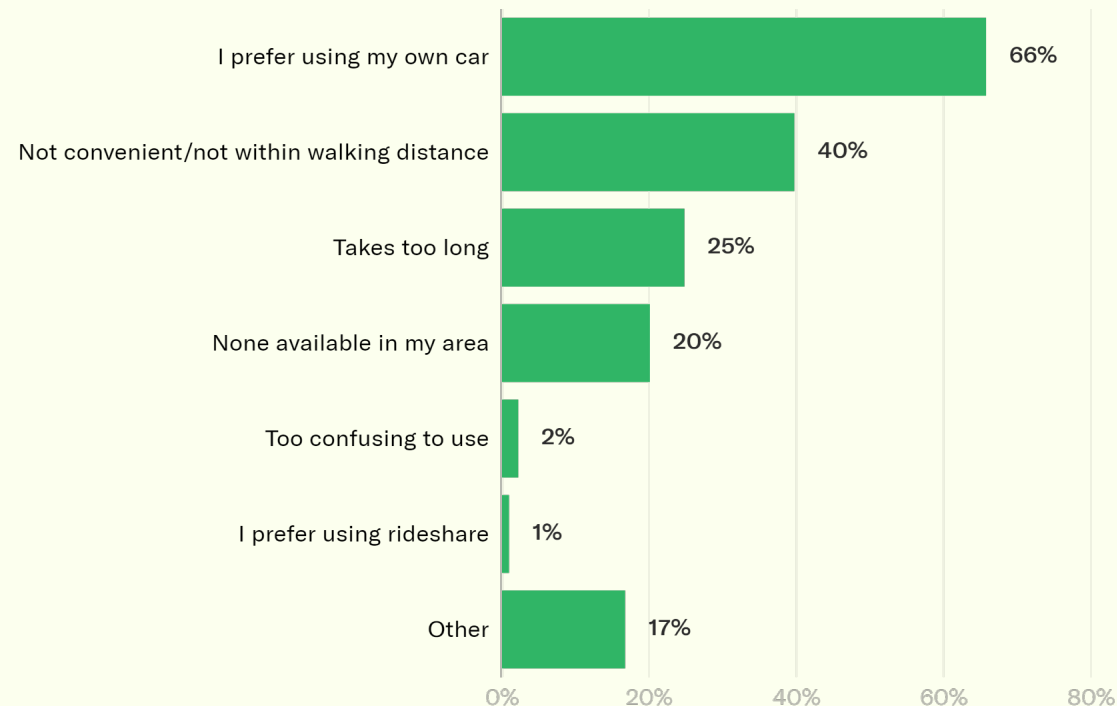
Question: How often do you use public transportation (e.g., Mt Hood Express, Columbia Gorge Express, CAT, SAME Sandy, Trimet, etc.) in your community?

Base: Mt. Hood/CRG residents. 168 completed surveys.

The majority of residents say they do not use public transportation because they prefer using their own car.

Most Mt. Hood/Columbia River Gorge residents resist public transportation because they prefer to drive their own car (66%). Secondarily, they consider public transportation inconvenient (40%) or think that it takes too long (25%). One in five potential users note that there is currently no public transit available in their area (20%).

Mt. Hood/Columbia River Gorge Resident Perceptions



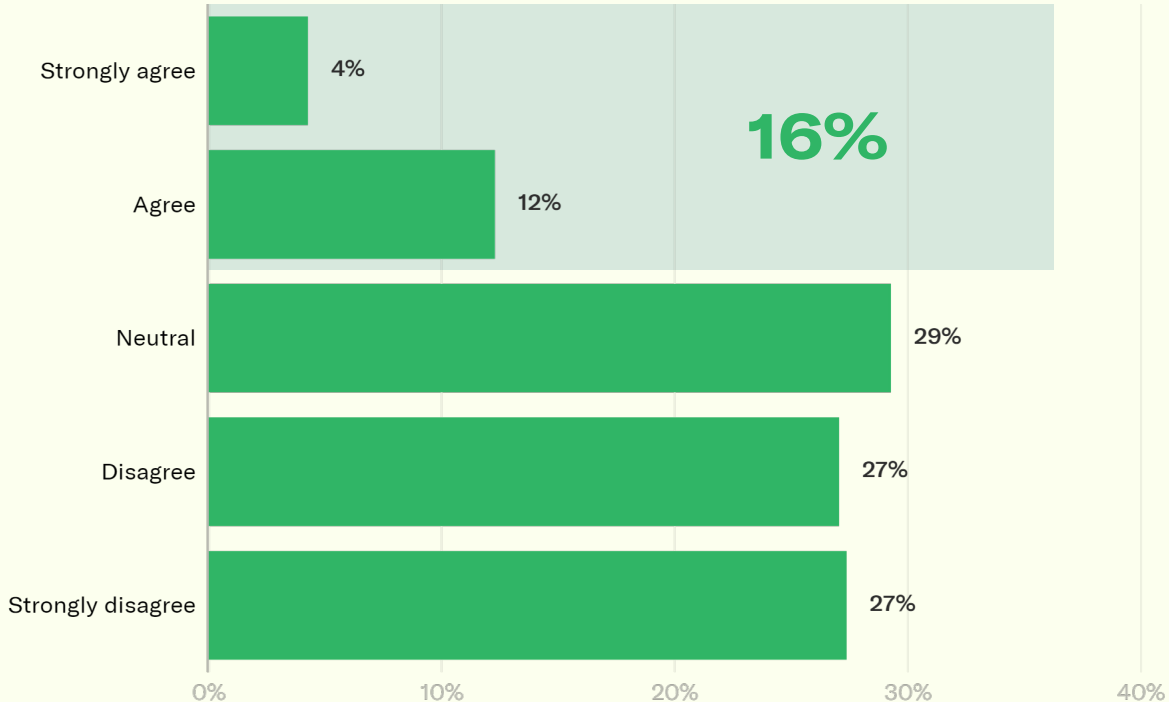
Question: What prevents you from using public transportation such as city bus, train, etc. in your area? (Select all that apply.)

Base: Mt. Hood/CRG residents who use public transportation in their area less than once a month or never. 144 completed surveys.

Only a minority of Mt. Hood/CRG residents promote the use of public transportation to friends and family who visit the area.

Few Mt. Hood/Columbia River Gorge residents encourage their guests to use public transportation during their stay (16%). While a quarter profess neutrality (29%), more than half do not encourage public transit usage in the area (54%).

Mt. Hood/Columbia River Gorge Resident Perceptions



Question: When friends and family come to visit, I encourage them to use public transportation in my region during their stay.

Base: Mt. Hood/CRG residents. 168 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

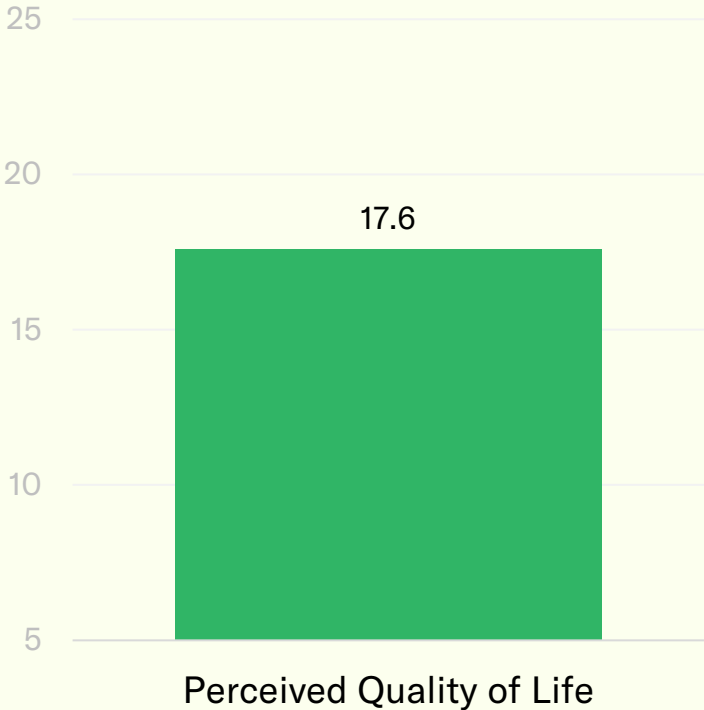
Total residents surveyed:	614
Average age:	46 years old
Average household income:	\$76,536
Employed:	65%
College graduate:	45%
Married/domestic partnership:	59%
Have children in household:	37%
BIPOC:	18%
LGBTQ+:	9%
Accessibility needs in household:	15%



Eastern Oregon residents have a slightly lower perceived quality of life compared to the overall state.

Eastern Oregon residents slightly lag the statewide Oregon average in overall perceived quality of life (17.6 vs. 18.1 overall). Nearly a third feel that their quality of life has improved from a year ago (31%, a bit below the overall average of 34%). They are somewhat optimistic that life will improve in the future (37%, just under the overall average of 40%).

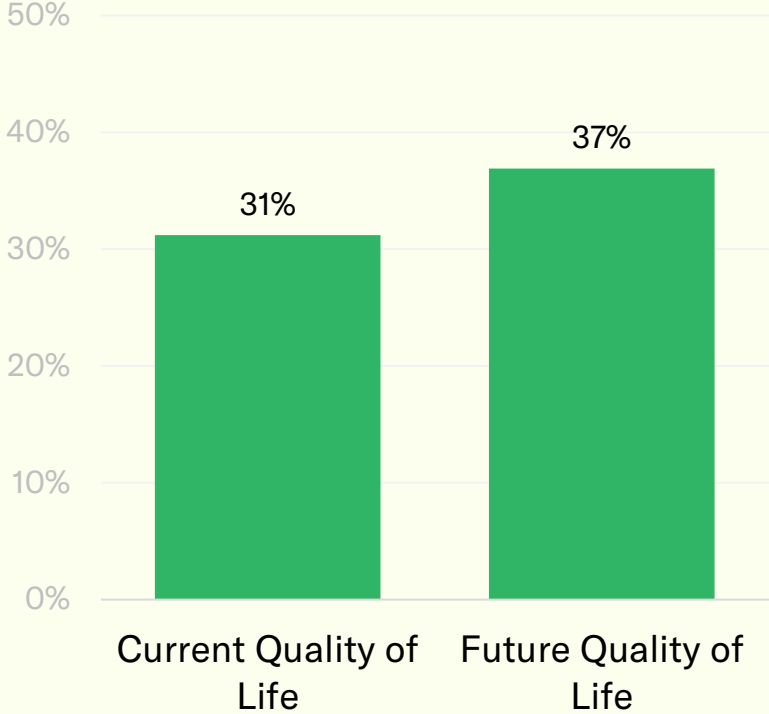
Eastern Oregon Residents' Score*



*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 5 (extremely dissatisfied) and a maximum possible score of 25 (extremely satisfied).

Quality of Life

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



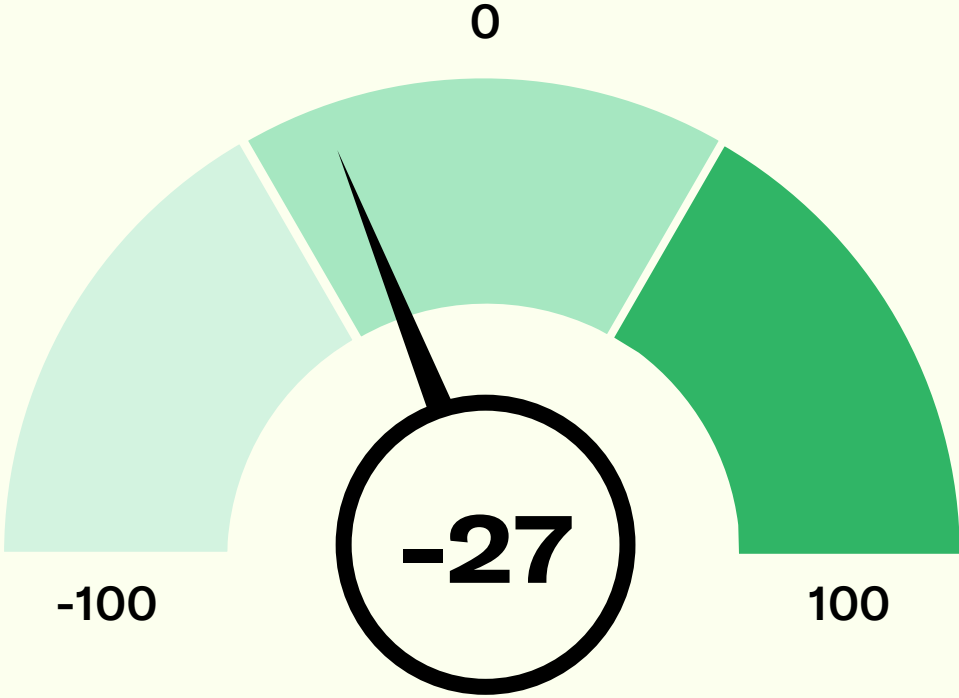
Questions: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?
Compared to one year ago, how would you rate your personal quality of life in Oregon?

Base: Eastern Oregon residents. 614 completed surveys.

Of the tourism regions, Eastern Oregon residents are the least likely to recommend their community as a tourism destination.

One-fourth of Eastern Oregon 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 Eastern Oregon likelihood-to-recommend score trails all other regions (-27 vs. -2 for the overall state).

Likelihood to Recommend Local Community as Tourism Destination



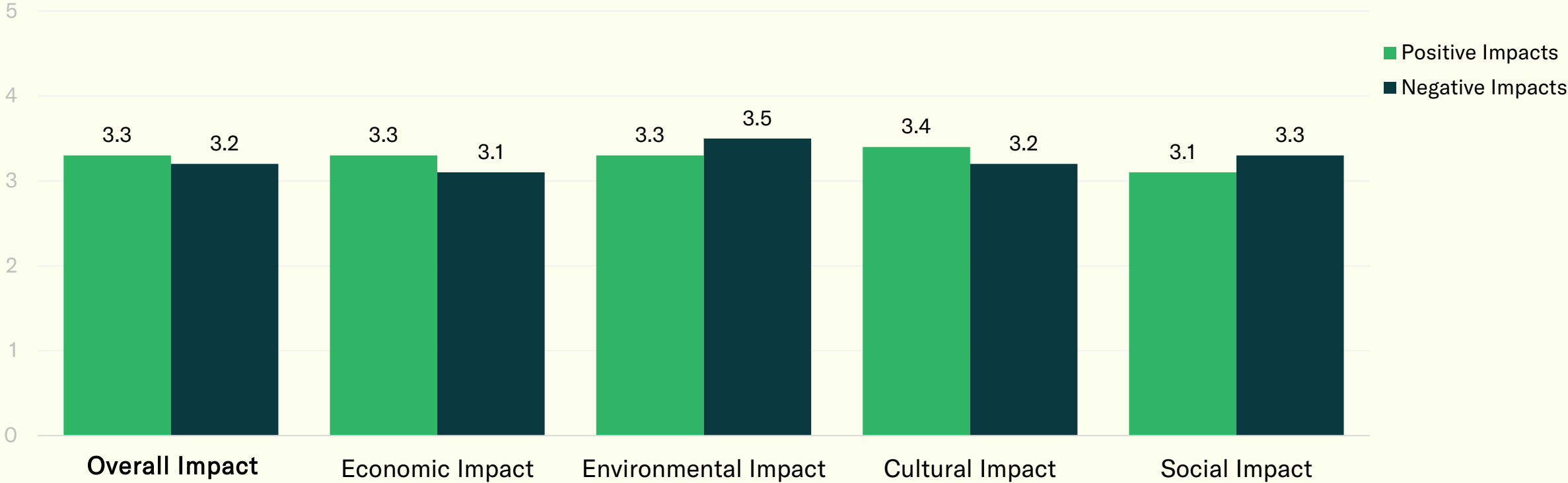
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

Base: Eastern Oregon residents. 614 completed surveys.

Eastern Oregon residents' perceptions of tourism's negative environmental and social impacts outweigh the positive.

Eastern Oregon residents also have mixed reactions on the impacts of tourism. Similar to the overall statewide results, they agree that the largest positive/negative gaps occur for the economic impact (3.3 vs. 3.1, a 0.2-point positive gap) and the cultural impact (3.4 vs. 3.2, also a 0.2-point positive gap). These residents view environmental and social impacts as more negative than positive, both with a 0.2-point negative gap.

Index of Residents' Perceptions of Tourism Impacts



*See the appendix for the individual scores for statements included in each index.

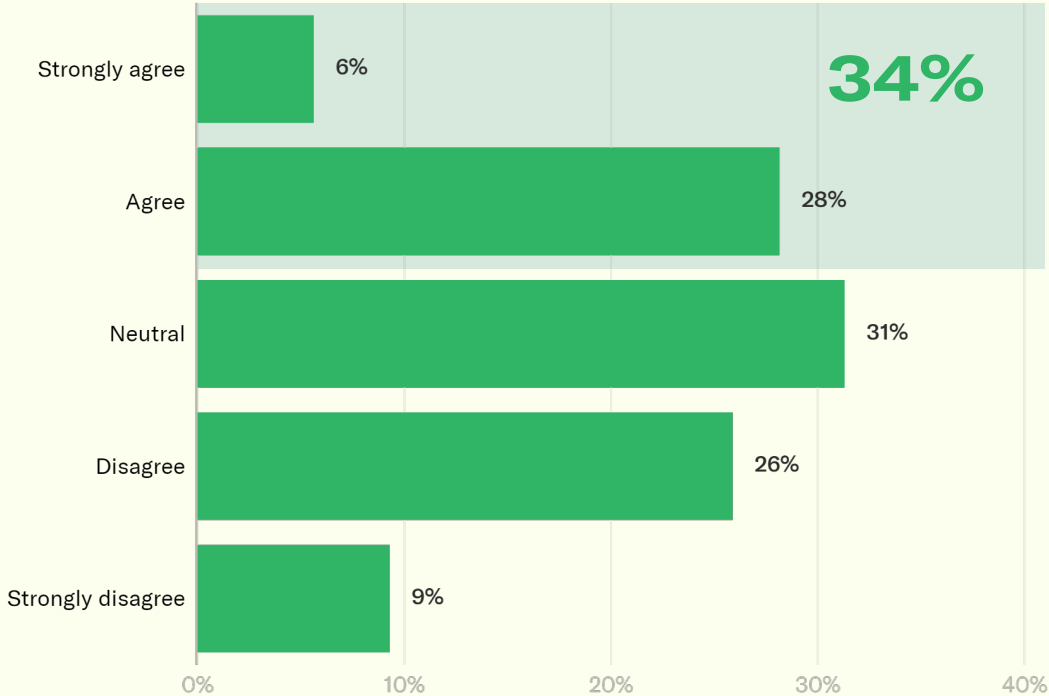
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon residents. 614 completed surveys.

There is perceived ample opportunity to improve local infrastructure and services to increase capacity for current tourism levels.

Many Eastern Oregon residents acknowledge that there is opportunity to improve the tourism infrastructure. Nearly as many residents disagree (35%) as agree (37%) that their region's capacity can accommodate the current level of tourism.

Eastern Oregon Resident Perceptions



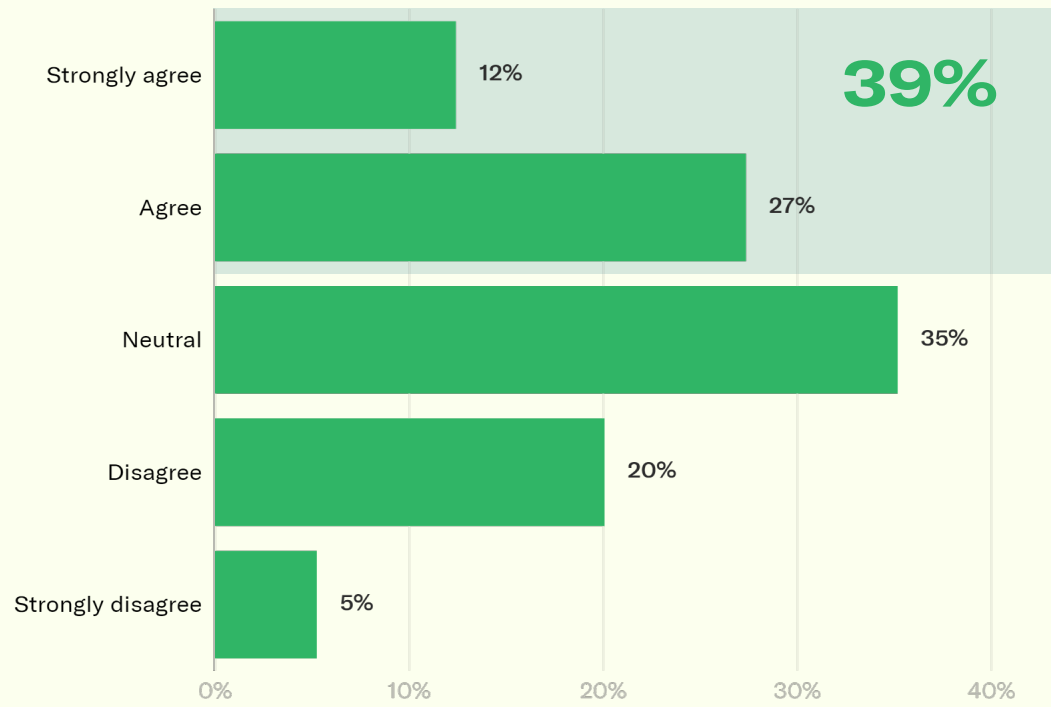
Question: Local infrastructure and services (including transportation, accommodations, and recreation facilities) have the capacity to accommodate the current level of tourism in Eastern Oregon.

Base: Eastern Oregon residents. 614 completed surveys.

Four in 10 Eastern Oregon residents agree that tourism negatively impacts certain areas of the region.

Four in 10 Eastern Oregon residents feel that tourism has negatively impacted their region (39%), a much larger share than those who disagree (25%). This aligns with the feeling (prior slide) that the current infrastructure would benefit from a boost in capacity/support.

Eastern Oregon Resident Perceptions



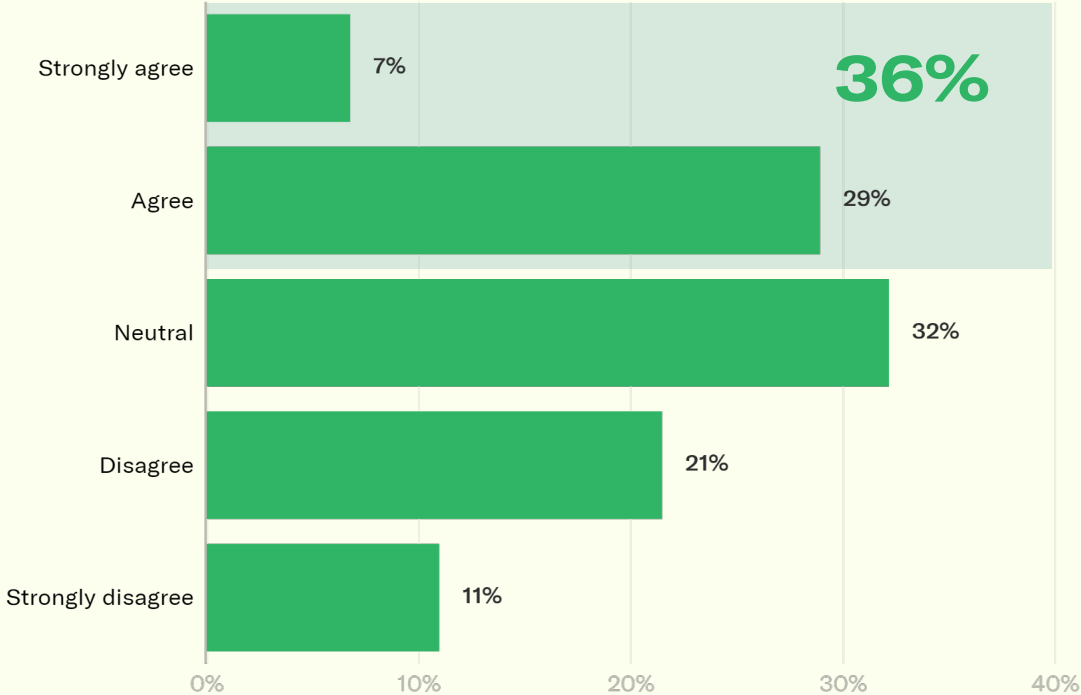
Question: There are specific areas or attractions in Eastern Oregon that I feel are negatively impacted by tourism.

Base: Eastern Oregon residents. 614 completed surveys.

Roughly one-third of Eastern Oregon residents are aware of short-term vacation-rental regulations in the region.

A third of Eastern Oregon residents state that they are aware of their local regulations/guidelines regarding short-term vacation rentals (36%). Nearly as many say they are unaware (32%) or feel neutral (32%).

Eastern Oregon Resident Perceptions



Question: I am aware of local regulations and guidelines related to short-term vacation rentals (Airbnb/VRBO) in my area.

Base: Eastern Oregon residents. 614 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

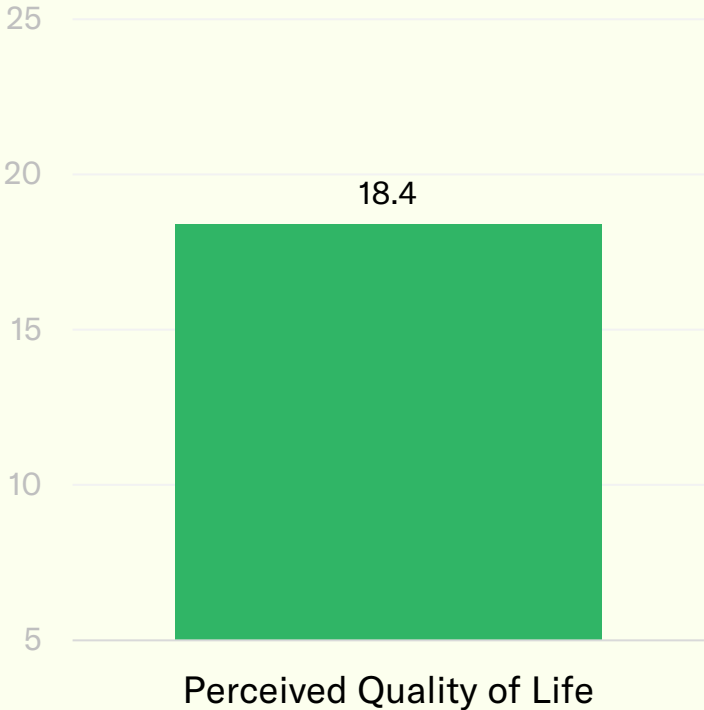
Total residents surveyed:	1,813
Average age:	59 years old
Average household income:	\$82,323
Employed:	46%
College graduate:	57%
Married/domestic partnership:	64%
Have children in household:	14%
BIPOC:	10%
LGBTQ+:	10%
Accessibility needs in household:	21%



Oregon Coast residents are less likely than the overall state to say that their future quality of life will improve.

Oregon Coast residents exceed the statewide Oregon average in overall perceived quality of life (18.4 vs. 18.1 overall). A third feel that their quality of life has improved from a year ago (33%, similar to the overall average of 34%). However, the least optimistic of the regions, they see no increase beyond that level in the future (33%, placing below the Oregon average of 40%).

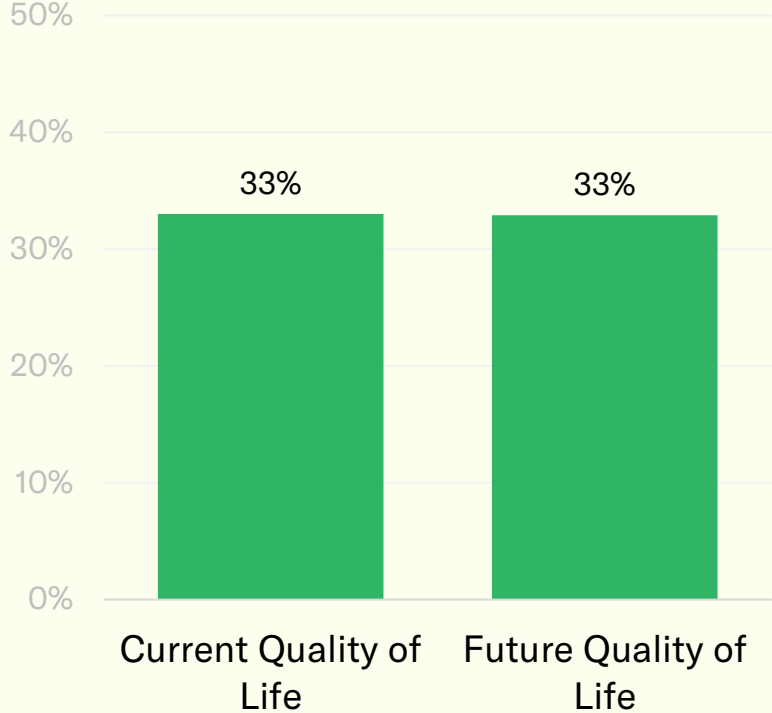
Oregon Coast Residents' Score*



*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 5 (extremely dissatisfied) and a maximum possible score of 25 (extremely satisfied).

Quality of Life

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



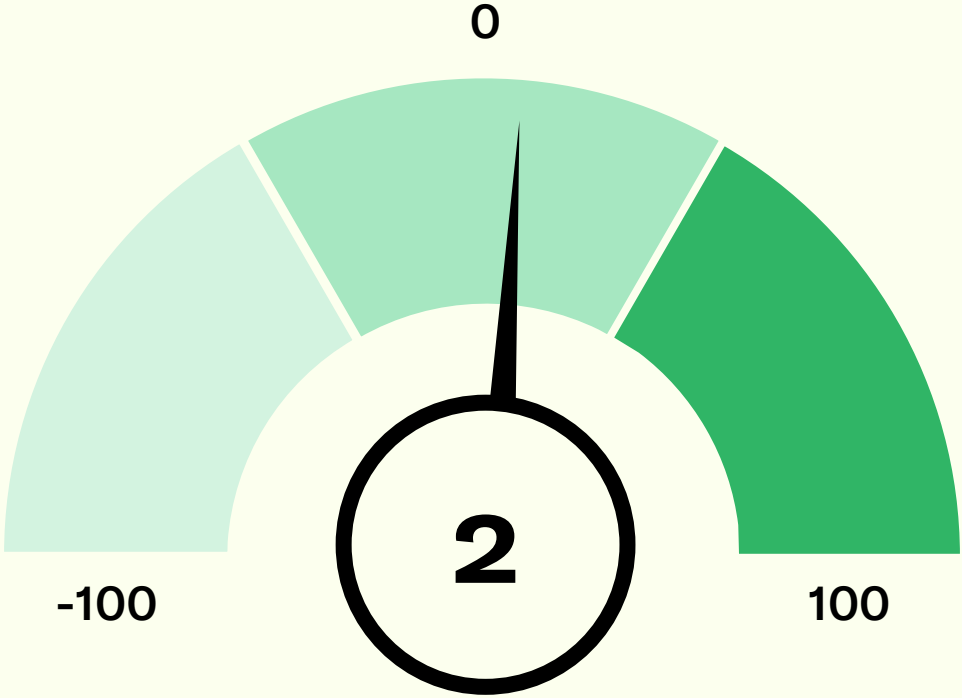
Questions: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?
Compared to one year ago, how would you rate your personal quality of life in Oregon?

Base: Oregon Coast residents. 1,813 completed surveys.

A slight majority of Oregon Coast residents are likely to recommend their community as a tourism destination.

Nearly four in 10 Oregon Coast residents are promoters of their local community as a tourism destination (39% 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 is 2, compared to the overall state score of -2.

Likelihood to Recommend Local Community as Tourism Destination



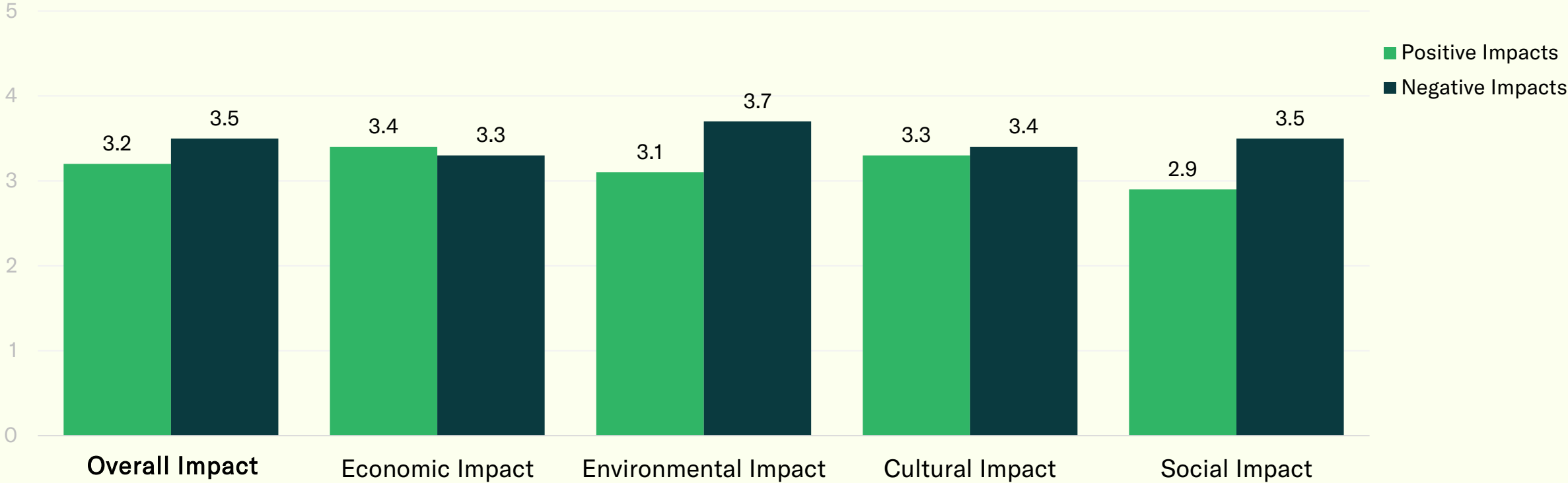
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

Base: Oregon Coast residents. 1,813 completed surveys.

Oregon Coast residents' perceptions of tourism's negative environmental and social impacts significantly outweigh the positive.

Oregon Coast residents feel the positive outweighs the negative on only the economic impact of tourism, perceiving stronger negatives on the other types of impacts. Unlike the overall statewide results, the largest positive/negative gaps occur in the environmental impact (3.1 vs. 3.7, a 0.6-point negative gap) and the social impact (2.9 vs. 3.5, also a 0.6-point negative gap). Meanwhile, the economic impact is slightly positive (3.4 vs. 3.3) and the cultural impact is slightly negative (3.3 vs. 3.4).

Index of Residents' Perceptions of Tourism Impacts



*See the appendix for the individual scores for statements included in each index.

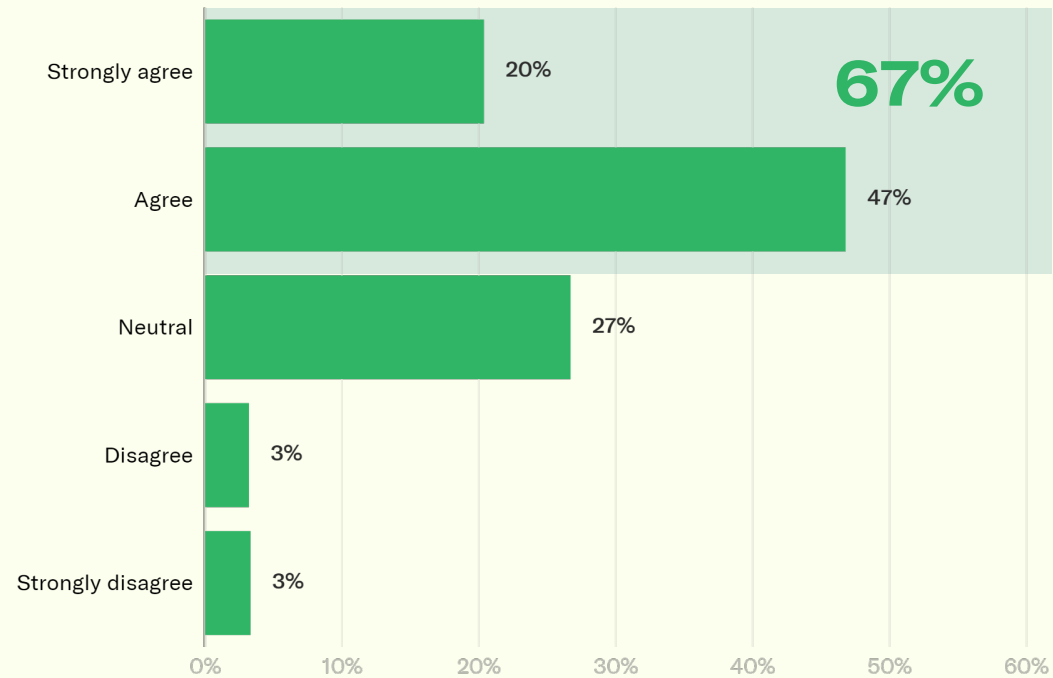
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Oregon Coast residents. 1,813 completed surveys.

Two-thirds of Oregon Coast residents want the tourism economy to better support and integrate with cultural heritage industries.

Consistent with the sense of social, environmental, and cultural negative impacts of tourism, two-thirds of Oregon Coast residents agree that the tourism economy could provide better support/integration with the region's culture (67%). Very few disagree (6%).

Oregon Coast Resident Perceptions



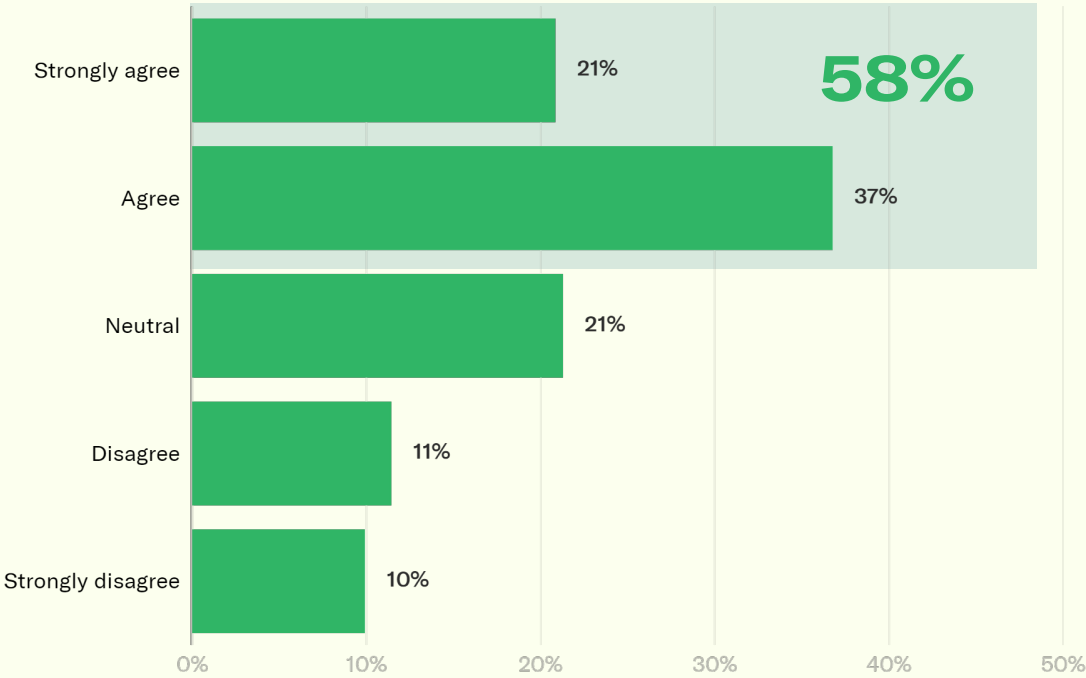
Question: The tourism economy could better support and be integrated with our cultural heritage industries (commercial fishing/seafood products, farming/agriculture products, forestry/wood products).

Base: Oregon Coast residents. 1,813 completed surveys.

Most residents agree that there are reasonable solutions to reduce the impact of vacation rentals on their neighborhoods.

Over half of Oregon Coast residents feel that there are reasonable solutions to reduce the impact of vacation rentals in their neighborhoods (58%). That so many agree suggests that they are concerned about the negative impact that is occurring in their neighborhoods now.

Oregon Coast Resident Perceptions



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

Base: Oregon Coast residents. 1,813 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

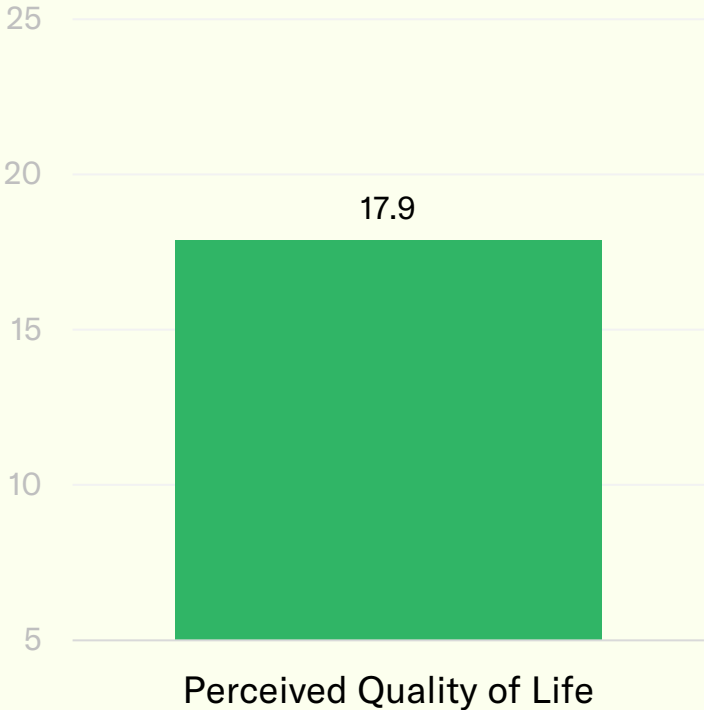
Total residents surveyed:	890
Average age:	50 years old
Average household income:	\$75,886
Employed:	62%
College graduate:	44%
Married/domestic partnership:	64%
Have children in household:	29%
BIPOC:	14%
LGBTQ+:	8%
Accessibility needs in household:	18%



Southern Oregon residents are more likely than overall state residents to be optimistic about an improved future quality of life.

Southern Oregon residents place near the seven-Oregon-region average in overall perceived quality of life (17.9 vs. 18.1 overall). Roughly a third feel that their quality of life has improved from a year ago (32%, similar to the overall average of 34%). They tie Mt. Hood/Columbia River Gorge residents as the most optimistic that will improve in the future (44%, above the overall average of 40%).

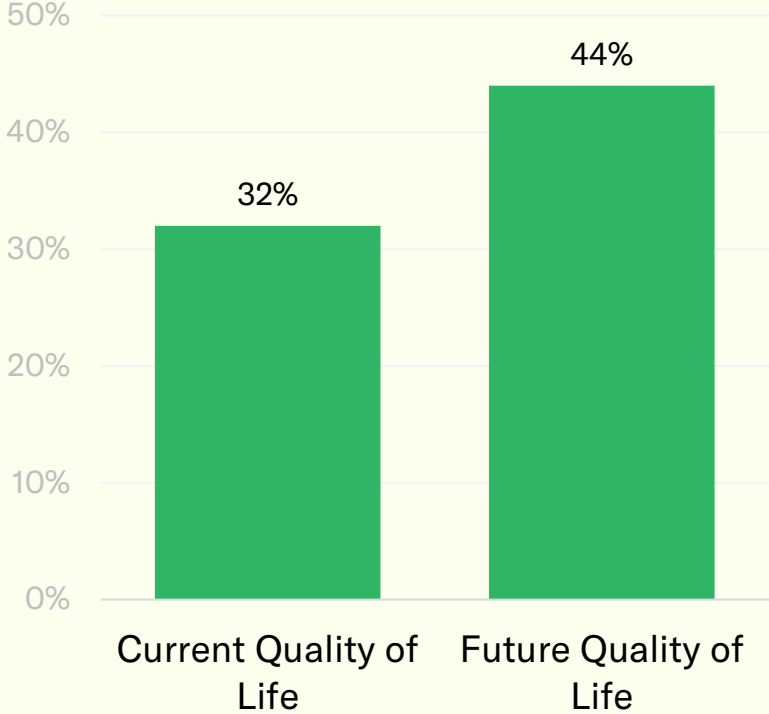
Southern Oregon Residents' Score*



*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 5 (extremely dissatisfied) and a maximum possible score of 25 (extremely satisfied).

Quality of Life

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



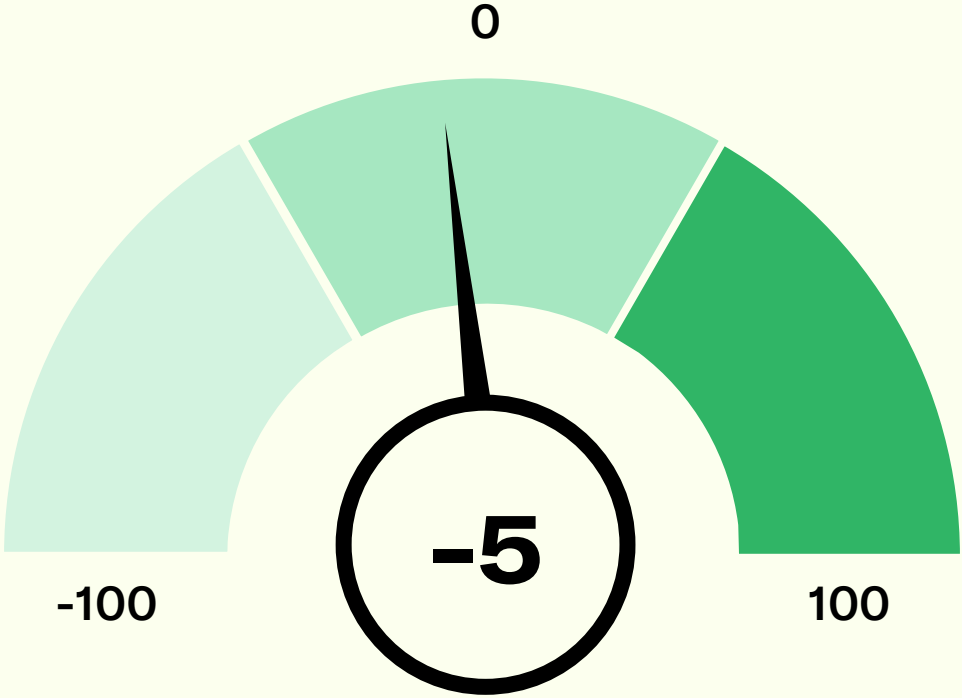
Questions: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?
Compared to one year ago, how would you rate your personal quality of life in Oregon?

Base: Southern Oregon residents. 890 completed surveys.

Just under half of Southern Oregon residents would recommend their community as a tourism destination.

More than a third of Southern Oregon residents are promoters of their local community as a tourism destination (34% 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 Southern Oregon likelihood-to-recommend score lags behind the state's (-5 vs. -2).

Likelihood to Recommend Local Community as Tourism Destination



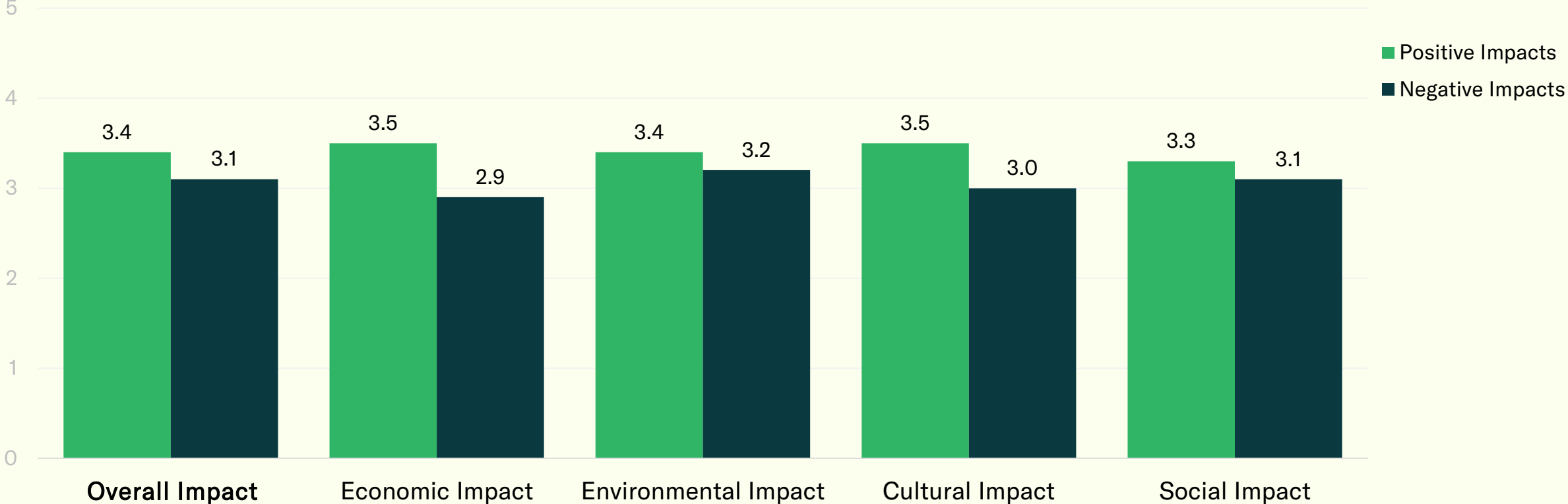
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

Base: Southern Oregon residents. 890 completed surveys.

Southern Oregon residents' perceptions of tourism's positive impacts outweigh the negative for all dimensions.

Southern Oregon residents consistently feel the positive outweighs the negative impacts of tourism. Similar to the overall statewide results, the largest positive/negative gap occurs in the economic impact (3.5 vs. 2.9, a 0.6-point gap) and the cultural impact (3.5 vs. 3.0, a 0.5-point gap). These two measures also reflect the highest positive scores as well. On the other hand, environmental and social impacts, while positive overall, differ by a much smaller margin (0.2-point gap for each).

Index of Residents' Perceptions of Tourism Impacts



*See the appendix for the individual scores for statements included in each index.

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. 890 completed surveys.

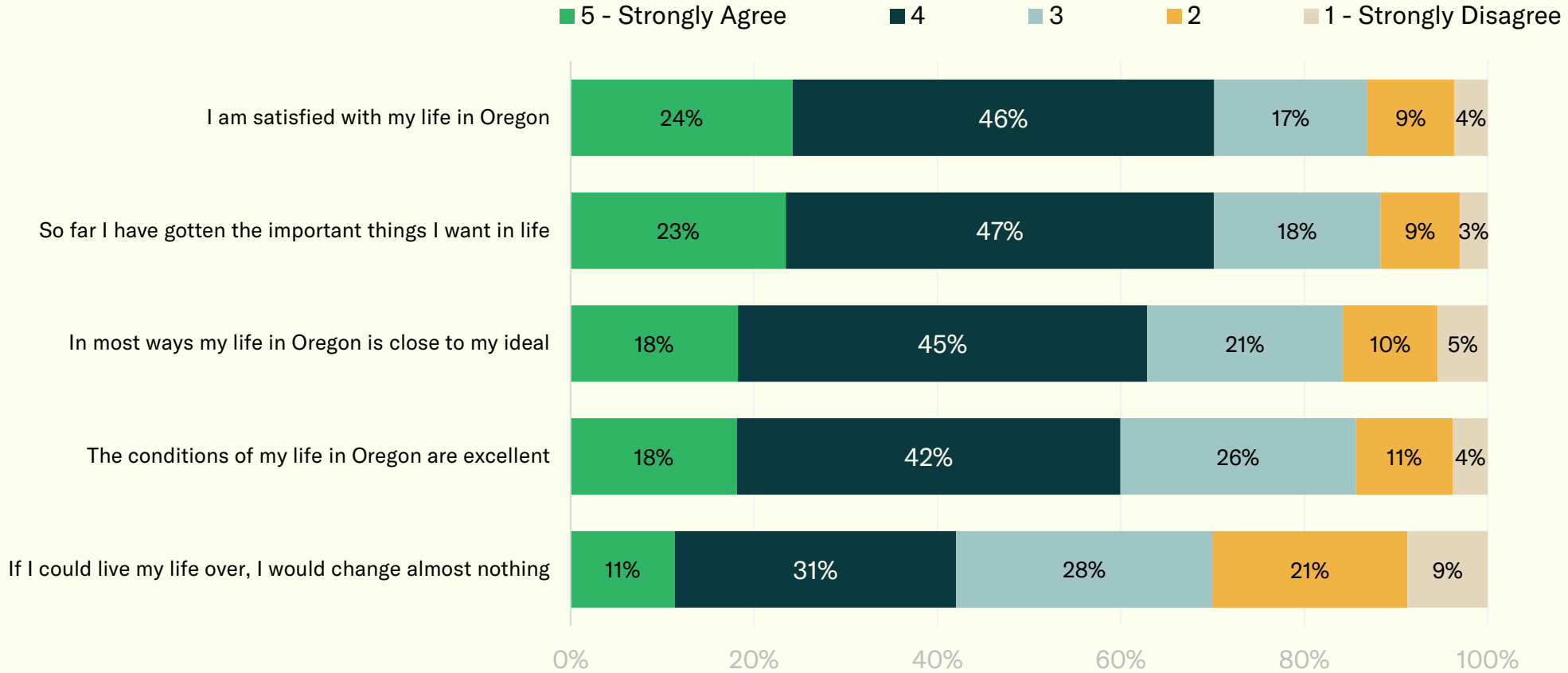
Future Partners

Appendix – Detailed Regional Findings

Portland Region

Portland Region – Perceived Quality of Life Statements

Statements Included in Perceived Quality of Life Score



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

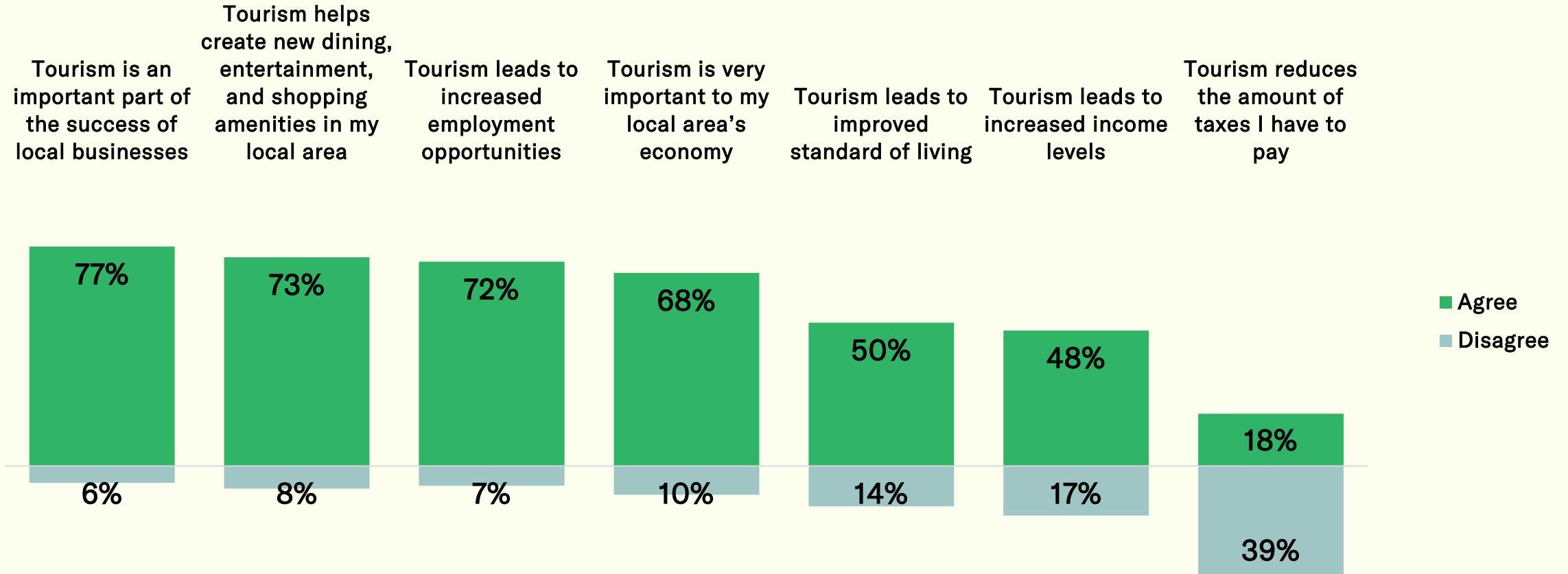
Question: Please rate your level of agreement with the following statements.

Base: Portland Region Residents. 1,518 completed surveys.

Portland Region – Economic Impact Index Statements

Residents' Perceptions of Tourism's Positive Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



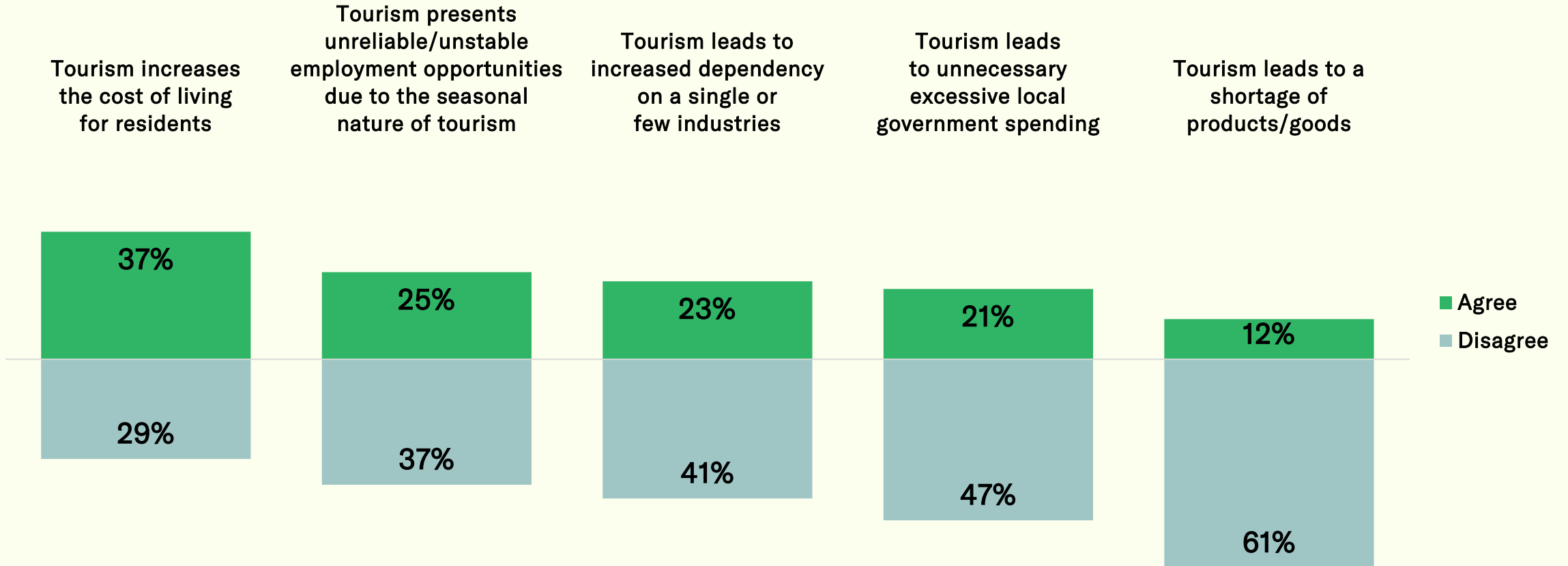
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Portland Region residents. 1,518 completed surveys.

Portland Region – Economic Impact Index Statements

Residents' Perceptions of Tourism's Negative Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



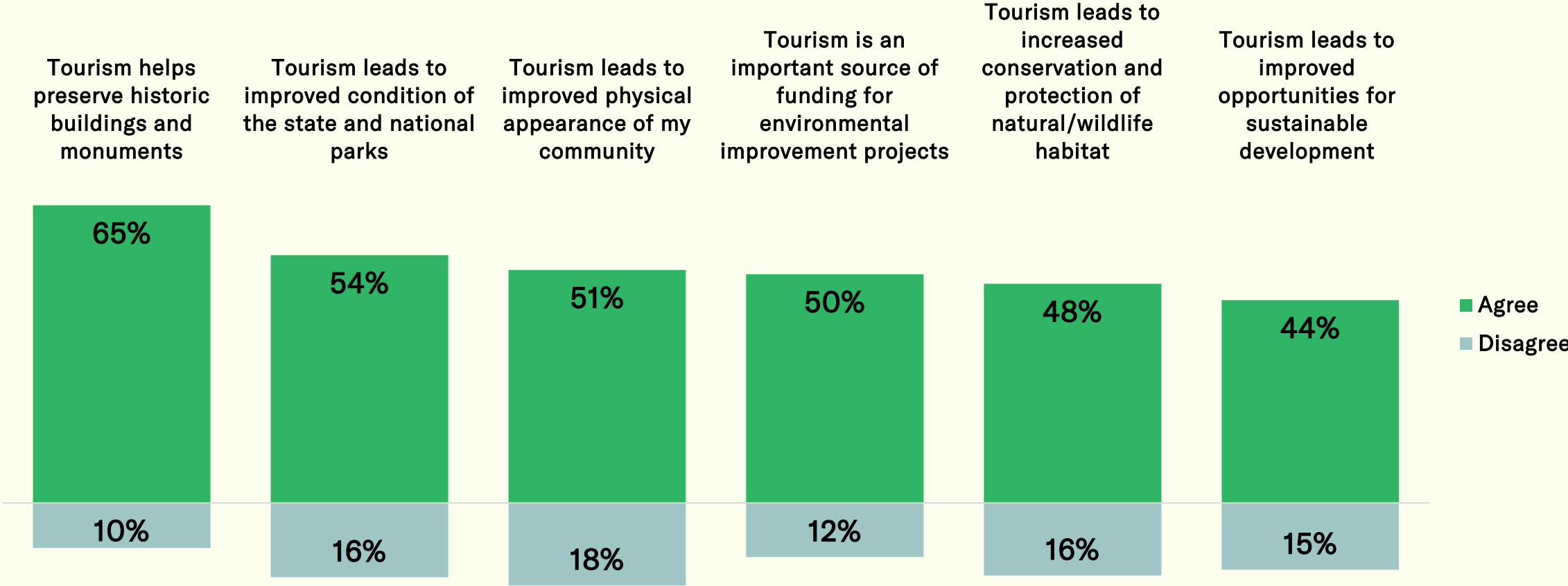
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Portland Region residents. 1,518 completed surveys.

Portland Region – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Positive Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

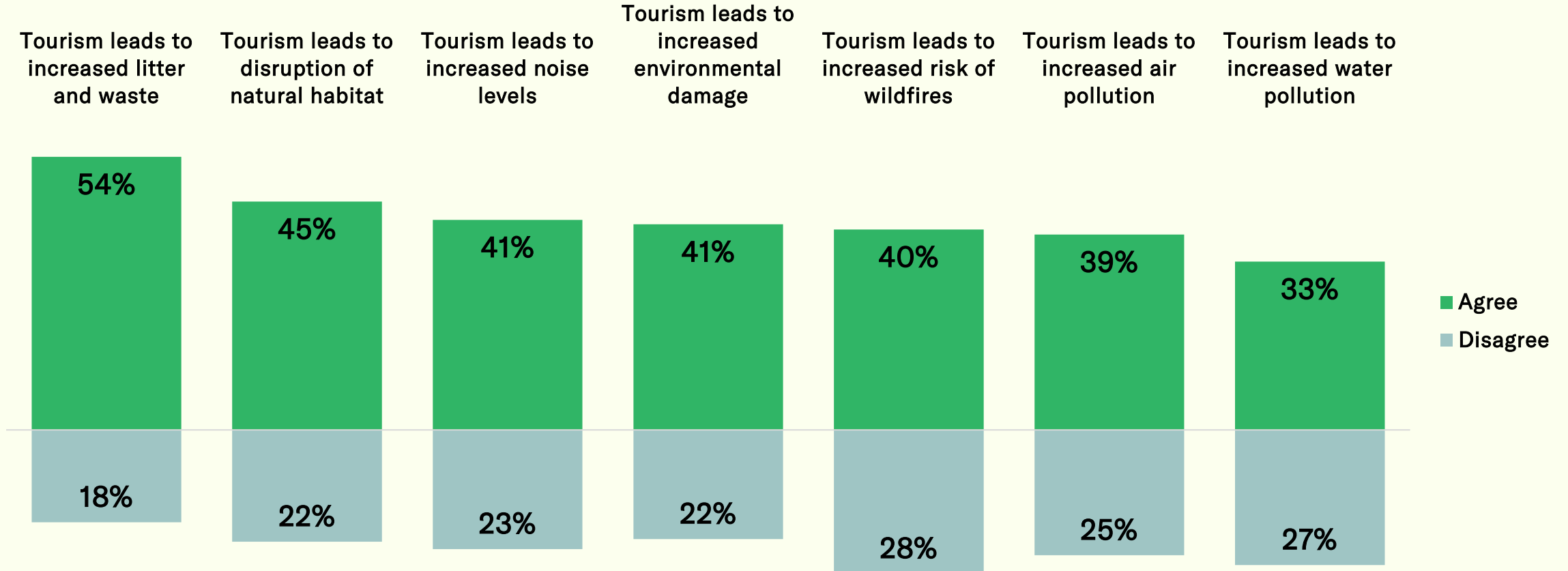


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Portland Region residents. 1,518 completed surveys.

Portland Region – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Negative Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



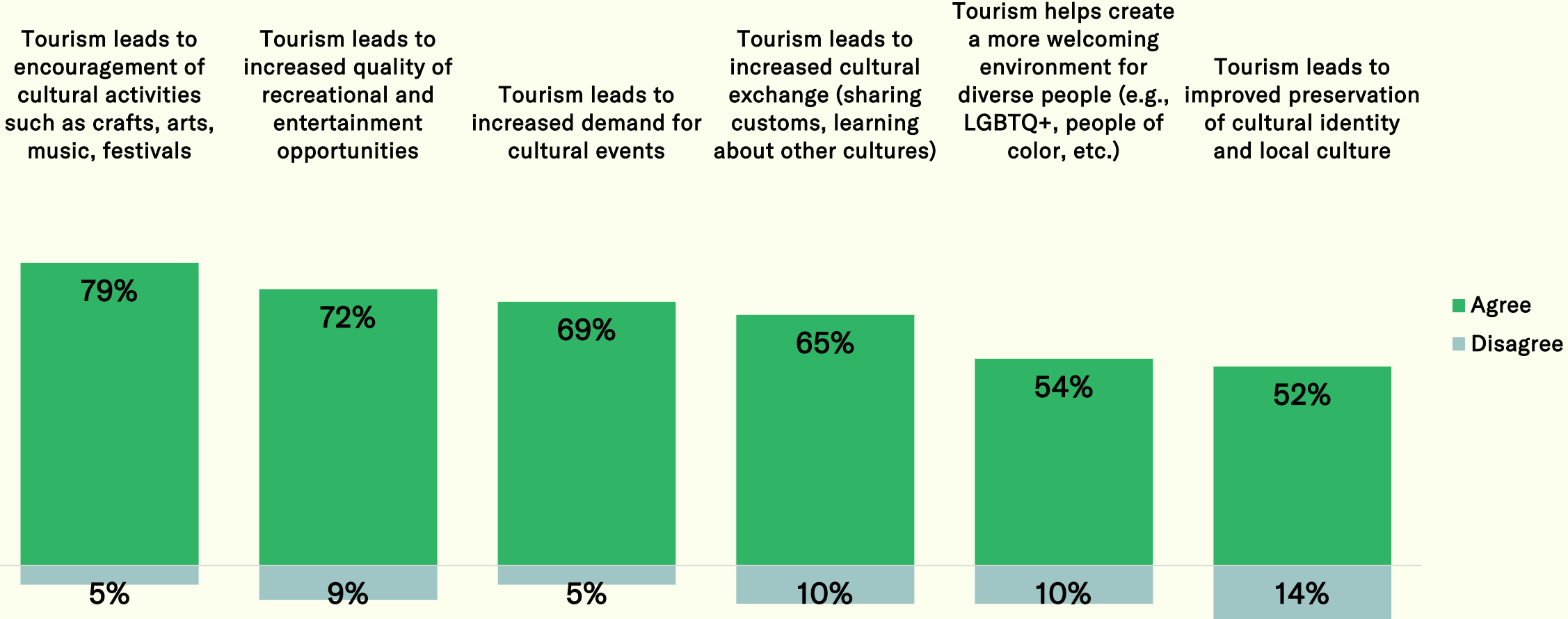
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Portland Region residents. 1,518 completed surveys.

Portland Region – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Positive Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

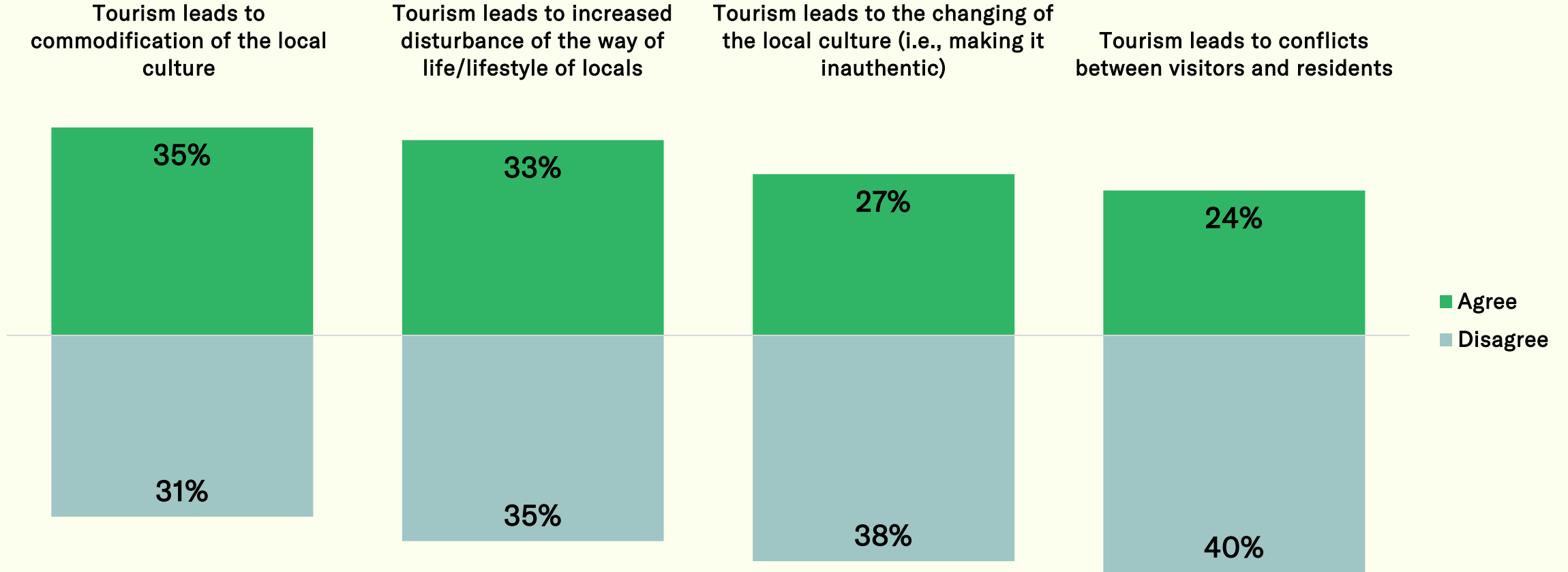


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Portland Region residents. 1,518 completed surveys.

Portland Region – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Negative Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



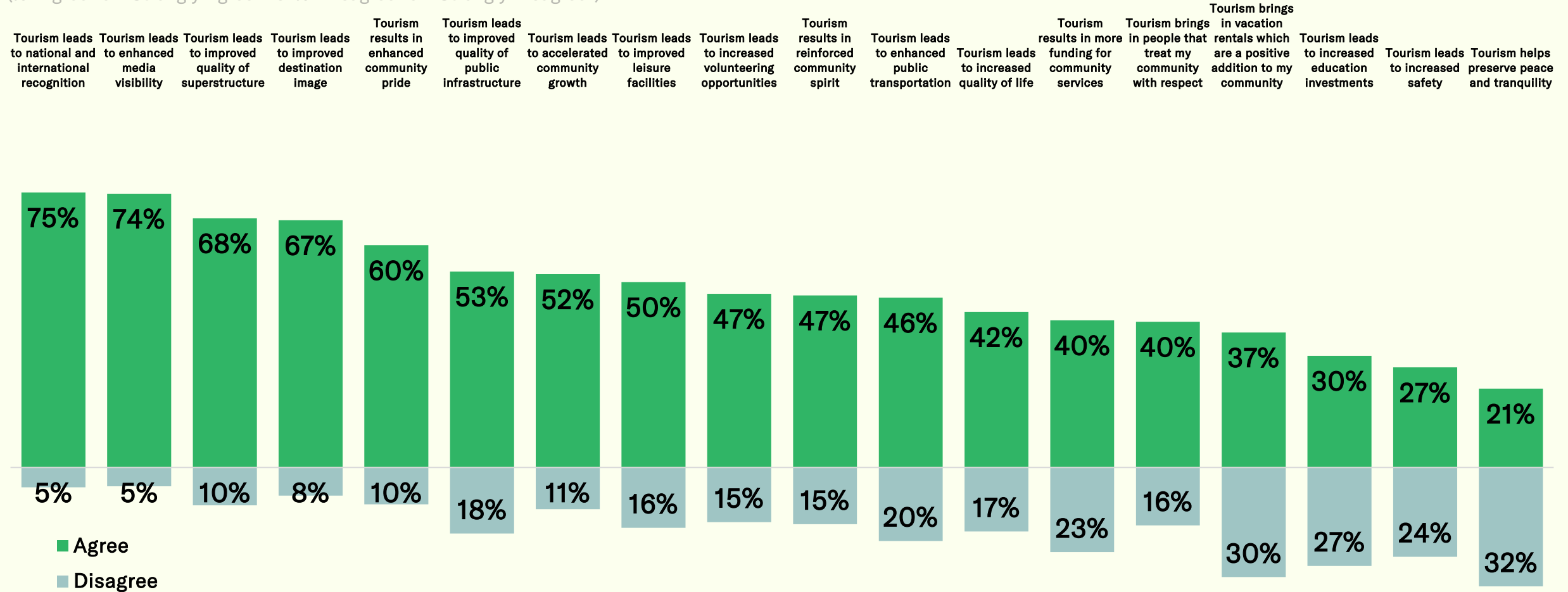
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Portland Region residents. 1,518 completed surveys.

Portland Region – Social Impact Index Statements

Residents' Perceptions of Tourism's Positive Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



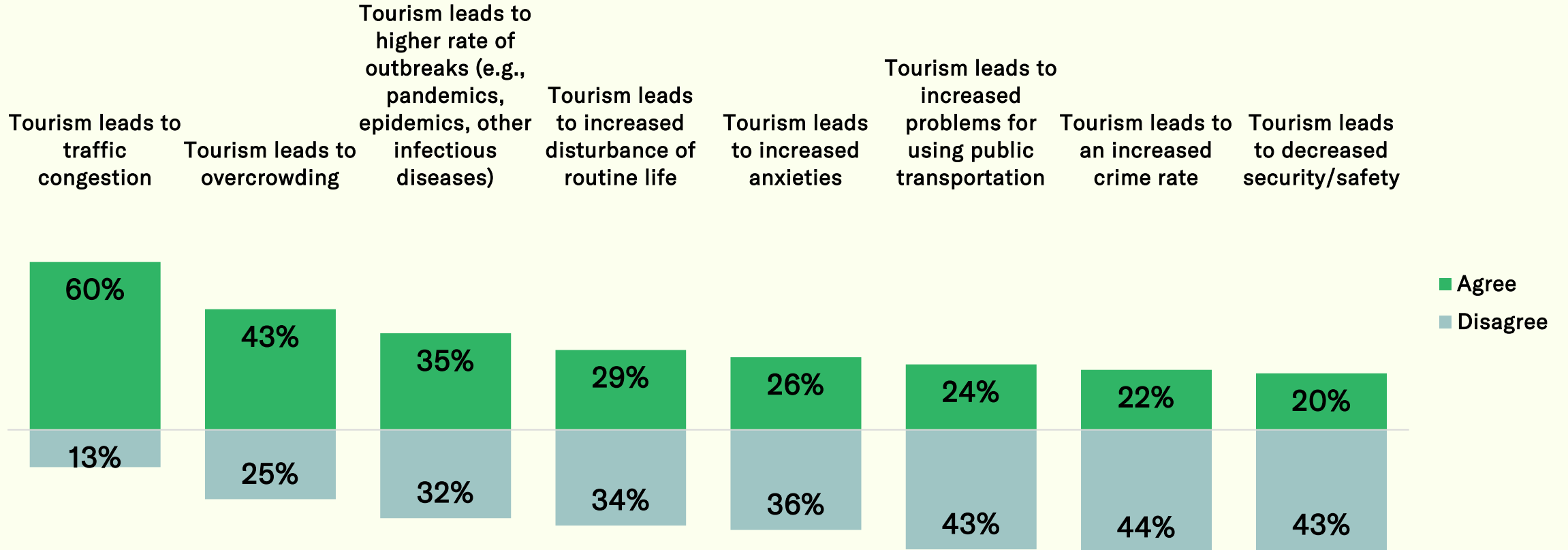
Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.

Base: Portland Region residents. 1,518 completed surveys.

Portland Region – Social Impact Index Statements

Residents' Perceptions of Tourism's Negative Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



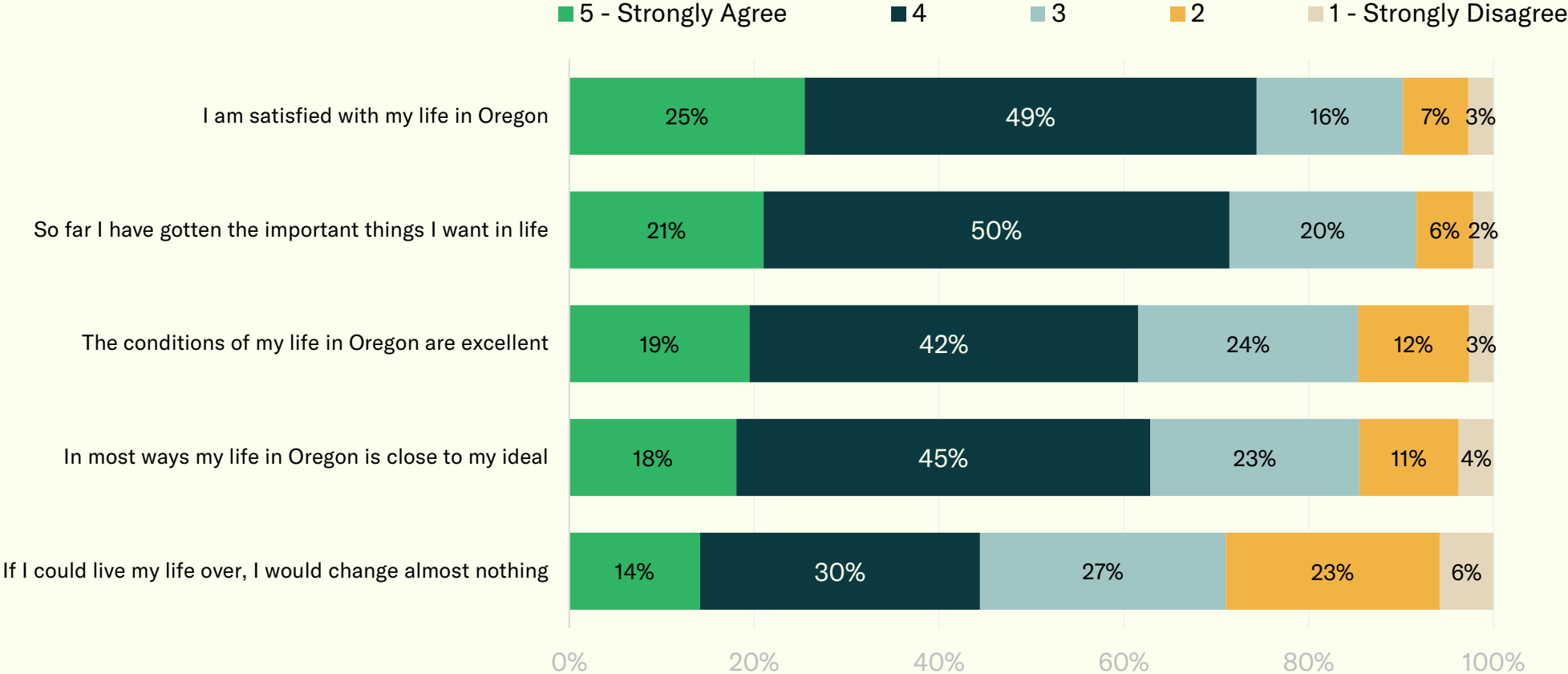
Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.

Base: Portland Region residents. 1,518 completed surveys.

Willamette Valley

Willamette Valley – Perceived Quality of Life Statements

Statements Included in Perceived Quality of Life Score

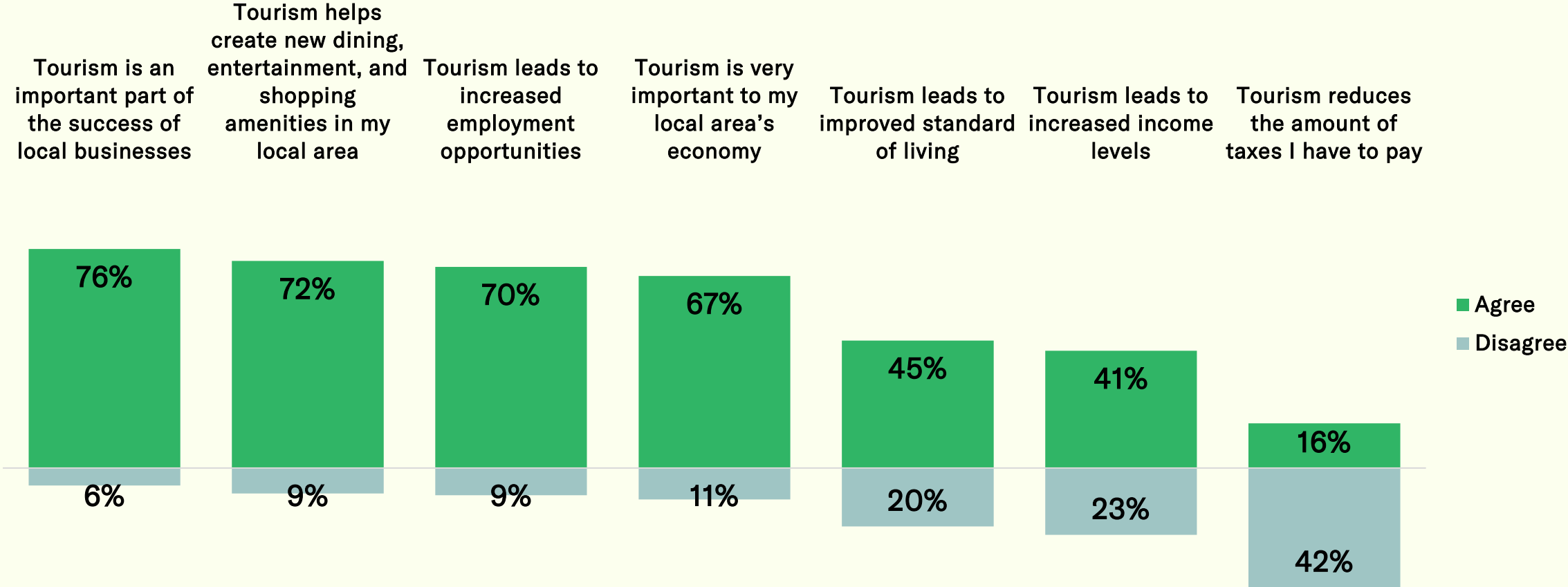


Question: Please rate your level of agreement with the following statements.
 Base: Willamette Valley residents. 1,041 completed surveys.

Willamette Valley – Economic Impact Index Statements

Residents' Perceptions of Tourism's Positive Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

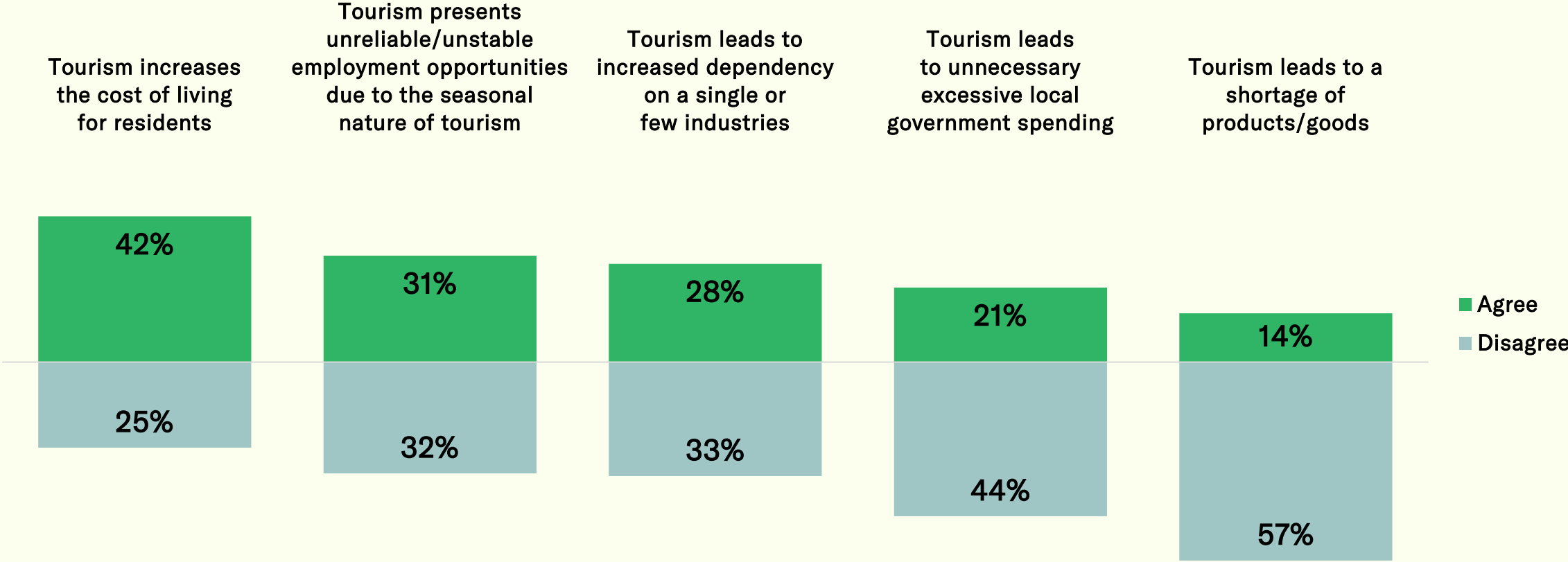


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
 Base: Willamette Valley residents. 1,041 completed surveys.

Willamette Valley – Economic Impact Index Statements

Residents' Perceptions of Tourism's Negative Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

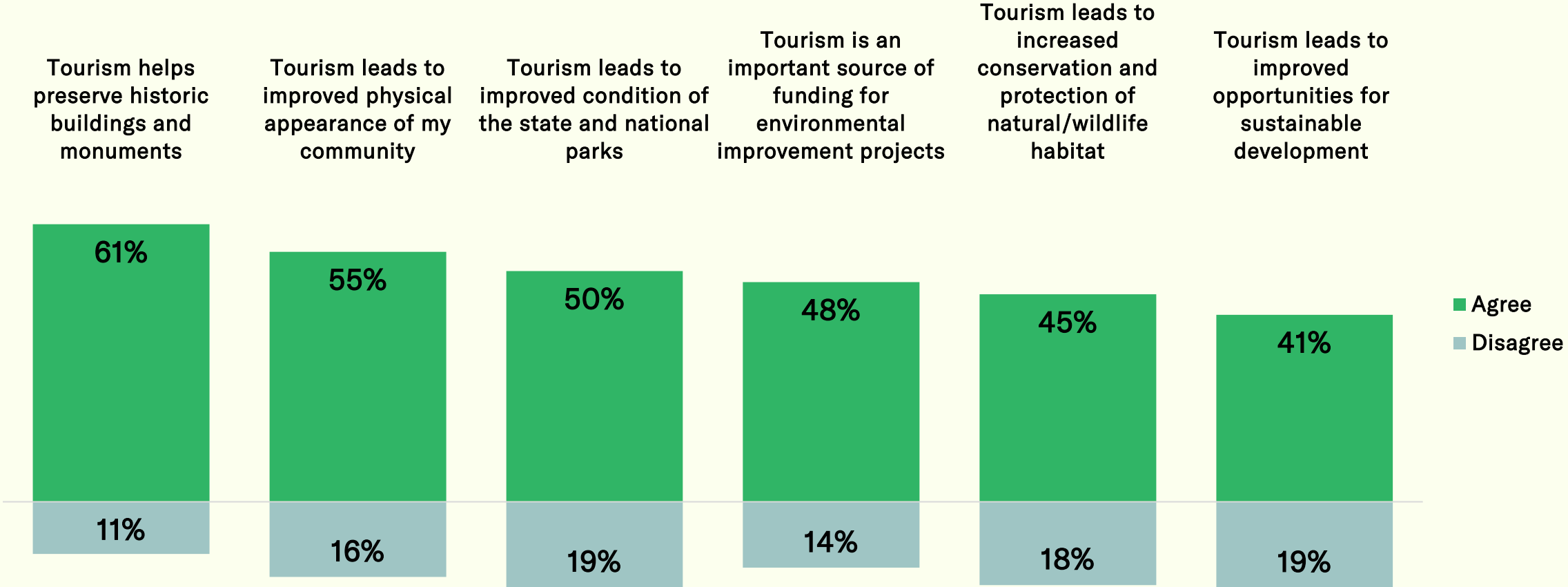


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Willamette Valley residents. 1,041 completed surveys.

Willamette Valley – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Positive Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

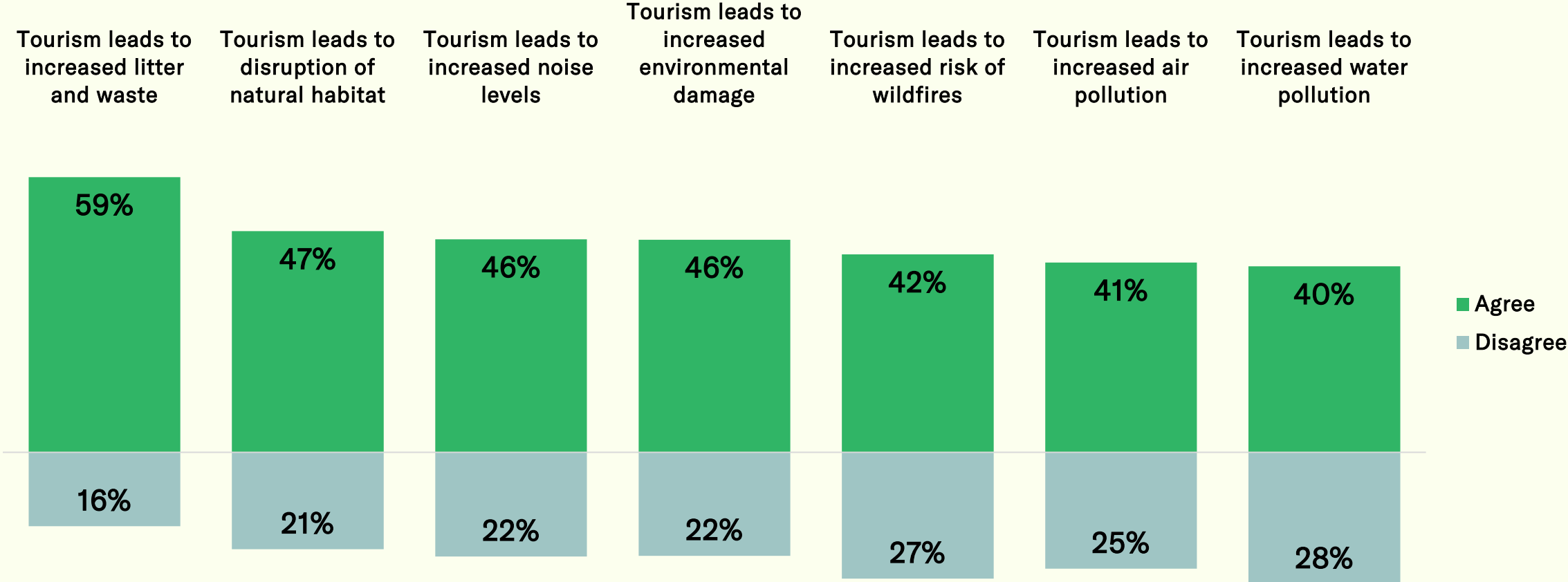


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Willamette Valley residents. 1,041 completed surveys.

Willamette Valley – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Negative Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

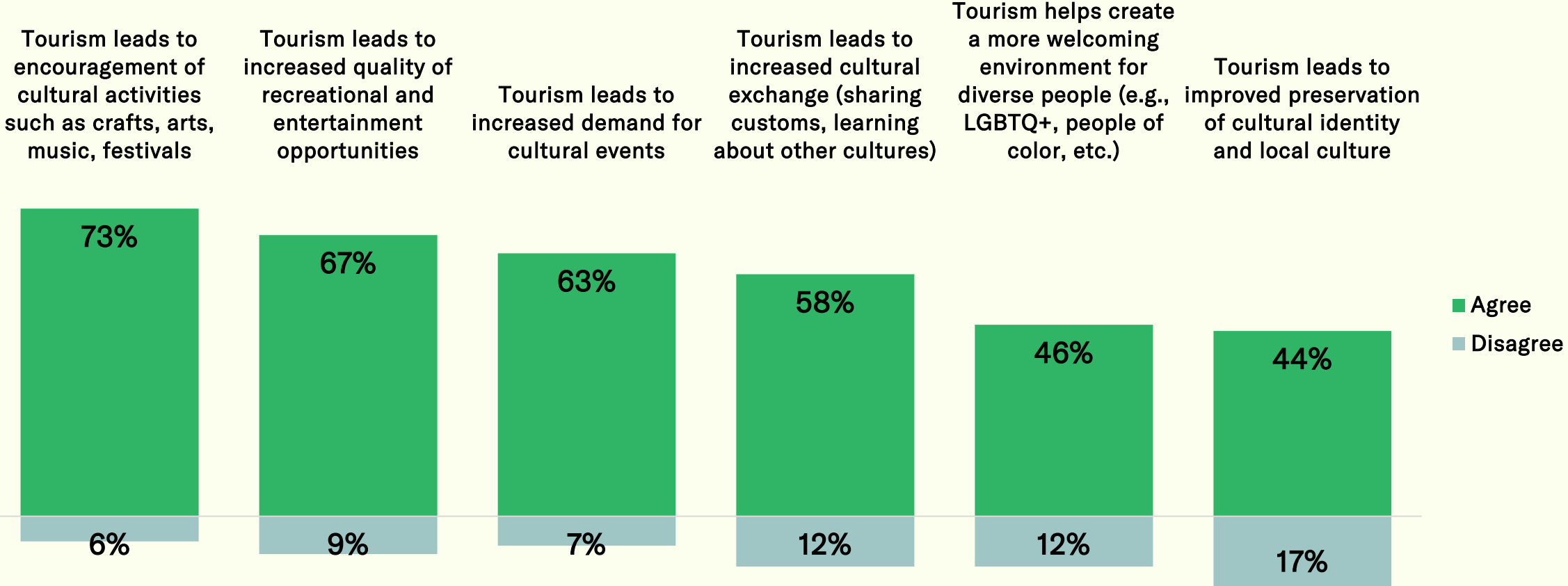


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Willamette Valley residents. 1,041 completed surveys.

Willamette Valley – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Positive Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

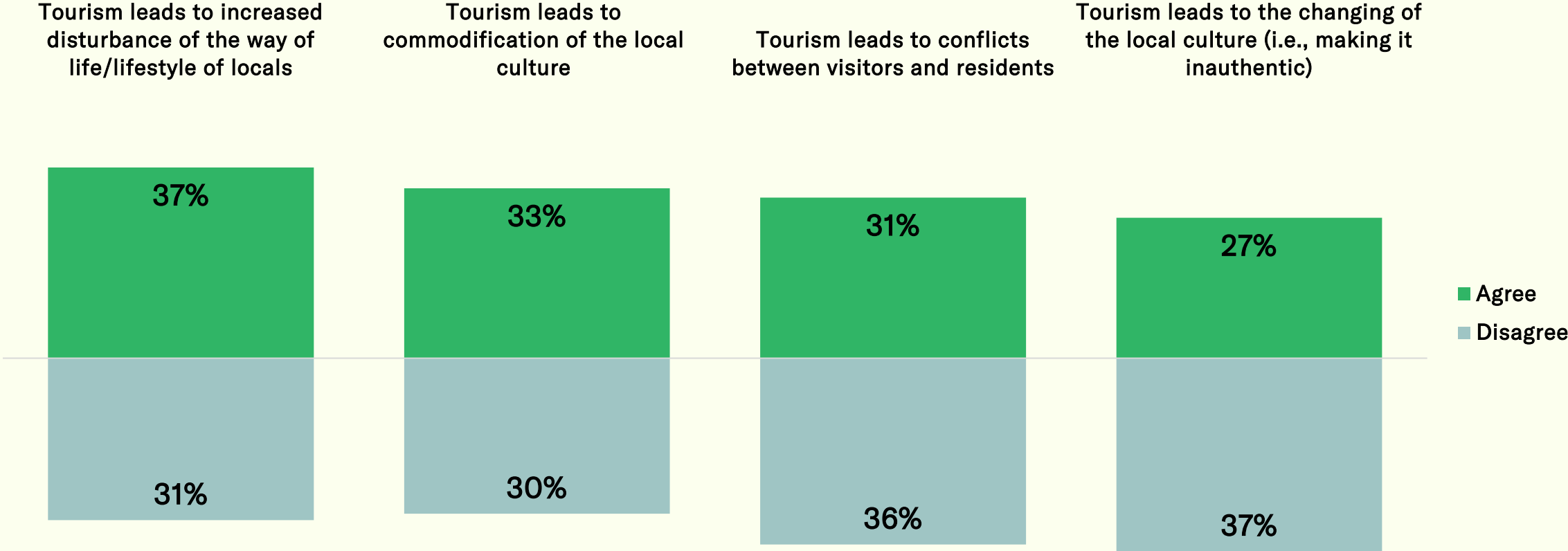


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Willamette Valley residents. 1,041 completed surveys.

Willamette Valley – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Negative Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

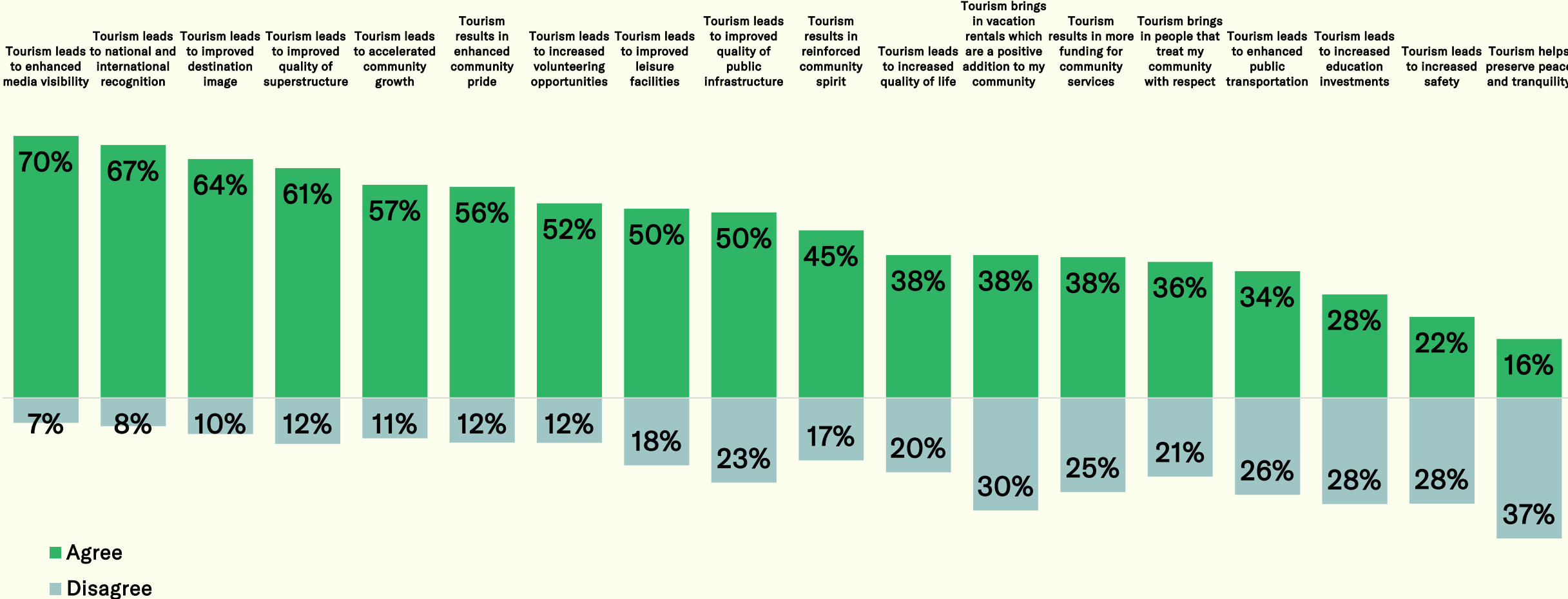


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Willamette Valley residents. 1,041 completed surveys.

Willamette Valley – Social Impact Index Statements

Residents' Perceptions of Tourism's Positive Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

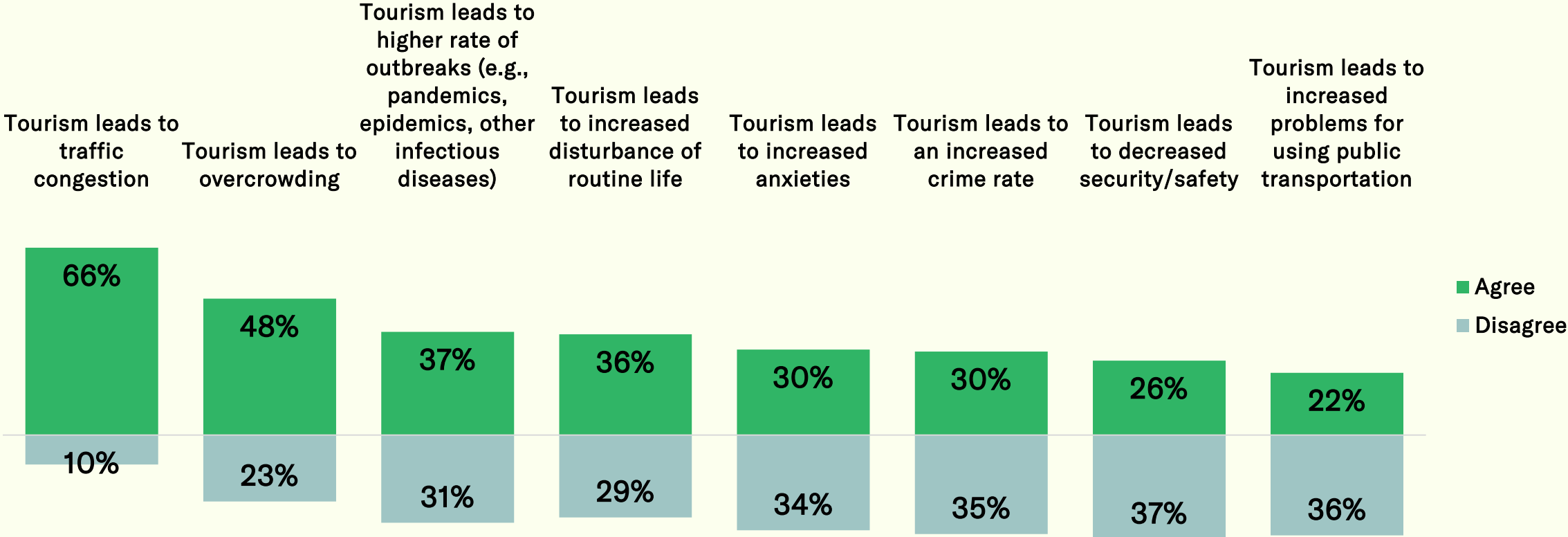


Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Willamette Valley residents. 1,041 completed surveys.

Willamette Valley – Social Impact Index Statements

Residents' Perceptions of Tourism's Negative Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

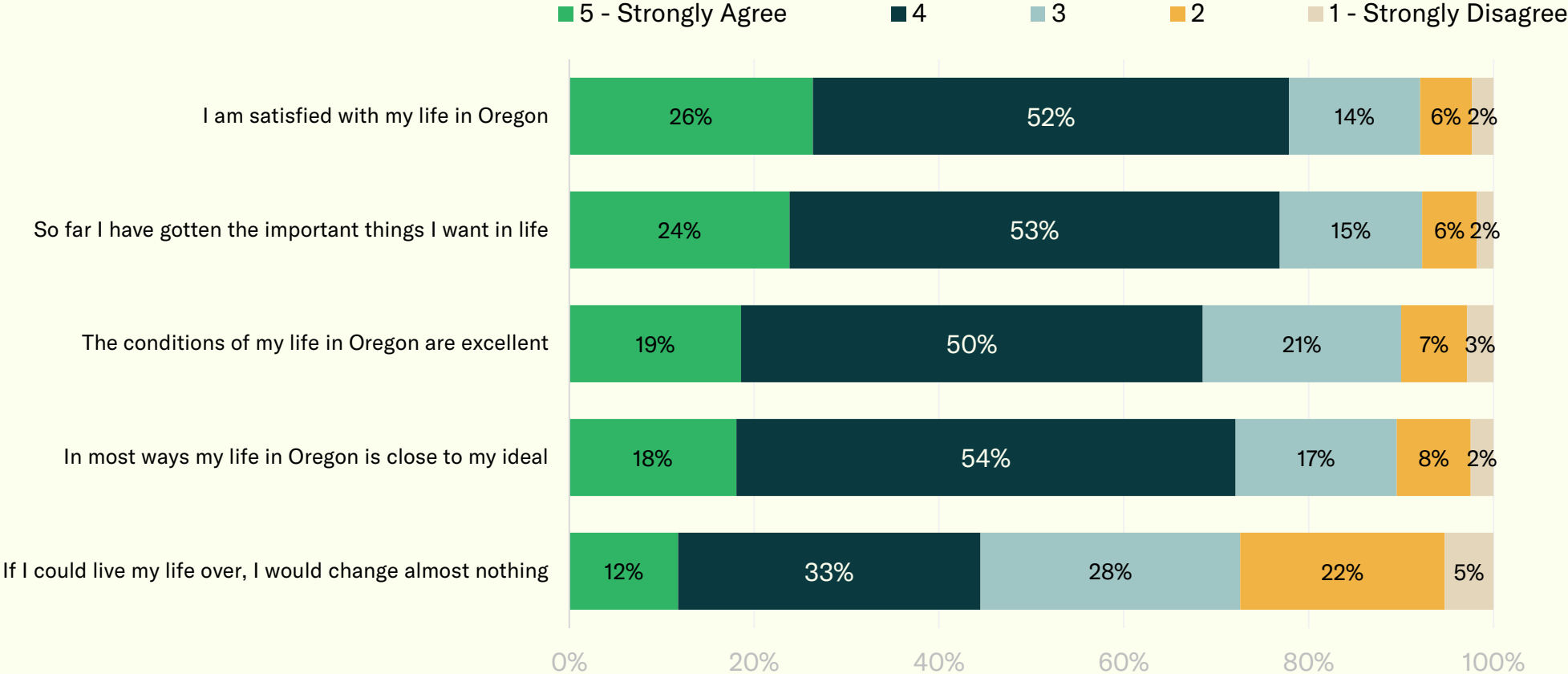


Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Willamette Valley residents. 1,041 completed surveys.

Central Oregon

Central Oregon – Perceived Quality of Life Statements

Statements Included in Perceived Quality of Life Score

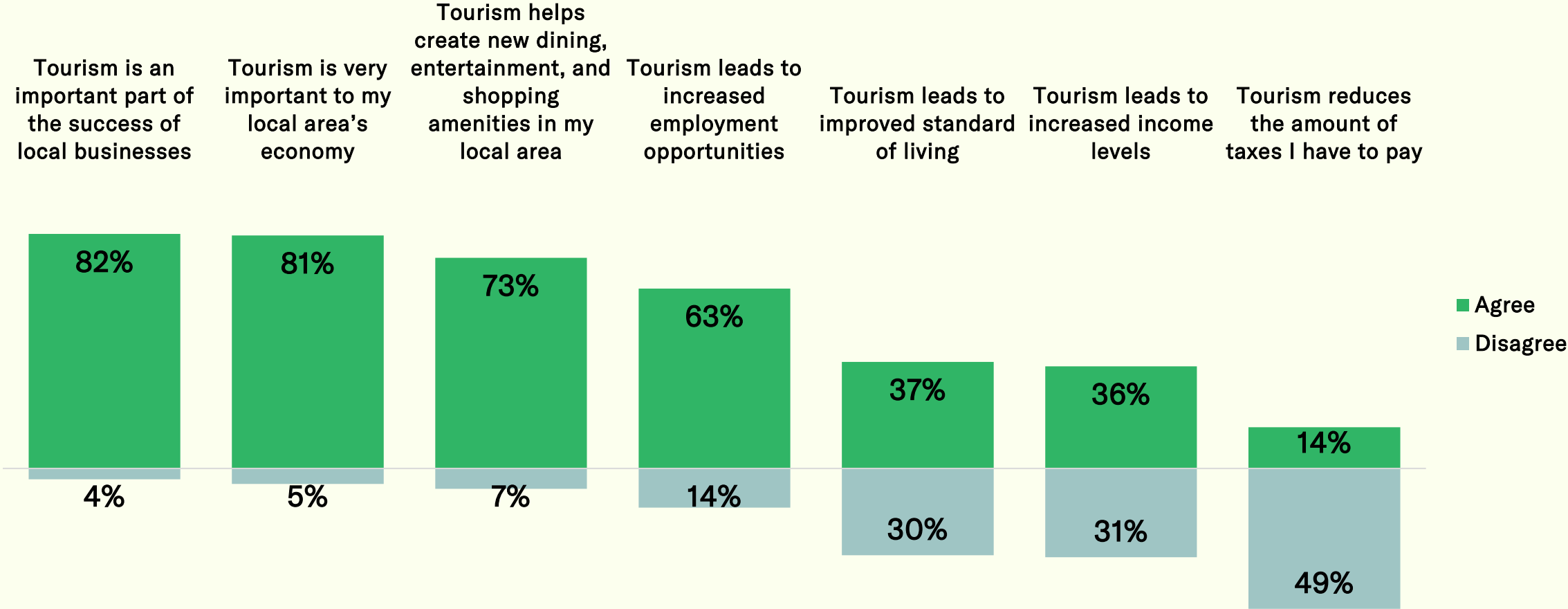


Note: Percentages may not sum to 100% due to rounding.
 Question: Please rate your level of agreement with the following statements.
 Base: Central Oregon residents. 820 completed surveys.

Central Oregon – Economic Impact Index Statements

Residents' Perceptions of Tourism's Positive Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



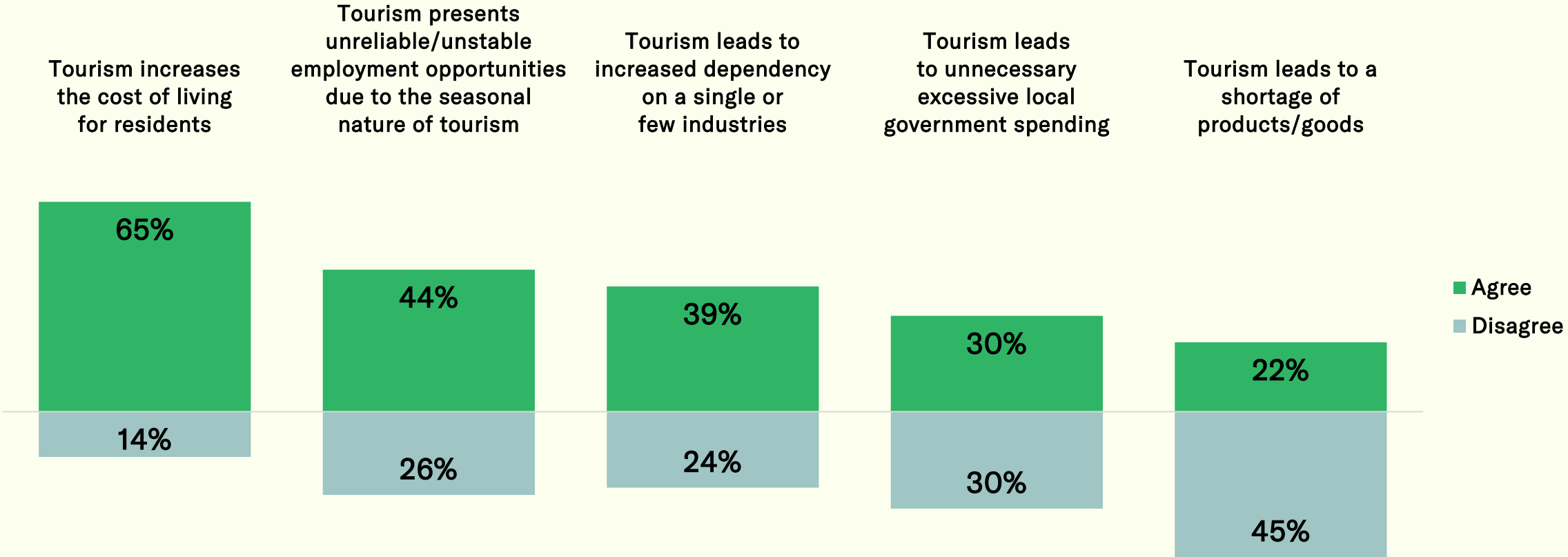
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Central Oregon residents. 820 completed surveys.

Central Oregon – Economic Impact Index Statements

Residents' Perceptions of Tourism's Negative Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

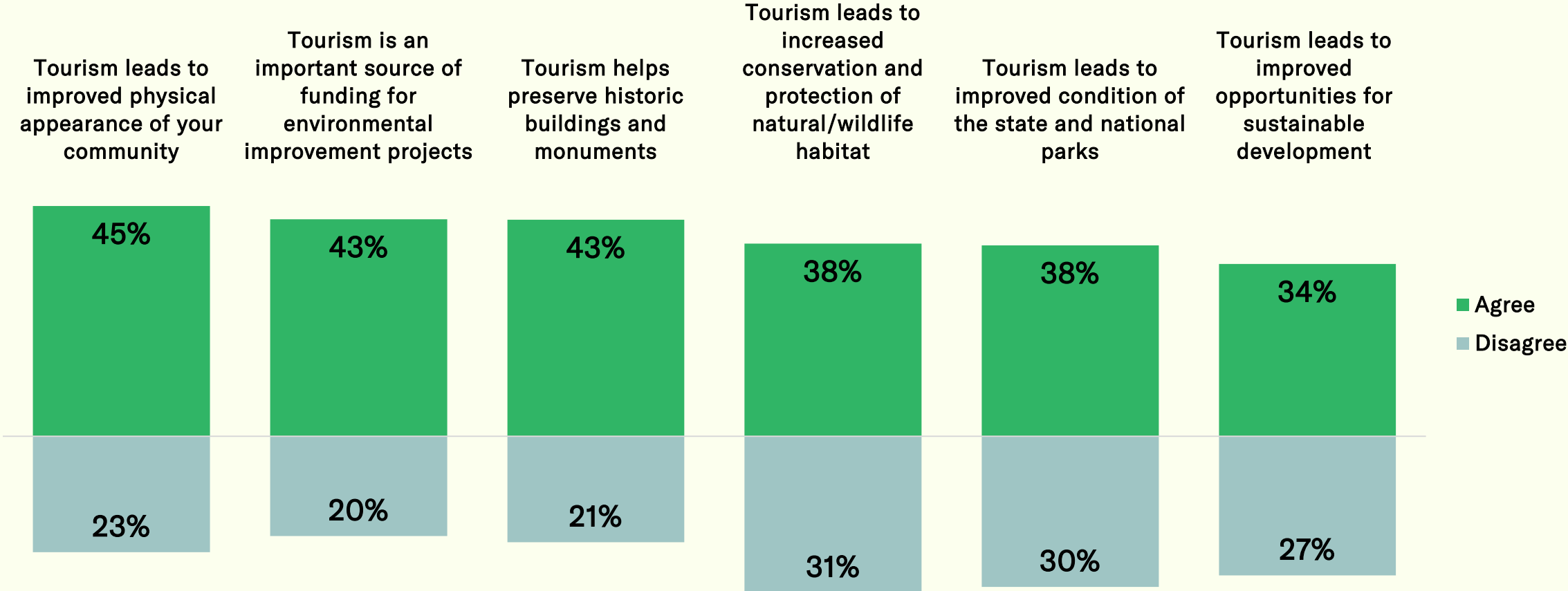


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Central Oregon residents. 820 completed surveys.

Central Oregon – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Positive Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



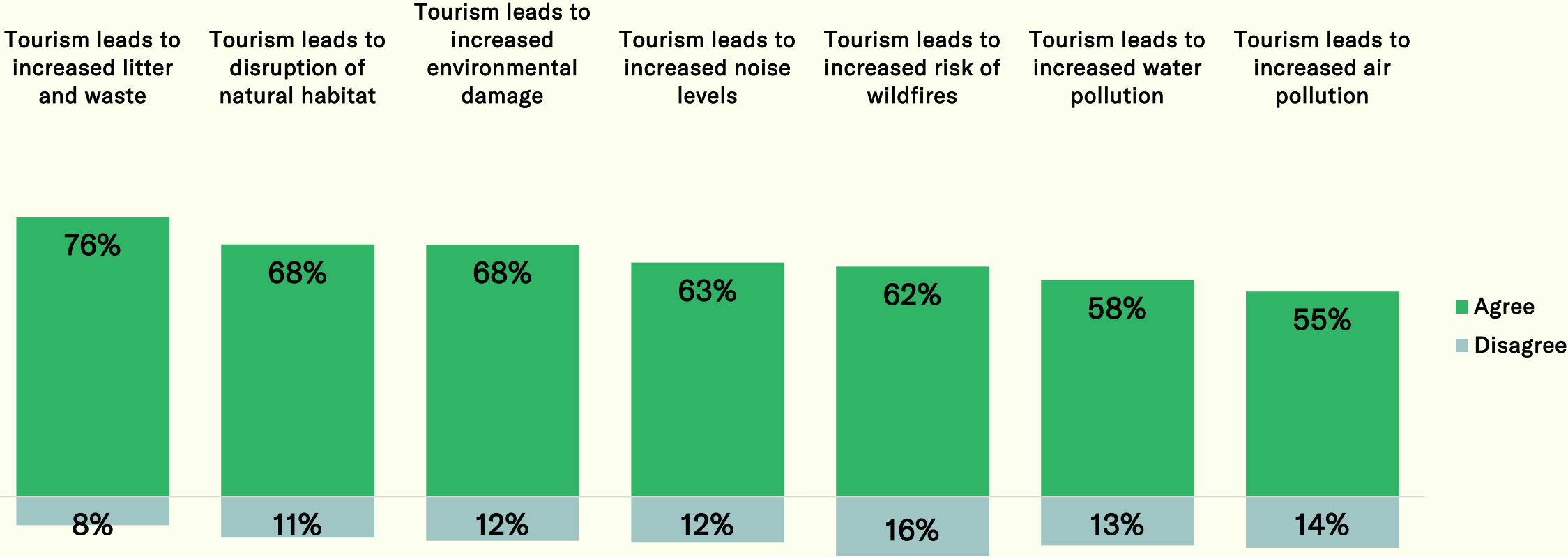
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Central Oregon residents. 820 completed surveys.

Central Oregon – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Negative Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

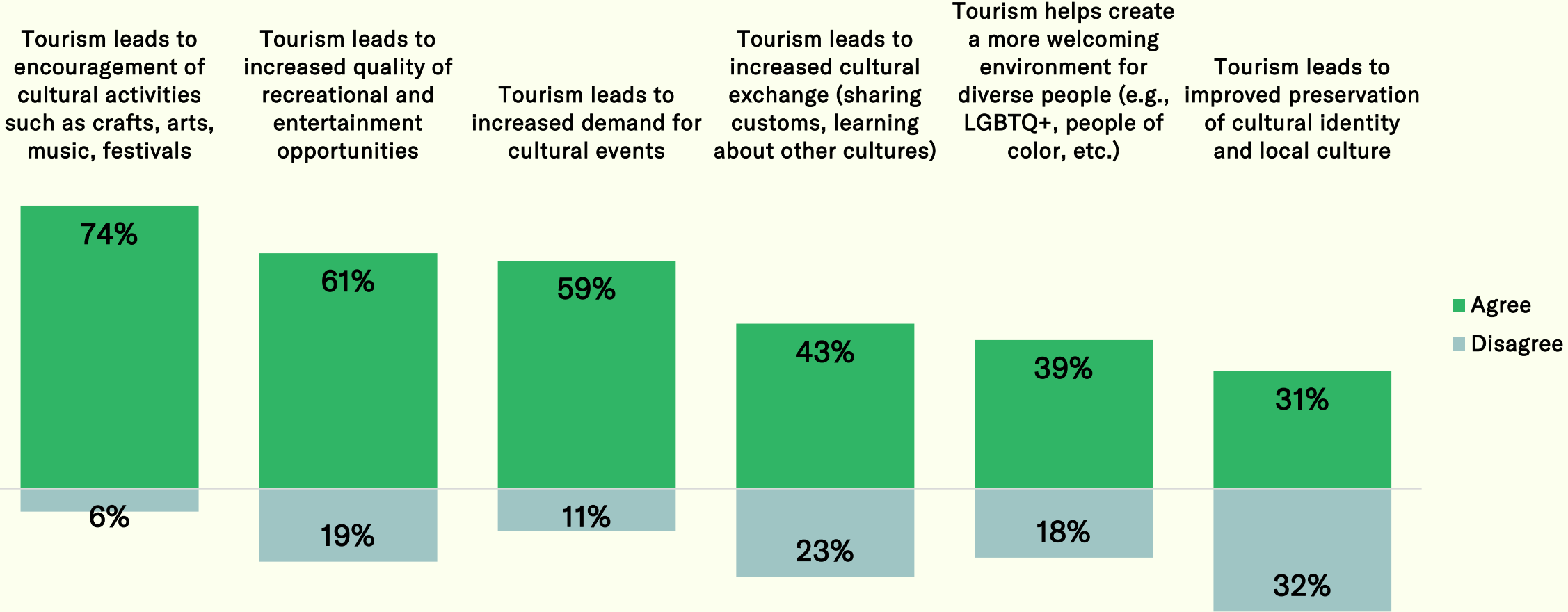


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Central Oregon residents. 820 completed surveys.

Central Oregon – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Positive Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

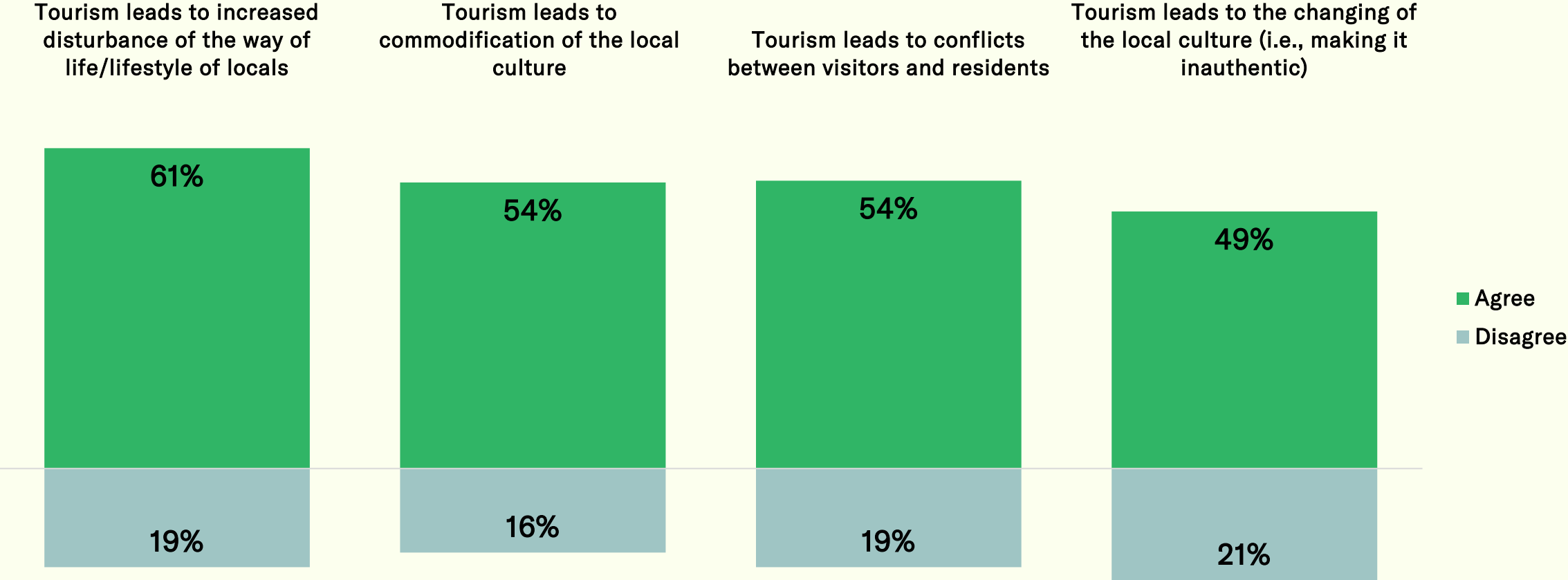


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Central Oregon residents. 820 completed surveys.

Central Oregon – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Negative Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

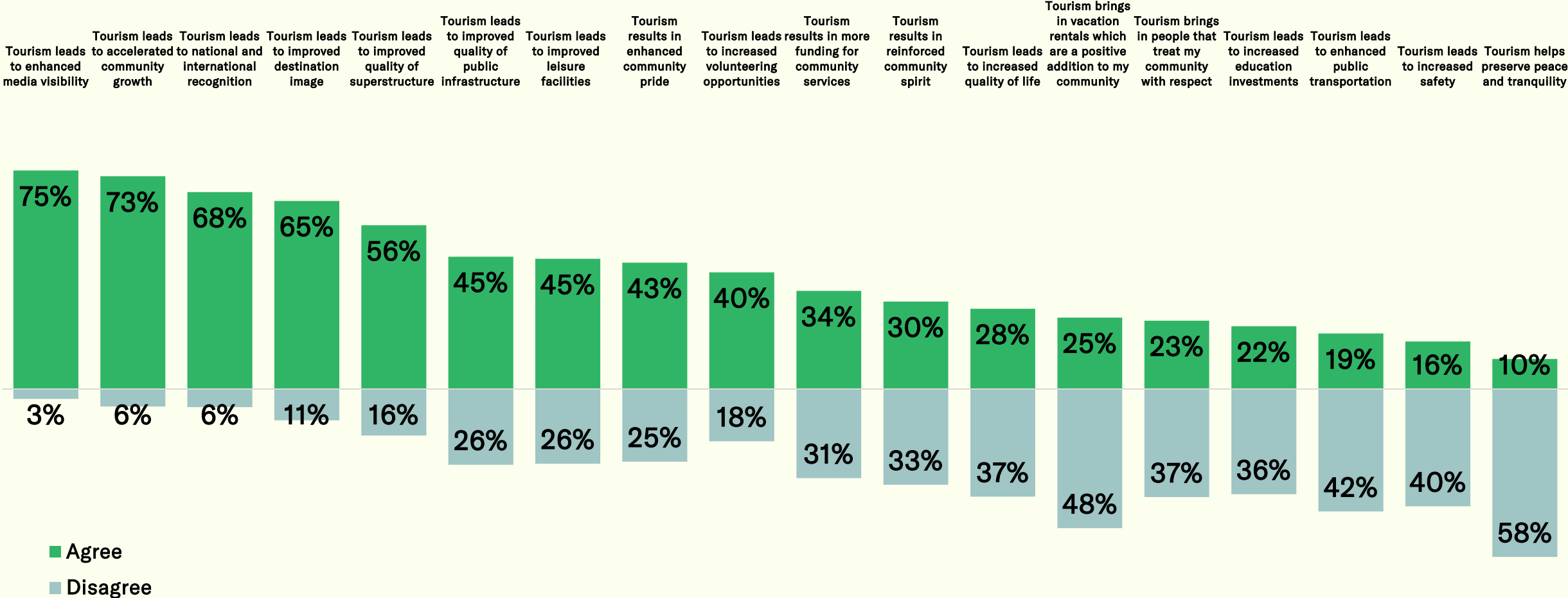


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Central Oregon residents. 820 completed surveys.

Central Oregon – Social Impact Index Statements

Residents' Perceptions of Tourism's Positive Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

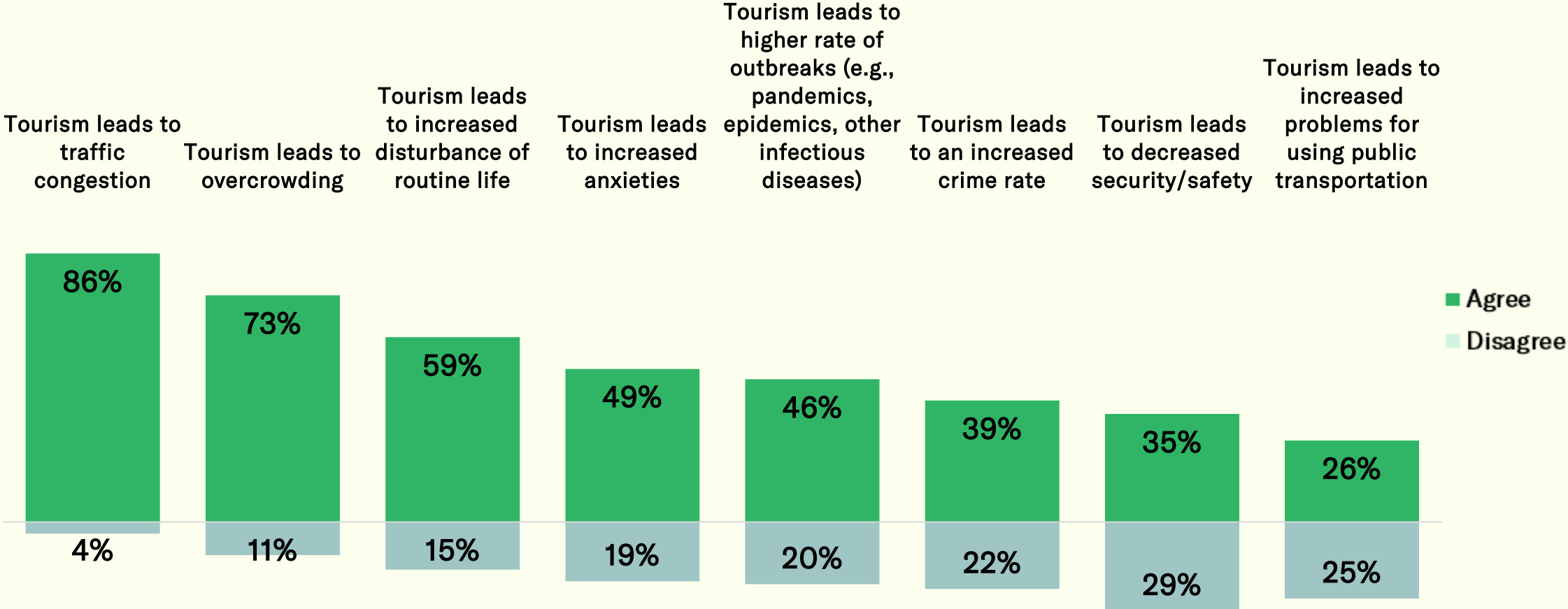


Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Central Oregon residents. 820 completed surveys.

Central Oregon – Social Impact Index Statements

Residents' Perceptions of Tourism's Negative Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

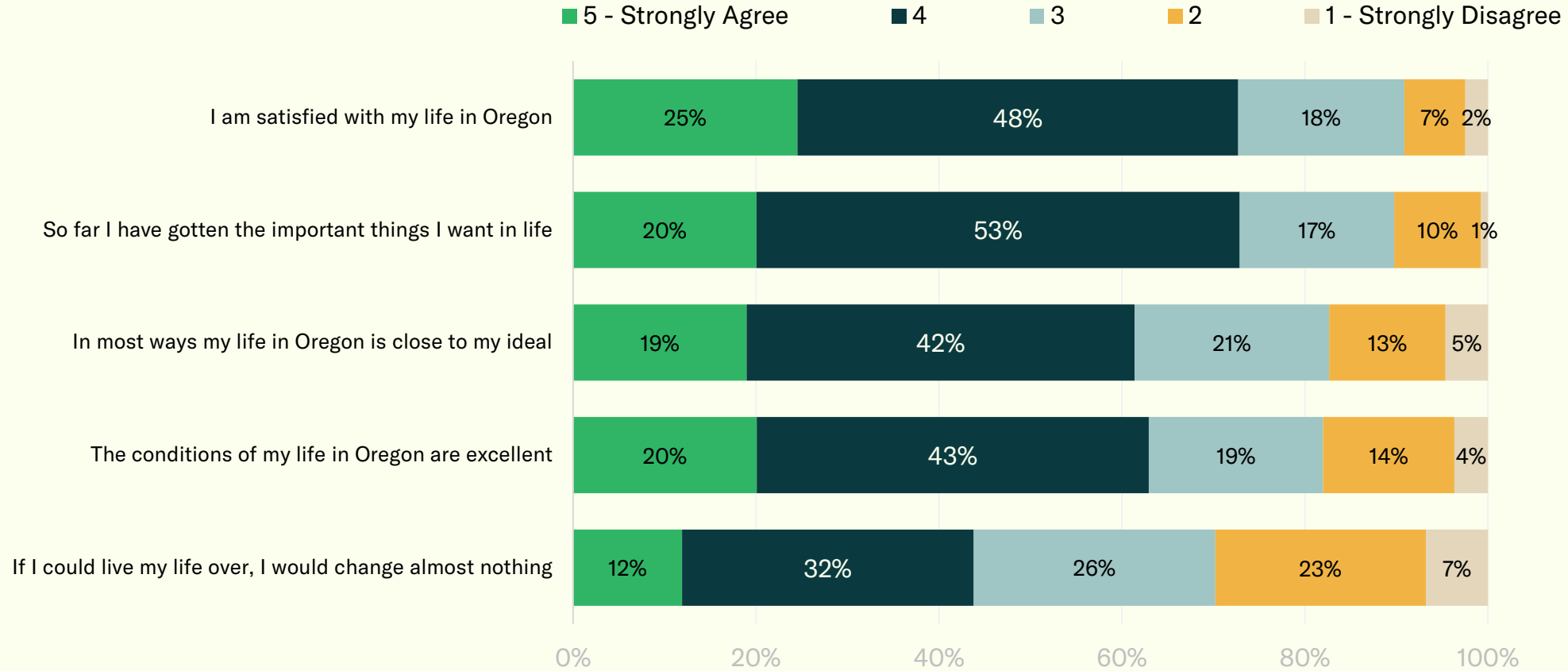


Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Central Oregon residents. 820 completed surveys.

Mt. Hood/Columbia River Gorge

Mt. Hood/CRG – Perceived Quality of Life Statements

Statements Included in Perceived Quality of Life Score



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

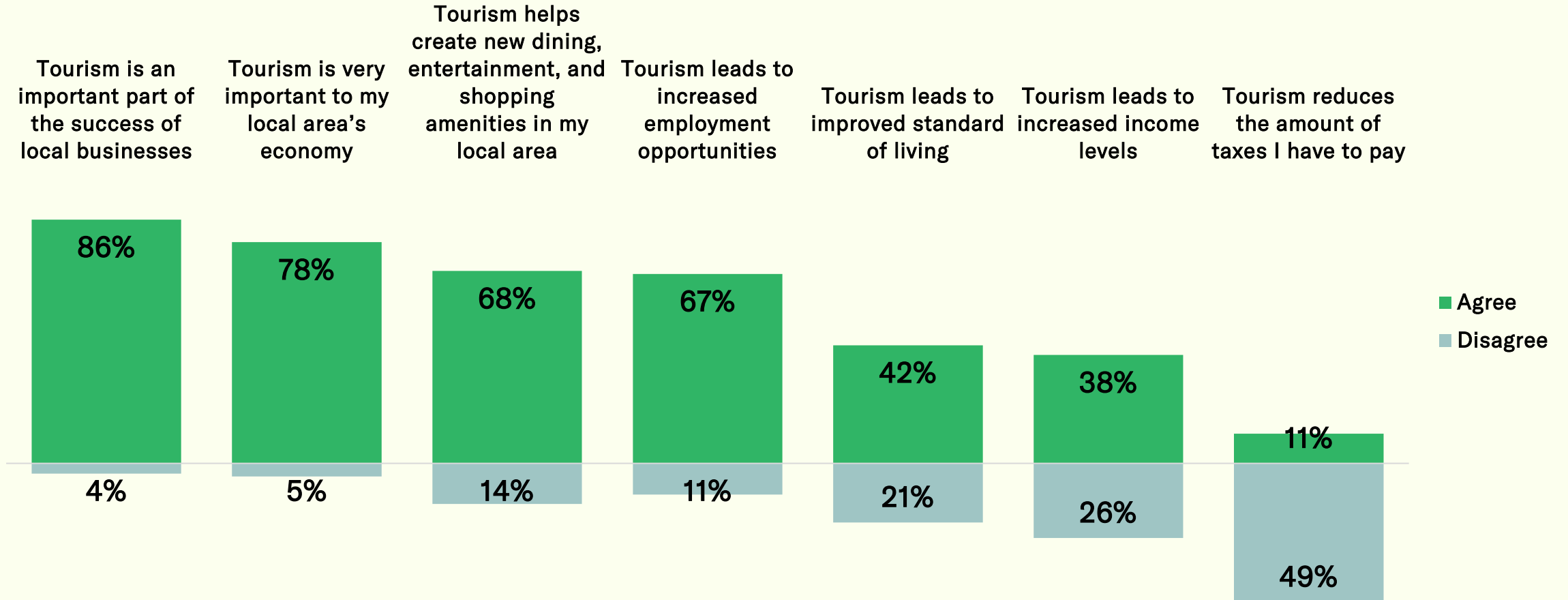
Question: Please rate your level of agreement with the following statements.

Base: Mt. Hood/CRG residents. 168 completed surveys.

Mt. Hood/CRG – Economic Impact Index Statements

Residents' Perceptions of Tourism's Positive Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



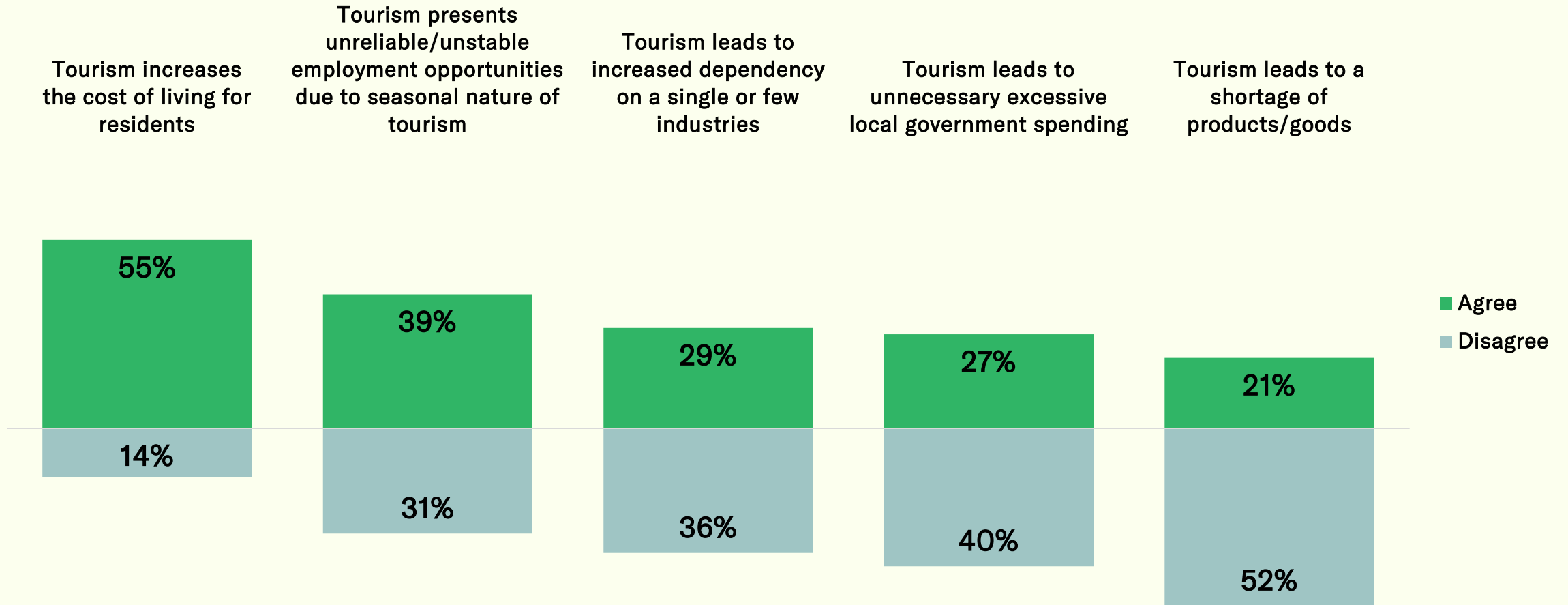
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Mt. Hood/CRG residents. 168 completed surveys.

Mt. Hood/CRG – Economic Impact Index Statements

Residents' Perceptions of Tourism's Negative Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



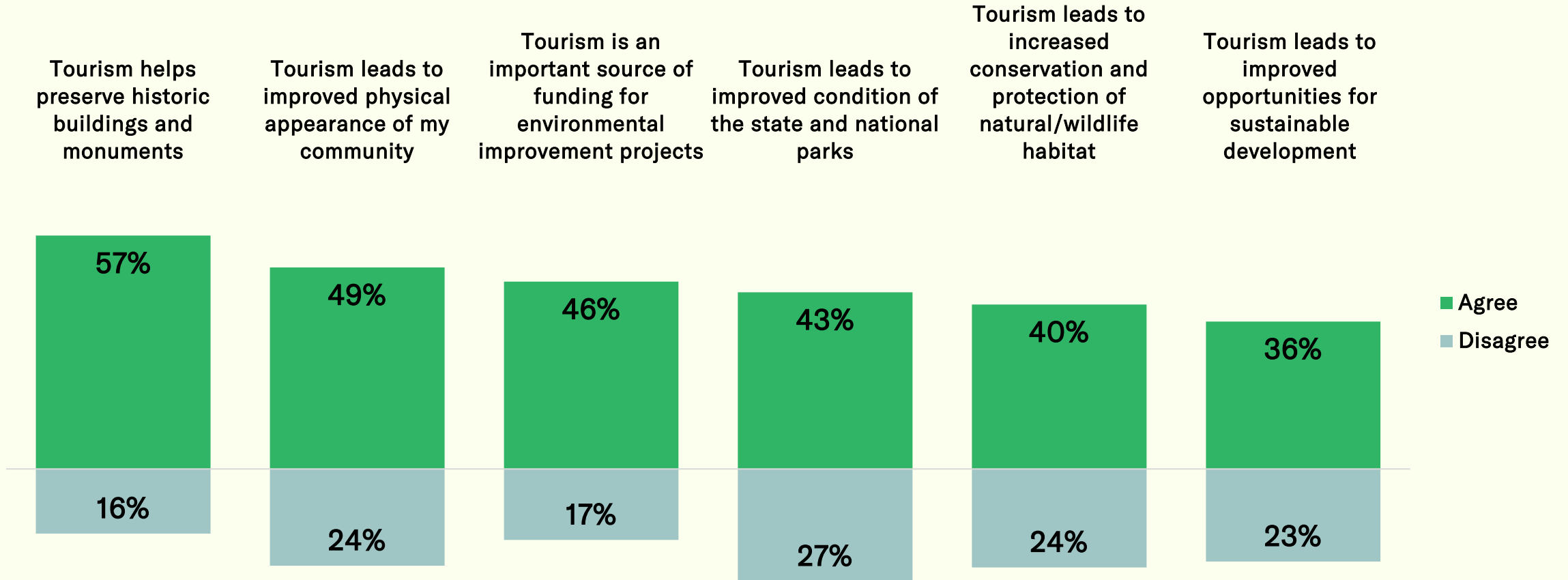
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Mt. Hood/CRG residents. 168 completed surveys.

Mt. Hood/CRG – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Positive Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



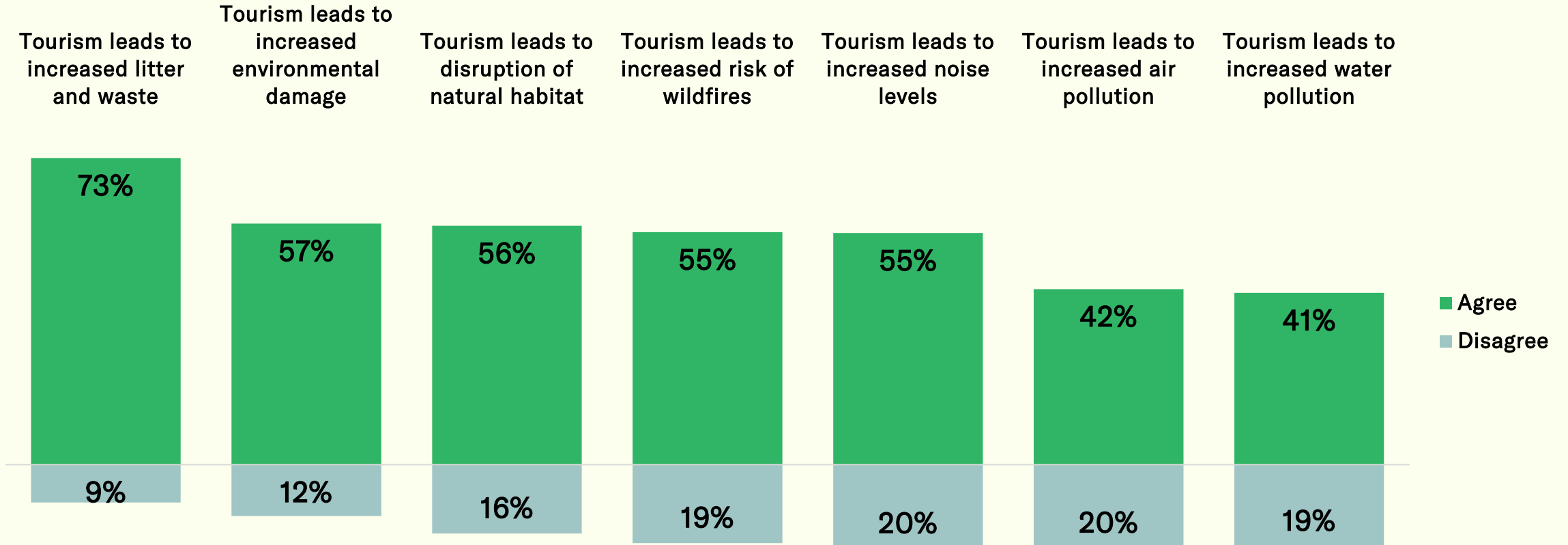
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Mt. Hood/CRG residents. 168 completed surveys.

Mt. Hood/CRG – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Negative Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



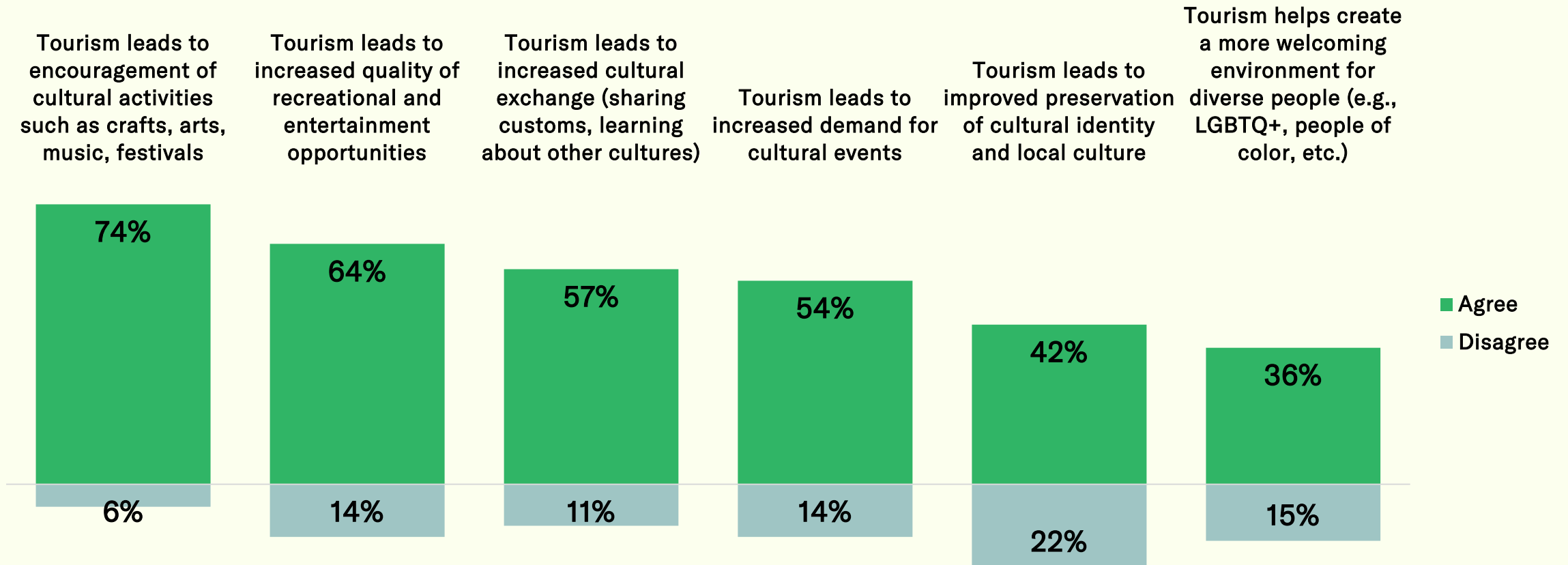
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Mt. Hood/CRG residents. 168 completed surveys.

Mt. Hood/CRG – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Positive Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



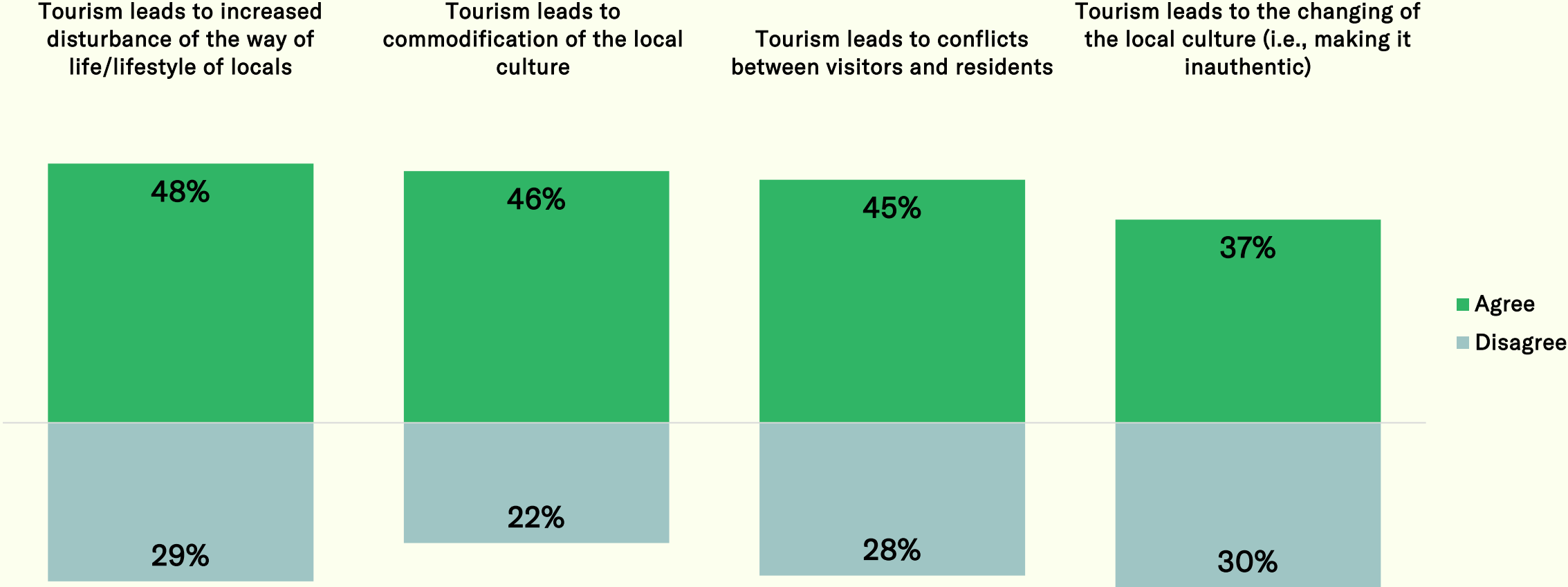
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Mt. Hood/CRG residents. 168 completed surveys.

Mt. Hood/CRG – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Negative Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

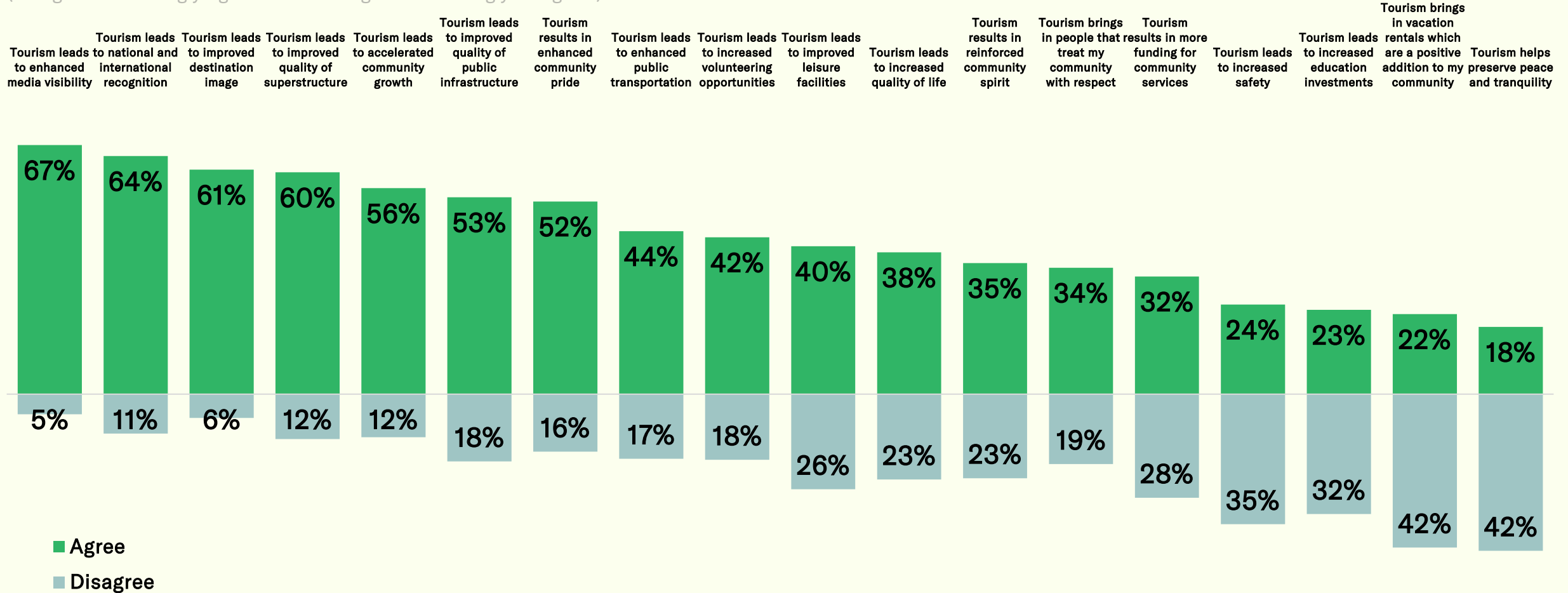


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Mt. Hood/CRG residents. 168 completed surveys.

Mt. Hood/CRG – Social Impact Index Statements

Residents' Perceptions of Tourism's Positive Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



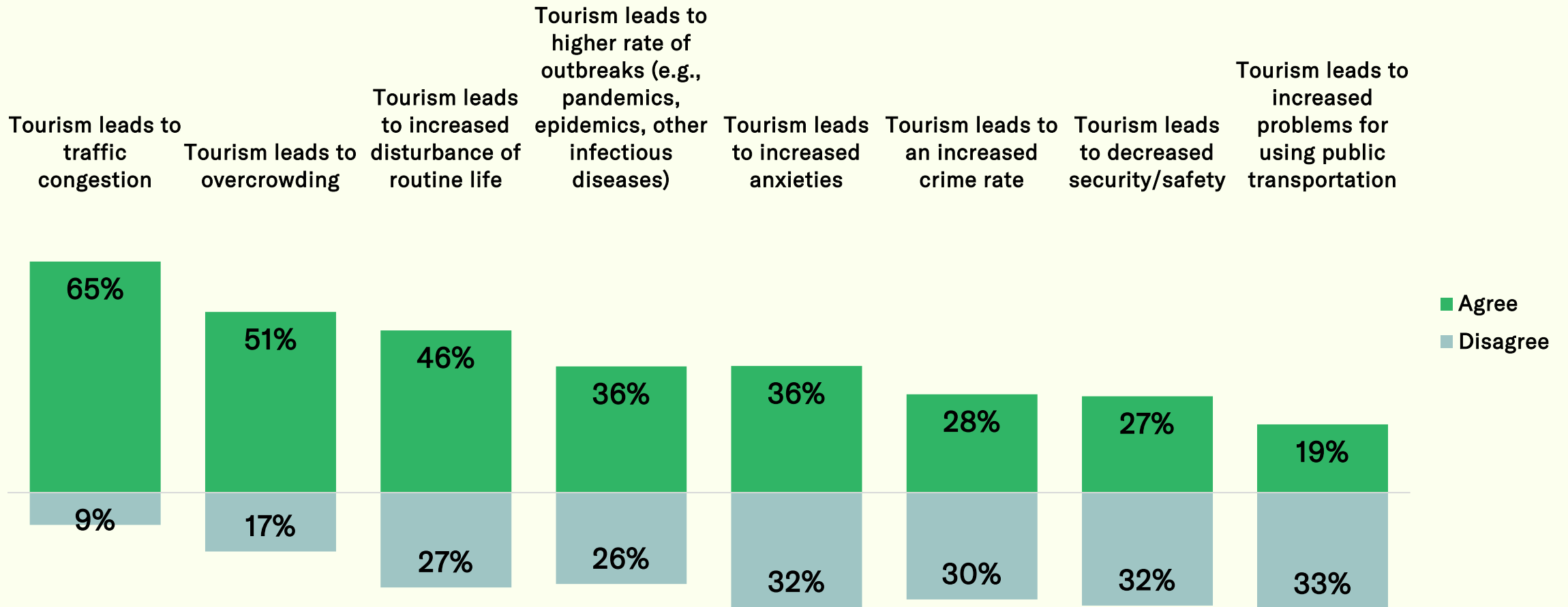
Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.

Base: Mt. Hood/CRG residents. 168 completed surveys.

Mt. Hood/CRG – Social Impact Index Statements

Residents' Perceptions of Negative Tourism Social Impacts

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



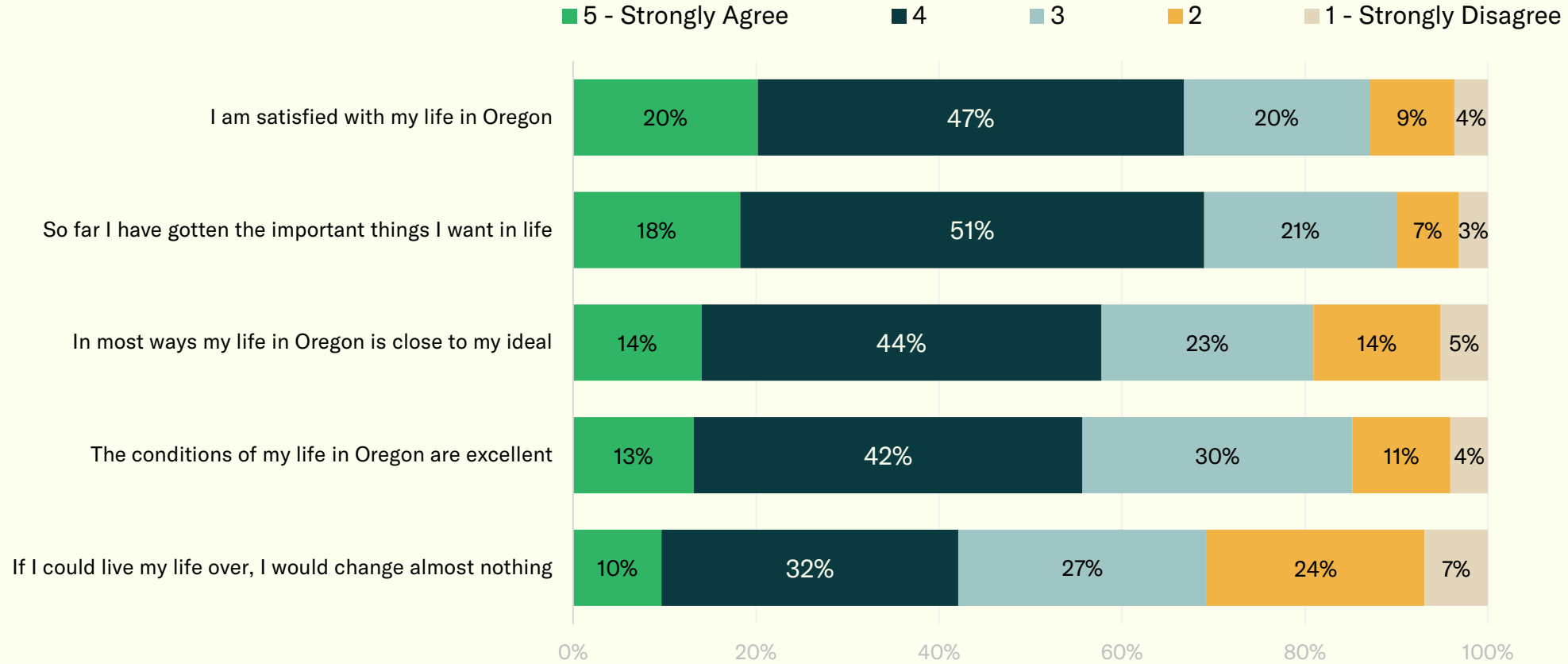
Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s communities, please rate how much you agree or disagree with the following statements.

Base: Mt. Hood/CRG residents. 168 completed surveys.

Eastern Oregon

Eastern Oregon – Perceived Quality of Life Statements

Statements Included in Perceived Quality of Life Score



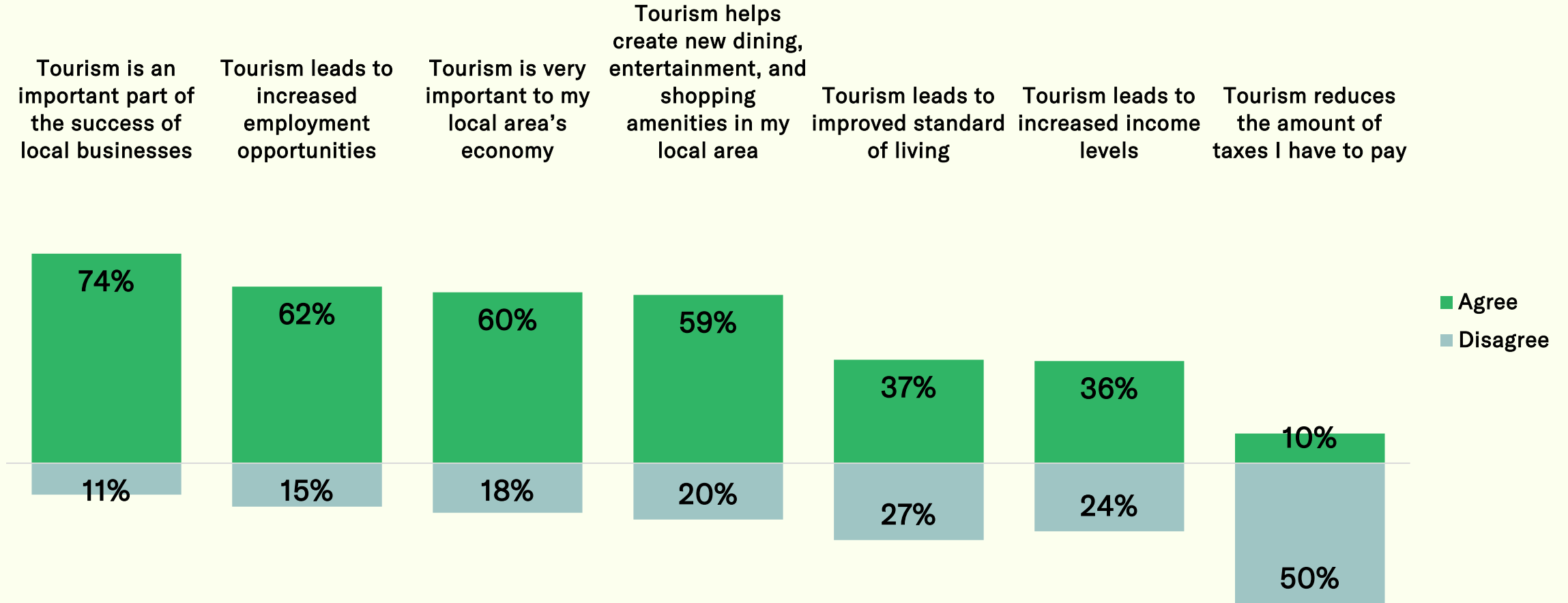
Question: Please rate your level of agreement with the following statements.

Base: Eastern Oregon residents. 614 completed surveys.

Eastern Oregon – Economic Impact Index Statements

Residents' Perceptions of Tourism's Positive Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



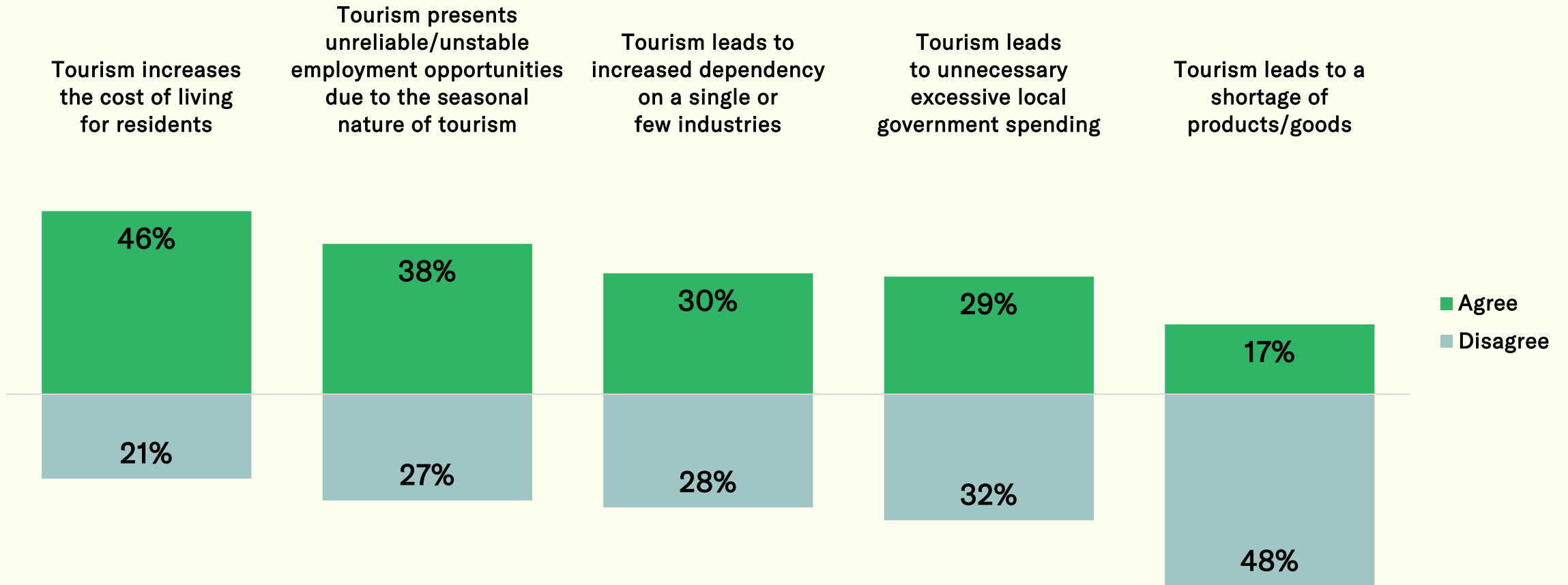
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon residents. 614 completed surveys.

Eastern Oregon – Economic Impact Index Statements

Residents' Perceptions of Tourism's Negative Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



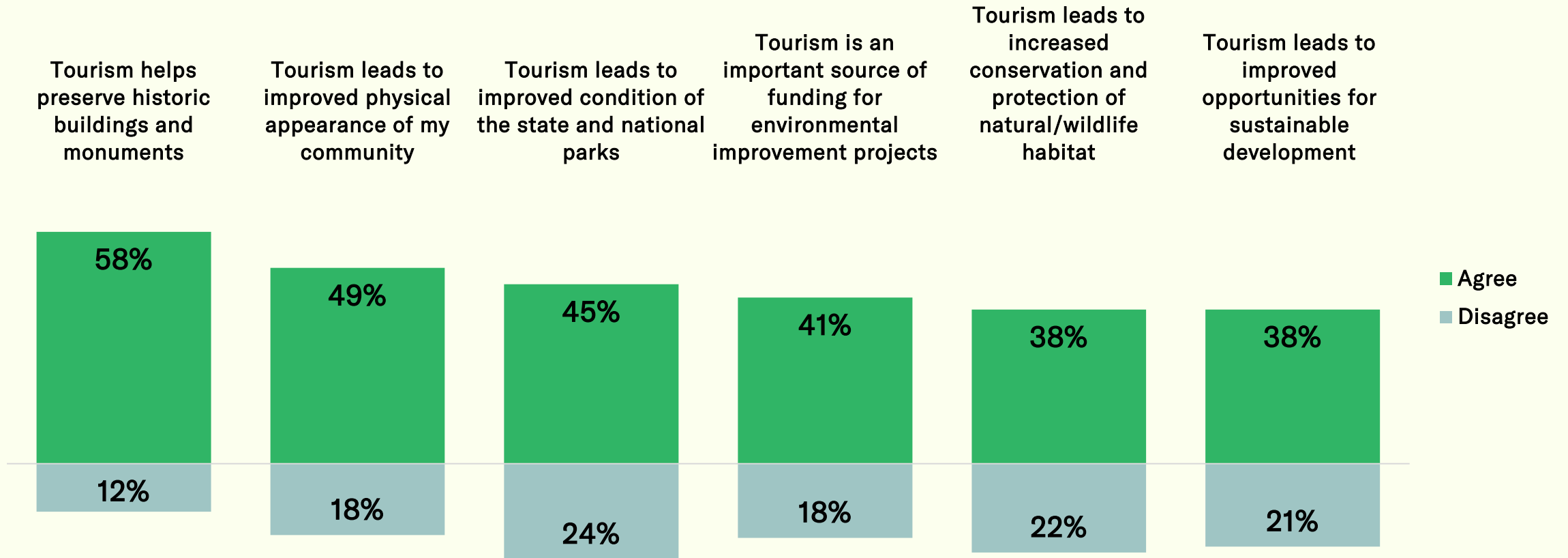
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon residents. 614 completed surveys.

Eastern Oregon – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Positive Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



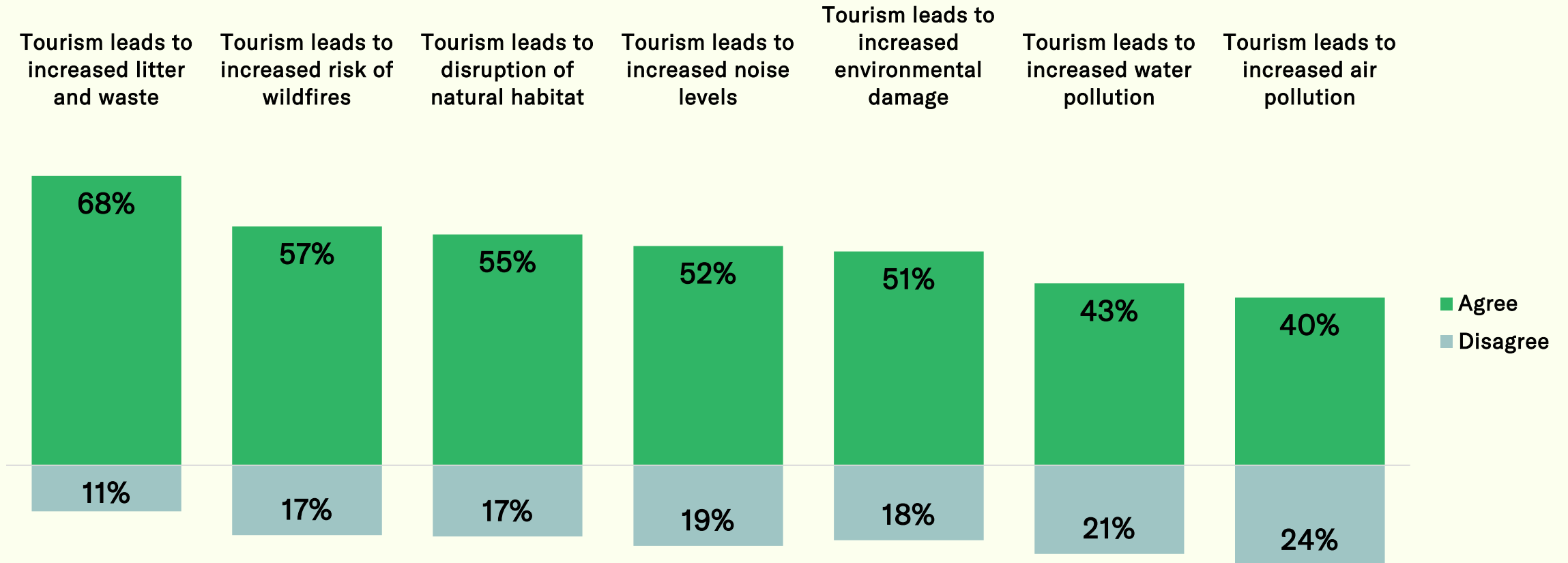
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon residents. 614 completed surveys.

Eastern Oregon – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Negative Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



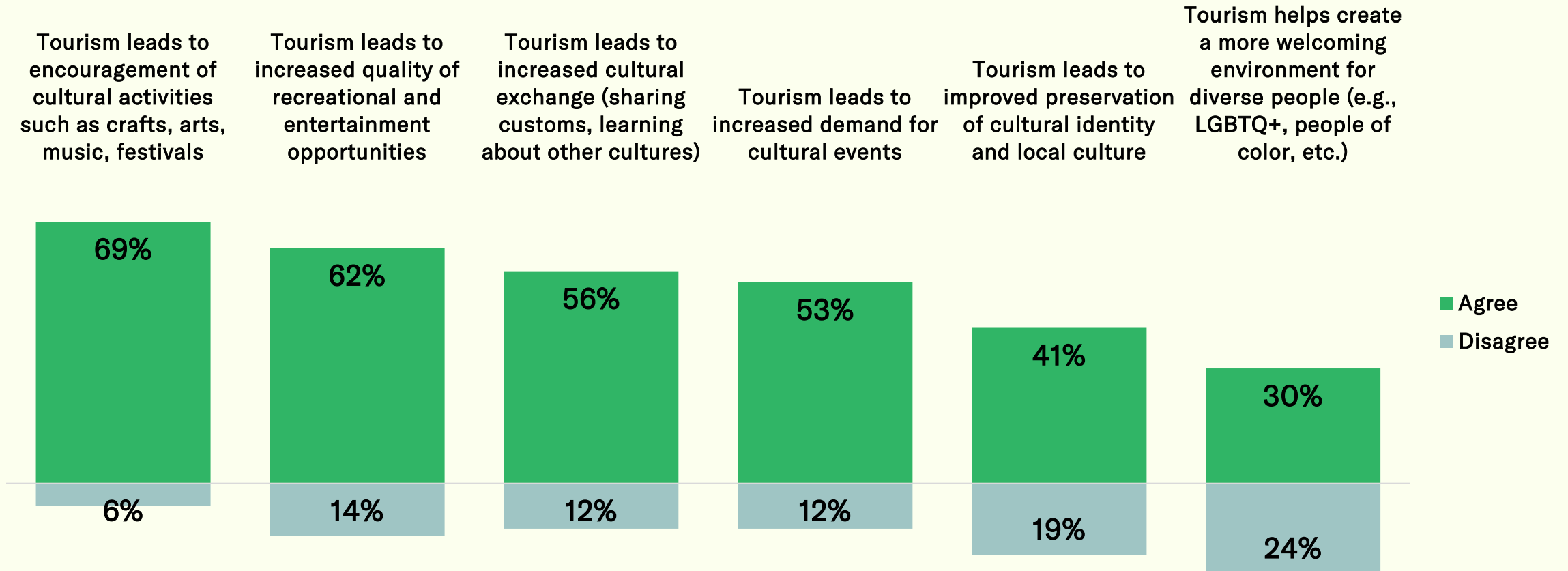
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon residents. 614 completed surveys.

Eastern Oregon – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Positive Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



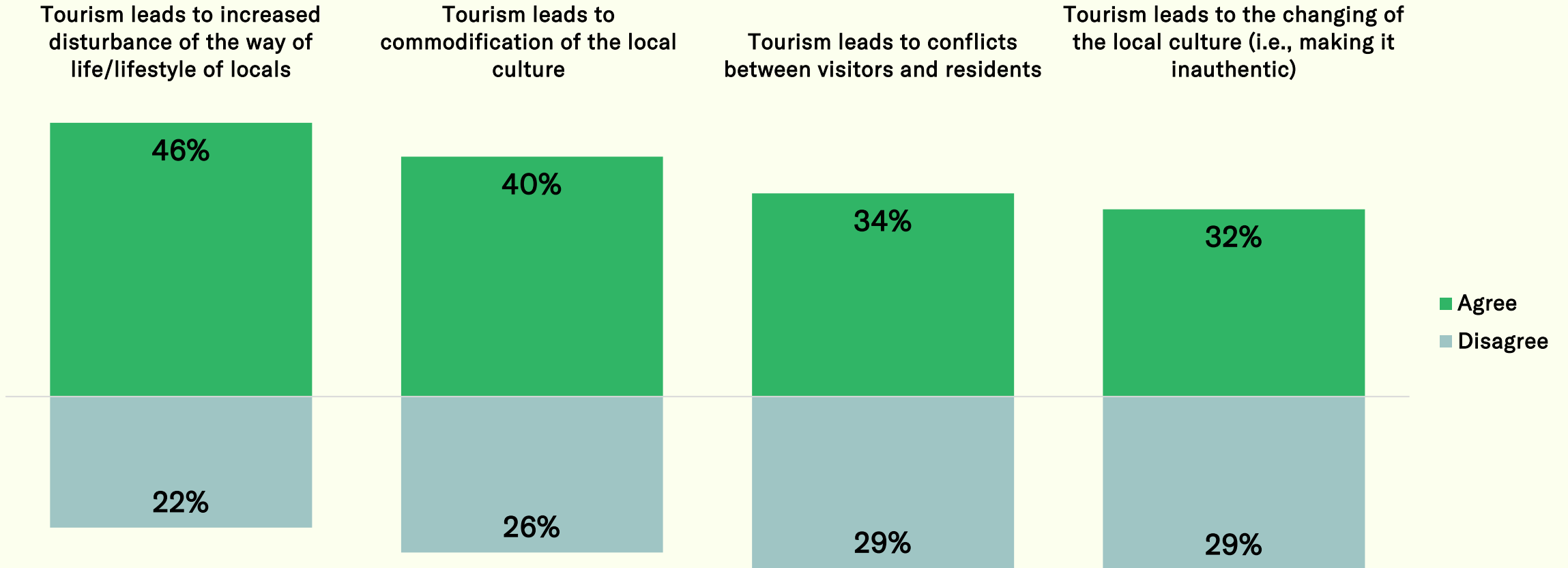
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon residents. 614 completed surveys.

Eastern Oregon – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Negative Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



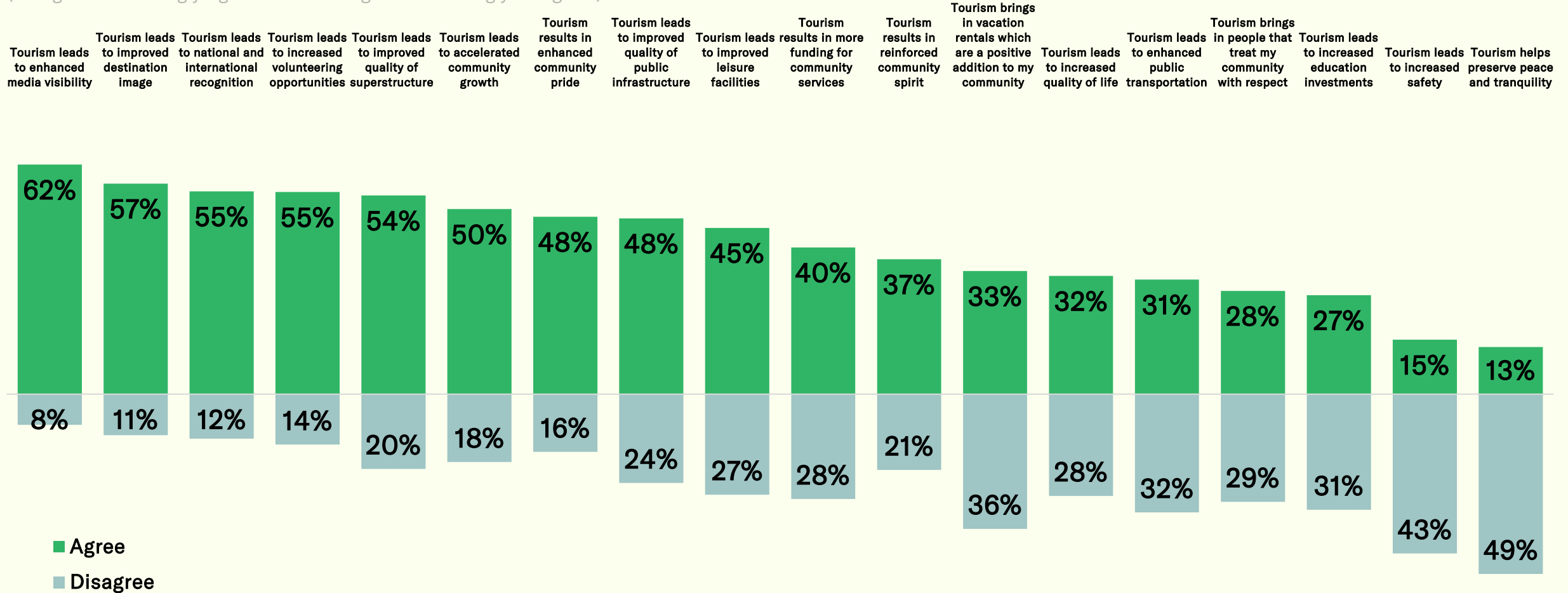
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon residents. 614 completed surveys.

Eastern Oregon – Social Impact Index Statements

Residents' Perceptions of Tourism's Positive Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



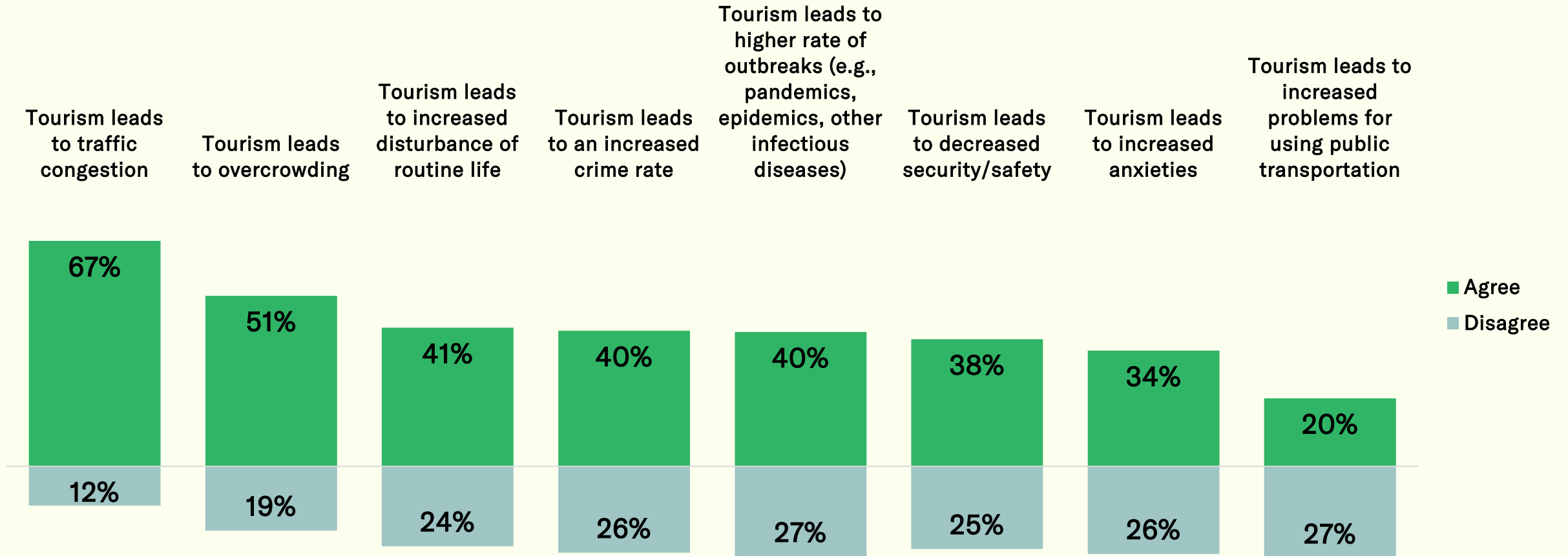
Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon residents. 614 completed surveys.

Eastern Oregon – Social Impact Index Statements

Residents' Perceptions of Tourism's Negative Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



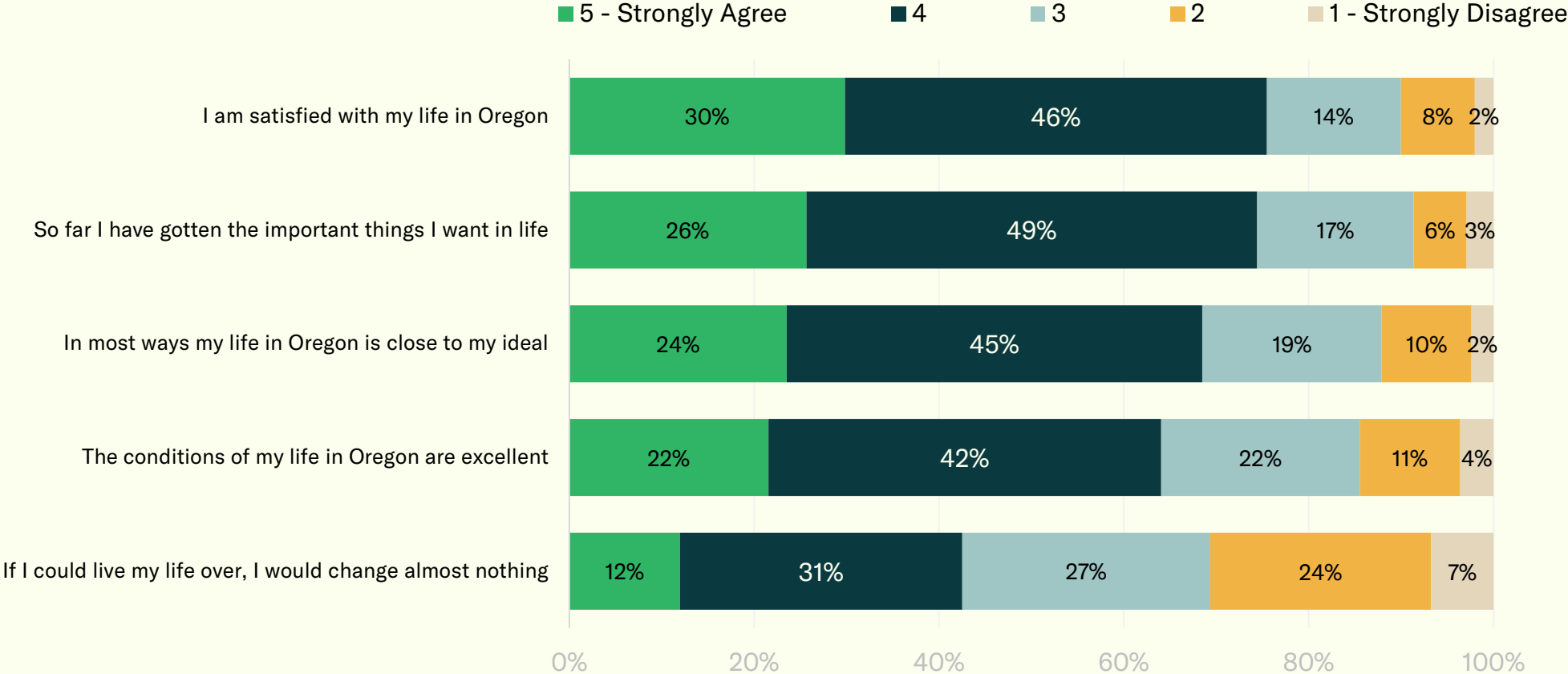
Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon residents. 614 completed surveys.

Oregon Coast

Oregon Coast – Perceived Quality of Life Statements

Statements Included in Perceived Quality of Life Score

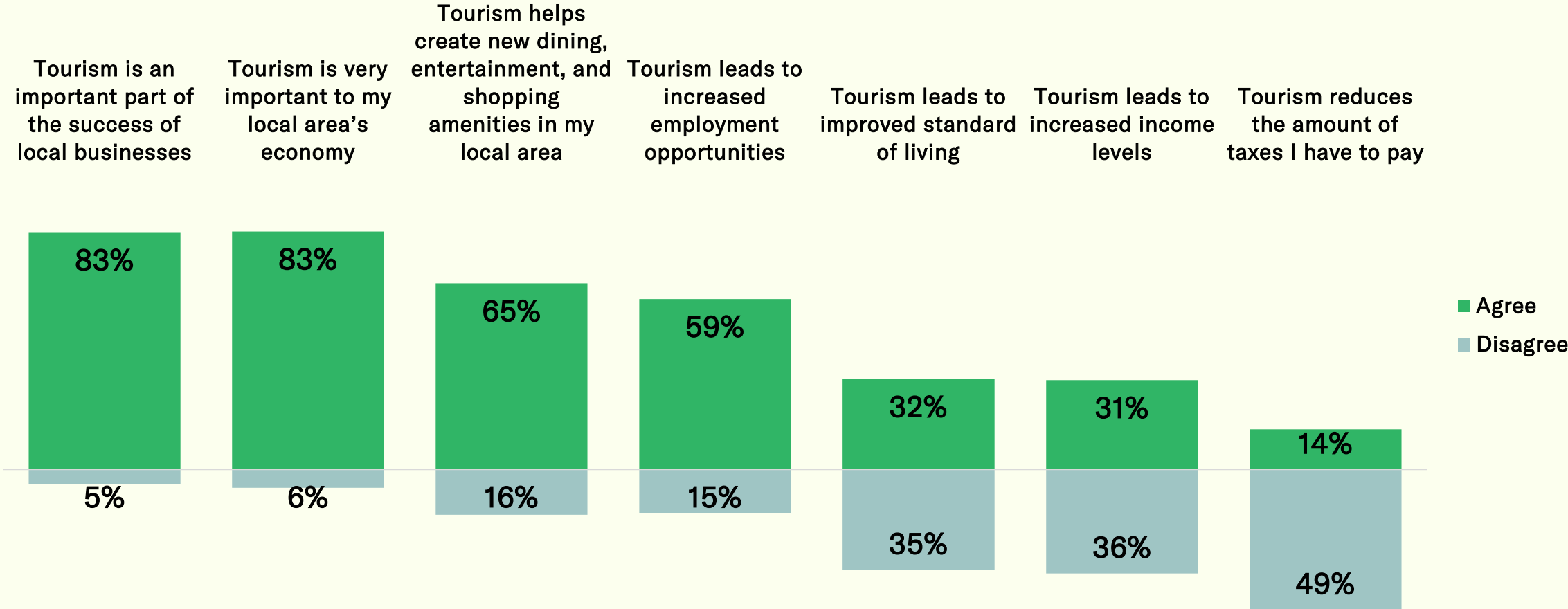


Note: Percentages may not sum to 100% due to rounding.
Question: Please rate your level of agreement with the following statements.
Base: Oregon Coast residents. 1,813 completed surveys.

Oregon Coast – Economic Impact Index Statements

Residents' Perceptions of Tourism's Positive Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

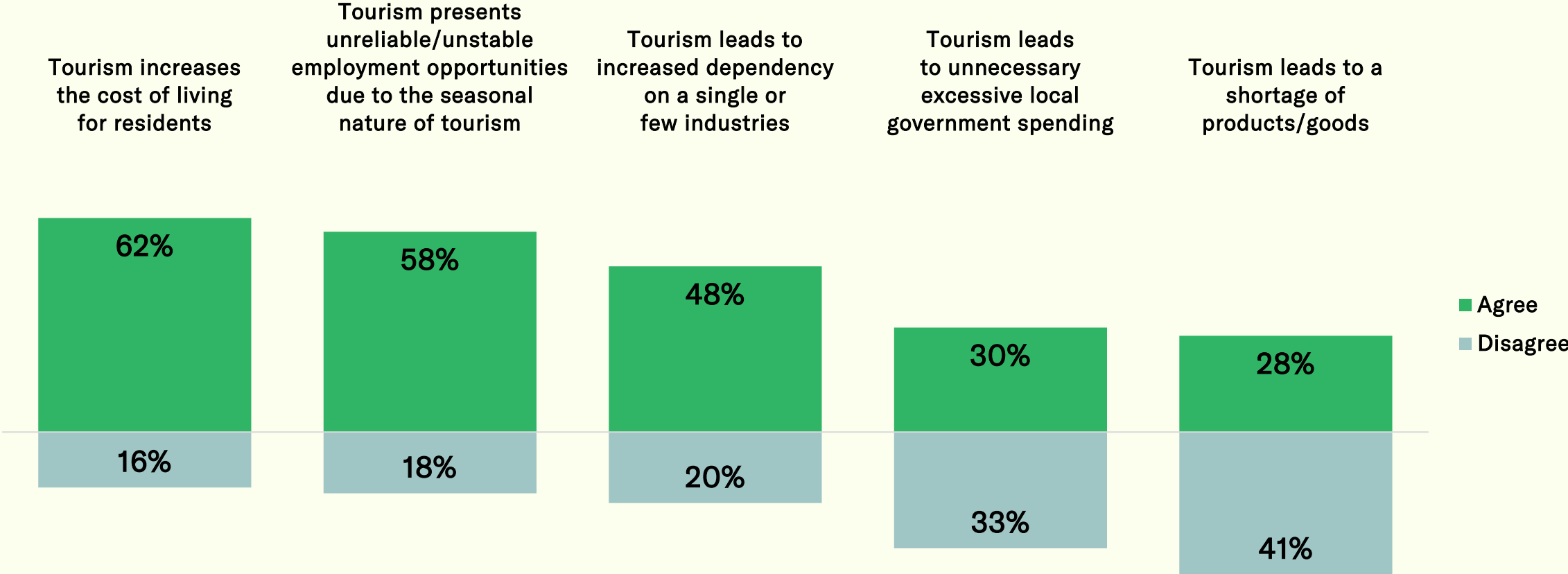


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
 Base: Oregon Coast residents. 1,813 completed surveys.

Oregon Coast – Economic Impact Index Statements

Residents' Perceptions of Tourism's Negative Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

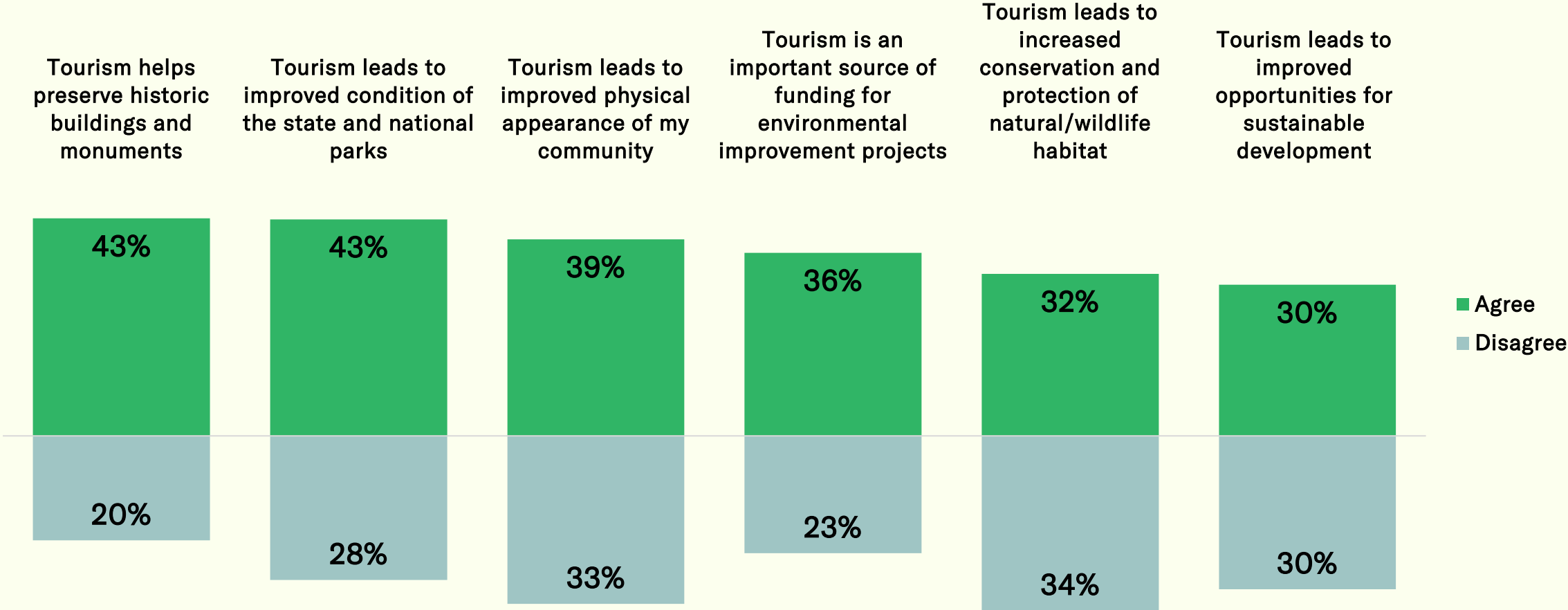


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Oregon Coast residents. 1,813 completed surveys.

Oregon Coast – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Positive Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

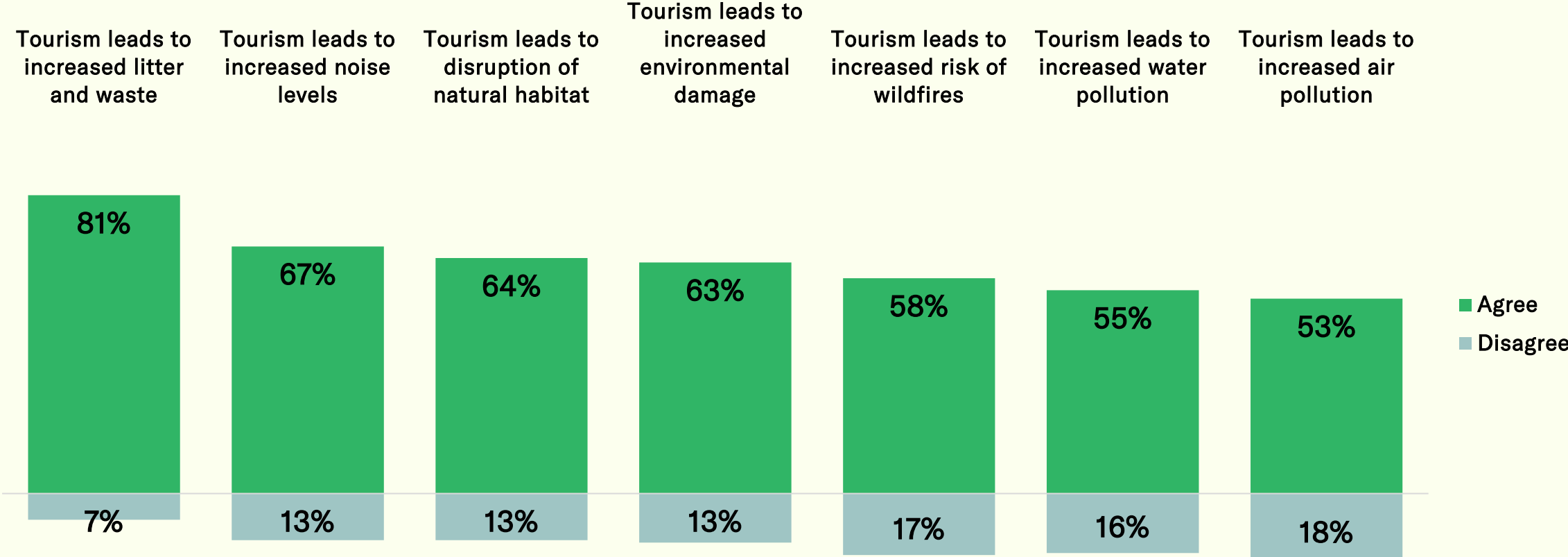


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Oregon Coast residents. 1,813 completed surveys.

Oregon Coast – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Negative Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

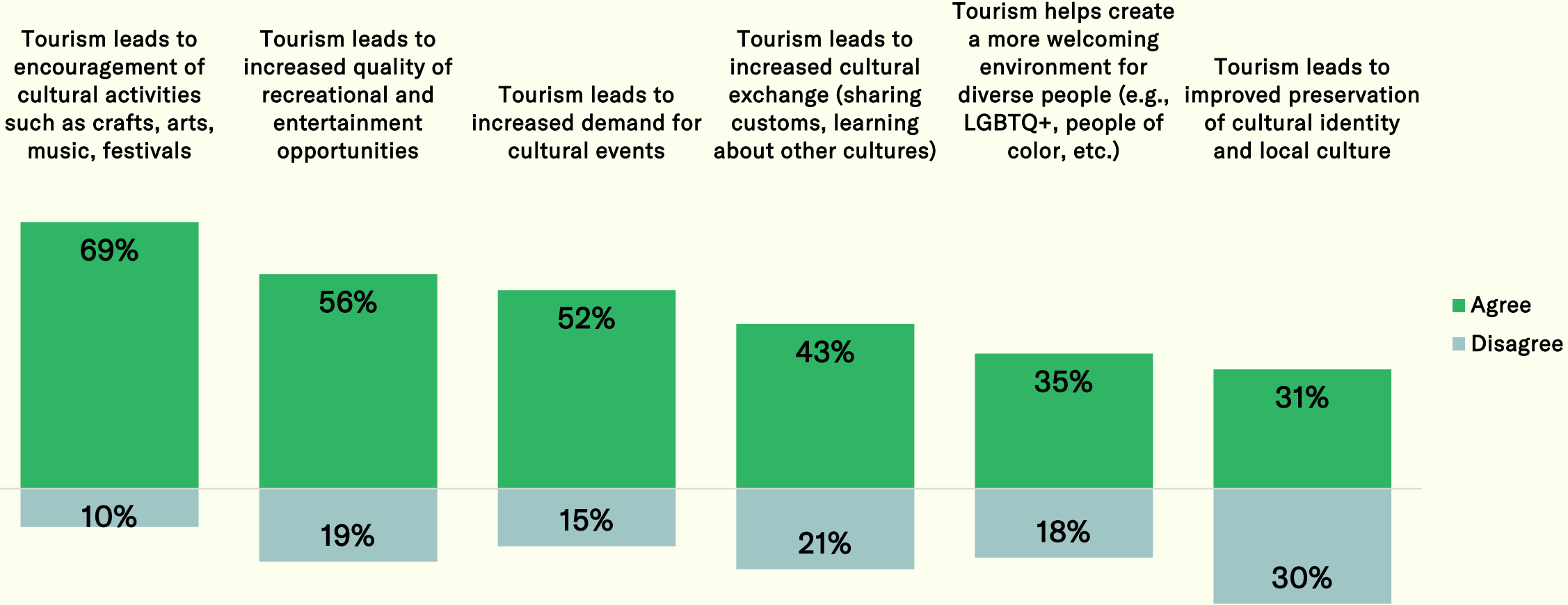


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Oregon Coast residents. 1,813 completed surveys.

Oregon Coast – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Positive Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

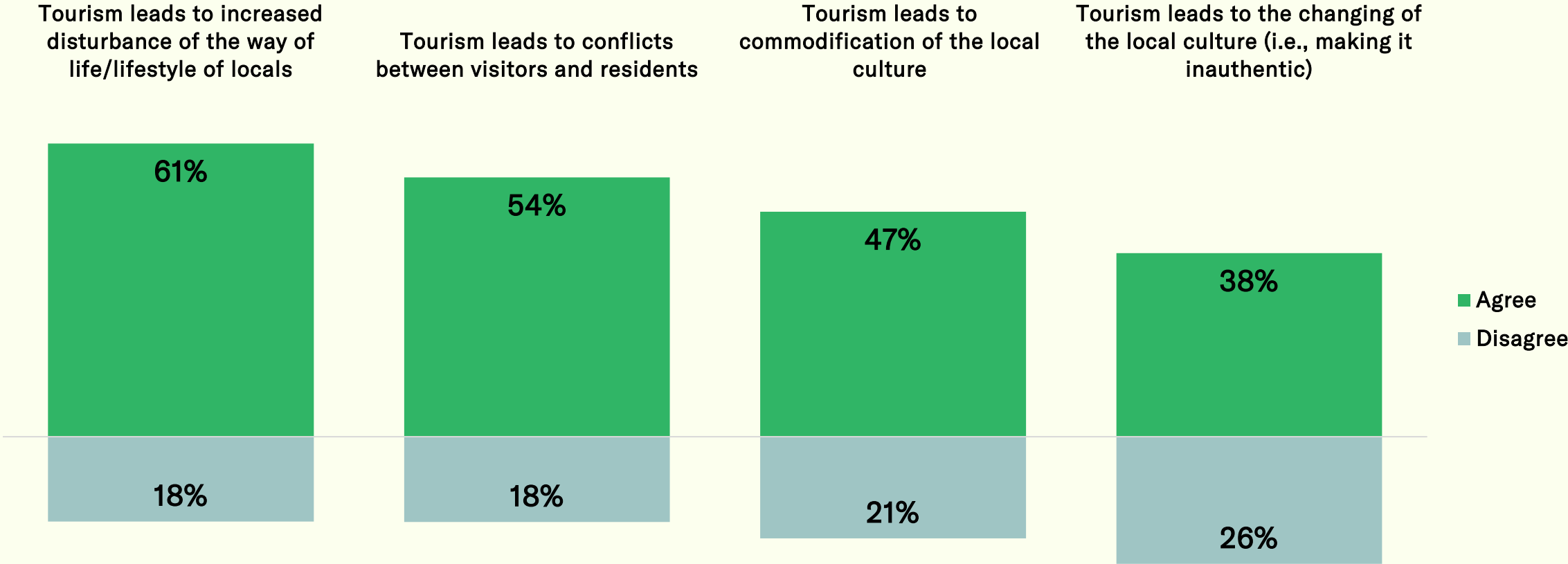


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Oregon Coast residents. 1,813 completed surveys.

Oregon Coast – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Negative Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

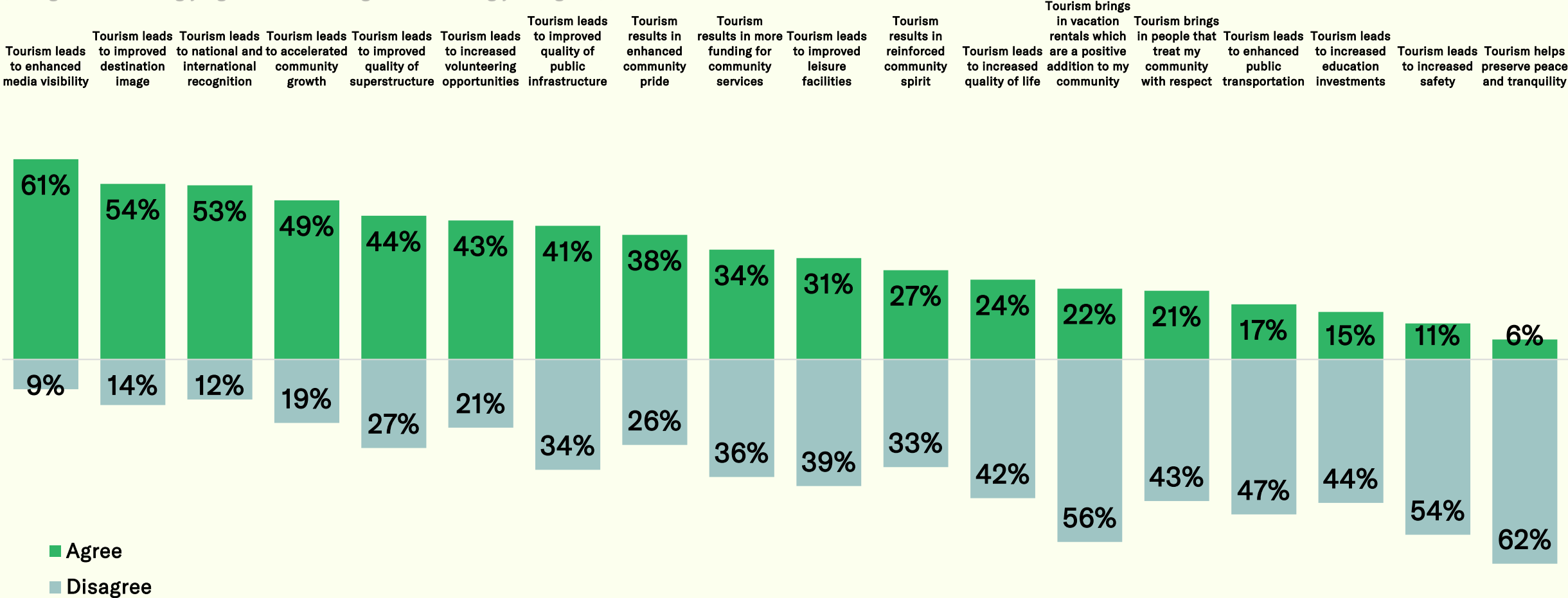


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Oregon Coast residents. 1,813 completed surveys.

Oregon Coast – Social Impact Index Statements

Residents' Perceptions of Tourism's Positive Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

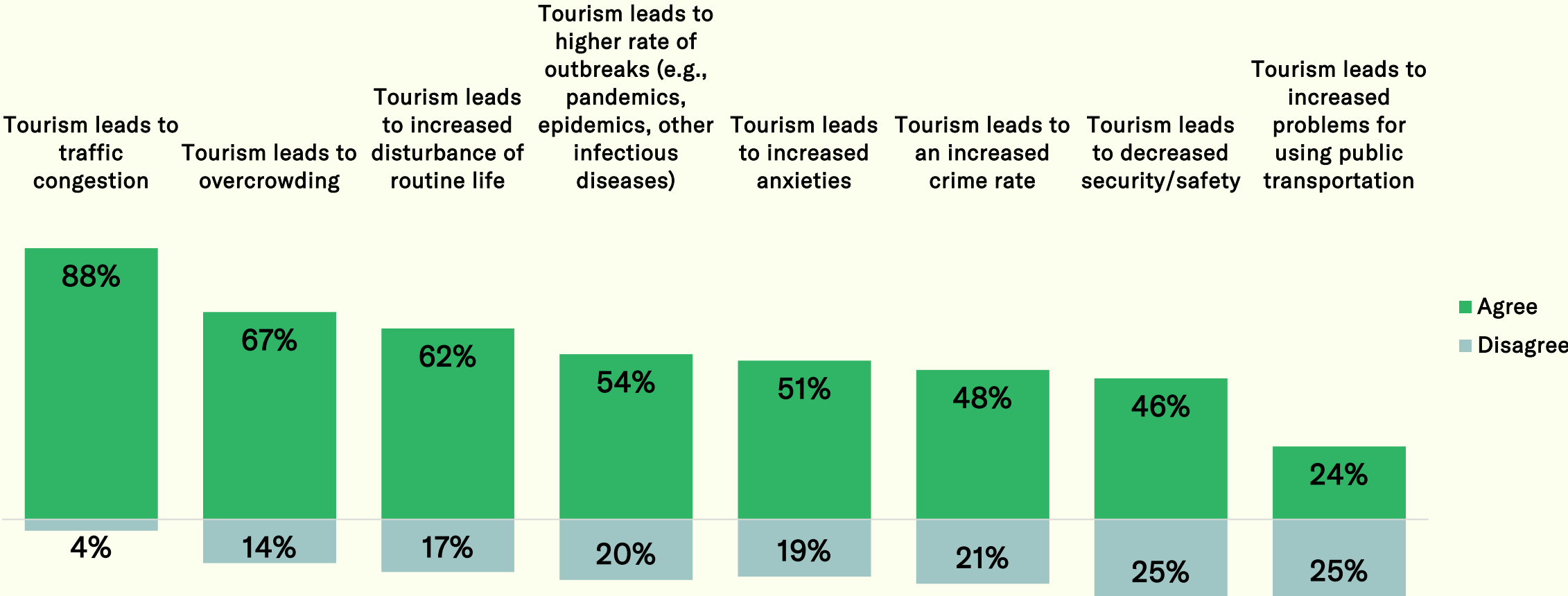


Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Oregon Coast residents. 1,813 completed surveys.

Oregon Coast – Social Impact Index Statements

Residents' Perceptions of Tourism's Negative Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

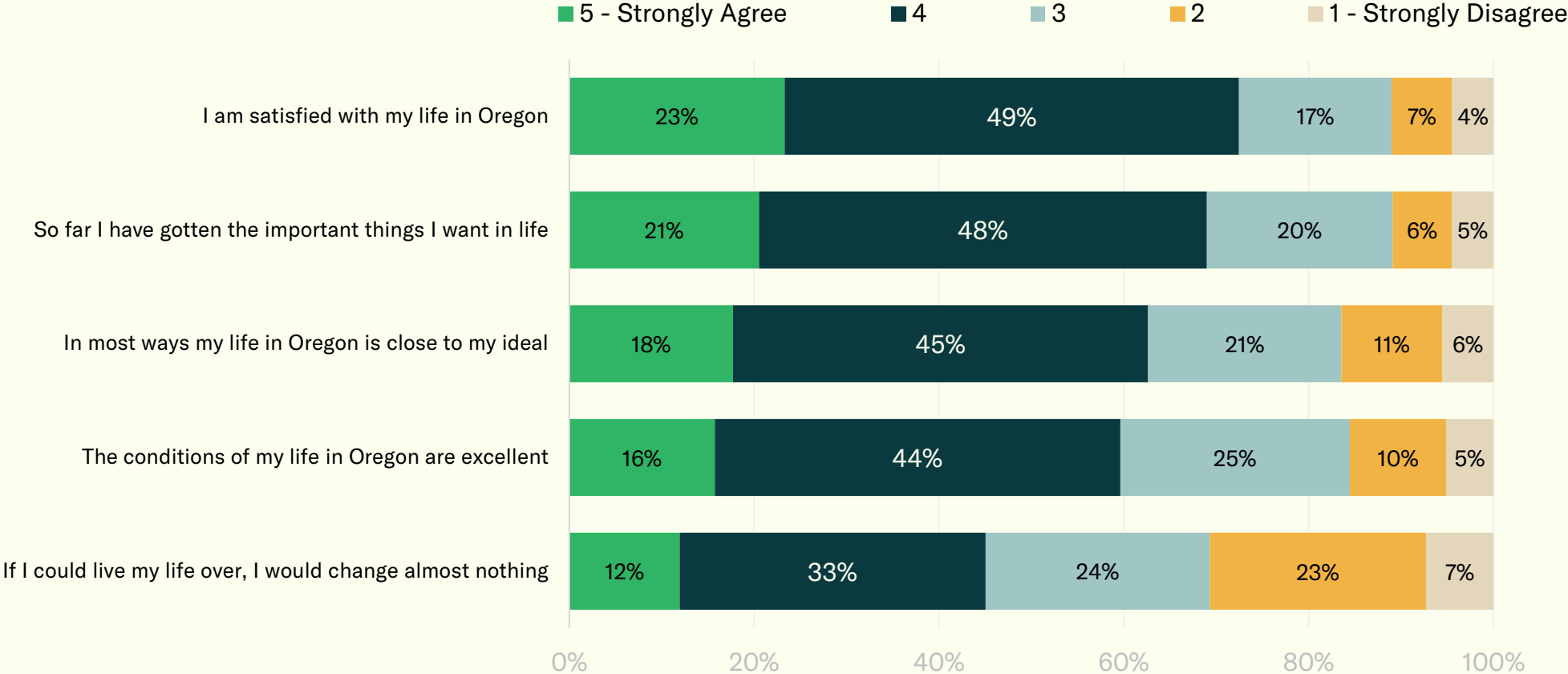


Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Oregon Coast residents. 1,813 completed surveys.

Southern Oregon

Southern Oregon – Perceived Quality of Life Statements

Statements Included in Perceived Quality of Life Score

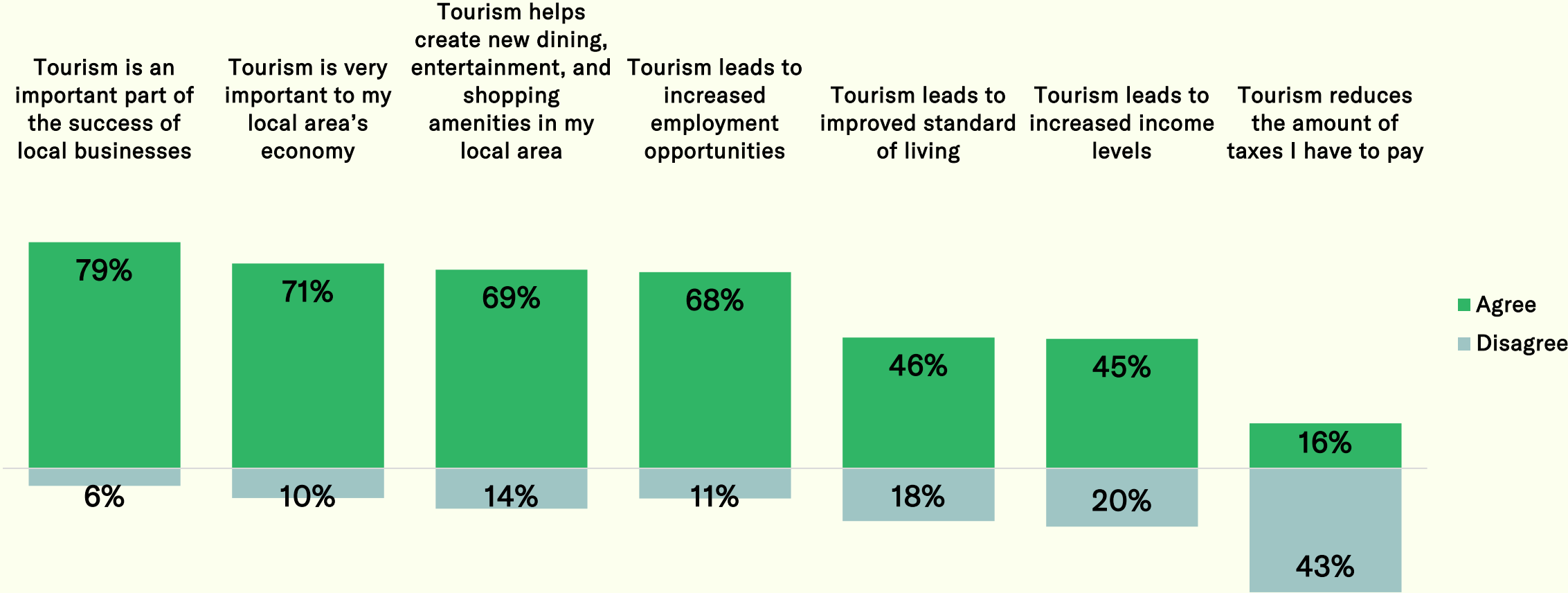


Note: Percentages may not sum to 100% due to rounding.
 Question: Please rate your level of agreement with the following statements.
 Base: Southern Oregon residents. 890 completed surveys.

Southern Oregon– Economic Impact Index Statements

Residents' Perceptions of Tourism’s Positive Economic Impacts

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

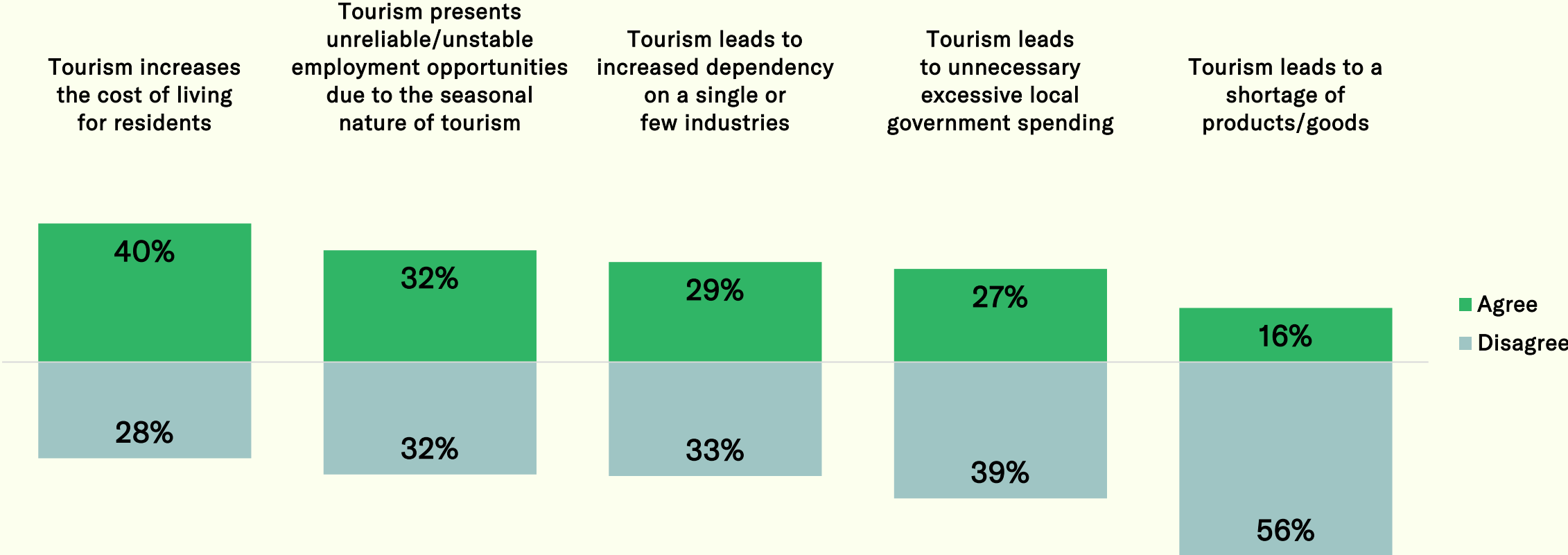


Question: Thinking about Oregon’s tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
 Base: Southern Oregon residents. 890 completed surveys.

Southern Oregon – Economic Impact Index Statements

Residents' Perceptions of Tourism's Negative Economic Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

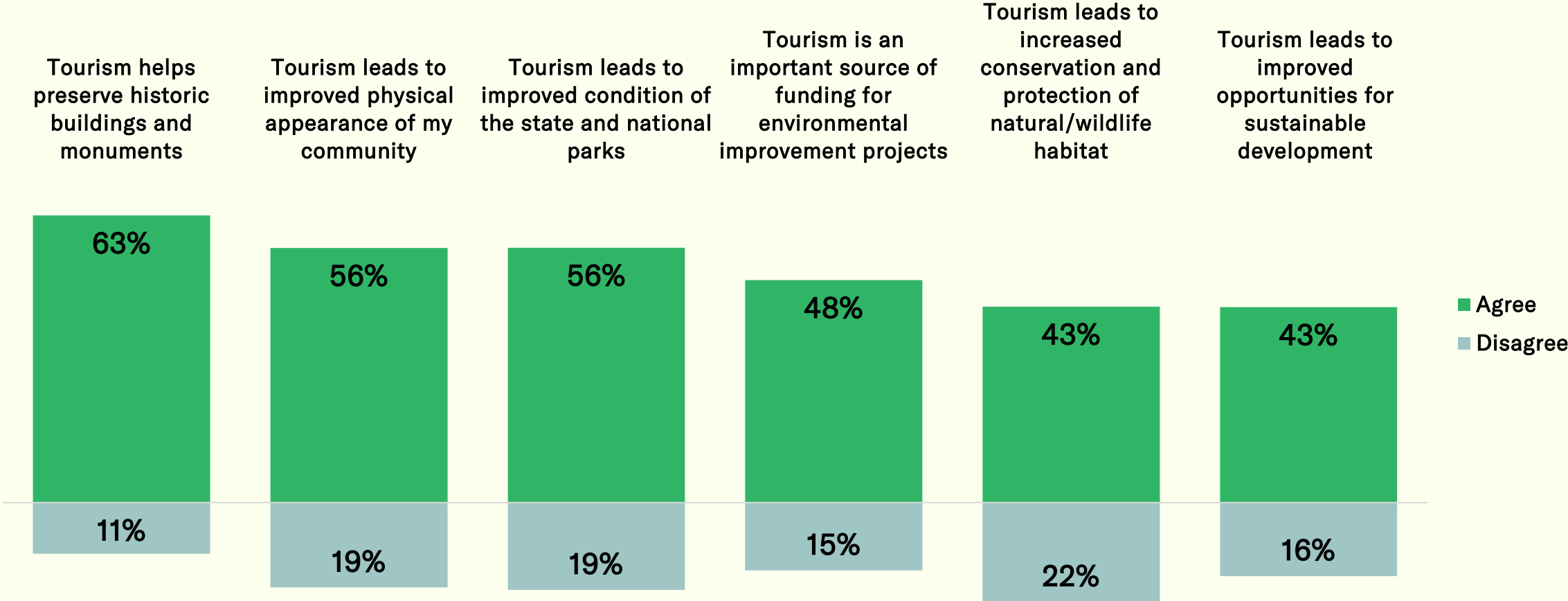


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Southern Oregon residents. 890 completed surveys.

Southern Oregon – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Positive Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

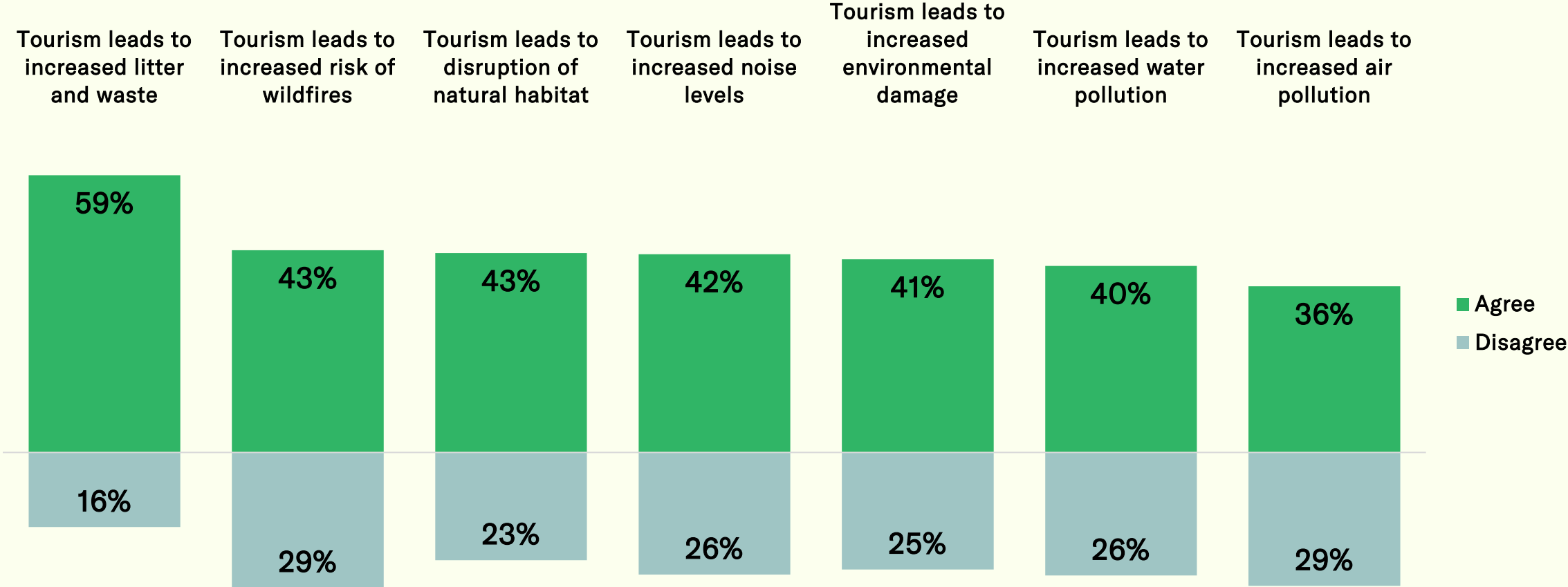


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Southern Oregon residents. 890 completed surveys.

Southern Oregon – Environmental Impact Index Statements

Residents' Perceptions of Tourism's Negative Environmental Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

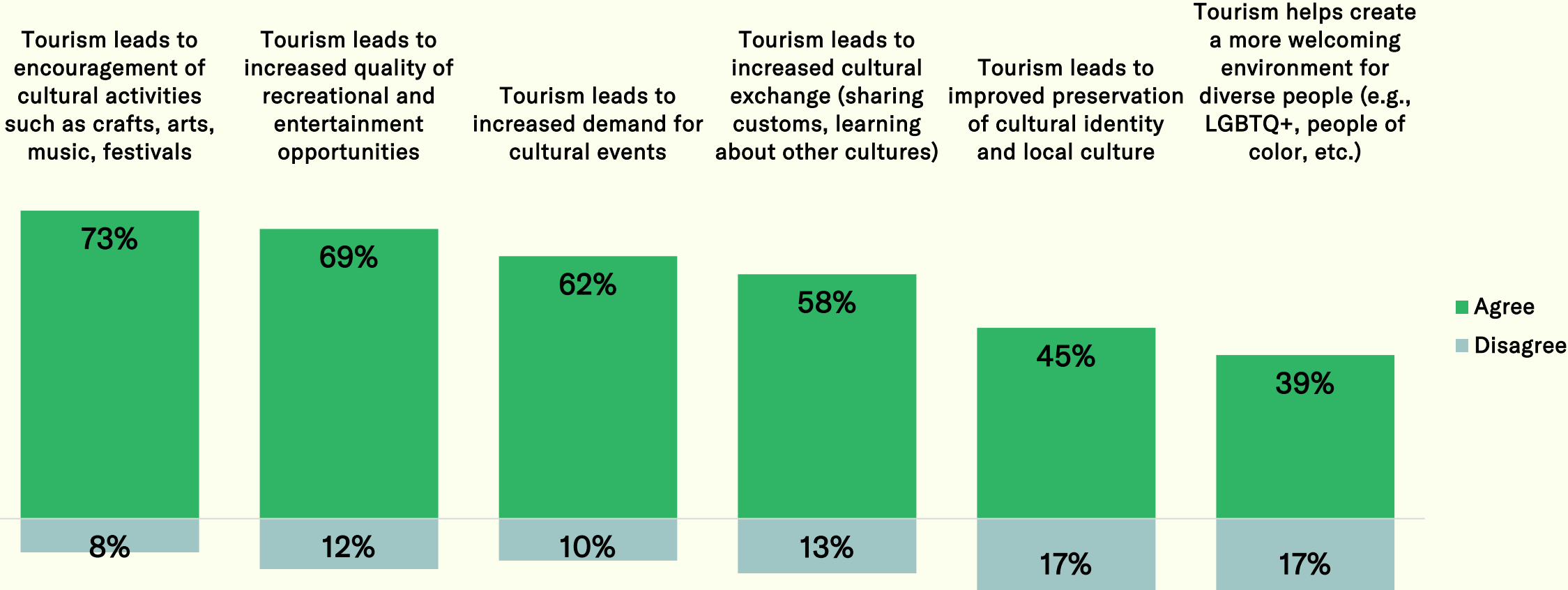


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Southern Oregon residents. 890 completed surveys.

Southern Oregon – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Positive Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

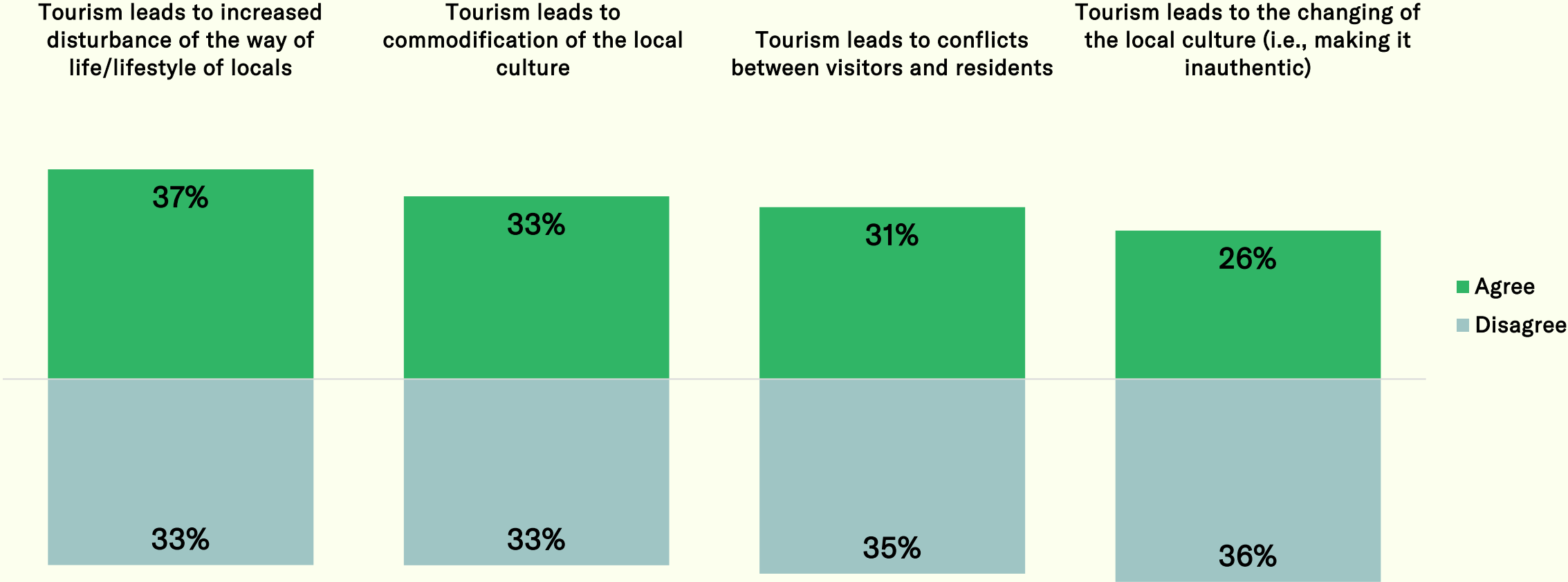


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
 Base: Southern Oregon residents. 890 completed surveys.

Southern Oregon – Cultural Impact Index Statements

Residents' Perceptions of Tourism's Negative Cultural Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

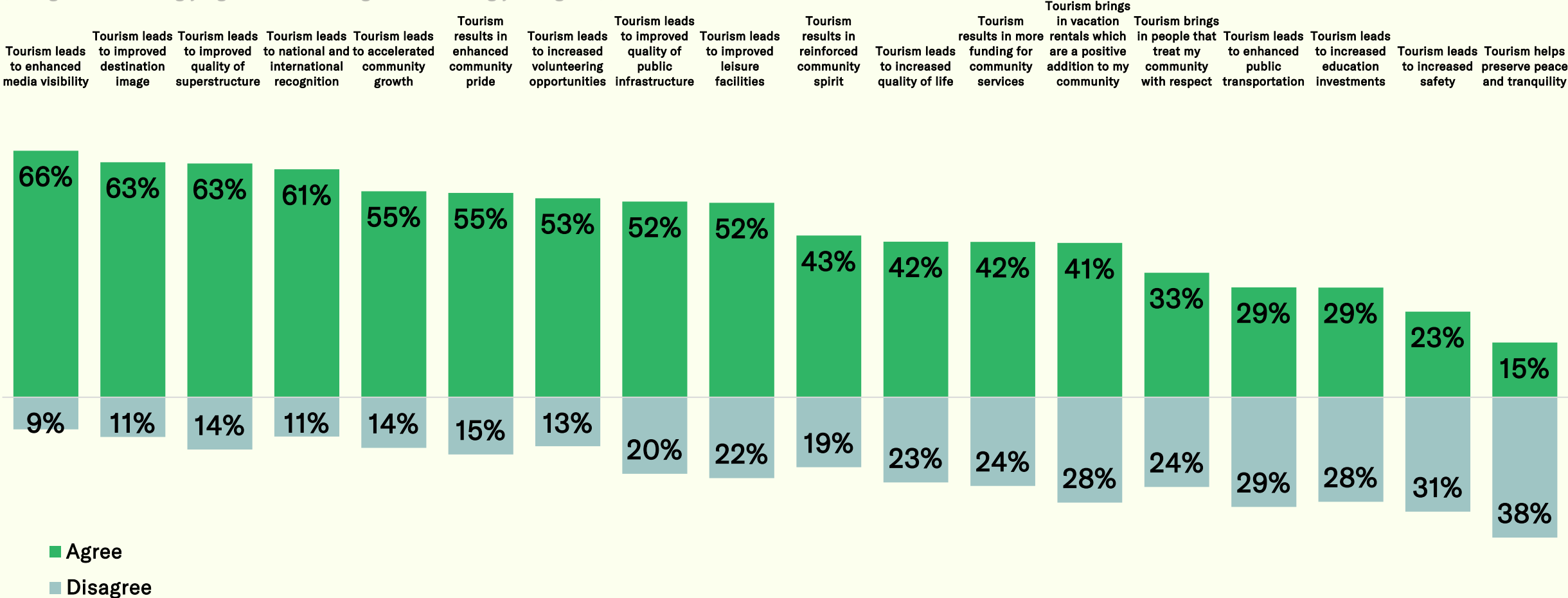


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Southern Oregon residents. 890 completed surveys.

Southern Oregon – Social Impact Index Statements

Residents' Perceptions of Tourism's Positive Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")

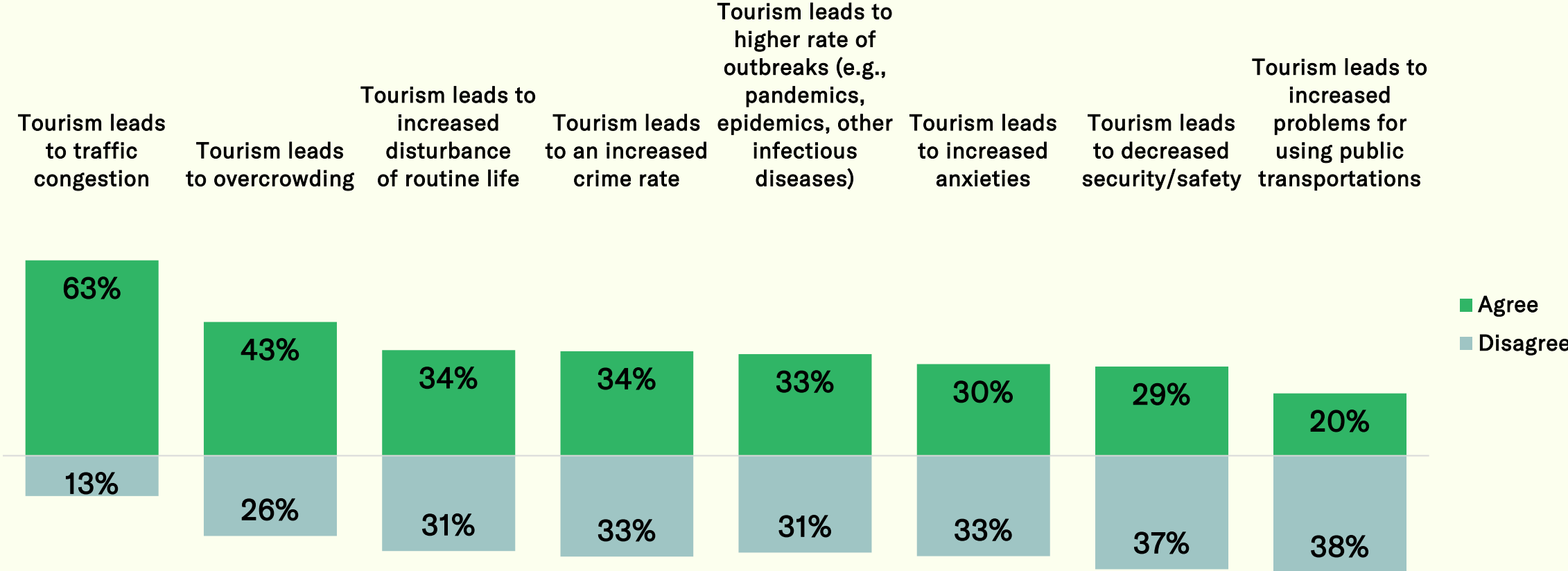


Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Southern Oregon residents. 890 completed surveys.

Southern Oregon – Social Impact Index Statements

Residents' Perceptions of Tourism's Negative Social Impacts

(% "Agree" or "Strongly Agree" vs. % "Disagree" or "Strongly Disagree")



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: Southern Oregon residents. 890 completed surveys.