



Resident Sentiment of Tourism

Sisters 2025

Project Mission

To protect destinations for future generations of visitors and residents.



Statement on Research Independence

The following report represents my independent scholarly work. I have conceived, designed, and executed this research with full intellectual independence, free from undue influence or external interference that could compromise the integrity of the work or its outcomes.

The OSU Sustainable Tourism Lab operates as a nonprofit organization dedicated to objective research and student learning. In other words, we have no vested interest in the outcome of this study, and we believe the results presented here accurately reflect the views of your residents.

Project Overview

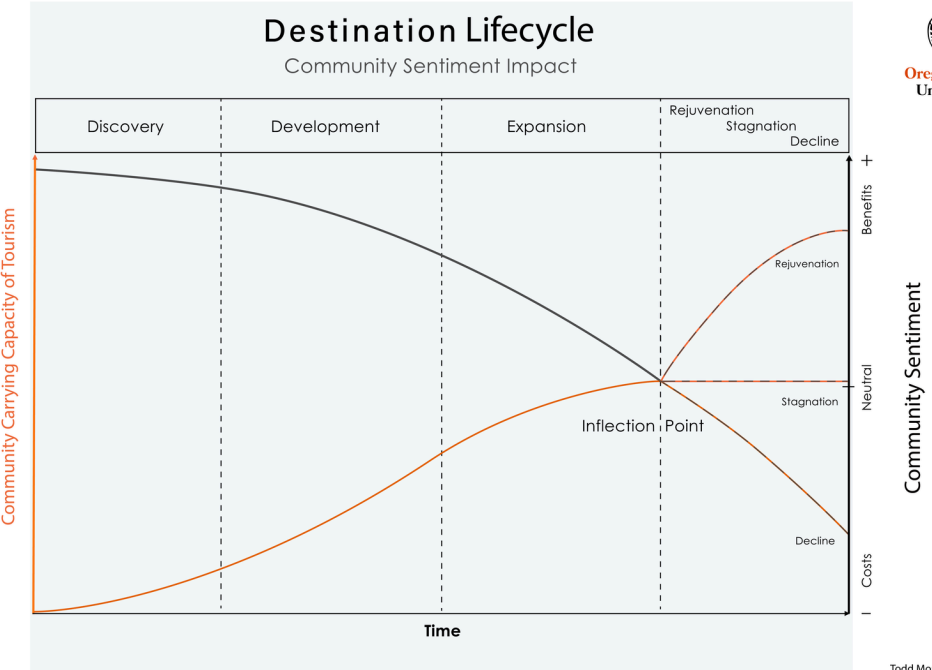
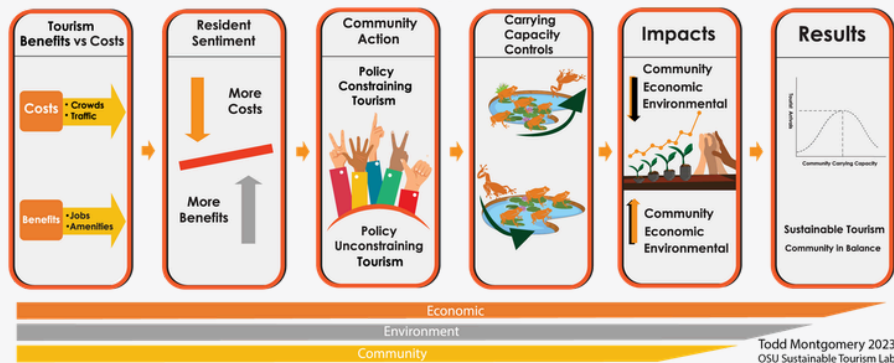
Why The Research

Communities around the world have grappled with tourism—its positive and negative impacts—for years. For many, it serves as the primary economic driver, meeting the basic needs of community members. However, in other destinations, the cost-benefit balance of tourism is less clear.

In the wake of the pandemic, communities are reassessing their relationship with tourism, exploring how to make the industry sustainable from economic, social, and environmental perspectives.

The goal of the OSU Sustainable Tourism Lab is to support these efforts by providing applied research, objective information, and best practices.

Sustainable Tourism Community Carrying Capacity Model



Project Overview

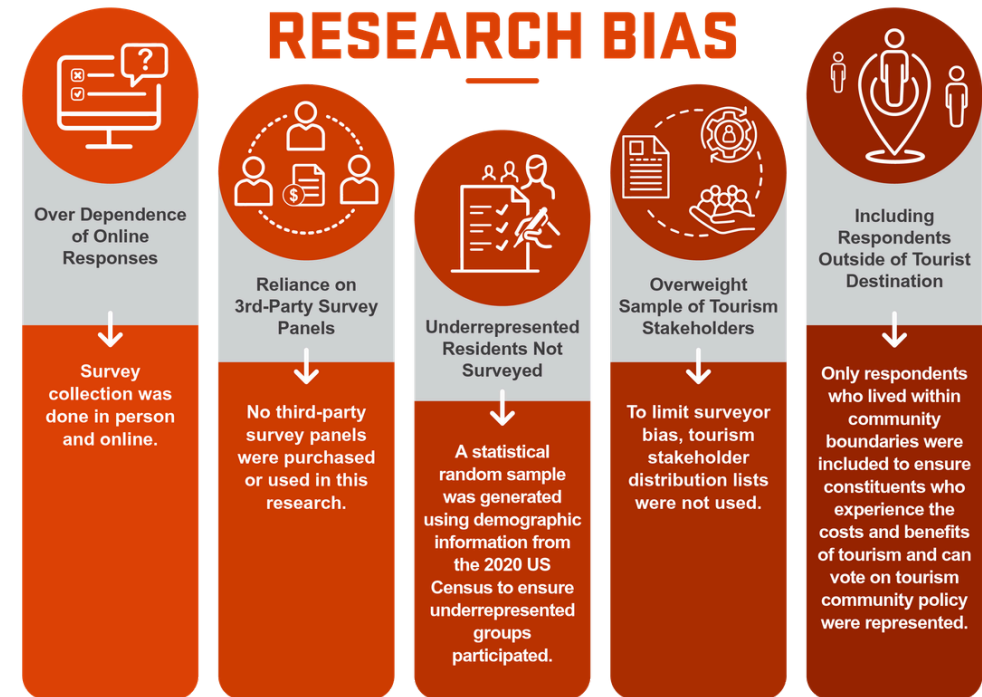
Our research has shown a strong relationship between a destination’s lifecycle stage and the sentiment levels within its community. Additionally, we’ve found that community sentiment levels influence the community carrying capacity of the destination.

When a community's sentiment falls below neutral, it often prompts action—directly or indirectly—through political entities to reduce the area’s overall carrying capacity. This may manifest as restrictions on visitor numbers, the implementation of policies aimed at preserving local resources, or changes to infrastructure planning. Such actions are typically driven by a desire to protect the community’s quality of life and mitigate negative impacts on the environment and local culture.

Methodology



ADDRESSING RESEARCH BIAS



Methodology

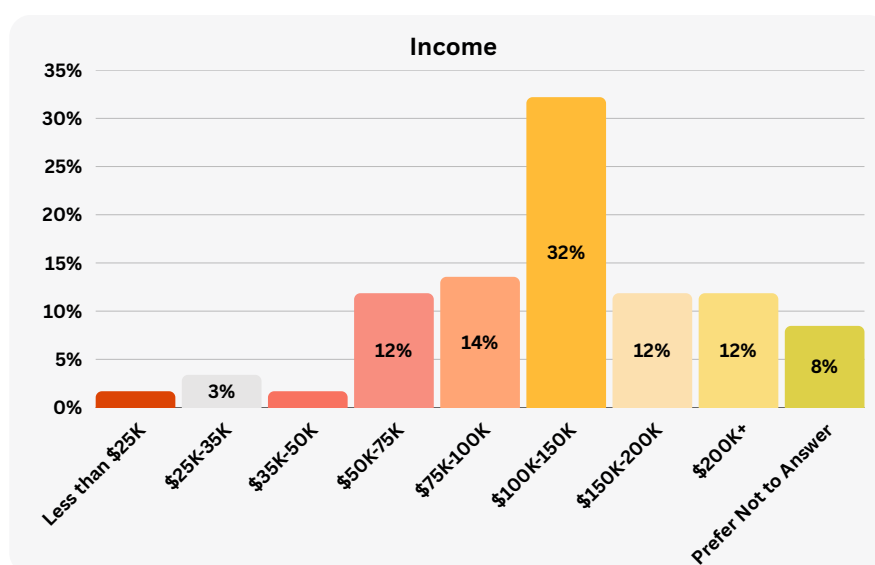
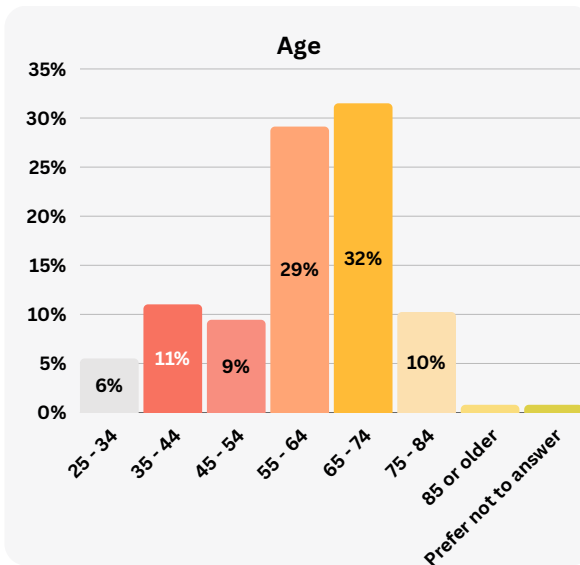
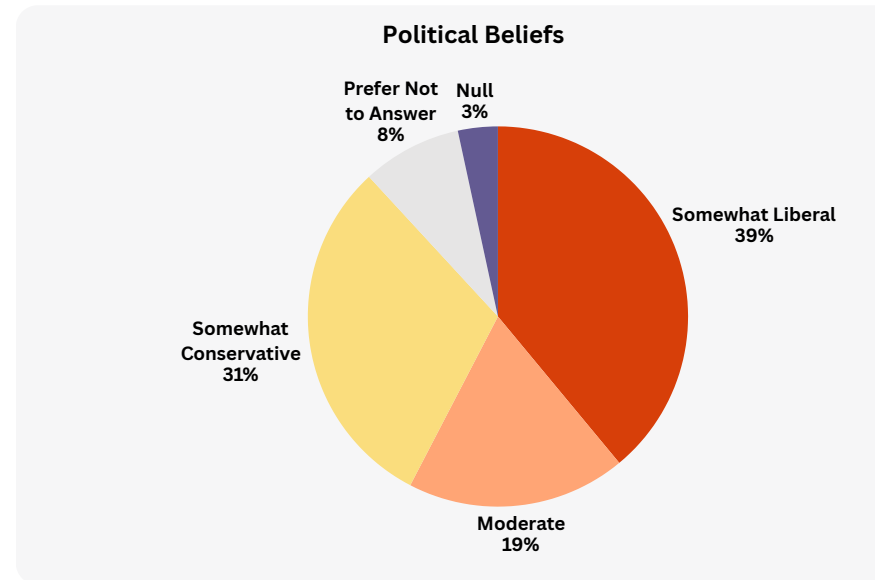
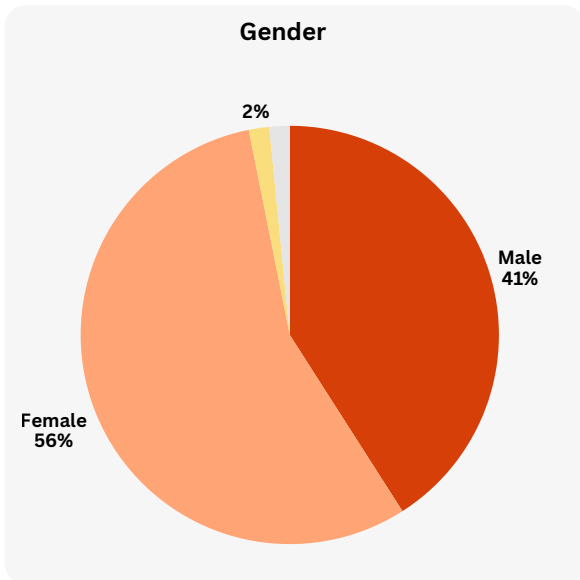
During our research, we have reviewed hundreds of studies conducted worldwide. The quality of these surveys varied greatly, with several common gaps identified, including:

- Were underrepresented groups included in the study?
- Was the sample statistically representative of the community?
- Were non-tourism stakeholders equally represented?
- Were the studies one-off efforts, or were follow-up studies conducted to track changes over time?

Our report ensures that community-specific survey data were statistically representative of the entire population in question. To amplify the voices of all community members, we made extensive efforts to engage people where they were, conducting surveys both in person and online. After collecting the initial data, we identified and performed outreach to groups underrepresented in our sample. Despite these efforts, we recognized that more rigorous methods were needed to ensure fairness and accuracy.

To meet this challenge, we employed stratified random sampling, followed by a downsampling technique to align category percentages with census data. Downsampling involves repeatedly drawing random samples—5,000 times in our case—as each random sample from the original dataset can yield different results. This approach allowed us to account for variability and ensure a balanced representation. The histograms in this report depict this variability, forming a bell curve that highlights the importance of repeated sampling in achieving reliable outcomes.

Sample Demographics



Demographics

In all our projects, we aim to gather samples that reflect the communities we study, anchored to US Census benchmarks. In Sisters, a town of about 3000 residents, our 171 survey responses provide a strong foundation and signal high community engagement, adding confidence to the reliability of our findings.

Our sample leaned slightly toward female respondents, with 56 percent identifying as female, 41 percent as male, and 2 percent selecting another gender. Political beliefs were varied: 39 percent identified as somewhat liberal, 31 percent as somewhat conservative, 19 percent as moderate, and 8 percent as preferring not to answer.

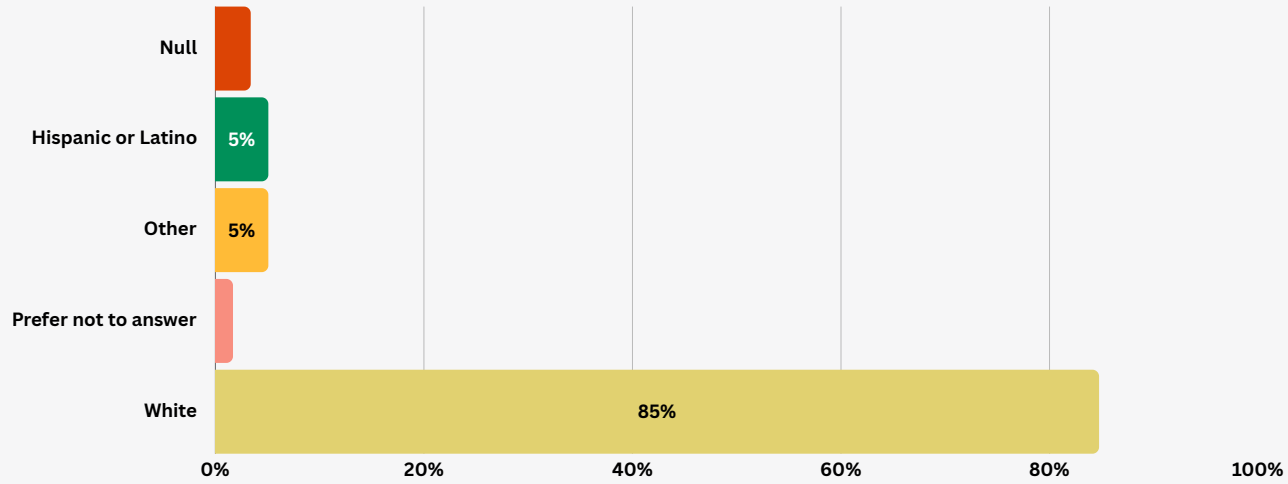
Age representation aligned with Sisters' older population profile. The largest groups were 65 to 74 at 32 percent and 55 to 64 at 29 percent, followed by smaller proportions in younger age groups. This distribution is consistent with Census data showing a significant share of retirees and long-term residents.

Income levels were widely distributed, with the largest share, 32 percent, reporting household incomes between 100K and 150K. Middle-income ranges were also well represented.

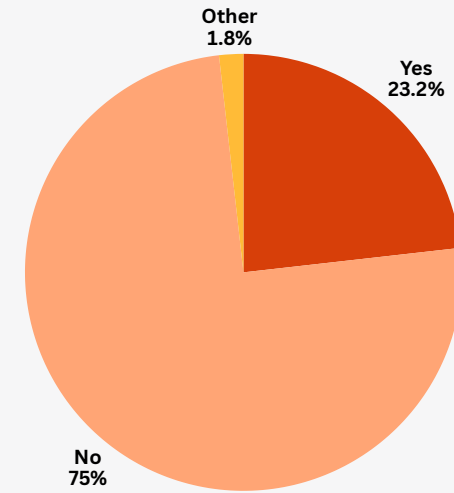
Altogether, this dataset provides a well-rounded view of resident perspectives.

Sample Demographics

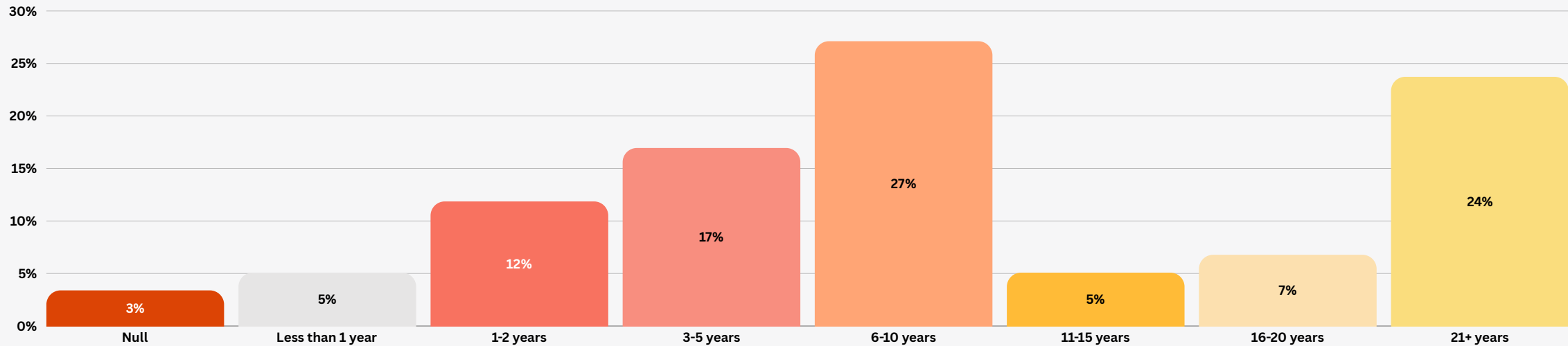
Ethnicity



Employed in Hospitality



Length of Residency



Resident KPI: Costs vs Benefits

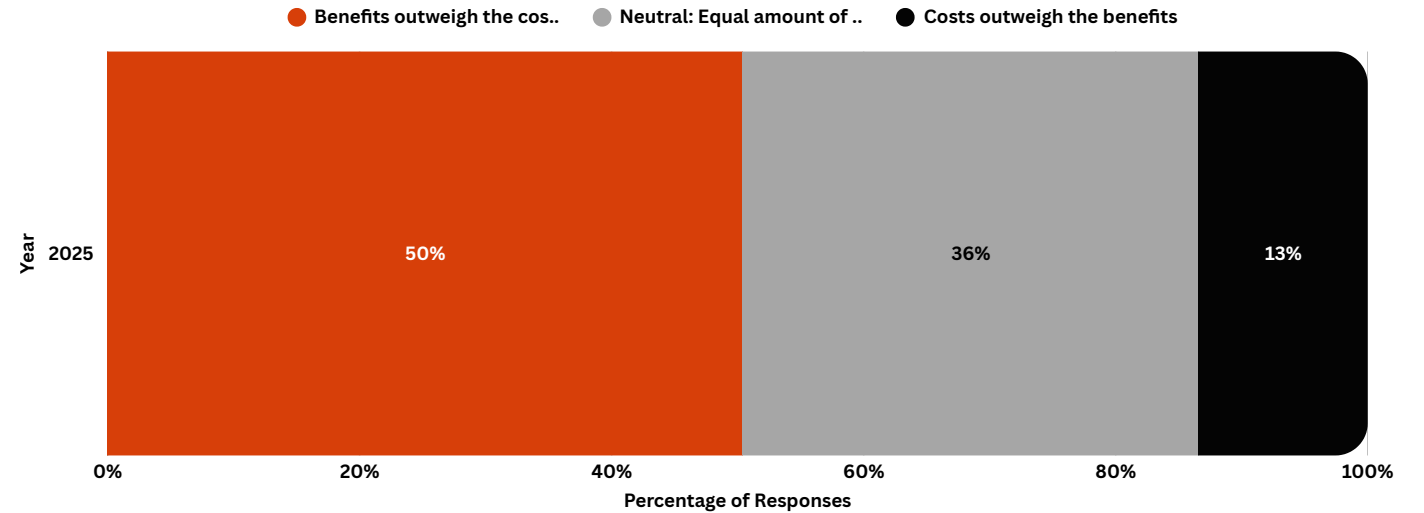
Costs Vs Benefits

As part of our Carrying Capacity Model, one of the most direct indicators of community sentiment is the Costs versus Benefits measure. This question centers on how residents evaluate the overall impact of tourism and whether the benefits exceed the costs.

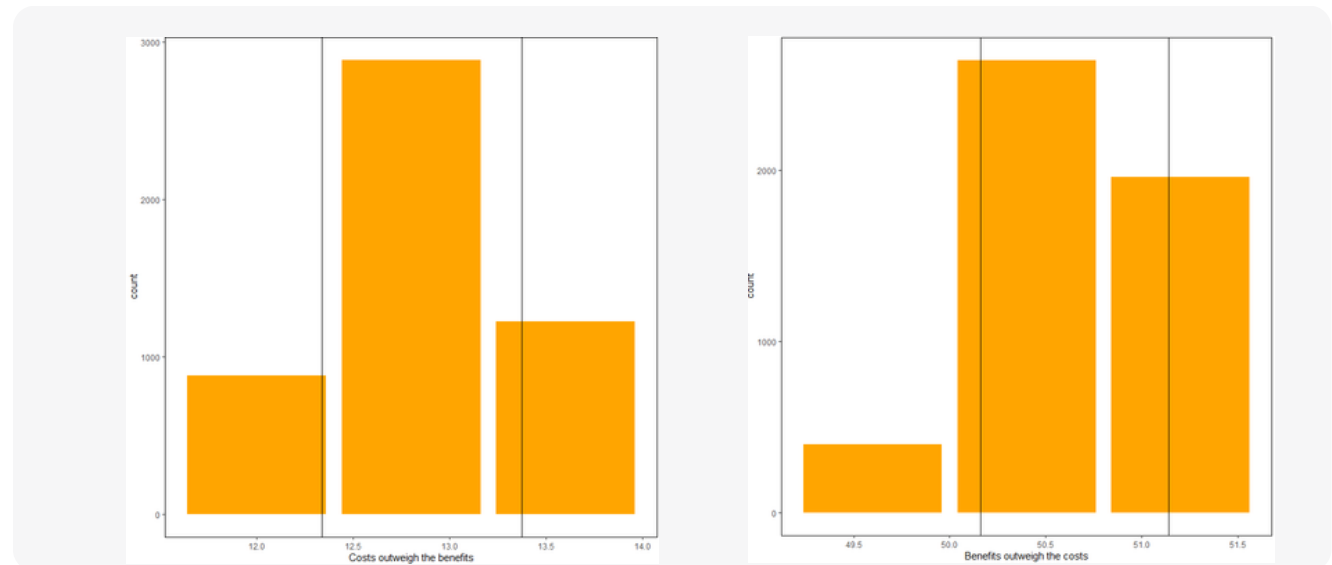
In Sisters, the 2025 results show a generally positive outlook. Half of respondents, 50 percent, reported that tourism brings more benefits than costs. Another 36 percent felt the impacts were balanced, indicating an equal amount of benefits and costs. A smaller share, 13 percent, believed that tourism's costs outweigh its benefits. After adjusting the sample to align with US Census benchmarks, these proportions remained consistent, reinforcing the conclusion that most residents view tourism's net effect as favorable.

These findings will later be benchmarked against results from other destinations to provide additional context. The stability of Sisters' results, along with alignment between the stratified and overall samples, suggests a healthy and steady sentiment toward tourism. However, without continued planning and proactive management, public attitudes can shift, potentially leading to support for policies that restrict tourism growth or limit future investment.

Tourism Benefits vs Costs



In general, do you feel the benefits of tourism outweigh the costs or the costs of tourism outweigh the benefits of tourism?



Stratified Downsampling Using US Census Data

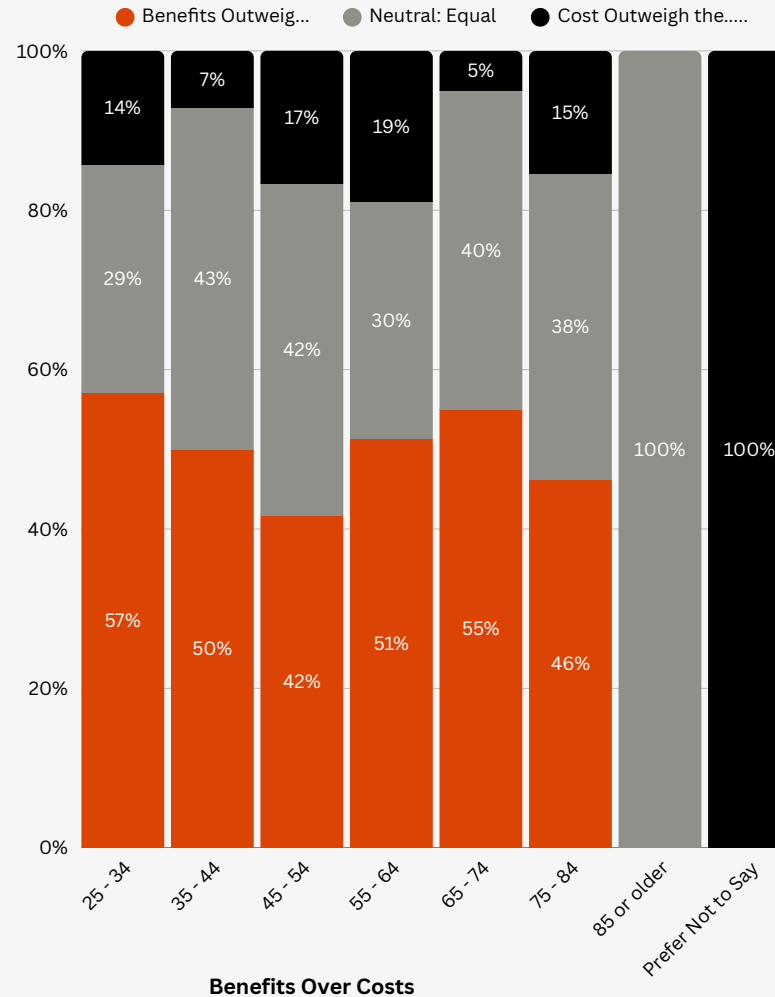
Age & Residency

Age & Residency Benefits vs Costs

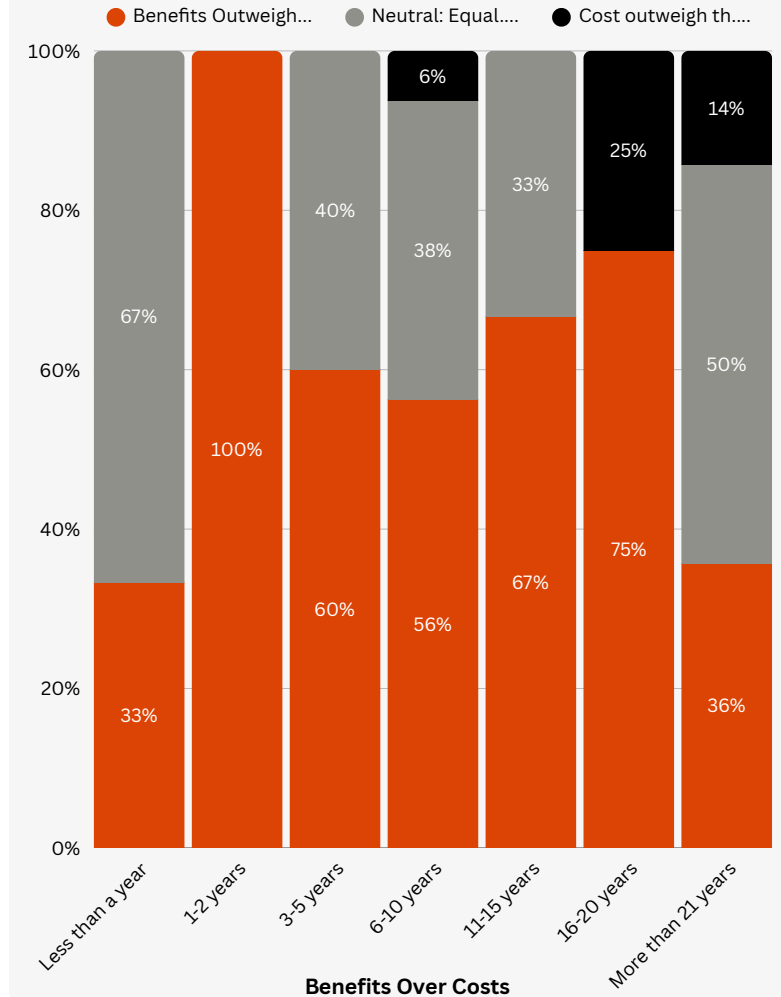
Perceptions of tourism in Sisters vary noticeably across both age and length of residency. Among age groups, residents between 55 and 74 report the most positive outlook. In the 55 to 64 group, 51 percent said tourism’s benefits outweigh its costs, while 30 percent felt the impacts were equal and 19 percent believed costs exceed benefits. Positivity rises further among those aged 65 to 74, with 55 percent viewing tourism as beneficial and 38 percent reporting a balanced view. The youngest groups, especially ages 25 to 34, express a mix of opinions, with 57 percent seeing benefits as greater, but also a relatively high share selecting neutral or costs outweigh.

Perceptions also vary with length of residency. Newer residents, especially those living in Sisters for less than three years, are more likely to express concerns about tourism’s costs. For example, only 33 percent of residents with less than one year in the community view tourism positively, while 67 percent report neutral impacts. As length of residency increases, attitudes become more favorable, reaching 75 percent positive among residents with 16 to 20 years in the community.

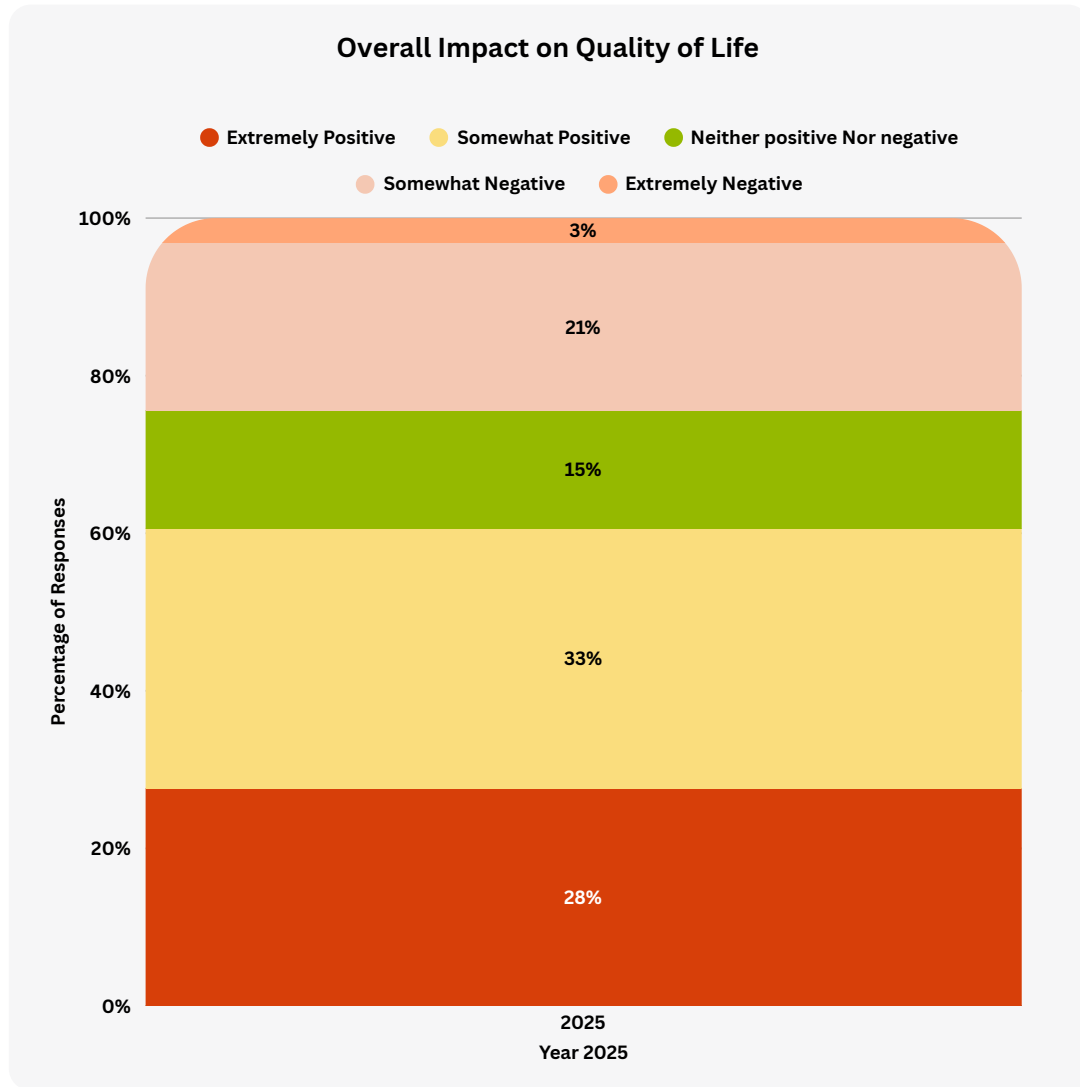
Perceptions of Tourism by Age Group



Perceptions of Tourism by Length of Residency



Resident KPI: Quality of Life

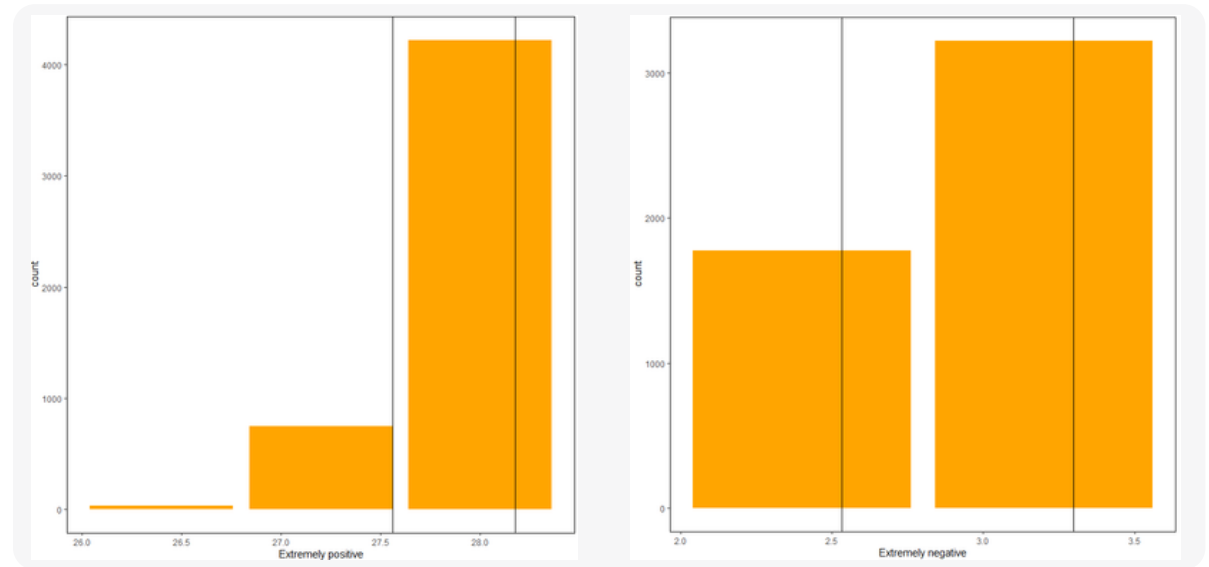


How would you rate the overall impact tourism has on the following: My Quality of Life?

Quality of Life

Our second key indicator for assessing tourism’s impact focuses on residents’ quality of life. Unlike broader economic or community-wide measures, this metric serves as an early warning signal, often predicting future shifts in how residents weigh the overall costs and benefits of tourism unless steps are taken to reduce negative effects and strengthen the positives.

In Sisters, 61 percent of residents reported that tourism has a positive impact on their quality of life, while about 24 percent said it has a negative effect. Quality of life scores are typically less favorable than responses to the Costs versus Benefits question, likely because this measure captures how tourism influences people on a personal and everyday level rather than through its broader community or economic contributions.



Stratified Downsampling Using US Census Data

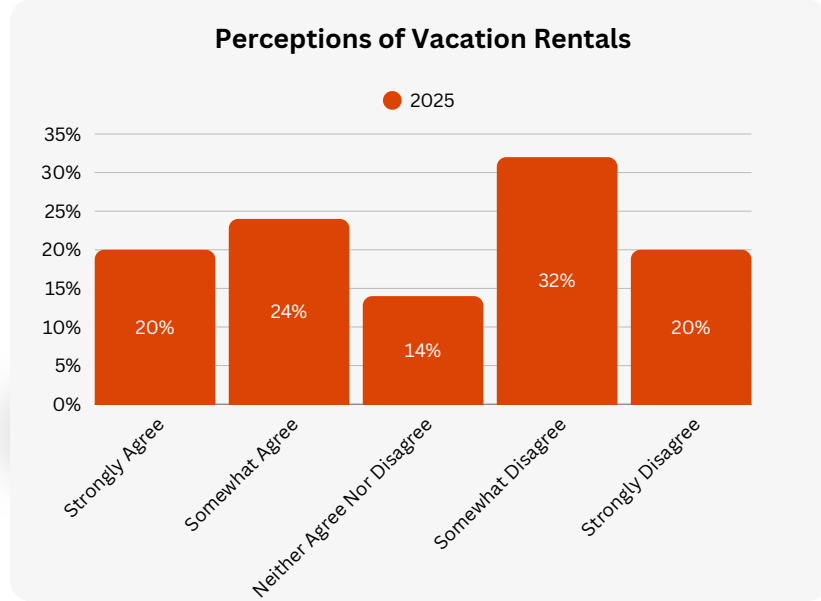
Common Costs of Tourism

Common Tourism Costs

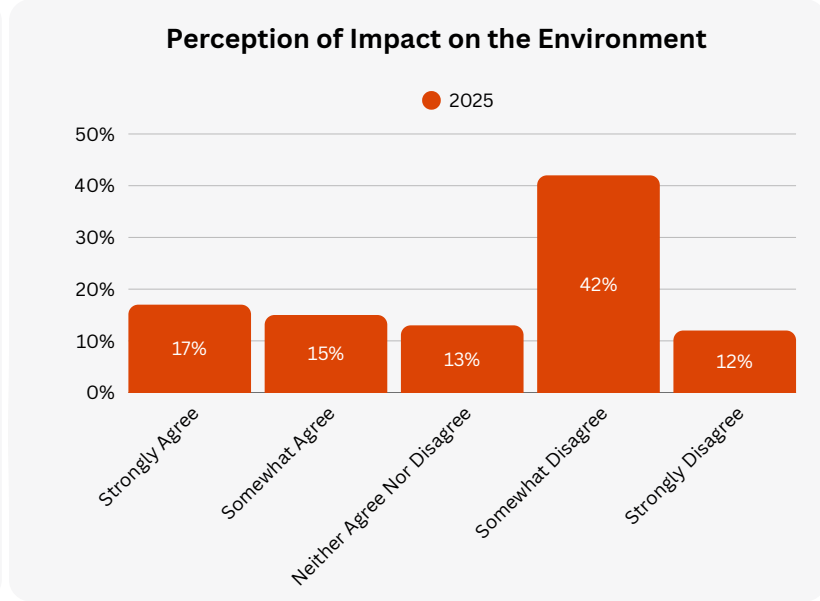
Globally, the most frequently cited costs of tourism include vacation rentals, traffic congestion, overcrowding, and environmental degradation. In Sisters, resident concerns closely reflect these broader trends, particularly related to traffic.

Views on vacation rentals are mixed, with 44 percent expressing negative perceptions. Traffic is attributed largely to visitors and tourists at 78 percent. Environmental impacts show a similar pattern, with 54 percent reporting negative effects.

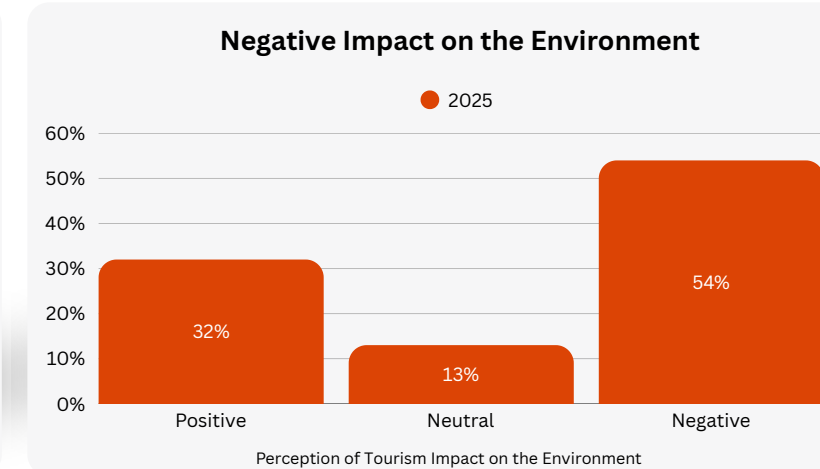
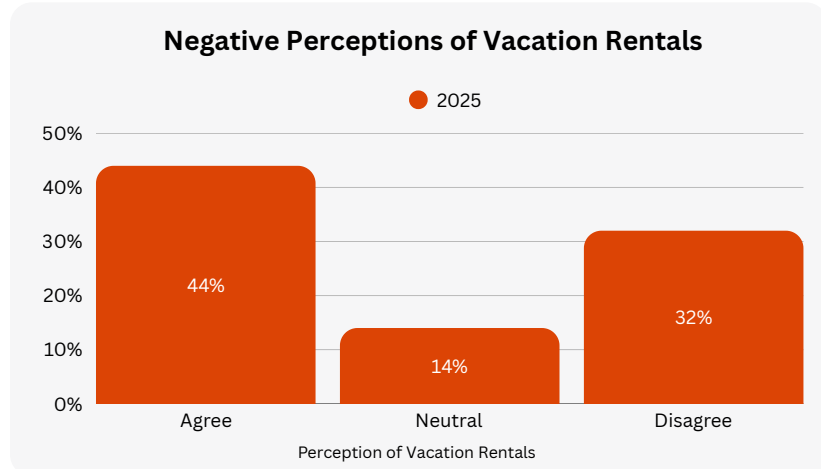
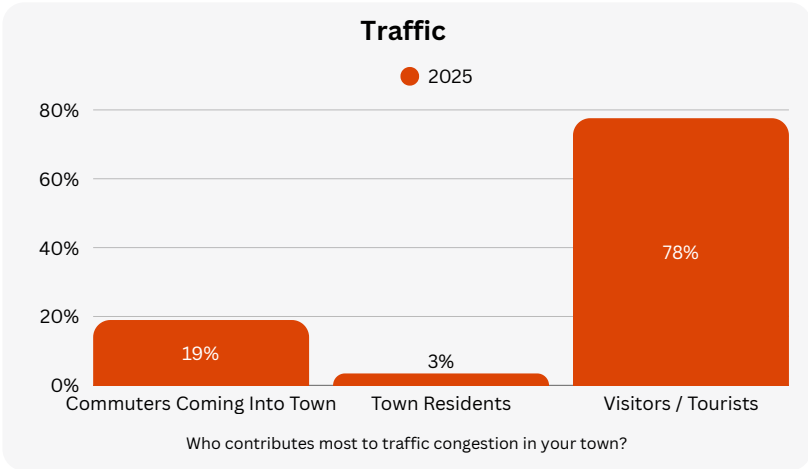
Overall, these results highlight traffic and environmental pressures as the most prominent costs of tourism for residents.



Do you agree or disagree with the following statements about short term rentals (i.e.: Airbnb, VRBO) in your town? Vacation rentals are a positive addition to our town.



Do you agree or disagree with the following statements about tourism and the environment? Tourism causes more positive environmental effects than negative ones.



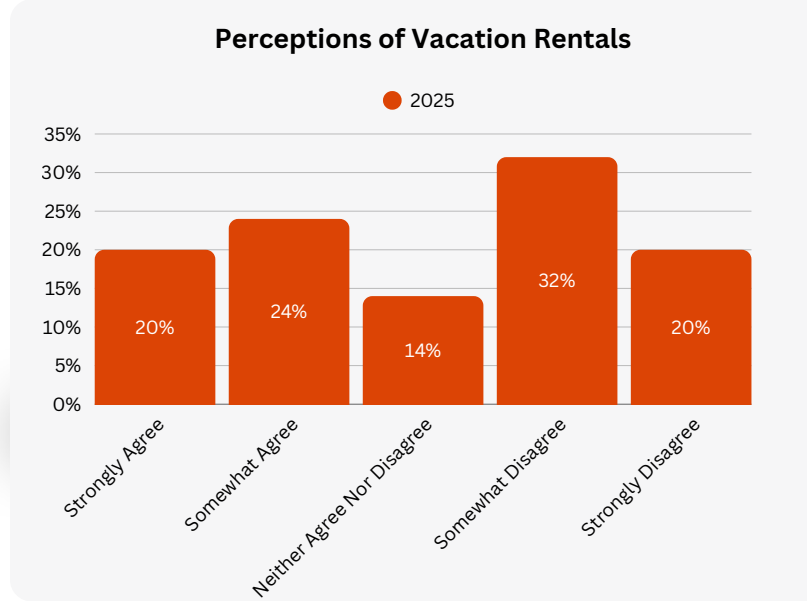
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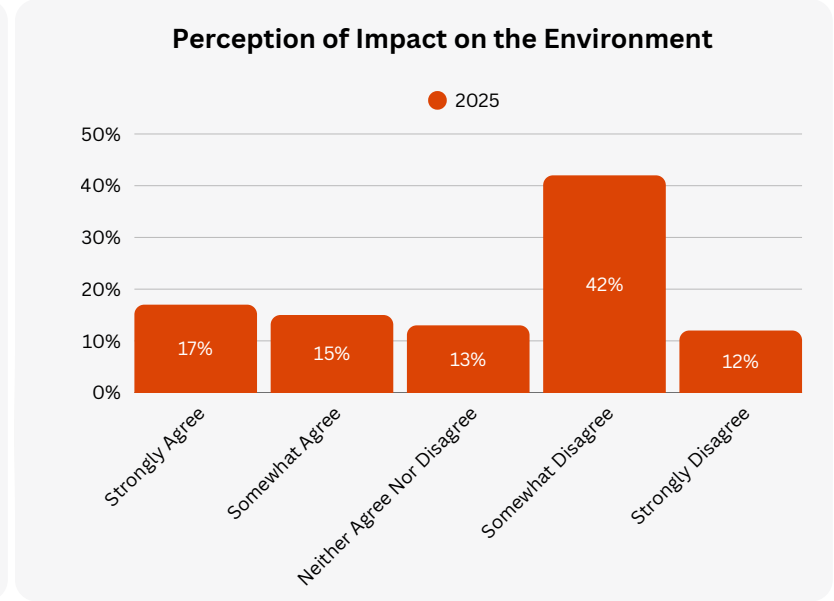
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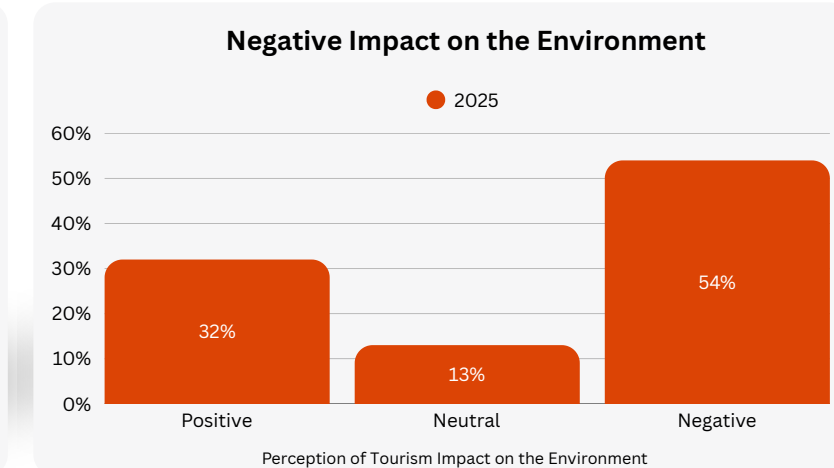
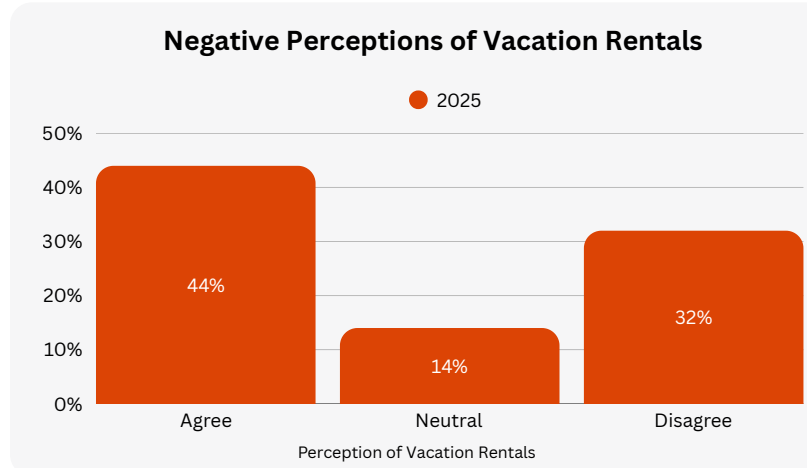
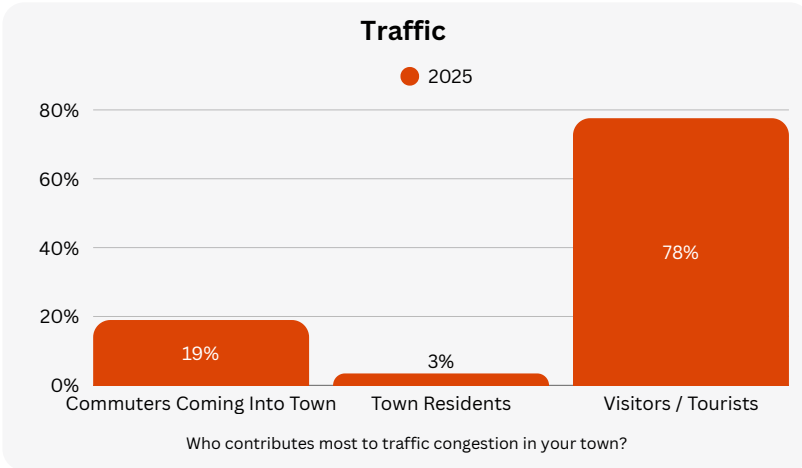
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Priority for Tourism Tax Revenue

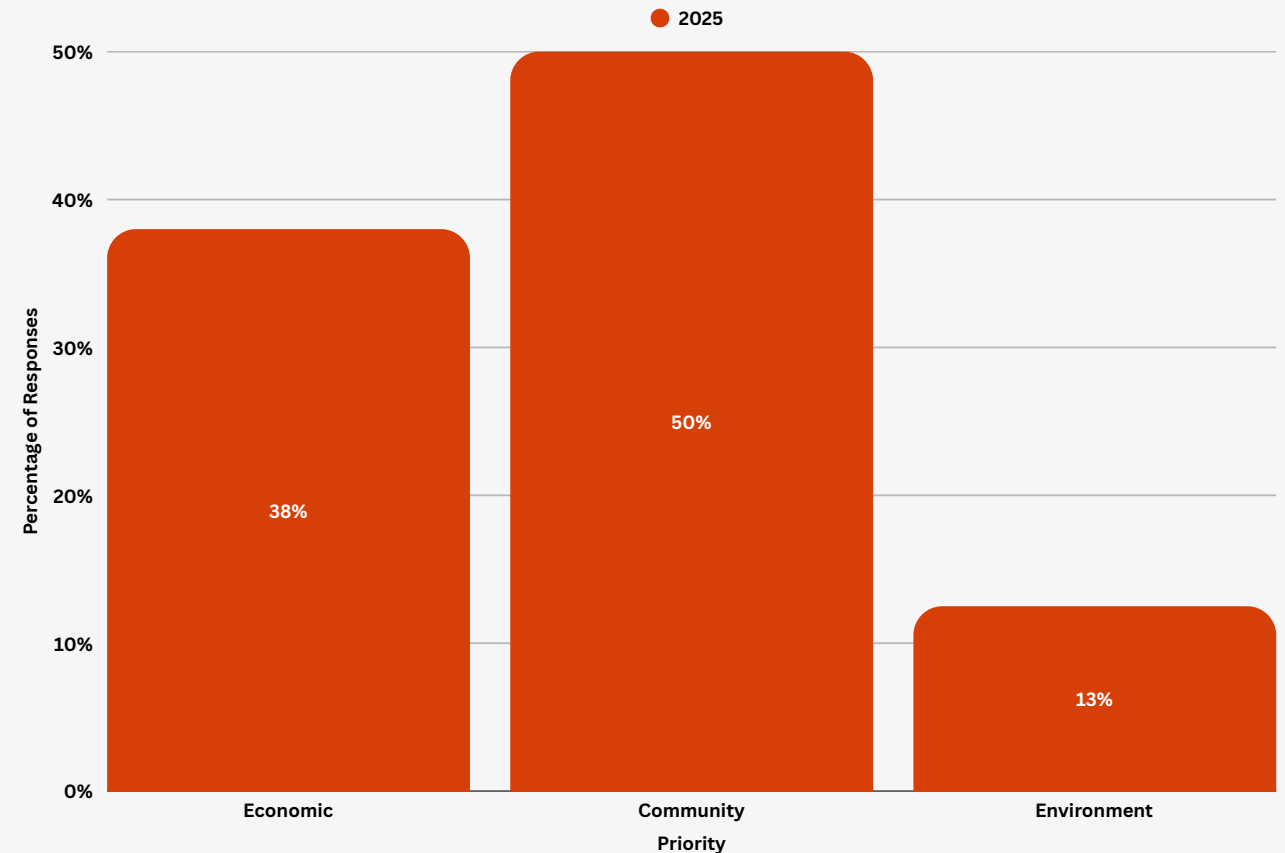
Tax Revenue Priorities

Sisters residents shared strong opinions on how tourism tax revenue should be spent, emphasizing investments that directly benefit the local community.

In 2025, community projects ranked as the top priority, receiving support from 50 percent of respondents. Economic priorities followed at 38 percent, reflecting growing interest in strengthening local business activity and overall financial stability. Environmental initiatives received 13 percent, indicating that while residents value ecological protection, it is less urgent than community and economic needs.

These results suggest a shift in how residents view tourism's financial contributions. Support for community-centered spending remains strong, yet interest in economic uses has grown, possibly reflecting broader economic pressures in the region. Such shifts are common in destination communities, where changing conditions influence how residents think about tourism related funding. As will be seen later in this report, priorities for the environment are among the lowest registered to date as part of this study.

Tax Revenue Priorities 2025



Tourist destinations often have a lodging tax (aka a tax on tourists) for anyone staying in a hotel, vacation rental, or other short-term lodging. Please rank how you feel tax revenue should be reinvested in your town.

Biggest Costs & Benefits

What are the biggest **benefits** of tourism?



In a few words, what is the biggest benefit of tourism to your town?

What are the biggest **costs** of tourism?



In a few words, what is the biggest cost of tourism to your town?

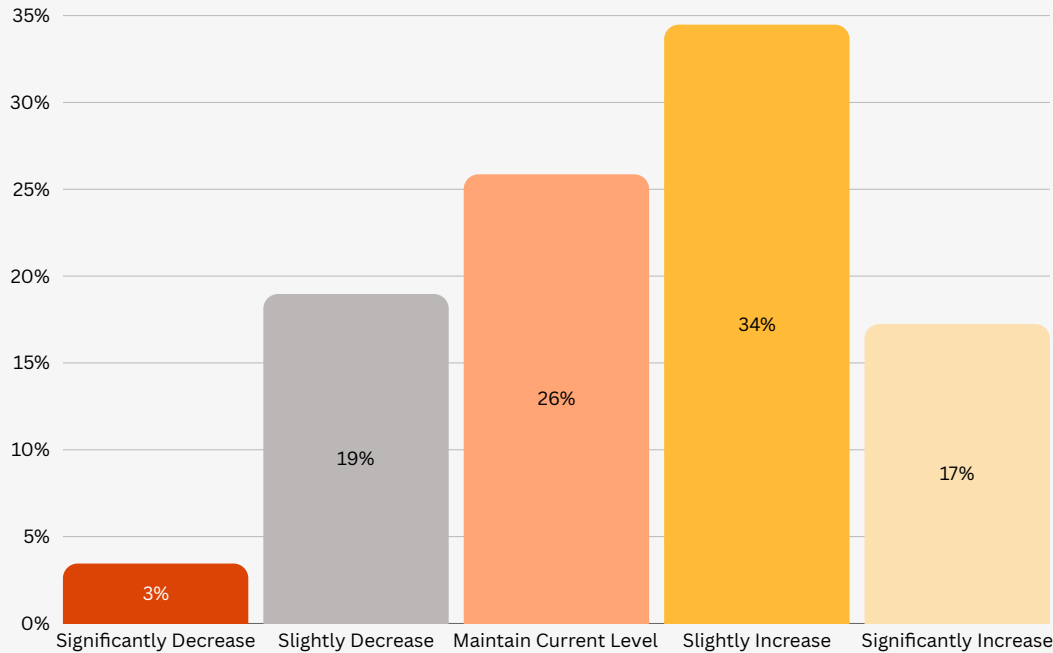
Perceived Costs & Benefits of Tourism

Across the globe, communities often view tourism primarily through an economic lens—and Sisters is no exception. Residents most frequently identified economic benefits such as job creation, business growth, and increased tax revenue as the key advantages of tourism.

When it comes to the perceived costs of tourism, Sisters reflects both global similarities and local distinctions. Like many destinations, residents expressed concern about affordable housing, infrastructure capacity, and traffic congestion. However, Sisters stands out as one of the few places in our broader research to highlight the rising cost of living as a major issue linked to tourism activity. This finding suggests that while tourism continues to deliver clear economic value, residents are increasingly attentive to how those gains interact with local affordability and quality of life.

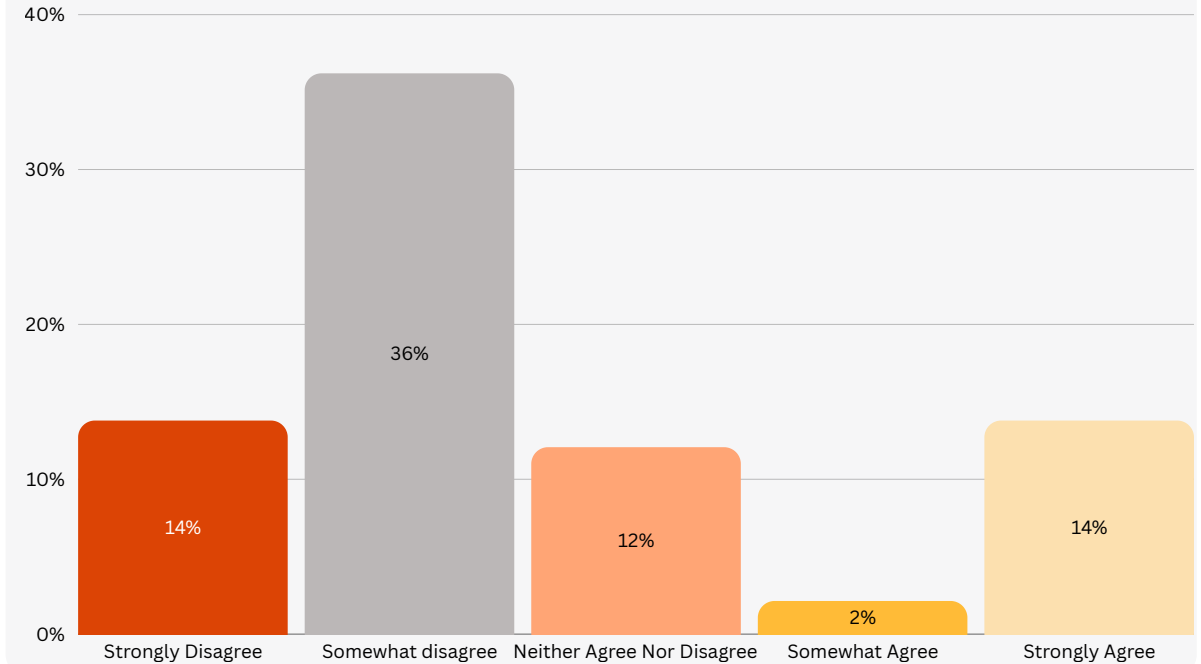
Positive & Negative Impacts of Tourism

Tourism Development



Do you support more or less tourism development in our town?

Infrastructure



Do you agree or disagree with the following statement:
The current infrastructure and visitor services can support the volume of tourism in my town?

Tourism Development & Infrastructure

In 2025, the OSU Sustainable Tourism Lab introduced new questions to better understand resident perspectives on tourism development and local infrastructure. Responses from Sisters reveal a community that values tourism and would like to see future growth. Over half of respondents indicated they would like to see tourism increase reflecting growing the economic benefits of tourism. About 26 percent prefer to maintain current levels.

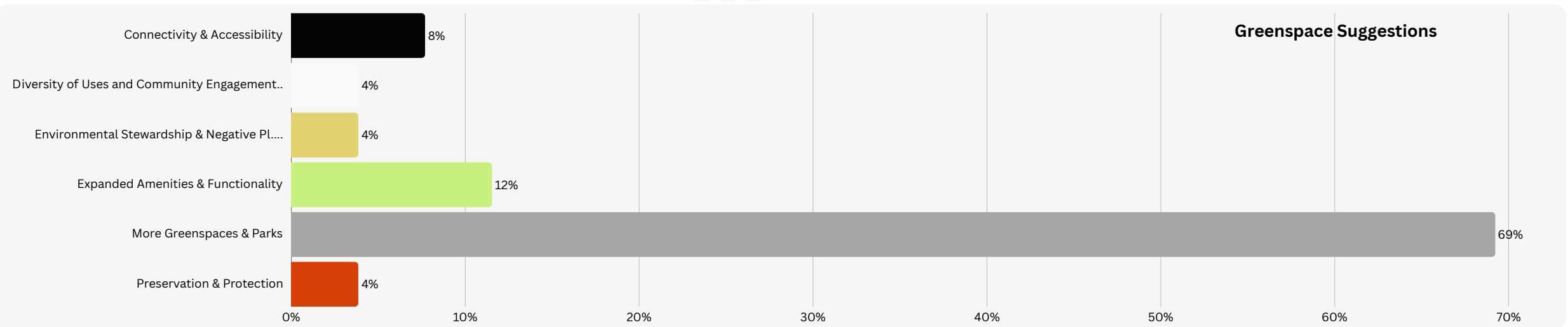
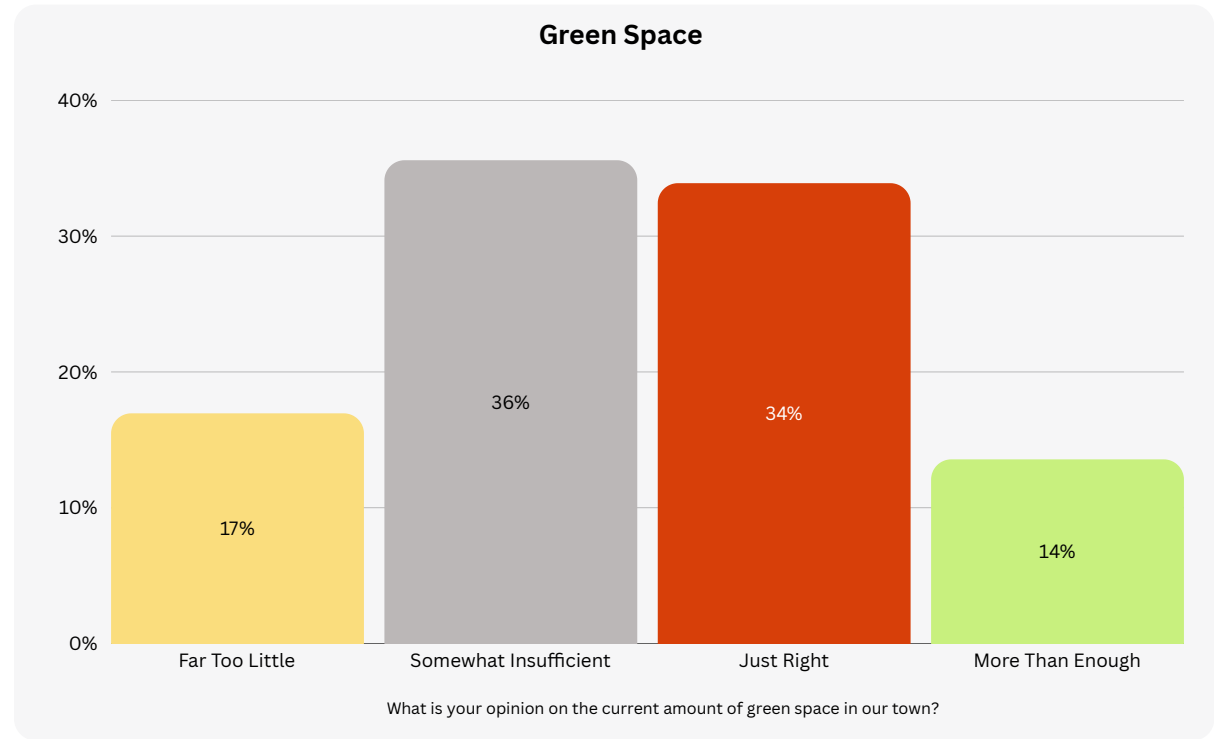
When asked about infrastructure, a strong majority of residents, nearly 61 percent, expressed concern that Sisters's current infrastructure cannot adequately support existing visitor volumes. This gap between preferred tourism growth and the perceived limitations of local infrastructure highlights a key challenge.

Sisters Green Spaces

Green Space

Sisters residents generally have a positive view of the town’s green spaces. About 34 percent believe the current amount is just right, while 36 percent feel it is somewhat insufficient, and 17 percent think there is far too little. Together, this means more than half of residents would like to see additional greenery or more parks in the community. Meanwhile, 14 percent believe there is more than enough green space, and only a very small share feel there is far too much.

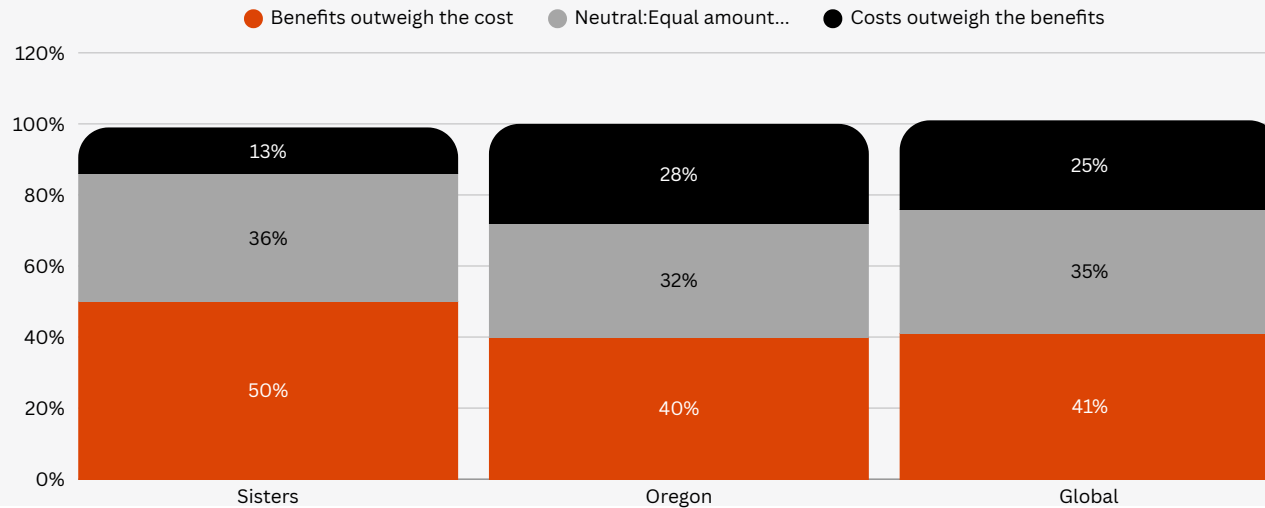
Responses from the Greenspace Categories section provide clearer insight into what residents hope to see added or improved. Nearly 69 percent expressed interest in developing more parks and green areas, making it the most common suggestion. Expanded amenities and functionality followed at 12 percent, while environmental stewardship and protection accounted for 11 percent combined across categories. Smaller shares noted the importance of connectivity, accessibility, and diverse uses.



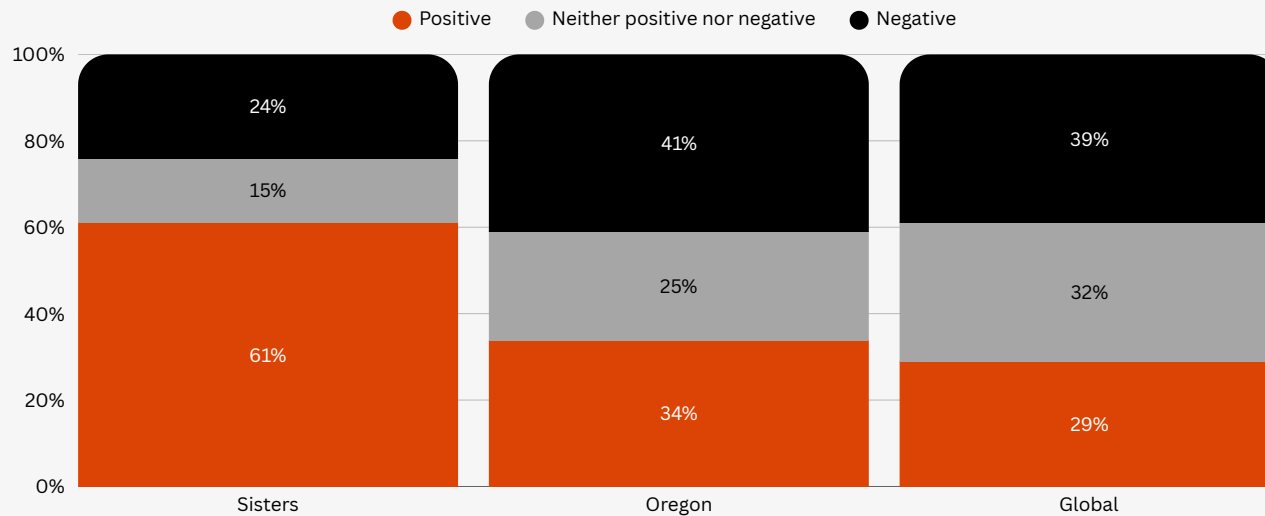
Destination Benchmarks

Benchmark: Impacts of Tourism

Benefits vs Costs of Tourism



Positive Impact on Quality of Life



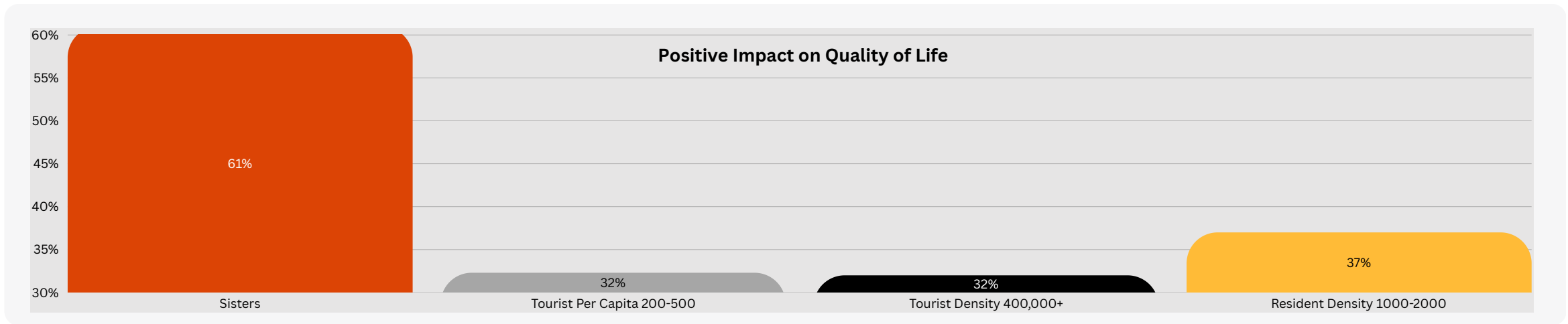
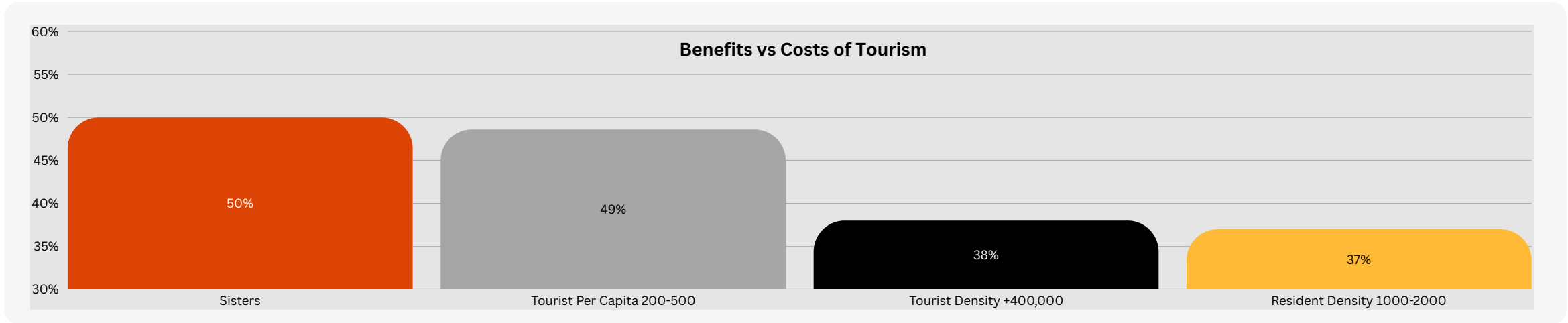
Tourism Impacts

In Sisters, 50 percent of residents believe the benefits of tourism outweigh the costs, a notably stronger result than both the Oregon average of 40 percent and the global benchmark of 41 percent. Another 36 percent of Sisters residents view the effects of tourism as neutral, meaning they perceive an equal balance of benefits and costs. This proportion is similar to the 32 percent statewide and 35 percent globally who hold a neutral view. Only 13 percent of respondents in Sisters believe the costs outweigh the benefits, which is substantially lower than the 28 percent reported across Oregon and the 25 percent observed in the global dataset. Together, these comparisons show that residents in Sisters maintain a more favorable and less polarized view of tourism’s overall impact than many other communities.

Perceptions of tourism’s influence on quality of life reinforce this pattern. About 61 percent of Sisters residents report that tourism has a positive effect on their quality of life, far exceeding the statewide rate of 34 percent and the global rate of 29 percent. Neutral responses in Sisters stand at 15 percent, which is lower than both the 25 percent statewide and the 32 percent globally. Negative perceptions are also less common in Sisters, with 24 percent reporting a negative effect compared with 41 percent across Oregon and 39 percent globally.

Taken together, these benchmark results demonstrate that Sisters experiences stronger resident support for tourism, lower levels of concern, and a more optimistic outlook on tourism’s role in community life than many comparable destinations. These patterns suggest that Sisters continues to balance tourism activity with resident well being in ways that many regions struggle to achieve.

Benchmark: Destination Metrics



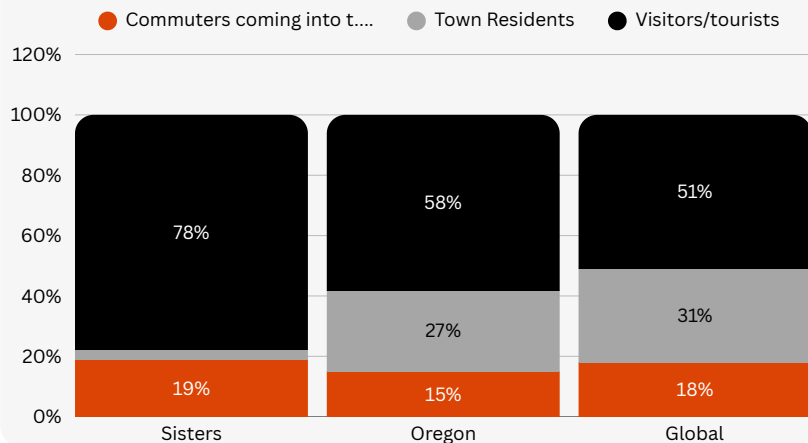
1. Tourists per Capita: $\text{Tourists per Capita} = \text{Annual Tourist Arrivals} / \text{Resident Population}$
2. Tourist Density: $\text{Tourist Density} = \text{Annual Tourist Arrivals} / \text{Land Area (in square miles)}$
3. Resident Density: $\text{Resident Density} = \text{Resident Population} / \text{Land Area (in square miles)}$

Benchmark: VR & Environment

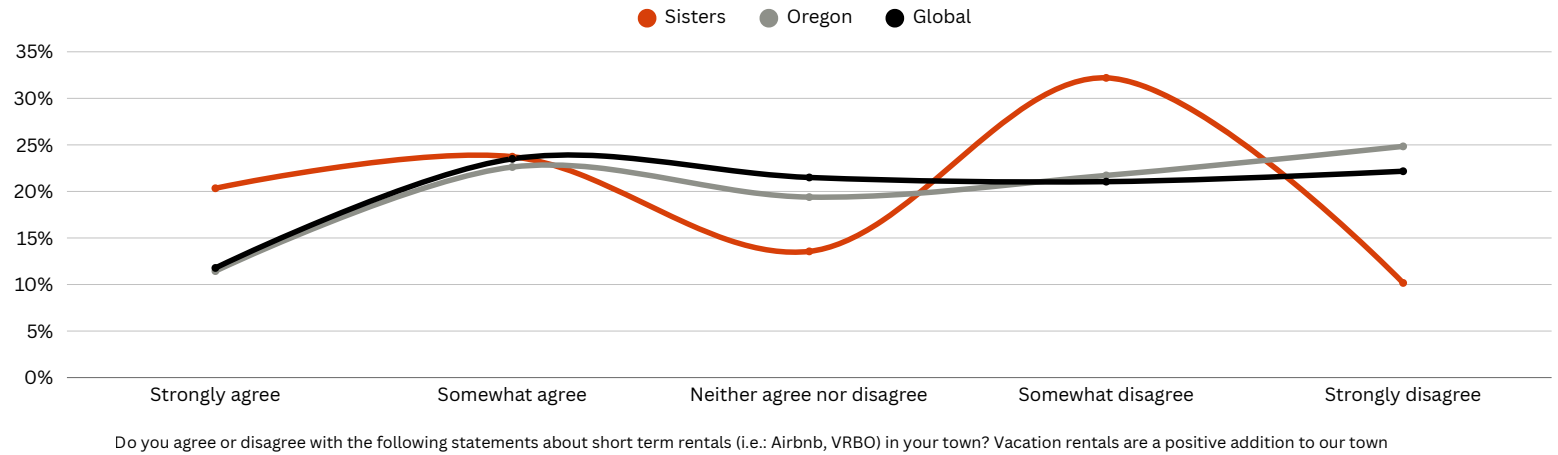
Vacation Rentals, Environment & Traffic

Vacation rentals are viewed relatively favorably in Sisters, with less disagreement than seen across Oregon or global benchmarks. Residents hold more positive or neutral views toward rentals compared with many monitored destinations. At the same time, Sisters scenic setting creates heightened sensitivity to environmental impacts. Residents express stronger concern about tourism's effect on nature than is typical statewide or globally. Traffic remains the most prominent issue. About 78 percent of Sisters residents attribute congestion to visitors, compared with 58 percent in Oregon and 51 percent globally. These comparisons show how concentrated visitation shapes local concerns about transportation and the environment.

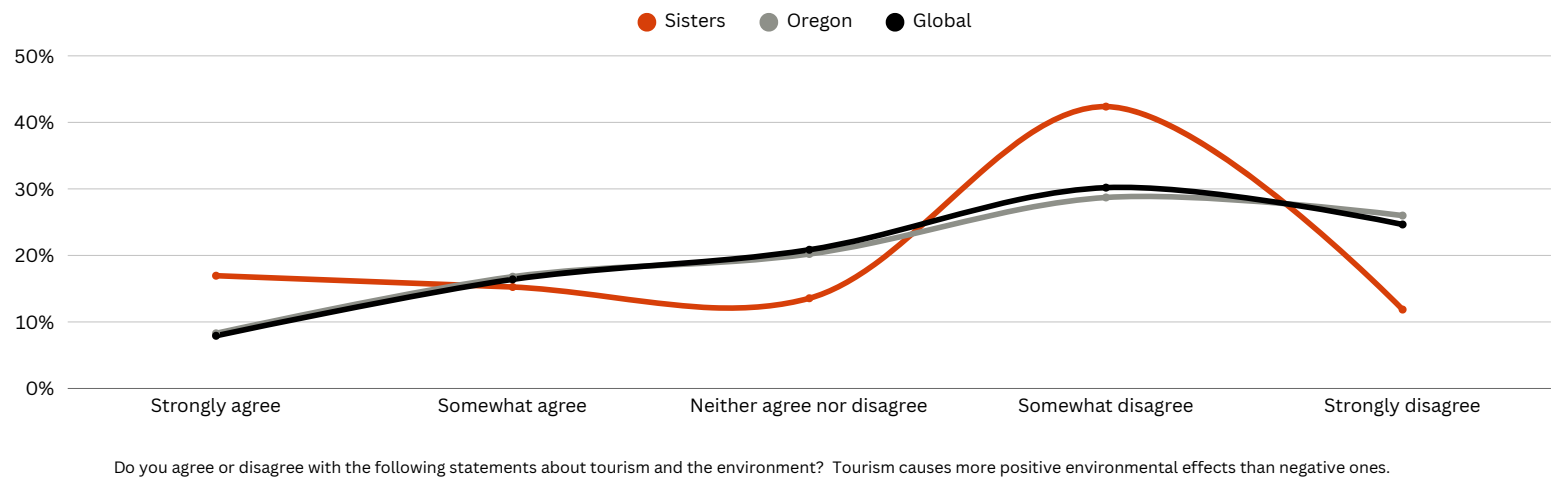
Percentage Blame Tourists for Traffic



Perceptions of Vacation Rentals



Perception of Tourism Impact on the Environment



Benchmark: Most Common Benefits

Sisters



Oregon



Global



In a few words, what is the biggest benefit of tourism to your town?

Benefits

Sisters residents continue to view tourism's benefits in ways that are consistent with other destination communities. Economic contributions such as support for local businesses, job creation, and increased tax revenue remain widely acknowledged and appreciated. For many residents, tourism serves as a vital economic engine that sustains year-round employment, supports public services, and stimulates entrepreneurial activity in a small, remote economy.

This recognition of tourism's financial value reflects a familiar pattern across tourism-dependent towns, where visitor spending helps diversify local income streams and provides resilience against broader economic fluctuations. In Sisters' case, the seasonal nature of visitation also means that tourism plays an essential role in maintaining the town's economic stability during the summer months, while indirectly supporting many community programs and amenities funded through visitor-generated taxes.

Benchmark: Most Common Costs

Sisters



Oregon



Global



In a few words, what is the biggest cost of tourism to your town?

Costs

Across all benchmarks, traffic stands out as the most frequently mentioned cost of tourism. In Sisters, traffic appears even more prominently than in Oregon or global comparisons, reflecting how concentrated visitation places pressure on a smaller road network. Residents also highlighted concerns related to overcrowding, cost of living, affordable housing, environmental impacts, and community strain. These themes mirror statewide and global patterns, though in Sisters they appear more closely linked to infrastructure limitations and seasonal visitor peaks.

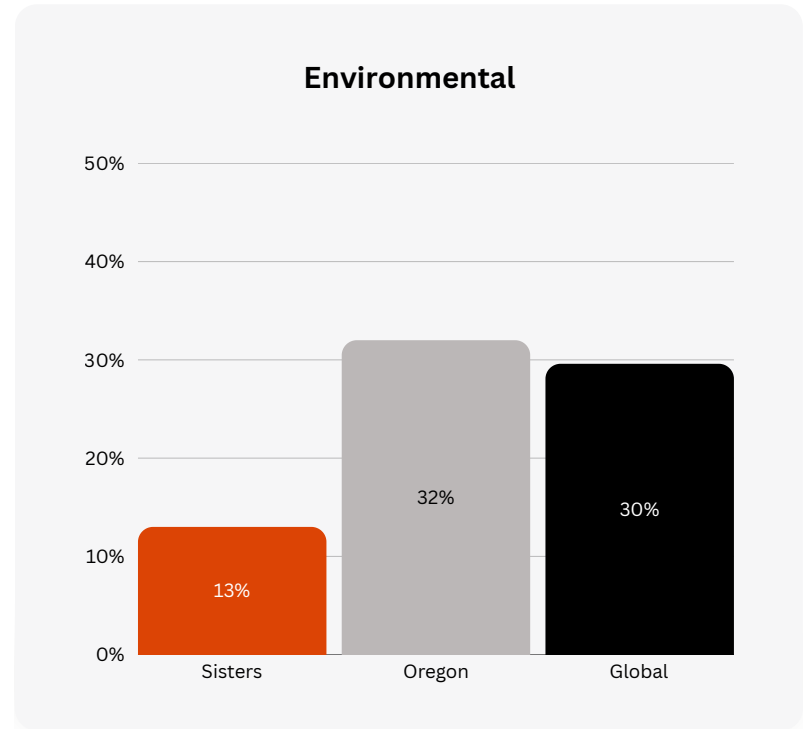
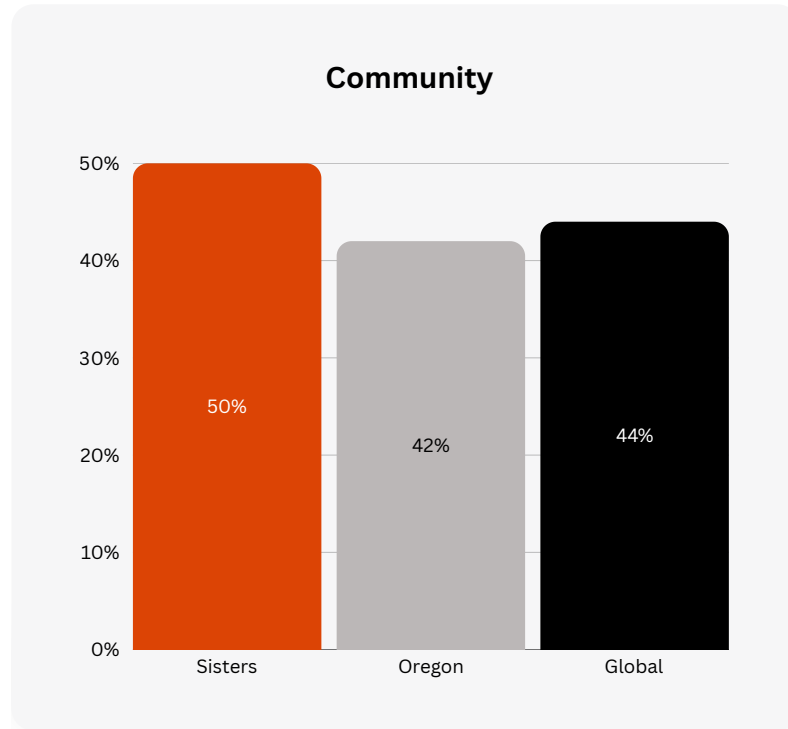
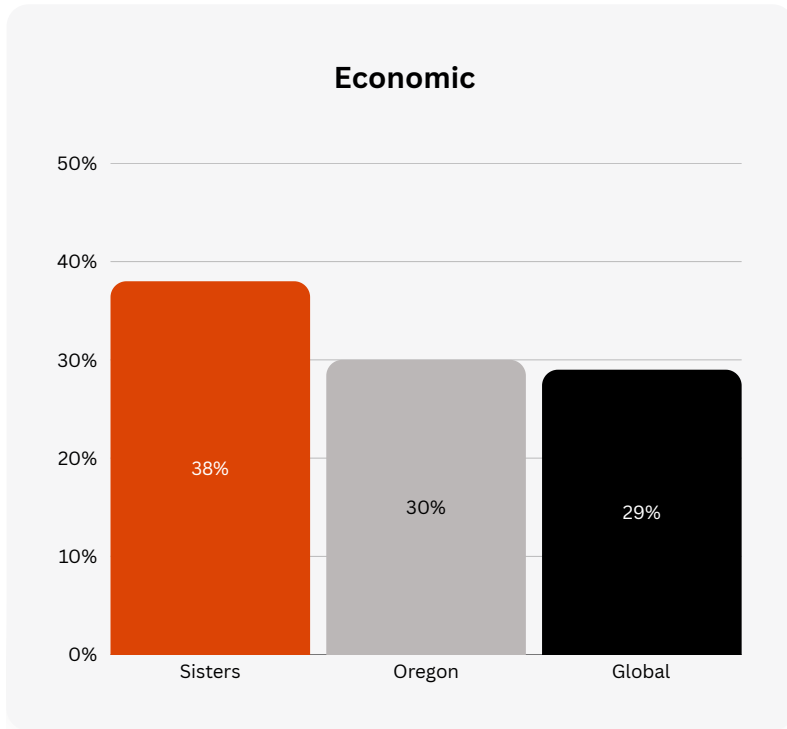
This pattern suggests a unique challenge for Sisters. The town's compact size and high visitor volume make tourism related pressures more visible and immediate, underscoring the need for careful planning to manage congestion, support housing stability, and protect overall quality of life.

Tax Revenue Allocation

Tax Priorities

Sisters residents show a clear pattern in how they want tourism tax revenue allocated. Community projects remain the top priority, selected by 50 percent of residents, which is higher than both the Oregon average of 42 percent and the global benchmark of 44 percent. Economic initiatives rank next at 38 percent, also above statewide and global levels. Environmental projects receive the lowest support at 13 percent, far below the 32 percent statewide and 30 percent globally.

These results indicate that Sisters places stronger emphasis on community needs and local economic support, with less preference for directing tourism revenue toward environmental projects.

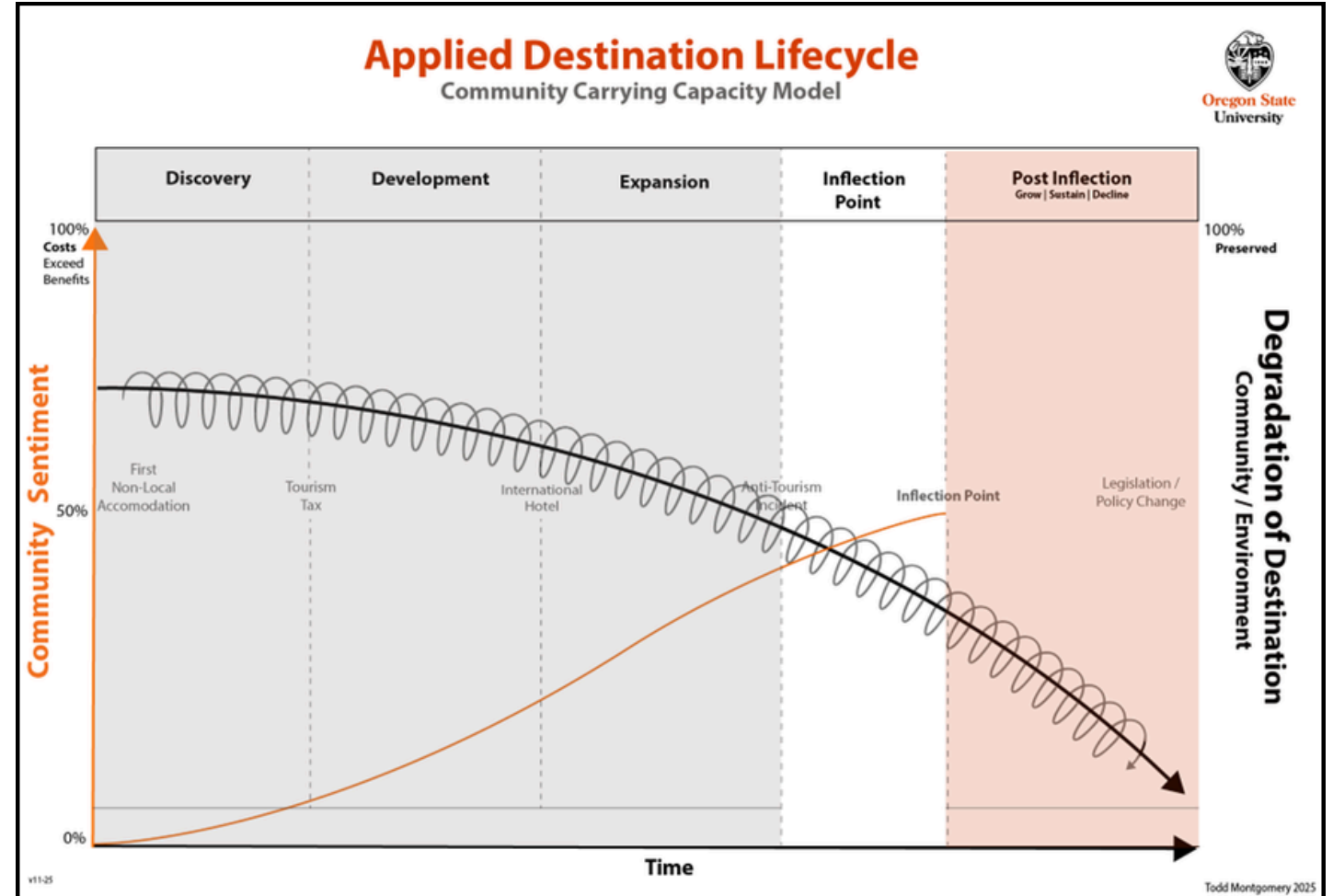


Tourist destinations often have a lodging tax (aka a tax on tourists) for anyone staying in a hotel, vacation rental, or other short-term lodging. Please rank how you feel tax revenue should be reinvested in your town.

FINAL THOUGHTS

Sisters is in the early stages of the destination lifecycle, and the data presented in this report indicates that the community is managing this phase effectively. Residents generally express positive views toward tourism, while also identifying clear priorities for future planning. These patterns suggest that Sisters is balancing the experiences of both visitors and residents in ways that reflect thoughtful management and strong community engagement. This balance is consistent with outcomes seen in other benchmark destinations that are also navigating early or developing stages of tourism growth. As Sisters continues to evolve, maintaining this alignment will be essential to supporting long term resilience and community well being.

The OSU Sustainable Tourism Lab is thankful for our partnership and truly values the chance to collaborate with you this year. We would be delighted to present these findings and discuss the results at your convenience.



THANK YOU

OSU Sustainable Tourism Lab

