



Travel Oregon Key Performance Indicators

Summary Report 2021-2022





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ABOVE: DYLAN VANWEELDEN
COVER: KATIE FALKENBERG

*This report created in partnership with
East Carolina University and Dean Runyan Associates.*



Introduction

Travel Oregon's Mission: We inspire travel that uplifts Oregon communities. Collaborating with stakeholders to align as stewards of Oregon, we work to optimize economic opportunity, advance equity and respect the ecosystems, cultures and places that make Oregon...Oregon.

The purpose of Travel Oregon's 2021-23 Rebuild Strategic Plan is to lead and support the rebuilding of Oregon's tourism industry and economic recovery, while balancing priorities in a way that benefits both residents and visitors. Travel Oregon has developed three interconnected Key Performance Indicators (KPIs) to monitor progress against the 2021-23 Rebuild Strategic Plan. The three KPIs: economic recovery of the Oregon tourism industry, resident sentiments and visitor sentiments, will help to bring our mission to life.

The following sections define each KPI and present the established baselines.

Tourism Economic Recovery

Definitions:

Combined Economic Impact: An index that reflects changes in visitor spending, employment, earnings, and taxes.

Visitor Spending: Spending on goods and services by visitors in the state of Oregon.

Visitor: An individual staying overnight in paid accommodations (hotel, motel, short term vacation rental, campground), or on a non-routine day or overnight (friends & family or 2nd home) trip to places 50 miles or more from their home. This includes in-state, out-of-state, and international travelers.

Employment: The total number of full and part-time jobs directly attributable to travel spending. While few jobs exist solely due to travel in Oregon, a significant share of many industries' earnings come from travel-related spending. Part of these earnings are used to pay employees in the form of income and benefits. Based on average salaries for employees in the various travel-related industries in Oregon, a total employment number attributable to travel can be reached.

Earnings: the total after-tax net income from travel. It includes wage and salary disbursements, proprietor income, and other earned income or benefits.

State Taxes: The tax receipts generated by state taxes on travel-related spending. Taxes include: motor fuel taxes, transient lodging taxes, and personal and business income taxes.

Local Taxes: The tax receipts generated by local taxes on travel-related spending. Taxes include: transient lodging taxes, food & beverage taxes (where applicable), auto rental taxes (where applicable), and port facility charges (where applicable).

Hotel Revenue: Reported hotel revenue in Oregon, provided by STR LLC.

STVR Revenue: Reported revenue generated from STVR, provided by AirDNA.

Methodology

The method used is a simplified version of DRA's county impact model. Each tourism region is calculated with up-to-date data to estimate the economic impacts of travel. All calculations are then compared to the baseline measure of calendar year 2019 and reported as the percent difference. Input data used in estimating the quarterly economic impacts include lodging taxes, STR LLC. information on hotel activity, AirDNA & KeyData information on short term vacation rentals, VisaVue credit and debit card transactions, and Bureau of Labor Statistics employment and wages.

Key Insights

Oregon

The main measures of tourism economic impact steadily recovered in the state (compared to 2019 levels). Individual measures in 2021 are between 85% and 92% of 2019 estimates. Spending in Q4 2021 exceeded Q4 2019 by 16.3%. This represents a large shift in seasonal activity, compared to historical patterns. Approximately 27% of the 2021 economic activity occurred between October and December. In prior years, this period contained approximately 20% of annual economic activity.

Indicators of overnight travel activity show that hotels are slightly lower than the 2019 level, while short term vacation rental (STVR) activity is occurring at a greater rate than in 2019. These two measures are key components in the recovery of local tax receipts, which are primarily sourced from transient lodging taxes.

Central Oregon

As of 2021, Central Oregon exceeded 2019 economic impacts in four measures: spending, earnings, local taxes and state taxes. Employment remains 7% less than 2019 levels. Spending in 2021 exceeded 2019 spending in every quarter except Q3.

Spending on overnight accommodations recovered to 2019 levels in Central Oregon. Hotel revenue in 2021 was at 98% of 2019 levels, while short term vacation rental (STVR) revenue was 21% greater than 2019.

Eastern Oregon

Eastern Oregon has nearly reached full recovery as of 2021. Earnings, local taxes and state taxes exceeded 2019 levels, while spending and employment largely recovered to 2019 levels (down only 1% and 3% respectively). Notably, local taxes were 25% higher in 2021 than in 2019. Like the state, Eastern Oregon experienced a high amount of travel activity in Q4 2021: approximately 30% of travel spending occurred in Q4 2021 as compared to a historical average of 20% of annual spending for this quarter.

Both hotel revenue and STVR revenue exceeded 2019 levels.

Mt. Hood & The Columbia River Gorge

Local taxes generated from travel spending vastly exceeded 2019 receipts in Mt. Hood & the Columbia River Gorge. By the end of the year, local taxes were up by 43%. Strong growth in both hotel and STVR activity drove the recovery in local taxes, which are primarily sourced from transient lodging tax. Other measures of economic activity continue to be less than 2019. Employment is the furthest behind in terms of recovery.

Oregon Coast

The Oregon Coast has seen recovery in earnings and local taxes generated by travel activity. Local taxes grew sharply in 2021: 25% greater than 2019 levels. Strong growth in both hotel and STVR activity drove the recovery in local taxes, which are primarily sourced from transient lodging tax. Both employment and spending remain 9% under 2019 levels.

Portland Region

Travel to the Portland Region was most impacted by the COVID pandemic and has been the slowest to recover. As of 2021, individual measures are between 64% and 78% of 2019 estimates. Spending in Q4 2021 reached 88% of the comparable period in 2019. Many regions in the state experienced high levels of activity at the end of the year.

Short term vacation rental activity recovered in 2021, but hotel revenue is still 40% less than in 2019. Local tax receipts are sourced largely from transient lodging taxes and will not recover until hotel activity approaches historical activity levels.

Southern Oregon

As of 2021, Southern Oregon exceeded 2019 economic impacts in four measures: spending, earnings, local taxes and state taxes. Employment remains 5% less than 2019 levels. Spending in 2021 exceeded 2019 spending in every quarter except Q3.

Strong economic growth in 2021 was driven by a 30% growth in hotel revenue in the region and 44% growth in STVR activity since 2019.

Willamette Valley

The Willamette Valley has nearly reached full recovery in 2021, as compared to 2019. Two measures (spending and local taxes) exceeded 2019 levels. Employment is the farthest behind in terms of recovery.

The economic recovery in 2021 was aided by growth in hotel revenue in the region and by a large increase in STVR activity, 28% greater than in 2019. These sources of revenue resulted in a notable increase in local taxes generated from travel activity (up 15%).

Oregon Residents' Sentiments

Introduction

Understanding residents' sentiments towards tourism is essential for tourism development in any destination. It is generally understood that residents who express positive sentiments toward tourism are more supportive of tourism development, and those who have negative sentiments are less supportive. This section of the report includes a summary of the methodology used in the study, general demographics of the sample, and sentiment variables presented in the associated dashboard. The report focuses on the positive and negative tourism impacts related to social, economic, cultural and environmental aspects of the community. Additionally, the report captures the residents' willingness to support tourism development within their communities, as well as specific aspects of tourism (e.g., advertising tourism at an international scale).

Methodology

The resident sentiment data was collected using an online survey (fielded December 2021 – January 2022) by a third-party public opinion polling company, Engine Insights. The data sample included 1,001 responses from Oregon residents. To ensure accuracy of analysis, data was adjusted (weighted) to represent the visitation load of different regions. The number of day trips and number of nights spent in seven tourism regions for three consecutive years of 2018, 2019 and 2020 were utilized to calculate the weight for each region. The table below shows the average percentage of visitors in the seven regions of Oregon. This weight (RW) was created to weigh resident sentiment related to the indicators listed below (support for tourism development, perceptions of positive/negative tourism impacts). Demographics and general sample information were also weighted using the same approach.

	Weights
Portland Metro	26.7%
Mt. Hood & Columbia River Gorge	4.0%
Eastern Oregon	5.9%
Southern Oregon	12.5%
Central Oregon	10.5%
Willamette Valley	20.4%
Oregon Coast	20.0%

Demographics

The average age of participants is 46.31, with 64.4% being female. More than a third of the participants are married (38.6%), about 15% live with a partner and 23.6% are single. Most participants self-identified as white or a combination of white and another racial background (88.5%). To be specific, 88.5% of respondents self-identified as white, 11.3% as Hispanic/Latino, 5.4% as native Americans or Alaska natives, 4.7% as Asian, 2.6% as Black or African American and 4.2% selected other racial backgrounds (respondents could select more than one racial background).

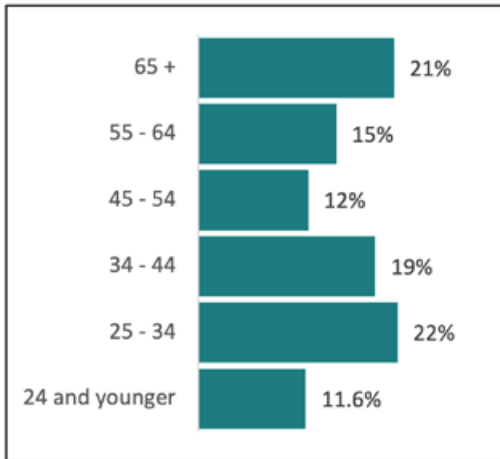


Chart 1: Age distribution

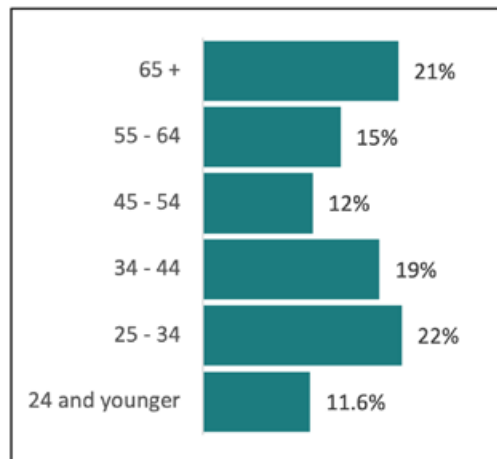


Chart 2: Self-identified racial background

About a third of the participants had some college education (30.7%) followed by high school (19.3%), four-year college (18.1%), and two-year college/technical school (15%). Just over a third of the participants (34.7%) were working full-time, a tenth were working part-time (11.4%) or were self-employed (9.7%). A fifth (20.8%) were retired, and 13.9% were unemployed. Out of all participants who answered the employment related questions, 26 (2.6%) indicated that they were employed in the tourism industry. About half of the sample made less than \$40K a year (47%) with the largest group making less than \$25K (24%), and only 2% of respondents were making more than \$200K. Almost half of the respondents (47.5%) owned their home, 42.7% rented their place, and 9.8% lived with others at no cost. On average, respondents have lived in Oregon for 26.8 years.

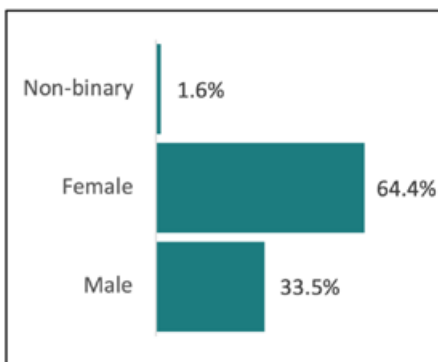


Chart 3: Self-identified gender

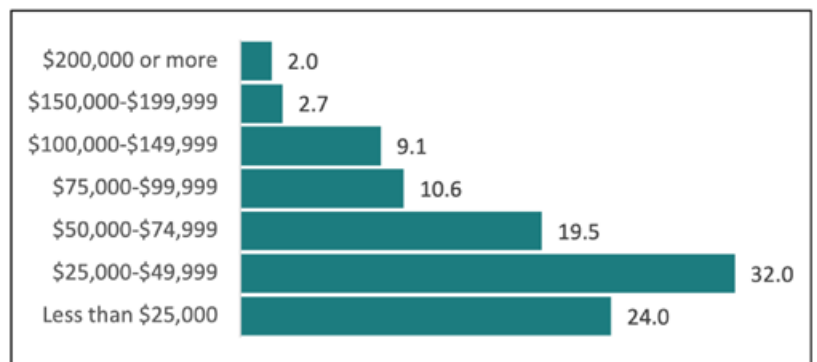


Chart 4: Annual household income

Perceptions of Positive Tourism Impacts

Residents' perceptions of positive impacts of tourism were measured using a seven-point scale of agreement. Respondents were presented with a series of statements on the positive impacts of tourism (e.g., "tourism leads to increased safety"), on which they had to rate their level of agreement (1 = strongly disagree, 4 = Neither disagree nor agree, 7 = strongly agree). For a full list of the positive tourism impact items, see [appendix 1](#).

Most participants agreed that tourism positively impacts their community in all four areas of economic, environmental, cultural and social. Participants took a more neutral position only in four social impact items of "improved zoning and land use", "increased safety", "preserving peace and tranquility," and "increased housing options." Most of the cultural and economic impact items were scored higher than environmental and social items. Participants were most confident about the positive impacts of tourism in five areas: "encouragement of cultural activities", "local business's increased trade", "increased quality of recreational and entertainment opportunities", "increased employment opportunities", and "increased shopping facilities" two of which were cultural and three of which were economic.

All Oregon regions hold a similar positive perception about tourism having a positive impact on their community in the areas of social, economic and environmental. Regarding cultural impacts, however, the residents of the Mt Hood/Gorge region report a higher positive perception compared to the Coast and Willamette Valley regions.

We looked at residents' perceptions of positive impacts of tourism by race and compared average score of each racial background to the average score of all racial background groups combined. There were no significant differences between perceptions of white participants and the average perception of all racial background groups combined about the positive impacts of tourism in their community. Among Black and African American respondents, positive economic impacts of tourism were rated significantly lower. All four positive impact areas of cultural, economic, social, and environmental were rated higher by Asian respondents. The same is true for Hispanic/Latino respondents except for economic impact. Like white respondents, Native Americans or Alaska Native respondents average scores on all four areas were not significantly different from the rest of respondents.

Further investigations at the item-level revealed some differences regarding the four areas. For example, Black/African American respondents were more in disagreement that tourism results in increased investments, tax revenues, and trade for local businesses. On the other hand, Asian respondents rated all items of positive economic impact higher than other respondents except for increased income levels, tax revenues, and shopping facilities where their level of agreement was like other respondents. It should be noted that Hispanic/Latino respondents, compared to other respondents and unlike Asian respondents, perceived tourism to have a larger impact on increased shopping facilities.

In terms of positive environmental impacts Native American or Alaska Native respondents and Asian respondents perceived that tourism leads to improved condition of the state and national parks, more than other respondents. Hispanic/Latino respondents, and Asian respondents rated increased level of urbanization and better quality of urban planning higher compared to all other groups combined.

In terms of cultural positive impacts, Black/African American respondents rated the impact of tourism on increased quality of recreational and entertainment opportunities lower than all respondents combined. Hispanic/Latino respondents considered the impact of tourism on increased quality of recreational and entertainment opportunities, improved preservation of cultural identity and local culture, and improved preservation of historic buildings and monuments more positively than other respondents.

From the social impact perspective, Black/African American respondents considered the impact of tourism on enhanced media visibility, improved destination image, and increased leisure facilities less positive than other respondents. Native American or Alaska Native respondents perceived about a third (i.e., seven items) of social positive tourism

impacts more positively than all respondents. Most of these seven items are quality-of-life-related social positive impact items. Like other aspects of positive impacts, Asian respondents perceived the positive impacts of tourism on most social items more positively compared to all respondents. Finally, Hispanic/Latino respondents perceived two third of social items more positively compared to all respondents combined.

Negative Impacts

Residents' perceptions of negative impacts of tourism were measured using a 7-point Likert scale of agreement. Respondents were presented with a series of statements (items) on the negative impacts of tourism (e.g., "tourism leads to increased crime rates"), on which they had to rate their level of agreement (1 = strongly disagree, 4 = Neither disagree nor agree, 7 = strongly agree). For a full list of the negative tourism impact items, please see [*appendix 2*](#).

Most participants perceived tourism to impact their community negatively in all four areas of economic, environmental, cultural, and social. Participants took a more neutral position in four social impact items of "increased drug abuse," "decreased security," "increased risk of terrorism," and "increased prostitution." The highest perceived negative impacts were mainly formed around the environmental impacts of tourism. Eight out of the 13 highest negative perceptions belonged to environmental impacts. Participants were most in agreement on that tourism leads to "increased amount of litter and waste (environmental)", "traffic congestion (social)", "increased price of real estate (economic)", and "increased noise levels (environmental)".

Different Oregon regions had different perceptions towards the negative impacts of tourism. For example, the Central and Coast regions perceived higher negative cultural, social, and economic impacts compared to those in other regions (i.e., Eastern, Mt Hood/Gorge, Portland, Willamette Valley, and Southern regions). Also, in terms of negative environmental impact, the Central region held the highest negative perception followed by Coast and Southern region. Residents of Eastern, Mt Hood/Gorge, Portland, and Willamette Valley regions held the lowest negative perceptions.

We also analyzed the residents' perceptions of tourism impacts in their community by race. We compared the average score of a specific racial background to the average score of all respondents combined. Since most participants identified as white, the total average scores are more representative of this group.

Asian respondents perceived tourism to have less negative economic impacts on their community, compared to all other racial groups combined. For the rest of the negative impact areas (i.e., social, cultural, and environmental) no significant differences were found when comparing perceptions among different racial groups

In terms of individual economic items, Black/African American respondent perceived the increased real-estate price and decreased affordable housing opportunities less negatively than all respondents combined. Asian respondents perceived the shortage of different products/goods more severely compared to other ethnicities combined.

Regarding negative environmental impacts, Black/African American respondents perceived all items of this area less severely than the rest of respondents. In the same vein, Hispanic/Latino respondents perceived the increased amount of litter and waste as less severe. In terms of cultural negative impacts, the only significant difference was that Black/African American respondents perceived a lower negative impact with respect to the increased commoditization of the local culture compared to other respondents. Finally, Asian respondents perceived increased drug abuse and increased risk of terrorism less severely and Hispanic/Latino respondents perceived traffic congestion less severely.

Comparing Positive and Negative Impacts

We also compared the perceptions of negative tourism impacts to the positive ones in the corresponding areas (i.e., economic, environmental, cultural, social). In terms of social and environmental impacts, participants' perception of negative impacts was stronger than positive impacts. On the other hand, for cultural and economic aspects, participants denoted stronger positive impacts of tourism compared to negative impacts.

The difference between the perceptions of positive and negative impacts varies among various regions. In the Mt. Hood/Gorge region, positive social impacts of tourism were perceived stronger than the negative social impacts whereas in the Central and Coast regions it was the opposite. In terms of cultural impacts, while in Central and Coast regions there were no significant differences between positive and negative impacts, for the remainder of regions, positive cultural impacts were perceived stronger than negative impacts. From the environmental impact perspective, Southern, Coast, and Central regions perceived the negative environmental impacts of tourism stronger than its positives impacts, whereas the Mt Hood/Gorge region and to some extent the Eastern region, perceived the positive environmental impacts significantly higher than the negative environmental impacts. For the remainder of the regions (i.e., Portland and Willamette Valley), there are no significant differences between the perceived negative and positive impacts. Similar to cultural impacts, there were no significant differences between the positive and negative economic impacts of tourism in the eyes of the Central and Coast region respondents. In other regions, however, the positive economic impacts were perceived significantly stronger than the negative impacts.

Support for Tourism Development

To measure support for tourism development in Oregon, respondents were asked to assign scores on a sliding scale (varying from -3 to 3) to a series of opposing statements (e.g., "attract fewer visitors/attract more visitors") to measure the level of agreement with them. Lower scores reflect less support or opposition for tourism development, while higher scores depict more support for tourism development.

Eleven opposing statements were employed to evaluate the support of locals for tourism development. When all eleven items were combined as the overall tourism development index, participants were statistically significantly more supportive of Oregon tourism development. Participants were neutral on Oregon becoming a major tourism destination. Oregonians supported less dependence on tourism by not considering tourism as the main priority of the state. Participants supported the remainder of eight tourism development items. The top three development priorities were supporting tourism advertisement in Oregon, supporting tourism advertisement of Oregon in the U.S., and not limiting the outdoor recreation development.

The support for tourism development was also examined among different regions. While participants of the Central region showed a strong lack of support for tourism development, participants of other regions were supportive of tourism development with the Eastern region being the most supportive and the Southern region being the least supportive. However, it should be noted that there are no significant differences among the regions that supported tourism development.

Support for tourism development was also further analyzed by race. In the areas of attracting visitors, encouraging tourism development, advertising tourism internationally, becoming a major destination, and considering tourism beneficial, all respondents showed support for, except for Black/African American respondents, who showed opposition. Regarding the lack of support of almost all respondents for considering tourism as the primary priority, Black/African American respondents showed a stronger opposition compared to other respondents. Asian respondents and Hispanic/Latino respondents, however, were the only two groups that showed support for considering tourism as the primary priority and depending more on tourism. Also, in the areas of encouraging tourism development, establishing more tourism facilities, advertising tourism internationally, advertising tourism in the U.S., advertising tourism in Oregon, becoming a major destination, and considering tourism beneficial, Asian respondents showed significantly stronger support compared to all respondents combined. Hispanic/Latino respondents also supported establishing more tourism facilities more strongly compared to all respondents combined. For a full list of the support for tourism items, please see [*appendix 3*](#).

Visitors' Sentiments

Introduction

Visitors' sentiments allow the tourism industry to understand how visitors feel and what they say about a place. It can affect a destination's reputation and can help identify strengths and weaknesses for tourism managers. This section of the report presents a summary of the methodology used in the study, general demographics of the sample (composed by two distinct samples, one of Oregonian visitors and one of out of state visitors), and then moves on to the sentiment variables presented in the associated dashboard. The report firstly focuses on the evaluations of visitors' satisfaction with their travel experience, both overall and with specific items (e.g., scenic beauty). The next part of this section looks at visitor loyalty, a metric composed by two of the variables presented in the associated dashboard, namely likelihood to recommend (also measured as net promoter score) and likelihood to travel.

Methodology

The visitor sentiment data was collected using an online survey (fielded December 2021 – January 2022) by third-party public opinion polling companies, Destination Analysts and Engine Insights. After initial data cleaning, we ended up with a sample of 849 responses from Oregon residents and 802 responses from out of state visitors. To ensure accuracy of analysis, data was adjusted (weighted) to represent the visitation load of different regions. The number of day trips and number of nights spent in seven tourism regions for three consecutive years of 2018, 2019 and 2020 were utilized to calculate the weights for each region. The table below shows the average percentage of visitors in the seven regions of Oregon. This weight (DW) was created to weight visitor sentiment related indicators that are listed below (Likelihood to travel, Net Promoter Score, Satisfaction with visit experience). Demographics and general sample information were also weighted using the same weighting approach.

	Weights
Portland Metro	26.7%
Mt. Hood & Columbia River Gorge	4.0%
Eastern Oregon	5.9%
Southern Oregon	12.5%
Central Oregon	10.5%
Willamette Valley	20.4%
Oregon Coast	20.0%

Demographics – Out-of-state visitors

Majority (85%) of respondents identify as white, followed by 7% who identify as black or African American, 6% Hispanic/Latino or Latinx, and 4% as Asian. Half of respondents were aged between 35 and 54 (50%), with a quarter (24%) being 35 and under, 14% 65 and above, and the rest between 55 and 64.

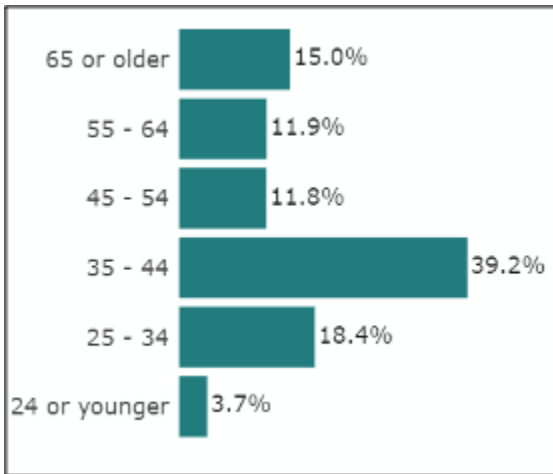


Chart 5: Age distribution

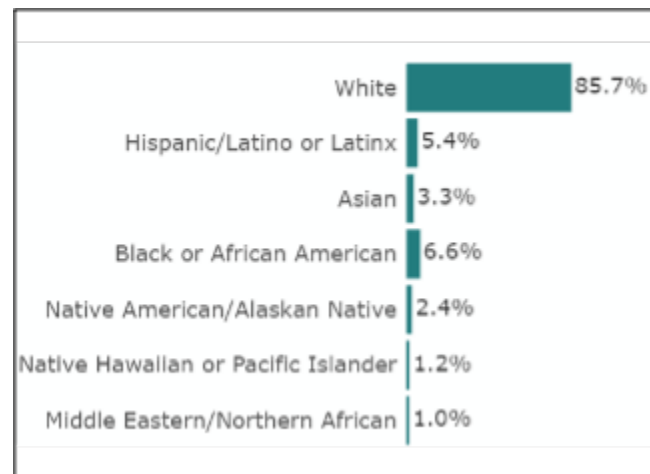


Chart 6: Self-identified racial background

Most respondents identified as male (58%) or female (41%), with only 1% identifying as genderqueer, and less than 1% as transgender and/or cisgender. 67% of respondents were married, 15% in a relationship, 8% partnered, and 3% were separated or widowed. 48% of respondents had a household income of between \$100,000 and \$199,999, 23% between \$50,000 and \$99,999, and 16% above \$200,000; only 11% of out of state visitors had a household income below \$50,000. California (15%) and Washington (13%) represent the biggest markets, followed by Texas (8%), Florida (8%) and New York (7%).

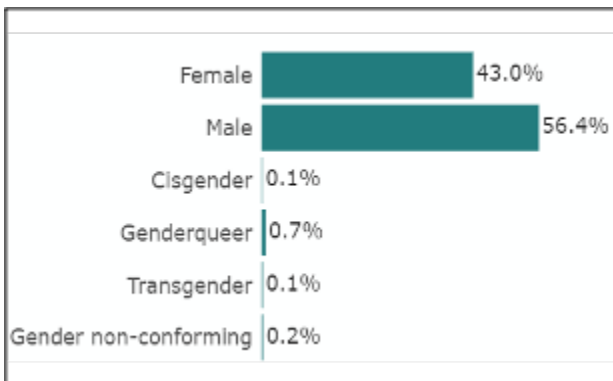


Chart 7: Self-identified gender

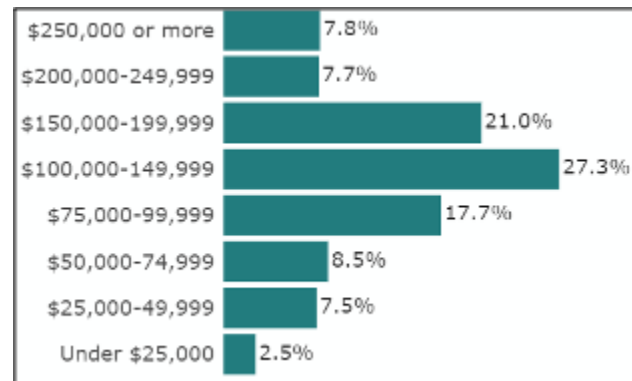


Chart 8: Annual household income

* Note: In state/Oregonian visitor respondents are same respondents as resident sentiment respondents, therefore, the demographics are only presented in the resident sentiments section above.

Visitor Satisfaction – Out-of-state-visitors

Eighteen items were utilized to measure the satisfaction of out of state visitors who had traveled to Oregon over the past two years. One of these items asked respondents about their overall satisfaction with the Oregon travel experience, resulting in an average score of 4.62 (out of 5). This section of the survey also asked respondents to rate their satisfaction with specific attributes of Oregon. The only item that obtained a score higher than 4.5 was Environmental Quality at 4.58. Other highly rated items were Scenic Beauty (4.39), Relaxing Environment/place

to unwind (4.21), and Local Food (4.21). The lowest rated satisfaction score was for accessibility to people with disabilities at 3.24. Other items with satisfaction scores lower than four were Tax Free Shopping (3.51), Family Friendly Activities (3.70), Arts, Historic and Cultural Heritage Experiences (3.70), and Safety/Crime Levels (3.99). For a full list of the visitor satisfaction items, please see appendix 4.

We also analyzed the satisfaction scores by race and based on the destination region of participants. Overall satisfaction with the travel experience by region is relatively even across all tourism regions with small differences, the lowest score being 4.55 (Eastern Oregon visitors) and the highest 4.73 (Mt. Hood/Columbia River Gorge visitors). The Overall Satisfaction for the rest of the regions was 4.57 (Central Oregon), 4.59 (Portland Region), 4.61 (Willamette Valley), 4.62 (Southern Oregon), and 4.70 (Oregon Coast). In terms of satisfaction with specific items, Scenic beauty and Outdoor recreation/ experiences stand out as high scoring items in most regions, rated at 4.32 and 4.40 by Central Oregon visitors respectively, 4.57 and 4.43 (Oregon Coast), 4.28 and 4.23 (Eastern), 4.53 and 4.41 (Mt Hood/Columbia River Gorge), 4.43 and 4.35 (Portland Region), 4.40 and 4.11(Southern Oregon), and 4.42 and 4.19 (Willamette Valley). No one item stands out as having a low rating across all regions, however each region appears to have their respective weakness in terms of satisfaction. Central Oregon's lowest score was 4.04 for accommodations/lodging options. The Coastal region, Mt Hood/Columbia River Gorge, Southern Oregon, and Willamette Valley had low scores in terms of accessibility to people with disabilities (3.89, 3.90, 3.96, and 3.81 respectively). Eastern Oregon had the lowest satisfaction with Environmental quality out of all the regions at 4.04. The Portland region had the lowest score in terms of Safety/Crime-levels at 3.95. Lastly, Willamette Valley had a low score in Walkability (3.95), and Affordability/value for the money (3.89).

Racial background breakout shows that visitors who identify as Middle Eastern/Northern African had the lowest overall satisfaction with their experience traveling Oregon, rated at an average of 4.00 (out of 5). This first group had the largest % of respondents rating their experience as "neutral" (3/5) at 36%. Most other groups had most of their respondents rate their experience as Satisfied (4/5) or Very Satisfied (5/5). The second lowest rating was by visitors of Asian background at 4.34, followed by Hispanic/Latino or Latinx (4.49), Black or African American (4.53), Native Hawaiian or Pacific Islander (4.62), Native American/Alaskan Native (4.63), and White (4.67).

Net Promoter Score (NPS) – Out-of-state-visitors

Using an approach known as Net Promoter Score (NPS), respondents were grouped into three categories based on the likelihood to recommend Oregon as a destination: Promoters (scores of 9-10), Passives (scores of 7-8), and detractors (scores of 0-6). Net Promoter Score is calculated by subtracting the total percentage of detractors from the total percentage of promoters (% Promoters - % Detractors). Out of state visitors are quite likely to recommend Oregon as a destination, with a Net Promoter Score of 54 (from a range of -100 to 100). An NPS of 54 is considered excellent. In this case, 65% of respondents will act as promoters, with a likelihood to recommend of 9 or 10 (out of 10), while only 11% of respondents will act as detractors (likelihood to recommend of 0-6). 24% of respondents are considered passives, which means that they will act neither as detractors nor promoters (likelihood to recommend of 7-8).

The data was also analyzed by region and racial background. Out of state visitors whose main region visited was Central Oregon had a Net Promoter Score of 54, Eastern Oregon visitors 62, Mt Hood and Columbia River Gorge was 61, Oregon Coast had 55, Portland Region 52, Southern Oregon 52 and Willamette Valley 55. We can see that the visitors of different regions had relatively similar NPS values.

In terms of racial background, people who identified as Native Hawaiian or Pacific Islander had the highest NPS at 69, followed by Native American/Alaskan Native at 63, White at 60, Hispanic/Latino or Latinx at 54, Middle Eastern/North African at 53, Black or African American at 51, and the lowest score was assigned by Asian visitors at 37. Please note that some of the breakout groups had small sample sizes (as small as 13 in the case of Middle Eastern/North African visitors). As more data comes in, we will be able to provide more accurate measurements of how people of different origins feel about their travel experience in Oregon.

Likelihood to Travel/Revisit – Out-of-state-visitors

Respondents' average intention to revisit Oregon was 4.35 (out of 5). When we looked at the intention to re-visit by the previous region visited, responses varied from 4.16 (Willamette Valley) to 4.45 (Central Oregon). For visitors of the rest of the regions the average likelihood to revisit was 4.21 (Oregon Coast), 4.34 (Eastern Oregon), 4.34 (Portland Region), 4.37 (Mt. Hood/Columbia River Gorge), and 4.39 (Southern Oregon). However, there was no evidence that these differences are statistically significant.

This data was also analyzed based on respondent's racial background. The visitors least likely to revisit were those who identified as Middle Eastern/North African at 3.27 (out of 5), followed by Native Hawaiian or Pacific Islander respondents at 3.31. Respondents who identify as Asian expressed a likelihood to revisit of 3.84, similar to the 3.92 expressed by Native American/Alaskan Native group. Lastly, respondents who identified as Black or African American rated their likelihood to revisit at 4.11, Hispanic/Latino(a) or Latinxs at 4.19, and White at 4.39. All these averages are significantly different from the overall average of 4.35, except for Hispanic group. Out of the groups with the lowest ratings (Middle Eastern/North African and Native Hawaiian or Pacific Islander), none of them expressed that they would be extremely like to return, meaning that none of the respondents rated their likelihood to return as 5 (out of 5).

Visitor Satisfaction – In-State (Oregonian) visitors

18 items were utilized to measure the satisfaction of Oregonians who had traveled within the state over the past two years. The highest level of satisfaction was reported for scenic beauty (average of 4.51 out of 5) that was rated significantly higher than the rest of the items. The other items on top of the list are as follows: tax free shopping (4.27), a place to unwind and relax (4.22), and environmental quality (4.20). At the bottom of the list, we have items such as inclusive and welcoming atmosphere (3.71), and crowding (3.70). Also, a one-item question was employed to measure the overall satisfaction which resulted in the average satisfaction of 4.42 that was not significantly different in various regions of Oregon. For a full list of the visitor satisfaction items, please see [appendix 4](#).

When looking at the satisfaction score by racial background, Asian respondents showed a higher overall satisfaction compared to all respondents combined, while Black/African American respondents showed a lower overall satisfaction. Also, Black/African American respondents indicated lower levels of satisfaction compared to all respondents combined in tax free shopping, and weather. On the other hand, Asian respondents disclosed higher levels of satisfaction in accessibility for people with disability, inclusive and welcoming atmosphere, environmental quality, weather, and safety and security. Native American and Alaskan Native respondents, unlike Asian respondents, denoted lower satisfaction levels compared to all other respondents with respect to inclusive and welcoming atmosphere. Native American and Alaskan Native respondents also showed higher levels of satisfaction with crowding compared to the average of all other respondents. Finally, Hispanic/Latino respondents scored lower in satisfaction level in scenic beauty, and tax-free shopping.

Net promoter score – Oregonian visitors

Using an approach known as Net Promoter Score (NPS), respondents were grouped into three categories based on the likelihood to recommend Oregon as a destination: Promoters (scores of 9-10), Passives (scores of 7-8), and detractors (scores of 0-6). Net Promoter Score is calculated by subtracting the total percentage of detractors from the total percentage of promoters (% Promoters - % Detractors). Based on the calculations, promoters were the largest group of visitors, comprising almost half of the respondents (46.9%). The other two groups of passives (25.5%) and detractors (27.6%) both represented about a quarter of the respondents respectively. This results in a NPS of 19 which is considered good due to there being more promoters than detractors.

The NPS scores were different based on regions. Portland region was the only region that had more detractor respondents than promoters, with an NPS of -1, followed by Eastern region at 8, Willamette Valley (10), Central Oregon (22), Southern Oregon (33), Mt. Hood & Columbia River Gorge (39), and Oregon Coast (46).

In terms of racial breakdown of NPS, people identifying as Black/African American (-12.9) and Hispanic/Latino respondents (-5.1) had the lowest NPS scores. People identifying as Asian (8.6), White (22.8), and Native American or Alaskan Native (26.2) all had positive NPS scores.

Likelihood to travel – Oregonian visitors

Regarding trip repeat likelihood, the average score of 4.47 (out of a maximum of 5) suggests a strong likelihood. For visitors who visited the different regions, no significant differences were found in respect to their intent to revisit Oregon. Looking into various self-identified racial background groups, however, showed that Hispanic/Latino respondents were less likely to repeat their trip compared to all respondents combined.

Appendix

APPENDIX 1: POSITIVE TOURISM IMPACTS

Please indicate your level of agreement with the **positive impacts** of tourism (as defined on the previous page) in Oregon and for Oregonians.

- 01 Strongly Disagree (1)
- 02 Disagree (2)
- 03 Slightly Disagree (3)
- 04 Neither Agree nor Disagree (4)
- 05 Slightly Agree (5)
- 06 Agree (6)
- 07 Strongly Agree (7)

Tourism results in.... **[Select one answer for each]**

[Economic Impacts]

- A. Improved local economic conditions
- B. Improved standard of living
- C. Increased income levels
- D. Increased investments (e.g., local businesses, out of state investments)
- E. Increased tax revenues
- F. Increased shopping facilities
- G. Increased trade for local businesses
- H. Increased employment opportunities
- I. Increased economic diversity

[Environmental Impacts]

- J. Improved condition of the state and national parks
- K. Increased conservation and protection of natural/wildlife habitat
- L. Increased conservation and protection of manmade environment
- M. Better quality of urban planning
- N. Improved opportunities for sustainable development
- O. Increased level of urbanization
- P. Improved physical appearance of cities

[Cultural Impacts]

- Q. Increased quality of recreational and entertainment opportunities
- R. Improved preservation of cultural identity and local culture
- S. Improved preservation of historic buildings and monuments
- T. Encouragement of cultural exchange
- U. Increased demand for cultural events
- V. Encouragement of cultural activities' varieties such as crafts, arts, music, festivals

[Social Impacts]

- W. Enhanced community pride
- X. Reinforced community spirit
- Y. Preserving peace and tranquillity
- Z. Increased safety
- AA. Improved city services such utilities, policing, hospitals, and firefighting
- BB. Enhanced public transportation
- CC. Improved quality of public infrastructure (e.g., bathrooms, parking)
- DD. Improved quality of superstructure (e.g., hotels, sporting facilities, monuments, seating area)
- EE. Improved zoning and land use
- FF. Increased volunteering opportunities
- GG. Higher levels of excitement in the host community
- HH. Enhanced media visibility
- II. Improved destination image
- JJ. National and international recognition
- KK. Increased local's social awareness
- LL. Accelerated community growth
- MM. Increased quality of life
- NN. Increased leisure facilities
- OO. Better sanitation facilities (e.g., public restrooms)
- PP. Increased education investments
- QQ. Increased housing options

APPENDIX 2: NEGATIVE TOURISM IMPACTS

Please indicate your level of agreement with the **negative impacts** of tourism (as defined above) in Oregon and for Oregonians.

- 01 Strongly Disagree (1)
- 02 Disagree (2)
- 03 Slightly Disagree (3)
- 04 Neither Agree nor Disagree (4)
- 05 Slightly Agree (5)
- 06 Agree (6)
- 07 Strongly Agree (7)

Tourism results in... **[Select one answer for each]**

[Economic Impacts]

- A. Unnecessary excessive local government spending
- B. Increased price of real estate
- C. Decreased affordable housing opportunities
- D. Inflation and higher product prices
- E. Shortage of different products/goods

[Environmental impacts]

- F. Increased water pollution
- G. Disruption of natural habitat
- H. Disturbance of landscape with unsustainable constructions
- I. Increased amount of litter and waste
- J. Increased air pollution
- K. Increased noise levels
- L. Increased risk of wildfires
- M. Increased environmental damage

[Cultural impacts]

- N. Conflicts and antagonism between visitors and residents
- O. Changing the local culture (i.e., , making it inauthentic)
- P. Increased commoditization of the local culture
- Q. Increased disturbance of the way of life/lifestyle of locals
- R. Increased intrusions by visitors

[Social Impacts]

- S. Overcrowding
- T. Gentrification
- U. Traffic congestion
- V.I increased problems for using public transportations
- W. Increased damage to infrastructure
- X. Increased crime rate
- Y. Increased alcohol abuse
- Z. Increased drug abuse
- AA. Increased prostitution
- BB. Increased risk of terrorism
- CC. Decreased security
- DD. Decreased safety
- EE. Increased disturbance of routine life
- FF. Increased psychological anxieties
- GG. Higher rate of outbreaks (e.g., pandemics, epidemics, other infectious diseases)
- HH. Overloaded local services (e.g., utilities, policing, hospitals, firefighting, search and rescue)

APPENDIX 3: SUPPORT FOR TOURISM DEVELOPMENT

What do you think about **tourism development** in Oregon? Please read each statement and complete it by using the slider scales below to plot how closely you agree to each statement. **[Please use the slider to indicate your preference.]**

Oregon should...


A.	Attract fewer visitors	Attract more visitors
B.	Discourage tourism development	Encourage tourism development
C.	Not consider tourism as the primary priority	Consider tourism as the primary priority
D.	Limit outdoor recreation development	Not limit outdoor recreation development
E.	Not establish more tourism facilities	Establish more tourism facilities
F.	Not support advertising tourism internationally	Support advertising tourism internationally
G.	Not support advertising tourism in the US	Support advertising tourism in the US
H.	Not support advertising tourism in Oregon	Support advertising tourism in Oregon
I.	Avoid being a major destination	Become a major destination
J.	Consider tourism detrimental	Consider tourism beneficial
K.	Depend less on tourism	Depend more on tourism

APPENDIX 4: VISITOR SATISFACTION

33. How satisfied are you with each of the following about your trip experience within Oregon?
Please use the scale from “Very satisfied” to “Very unsatisfied”

	Very satisfied	Satisfied	Neutral	Unsatisfied	Very unsatisfied	N/A
Relaxing environment/a place to unwind	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Scenic beauty	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accessibility to people with disabilities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Affordability/value for the money	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Outdoor recreation and experiences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Family friendly activities	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Arts, historic and cultural heritage experiences	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Accommodations/lodging options	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Inclusive and welcoming atmosphere	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environmental quality (e.g. air, cleanliness)	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tourism products & services	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Local food & drinks	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Weather	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Tax-free shopping	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
COVID-19 protocols	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Walkability	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Environmental sustainability practices	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Number of people/crowd size	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Safety/crime-levels	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Quality of service/hospitality	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>



TRAVEL  OREGON

OREGON TOURISM COMMISSION
319 SW Washington Street, Suite 700
Portland, Oregon 97204
971.717.6205
traveloregon.com
industry.traveloregon.com

DISCOVER NEWPORT OREGON