



Travel Oregon 2024 Tourism Workforce Sentiment

Research Objectives & Methodology 3

Topline Findings 6

Detailed Findings:

- Life in Oregon 11
- Tourism Employment 17
- Tourism Perceptions 22
 - Economic 30
 - Environmental 33
 - Cultural 36
 - Social 39
- Workforce Breakouts 42
 - Tourism Business Owners 43
 - Current Tourism Workers 59
- Appendix – Regional Breakouts 75

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’s tourism workforce’s perceptions of tourism and the potential impact on their quality of life. The study measures:

- Perceptions of tourism among Oregon’s Tourism Workforce
- 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. **Of these, 1,800 responses were collected from residents who currently work for or own a business related to tourism.** The results were weighted to Oregon’s demographics, population size, and share of the statewide tourism workforce for each region.

The following total number of responses were collected from each region:

- Oregon Coast: 466 responses
- Central Oregon: 251 responses
- Portland Region: 401 responses
- Eastern Oregon: 152 responses
- Willamette Valley: 281 responses
- Mt. Hood/Columbia River Gorge (CRG): 52 responses
- Southern Oregon: 197 responses



Key Terms

Tourism Workforce – current residents of Oregon who currently own a business that services Oregon’s tourism industry (including owning a vacation rental) or are currently employed by a business/company that interacts with Oregon’s tourists.

Tourism Business Owners – current residents of Oregon who currently own a business that services Oregon’s tourism industry (including owning a vacation rental).

Current Tourism Workers – current residents of Oregon who are currently employed by a business/company that interacts with Oregon’s tourists.



Topline Findings

Oregon Tourism Workforce Demographic Snapshot

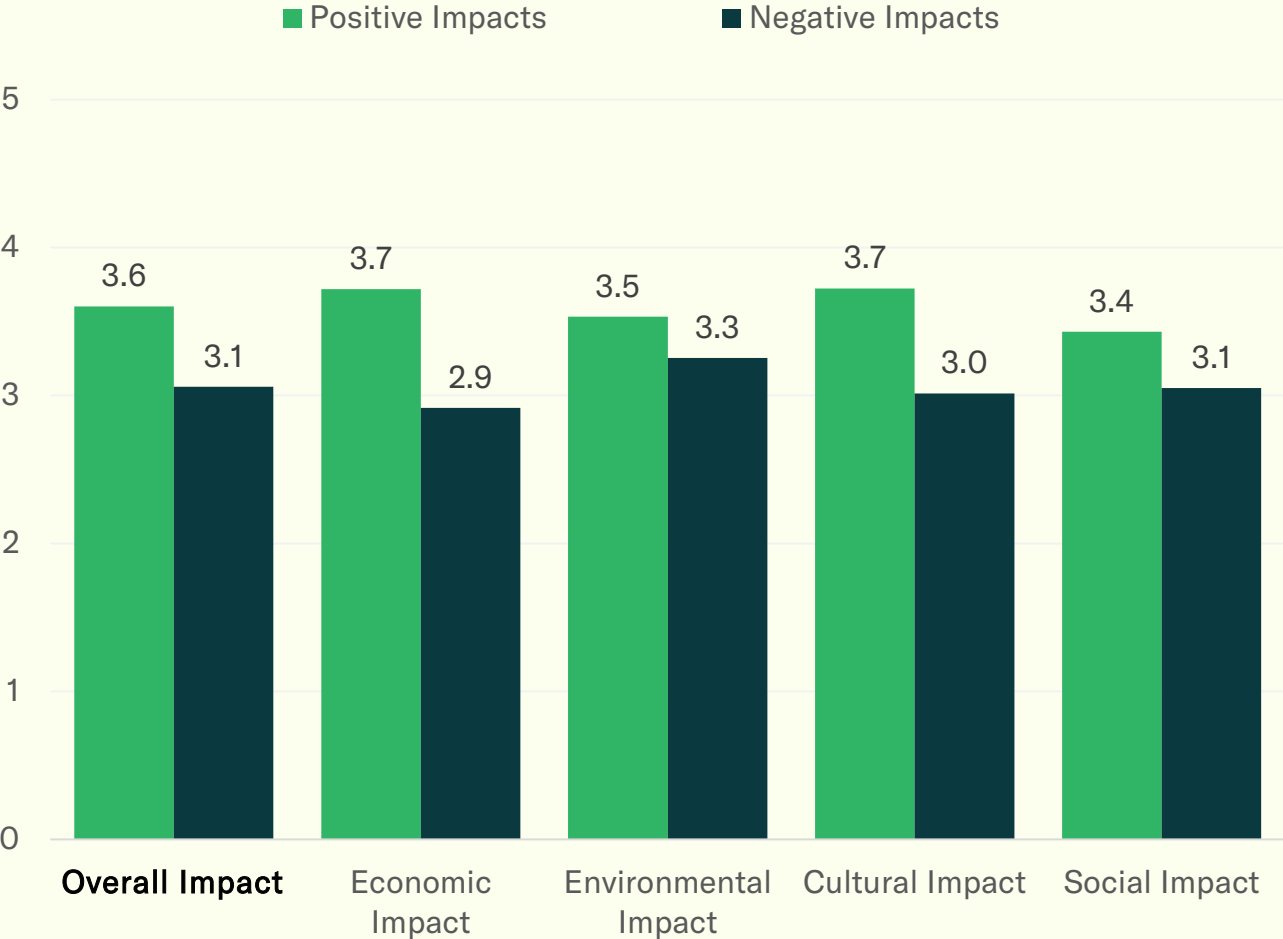
Total residents surveyed:	1,800
Average age:	46 years old
Average household income:	\$92,950
College graduate:	61%
Married/domestic partnership:	65%
Have children in household:	34%
Gender*	
• Female:	64%
• Male:	34%
• Non-binary/Other:	1%
Ethnicity*	
• White/Caucasian:	87%
• Hispanic/Latino:	6%
• Asian, Native Hawaiian, or Pacific Islander:	4%
• Native American, Alaskan Native:	4%
• African American/Black:	4%
• Other:	2%
LGBTQ+:	16%
Accessibility needs in household:	19%

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



Topline Findings

Index of Oregon Tourism Workforce's 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, among Oregon’s tourism workforce, perceptions of tourism’s positive impacts significantly outweigh the negative impacts, particularly for the economic dimension. The tourism workforce indexed higher for positive impacts across all dimensions, though the gap between positive/negative impacts was narrowest for tourism’s environmental impact (3.5 vs. 3.3, a 0.2-point gap). The highest positive scores were for the economic (3.7) and cultural (3.7) dimensions, while the social dimension had the lowest positive score at 3.4.

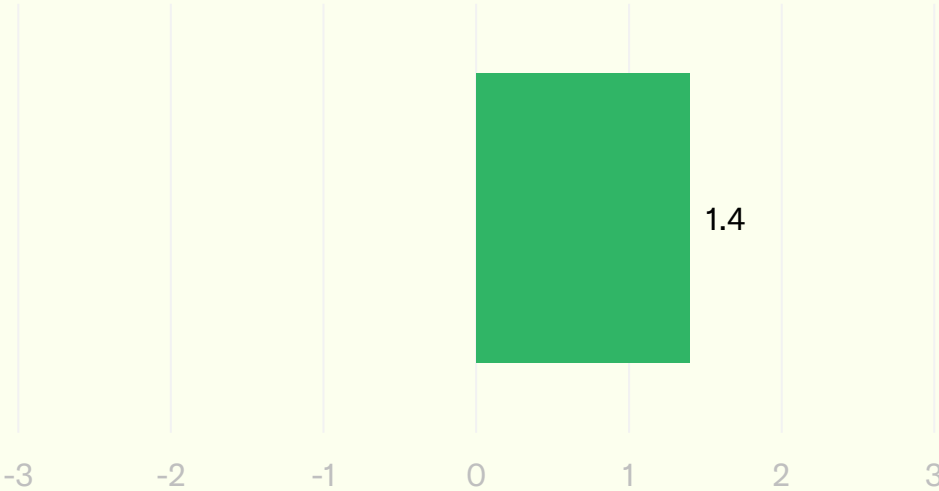
Base: Oregon tourism workforce. 1,800 completed surveys.

Topline Findings

In terms of overall support for tourism, calculated as the mean score across 10 statements, Oregon’s tourism workforce scored a 1.4 out of a highest possible score of 3, with -3 being the lowest possible score. Among the regions, support for tourism among the tourism workforce is strongest in Southern Oregon (1.6) and weakest in the Oregon Coast (0.9) and Central Oregon (0.9). This aligns with other findings in this study, which indicate that the Oregon Coast and Central Oregon are feeling the heaviest burdens of tourism’s negative impacts.

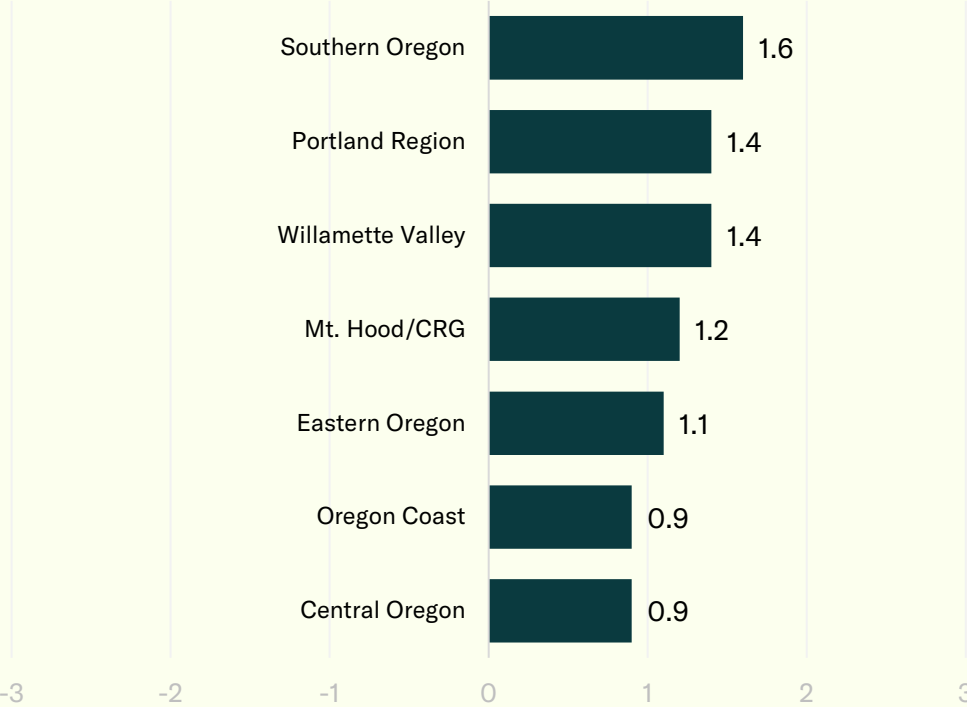
Overall Support for Tourism Mean Score*

Total Workforce’s Overall Support for Tourism



*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 27 for detailed scores for each included statement.

Overall Support for Tourism Mean Score by Tourism Region



Key Insights

1. The tourism workforce is much more likely to recognize tourism's positive impacts, though environmental and social concerns temper its overall sentiment.

The tourism workforce indexed higher for positive impacts than negative impacts across all four tourism dimensions, though the gap between positive/negative impacts was narrowest for tourism's environmental impact (3.5 vs. 3.3, a 0.2-point gap). The highest positive scores were for the economic (3.7) and cultural (3.7) dimensions, while the social dimension had the lowest positive score at 3.4. These sentiments were echoed in the areas where residents in the tourism workforce perceive the biggest benefits ("*Tourism provides an opportunity for local business growth, increased economic revenue, and historic renovations*"), as well as the biggest drawbacks of tourism ("*[Tourists] don't obey the rules. They don't respect the environment*").

Notably, the tourism workforce in the Oregon Coast reported the lowest positive scores across all dimensions, followed by Eastern and Central Oregon. The highest positive scores were reported by Southern Oregon followed distantly by the Portland Region and Willamette Valley. The inverse was true for the negative scores, with the exception of the Portland Region, which scored slightly higher than the overall tourism workforce for negative impacts in the economic and cultural dimensions.

2. Oregon's tourism workforce has a high perceived quality of life and is largely optimistic about its future.

Statewide, the score for perceived quality of life among the tourism workforce sums to 18.3 out of a possible 25, which slightly outpaces the overall total for all residents surveyed (18.1). Central Oregon's tourism workforce outpaced the statewide score slightly (18.6), while the tourism workforces in Eastern Oregon (17.6), Portland Region (17.7) and Willamette Valley (17.7) scored the lowest.

3. Oregon's tourism workforce has notably higher agreement levels around tourism's positive personal impacts compared to overall residents.

Nearly 7 in 10 of the state's tourism workforce said they often visit local tourism businesses (69% vs. 58% of overall residents), and the same share agree that they like having tourists in their area (69% vs. 50% of overall residents). Additionally, 65% agree that their personal income and livelihood are supported by tourism spending. Perceptions of the negative personal impacts of tourism mirrored that of total residents.

4. Likelihood to recommend is significantly higher among Oregon's tourism workforce.

Most of Oregon's tourism workforce are promoters of their local community as a tourism destination (52% scored a 9 or 10 on a 0- to 10-point scale). When subtracting the detractors (those who scored a 6 or lower) from the promoters, the statewide tourism workforce's likelihood-to-recommend score is 28, compared to the overall resident score of -2.

5. Oregon's tourism workforce supports promoting and developing the industry but balks at becoming too dependent on tourism.

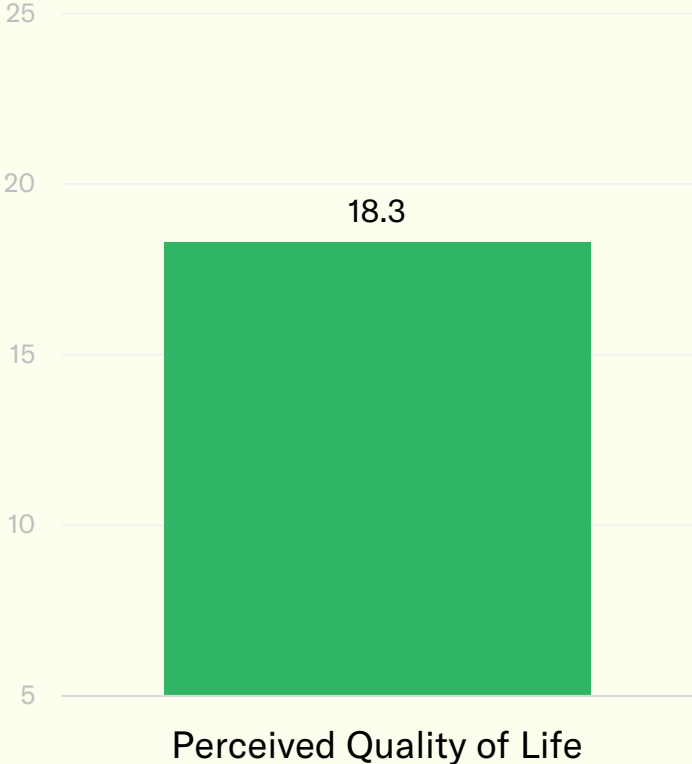
In terms of overall support for tourism, calculated as the mean score across all 10 statements shown below, Oregon's tourism workforce scored a 1.4 out of a highest possible score of 3, with -3 being the lowest possible score. While the majority of Oregon's tourism workforce wants to promote the state and become a major destination, less than half want to depend more on tourism.

Detailed Findings: Life in Oregon

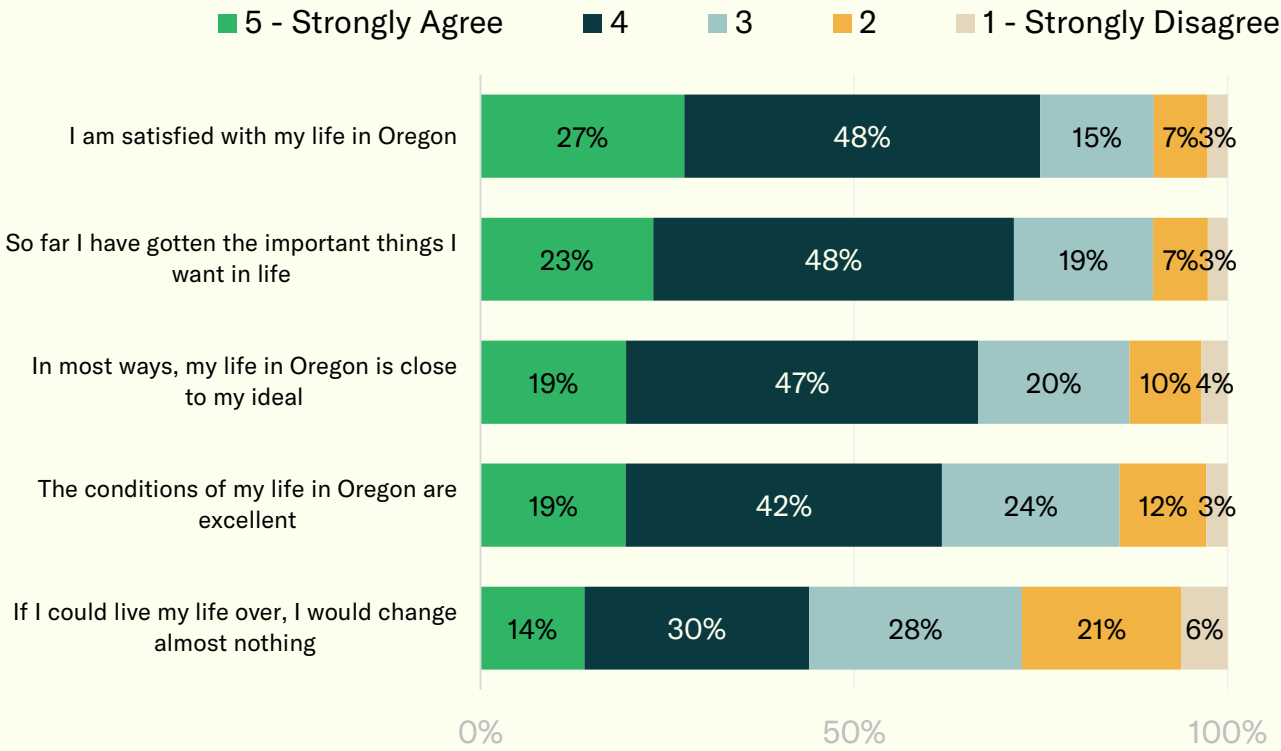
Oregon's tourism workforce has a high perceived quality of life.

Statewide, the score for perceived quality of life among the tourism workforce sums to 18.3 out of a possible 25, which slightly outpaces the overall total for all residents surveyed (18.1). Three in four residents in the tourism workforce are satisfied with their life in Oregon (75% agree or strongly agree), while a healthy 71% feel they have gotten the important things they want in life. Two-thirds agree that their life in Oregon is close to ideal (67%), and nearly as many agree that the conditions of their life in Oregon are excellent (62%).

Total Oregon Tourism Workforce's Score*



Perceived Quality-of-Life Statements Included in Score



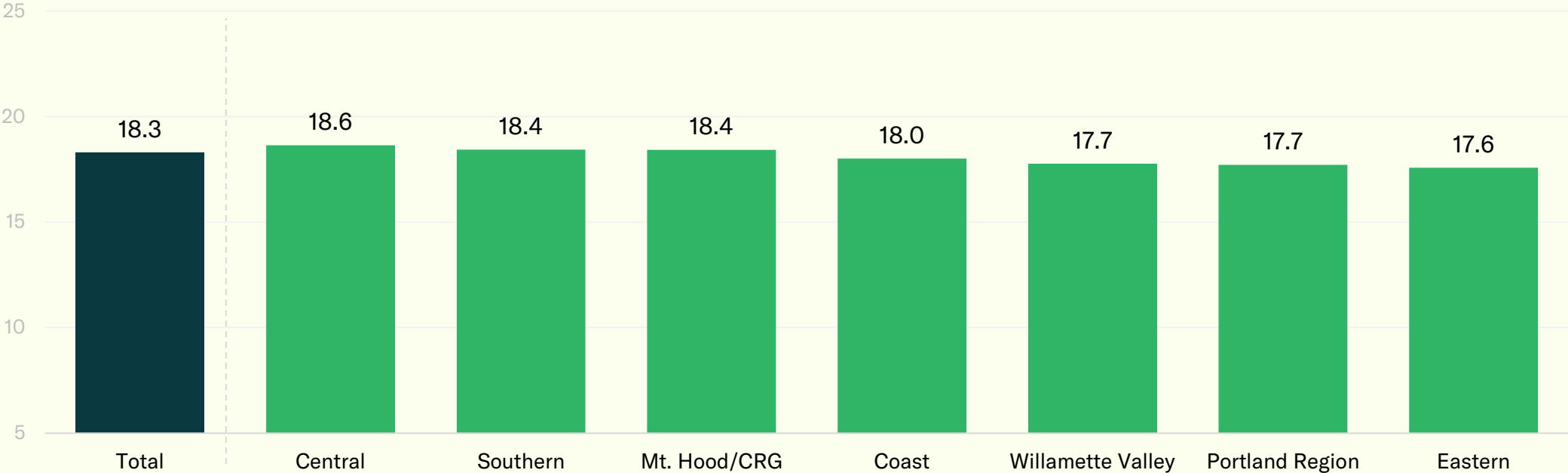
*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 5 (extremely dissatisfied) and a maximum possible score of 25 (extremely satisfied).

Note: Percentages may not sum to 100% due to rounding.
 Question: Please rate your level of agreement with the following statements.
 Base: Oregon tourism workforce. 1,800 completed surveys.

In terms of perceived quality of life, there is minimal deviation from the statewide score among the tourism regions.

Central Oregon's tourism workforce outpaced the statewide score slightly (18.6), while the tourism workforce in Eastern Oregon (17.6), Portland Region (17.7) and Willamette Valley (17.7) scored the lowest. Among those three regions, this slightly more negatively perceived quality of life score is largely driven by lower agreement rates around having gotten the most important things they want in life and feeling their life in Oregon is close to their ideal. While a majority still agree with those statements, their overall share was significantly lower than the statewide average.

Perceived Quality of Life Score* – By Tourism Region



*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).

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

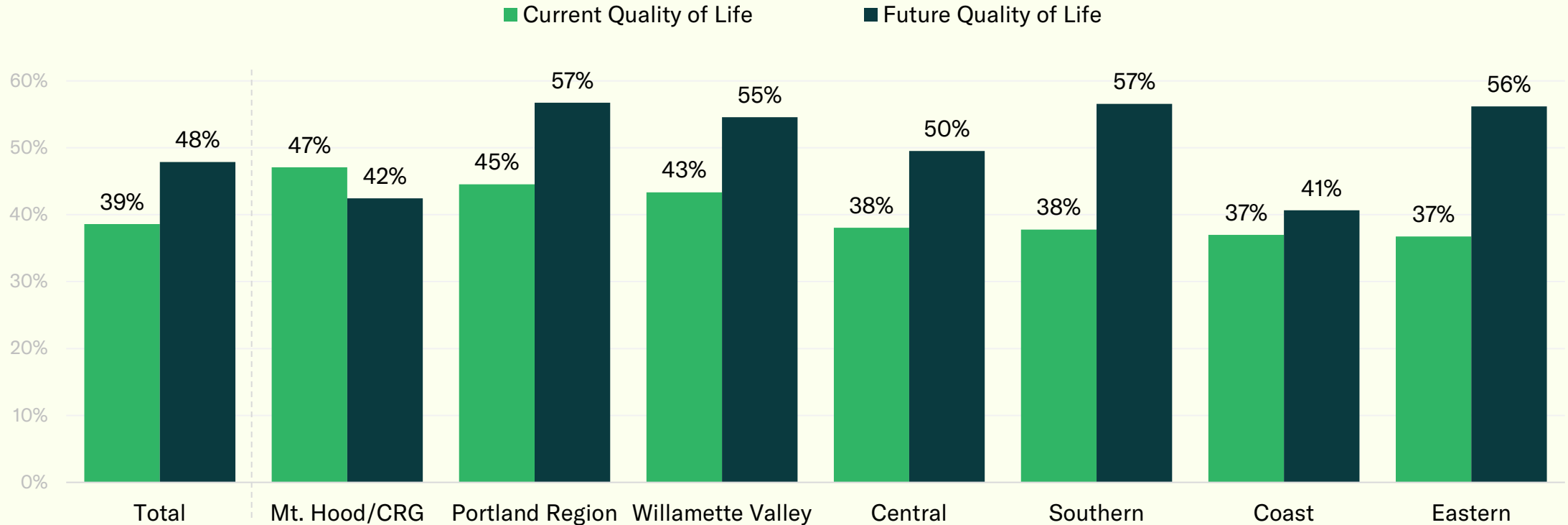
Base: Oregon tourism workforce. 1,800 completed surveys.

With some exceptions, the majority of the tourism workforces across most Oregon regions are optimistic about their future quality of life.

Nearly 4 in 10 residents in Oregon's tourism workforce feel that its current quality of life has improved from a year ago (39%), and nearly half (48%) expect their quality of life to improve in the next year. Looking at regional differences, while Mt. Hood/CRG's tourism workforce had the highest share of respondents who said their current quality of life has improved, it is the only region to report a comparatively lower share that expects improvement in the future (42%). Excepting Mt. Hood/CRG (42%), Coast (41%), and Central (50%) regions, more than half of the tourism workforce across the Oregon regions anticipates their future quality of life to be better.

Quality of Life – By Tourism Region

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



Question 1: Compared to one year ago, how would you rate your personal quality of life in Oregon?
Question 2: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?

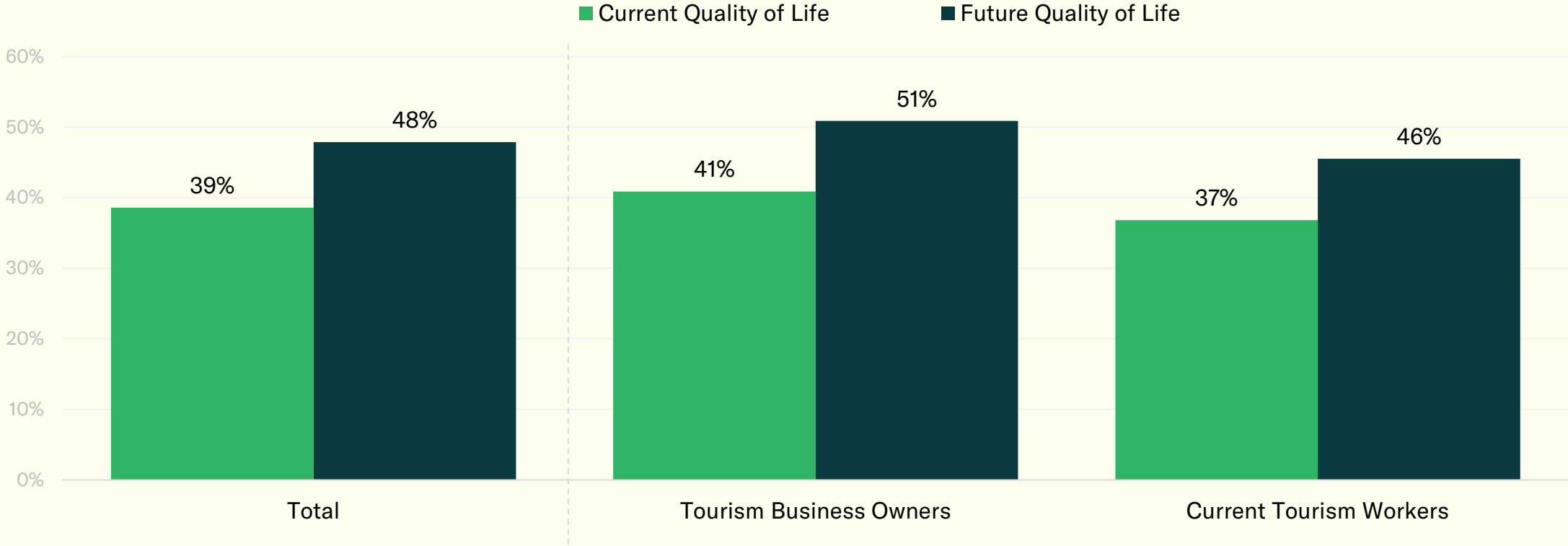
Base: Oregon tourism workforce. 1,800 completed surveys.

Tourism business owners have an overall more positive assessment of their quality of life compared to current tourism workers.

Just over half (51%) of tourism business owners expect that their future quality of life will be somewhat or much better a year from now, compared to less than half (46%) of current tourism workers. In a similar vein, current tourism workers are also less likely to say that their current quality of life is an improvement over a year ago (37% vs. 41% of tourism business owners).

Quality of Life – By Workforce Breakouts

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



Question 1: Compared to one year ago, how would you rate your personal quality of life in Oregon?
Question 2: Thinking one year ahead, how do you expect your personal quality of life to change in Oregon?

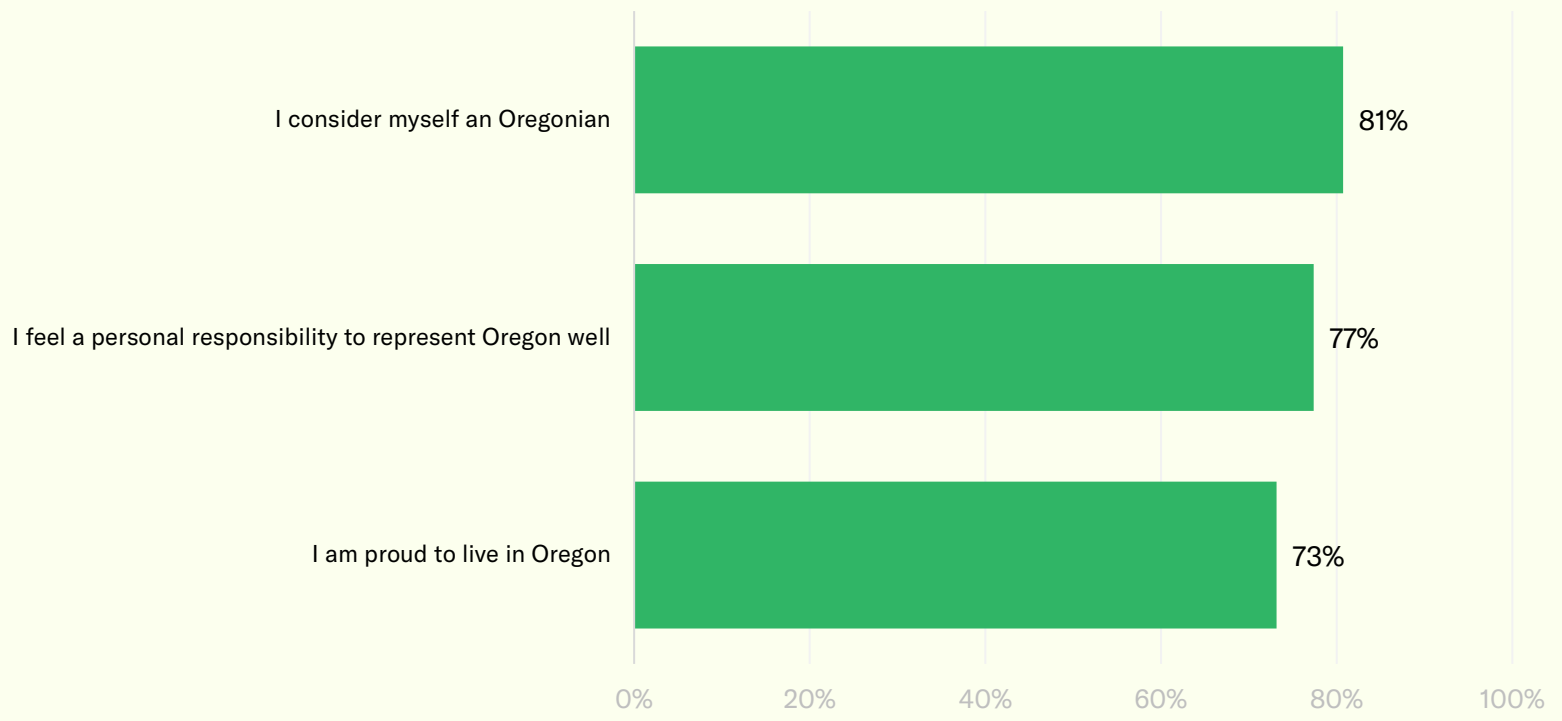
Base: Oregon tourism workforce. 1,800 completed surveys.

Seven in 10 residents in the Oregon tourism workforce feel pride in their community.

The majority of the state’s tourism workforce identifies with being an Oregonian (81%), feels a personal responsibility to represent Oregon well (77%), and are proud to live in Oregon (73%). While there was minimal difference across regions in terms of identifying Oregonians, there was some variation in the share of those who feel personally responsible for representing the state well and pride about living in Oregon. For the former, Southern Oregon’s tourism workforce (83%) outpaced other regions, while Willamette Valley (69%) reported the lowest share of those who agreed. For the latter, Central Oregon’s tourism workforce (78%) is most likely to agree, while Eastern (67%) and Portland Region (69%) ranked lowest.

Perceptions of Personal Life in Oregon

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



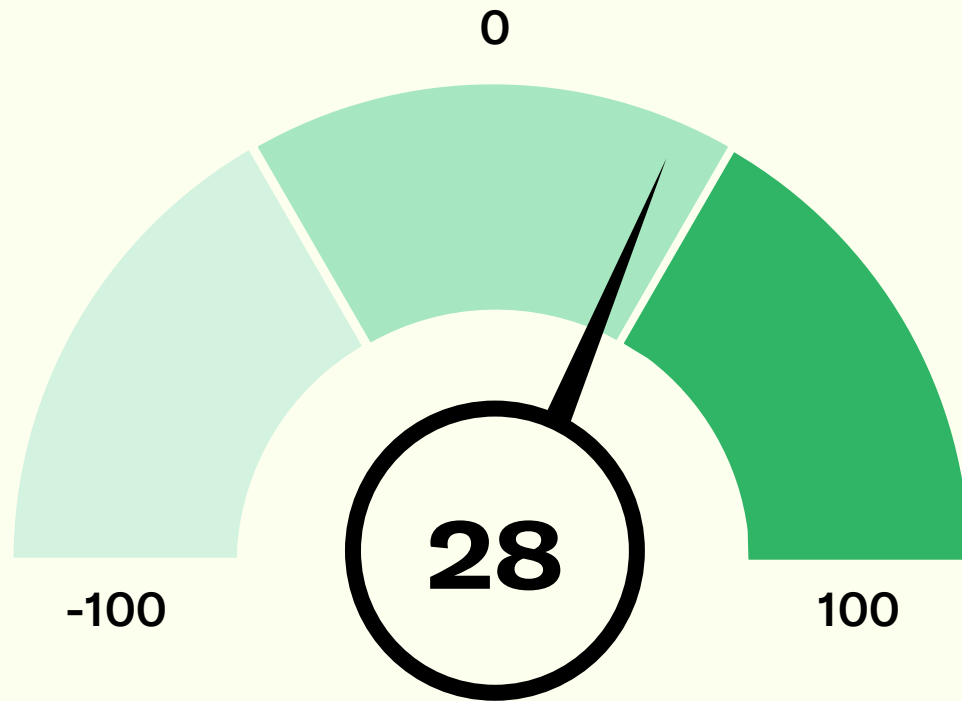
Question: Please rate your level of agreement with the following statements.

Base: Oregon tourism workforce. 1,800 completed surveys.

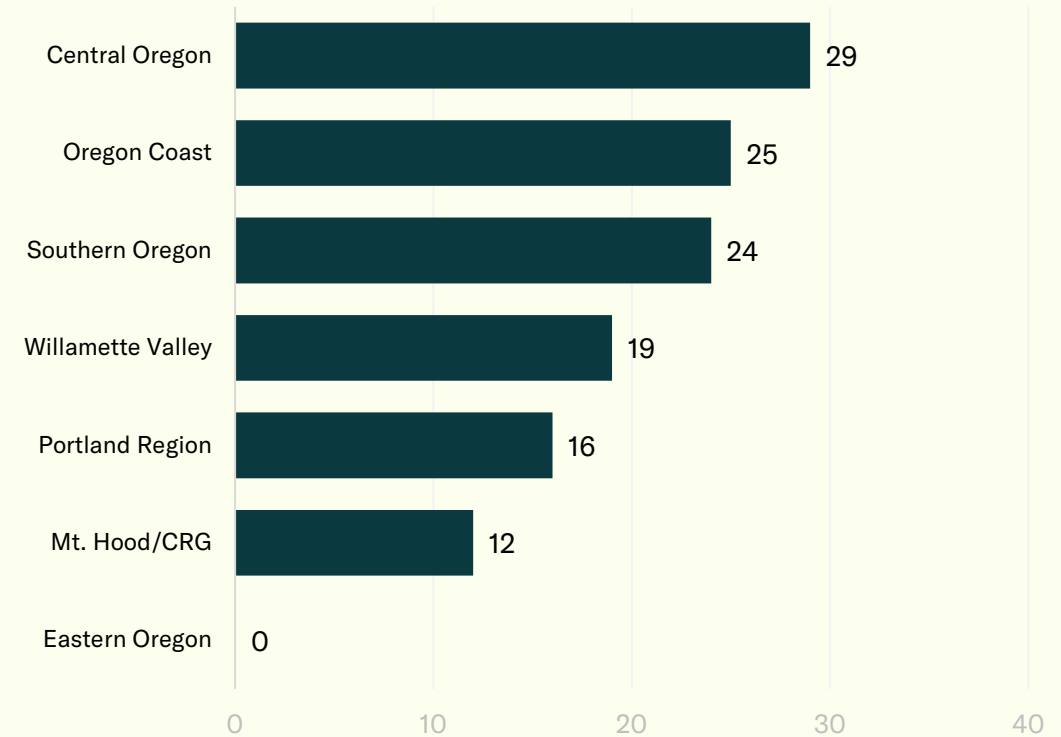
Likelihood to recommend is significantly higher among Oregon's tourism workforce.

More than half of Oregon's tourism workforce are promoters of their local community as a tourism destination (52% scored a 9 or 10 on a 0- to 10-point scale). When subtracting the detractors (those in the tourism workforce 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 28, while for overall residents, the likelihood-to-recommend score was -2. All regions' tourism workforces' likelihood-to-recommend scores outpaced the overall state resident score, though Eastern Oregon posted a notably lower score of 0.

Likelihood to Recommend Local Community as a Tourism Destination



Likelihood to Recommend – By Tourism Region



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

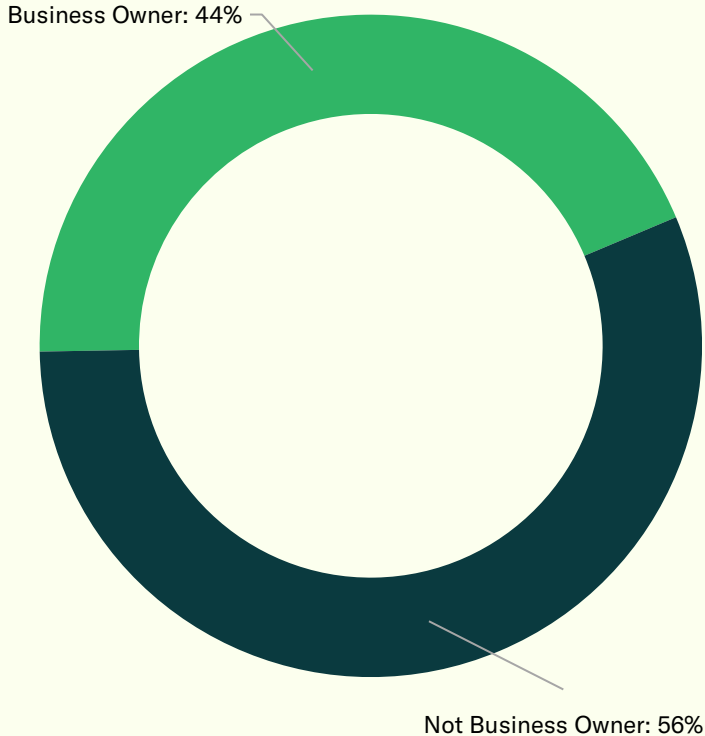
Base: Oregon tourism workforce. 1,800 completed surveys.

Detailed Findings: Tourism Employment

Of the statewide tourism workforce surveyed, just under half own a tourism-related business.

Tourism business owners make up a sizable share of survey respondents (44%). Of those tourism businesses owned, the largest share is comprised of vacation rentals (28%), followed distantly by restaurants (13%), attractions/activities (12%), and retail/shopping (11%).

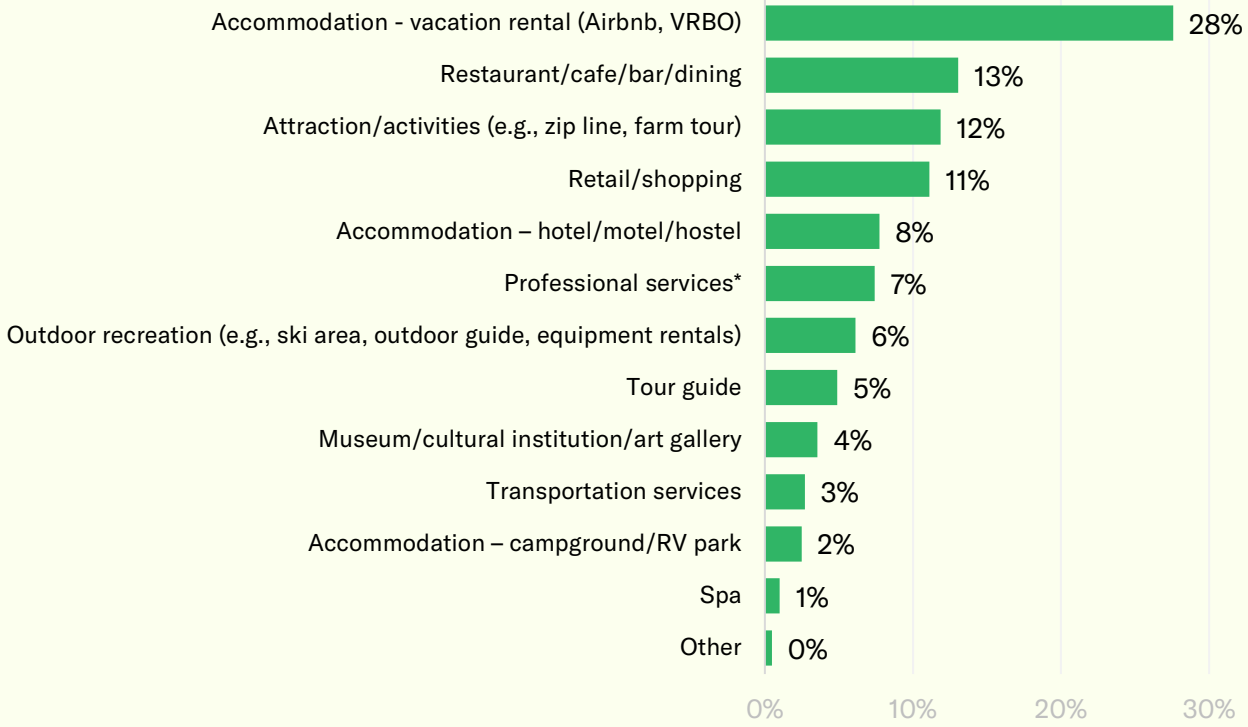
Tourism-Industry Business Owners



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

Base: Oregon tourism workforce. 1,800 completed surveys.

Type of Business Owned



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

Question: Which of the following best describes your business?

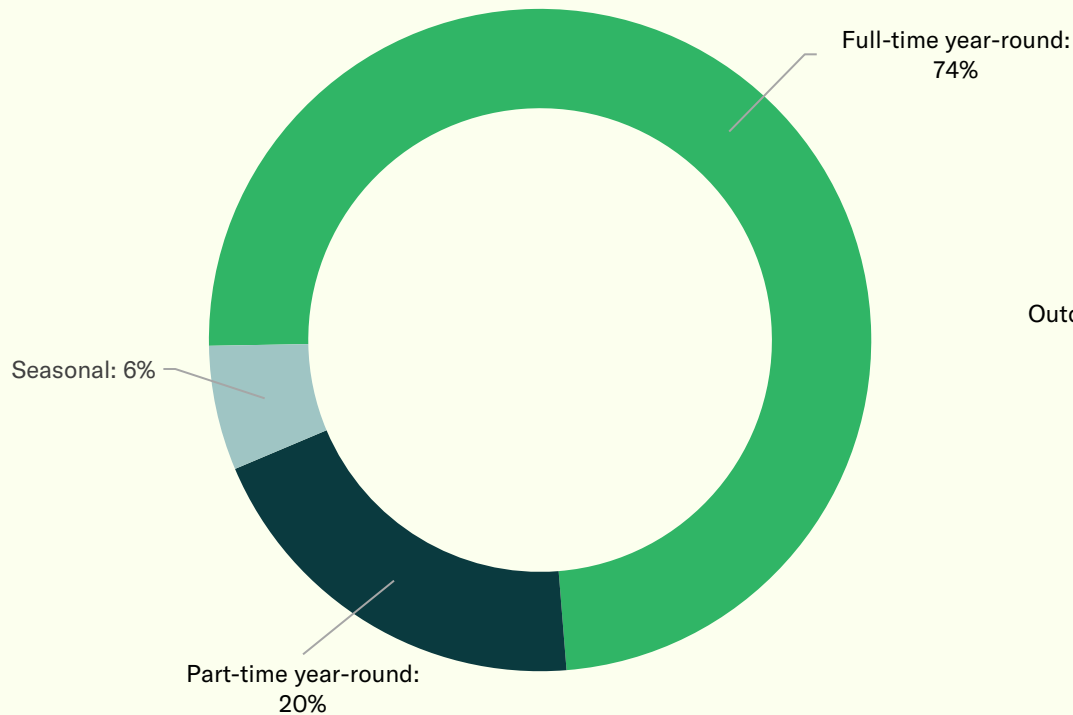
Base: Oregon residents who own a business that serves the tourism industry. 779 completed surveys.

*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, real estate, and other businesses that serve the needs of tourists outside of the hospitality industry (i.e., legal assistance, emergency/health services, tourism advocacy, etc.).

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* (19%), attractions/activities (13%), retail/shopping (12%), and restaurants (12%).

Current Employees: Employment Type



Question: Are you currently employed...?

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

Place of Employment



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

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

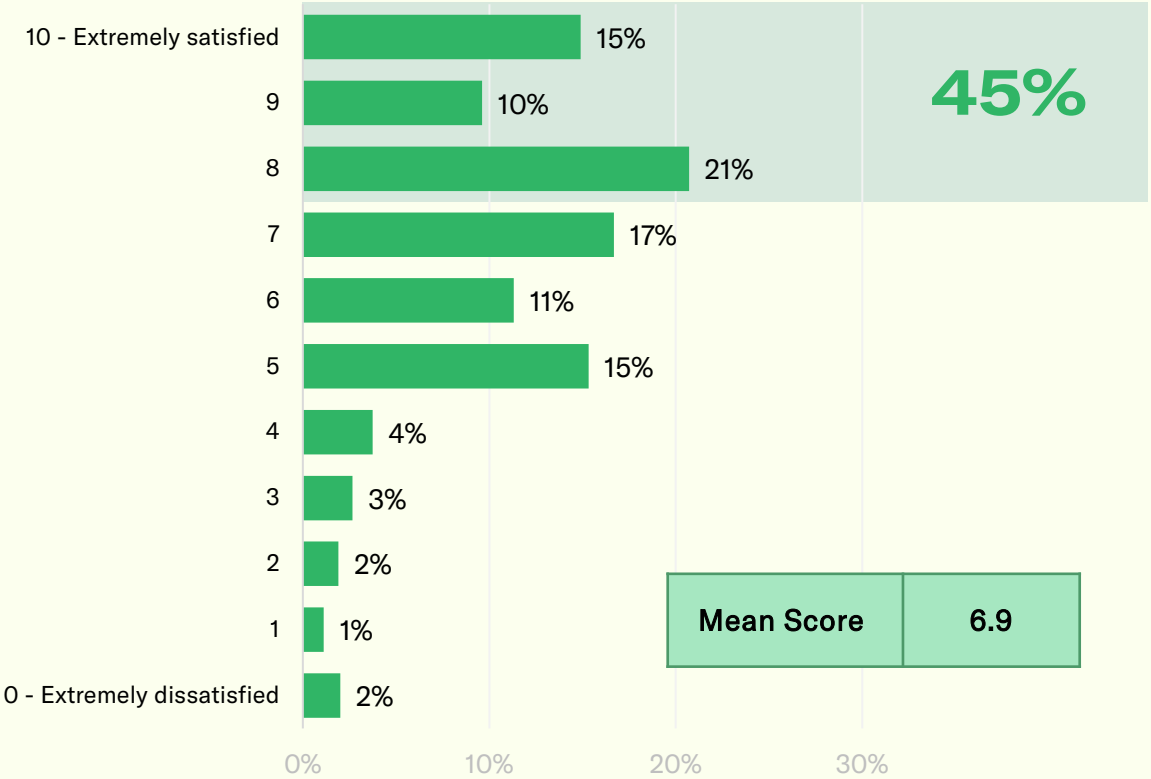
Base: Current tourism business employees. 1,021 completed surveys.

*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, real estate, and other businesses that serve the needs of tourists outside of the hospitality industry (i.e., legal assistance, emergency/health services, tourism advocacy, etc.).

Nearly half of the tourism workforce reported worker satisfaction levels at an eight or higher on an 11-point scale.

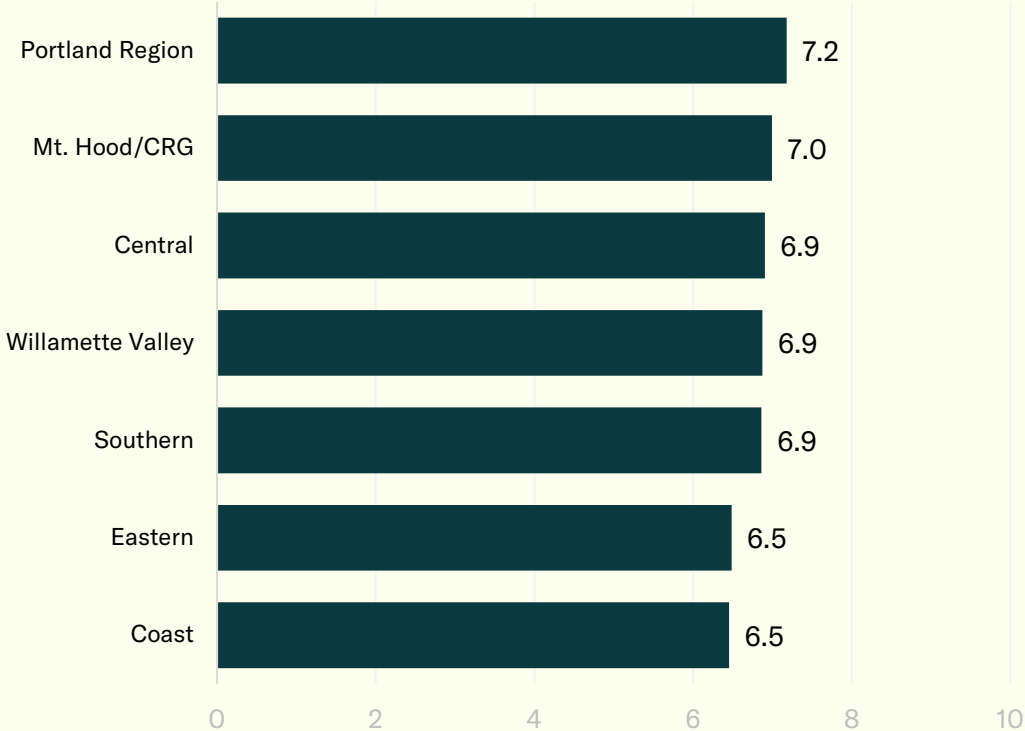
45% of the tourism workforce feels satisfied by their employment in the industry (top 3 box). The average score across the tourism workforce was 6.9 on a 0- to 10-point scale. Examining the tourism regions, the lowest mean satisfaction scores were reported by the tourism workforce in Eastern (6.5) and Coast (6.5), while Portland Region (7.2) and Mt. Hood/CRG (7.0) posted the highest mean satisfaction scores.

Tourism Industry Workforce Satisfaction



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

Workforce Satisfaction: Mean Score by Tourism Region



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

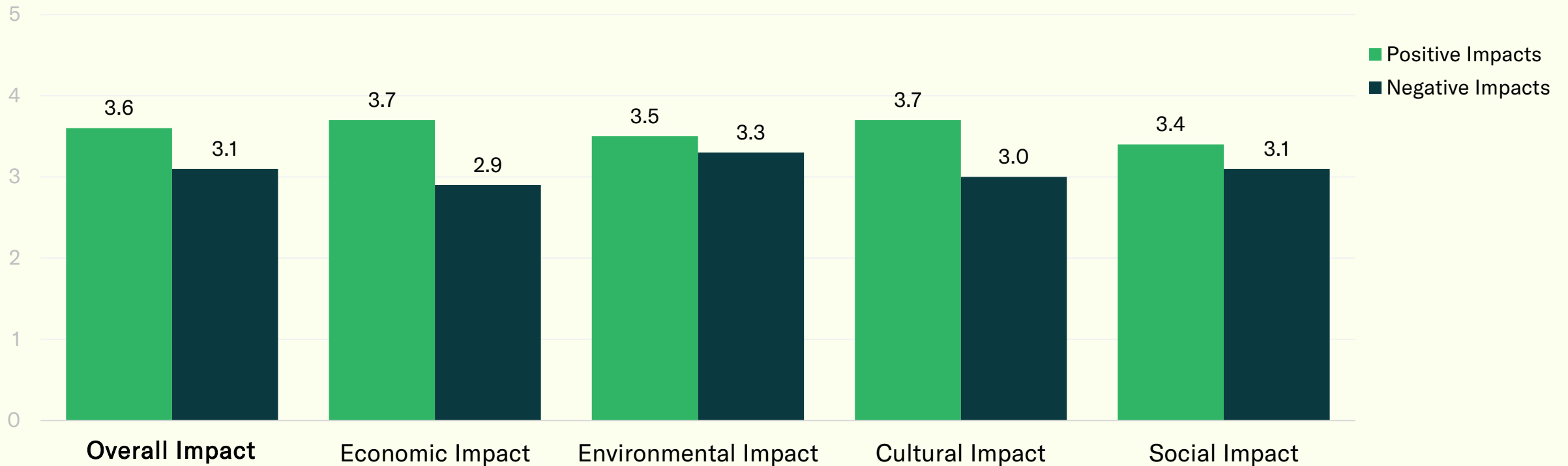
Base: Oregon tourism workforce. 1,800 completed surveys.

Detailed Findings: Tourism Perceptions

Perceptions of tourism's positive impacts significantly outweigh the negative impacts, particularly for the economic dimension.

The tourism workforce indexed higher for positive impacts across all dimensions, though the gap between positive/negative impacts was narrowest for tourism's environmental impact (3.5 vs. 3.3, a 0.2-point gap). The highest positive scores were for the economic (3.7) and cultural (3.7) dimensions, while the social dimension had the lowest positive score at 3.4. Notably, the tourism workforce in the Oregon Coast reported the lowest positive scores across all dimensions, followed by Eastern and Central Oregon. The highest positive scores were reported by Southern Oregon followed distantly by the Portland Region and Willamette Valley. The inverse was true for the negative scores, with the exception of the Portland Region, which scored slightly higher than the overall tourism workforce for negative impacts in the economic and cultural dimensions.

Index of Workforce's 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 tourism workforce. 1,800 completed surveys.

The positive economic impact of tourism is the throughline for the majority of the tourism workforces' perceived benefits of tourism.

Among both employees and business owners, more than half mentioned the monetary benefits of the industry to their community, which often overlapped with the other most-cited perceived benefits, including local business support, community development, and employment opportunity. Interestingly, employees and business owners were largely aligned in the areas where they feel the most positive impacts of tourism.

Positive Economic Impact

“Tourism provides an opportunity for local business growth, increased economic revenue, and historic renovations within the city of Portland. As a native Oregonian, I enjoy meeting visitors and highlighting the beauty of our state.”

“Tourism brings money into our local economy when locally owned businesses are supported and helps keep local people employed. “

Local Business Support

“Supporting small tour companies like mine! Providing us with livable income, which in turn supports the rest of our community.”

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

Community Development

“Tourism funds our community and gives it purpose. The businesses and industries we have in our community wouldn't exist without tourism.”

“Increased pride in city, increased investment in public areas and increased safety. Increased support for businesses and decrease in graffiti/litter from organizations cleaning up more.”

Employment Opportunity

“For me, the biggest benefit of tourism in my community is that it brings the whole area together. Because of tourism, many of the people in my town are employed continually every year, since we have tourists year-round.”

“The biggest benefit of tourism is that it does bring more jobs to the area. It also provides more traffic, which ups our business.”

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

Base: Oregon tourism workforce. 1,800 completed surveys.

Perceived drawbacks of tourism were more fragmented, but largely center around disruptions to resident life.

There was no clear majority in terms of which perceived drawbacks received the largest share of mentions among the state’s tourism workforce. For both employees and business owners, about one in four cited traffic/parking as the biggest negative impact, followed by one in five who cited crowding/congestion. Notably, employees were more likely to mention disrespectful visitors and impact on housing supply and cost, though these were also called out by business owners to a lesser degree.

Traffic/Parking

“Driving too fast, overcrowding, lack of awareness of the local community, lack of respect for local residents, entitlement attitudes, loud and fast traffic and TRASH in our forests, parks, waterways and roads!!!! Locals hide in the summer and rarely get to enjoy our parks and forests because of so many people.”

“Influx of tourists increase levels of traffic and litter in our community. Our town's infrastructure and businesses are completely overrun by tourists during the busy season, to the point where locals struggle to go out and enjoy themselves since now parking is limited and all the restaurants are full.”

Crowding/ Congestion

“A sudden influx of tourists can overwhelm a community's infrastructure, leading to congestion, noise pollution, and overcrowding. This can be particularly challenging for small towns and rural areas that may not have the resources to accommodate a large number of visitors.”

“Too many people at one time. There is a definite overload on the infrastructure in the summer. We are a town of 1,400 and get over a million visitors per year, mostly in the summer. That is a lot of toilet flushing and trash. Also, the parking situation in the summer plus the gridlock is appalling.”

Disrespectful Visitors

“They don't obey the rules. They don't respect the environment. They don't respect the speed limits. They need to not leave trash and go home. If they were responsible and respectful, I would welcome them.”

“Tourists are not self-[conscientious]of the others that live here. It's easy to dismiss the community and all that is here when you don't live in the area and are only visiting.”

Impact on Housing Supply & Cost

“A lot of the housing has been converted to vacation properties, and so that has led to a workforce housing shortage. Also, it has increased the cost of housing whether renting or buying due to the lack of supply.”

“Overcrowding and influence of vacation rentals on local affordable housing. Workers can't afford to live here.”

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

Base: Oregon tourism workforce. 1,800 completed surveys.

Oregon’s tourism workforce wants funding directed to infrastructure and support for workers.

Among those who wrote in a response for the question around Transient Lodging Tax (TLT) funding allocation, the most common response was around improving and expanding local infrastructure to support tourism demand. Other mentions include local business support – which was more likely to be cited by business owners – and housing and destination improvement.

Infrastructure

“Providing cleanup, better roads for accessibility, parking etc. Tourism is great but infrastructure needs to come first.”

“Put money toward efforts to expand the local infrastructure of tourist destinations so they are more livable and affordable for locals. If locals at a tourist destination don’t have a high quality of life, tourists aren’t going to enjoy the areas as much, and there becomes a rift between locals and tourists.”

Local Business Support

“Providing locals and businesses with supportive money to improve their tourist-related business needs.”

“Support LOCAL coastal businesses and OUR ability to serve visitors – namely, help find affordable housing for all the staff (housekeepers, servers, etc.) that are necessary to support tourist visits.”

Housing

“Provide workforce housing in tourist destinations to ease the conflict with locals who hate tourists but want all of the services that require local workers to have good, affordable housing.”

“Affordable housing options for people in tourist-driven towns, so businesses can maintain employees for tourism.”

Destination Improvement

“Provide ongoing partnership and technical assistance, especially for currently underdeveloped regions, for long-term planning and development to address community inputs and avoid foreseeable pitfalls.”

“It should go into maintaining and upgrading the community in which the taxes are collected.”

Question: Please look at the following list of projects that Travel Oregon funds in the tourism industry using TLT dollars, and identify the two areas that you believe should be prioritized and would best serve your community.

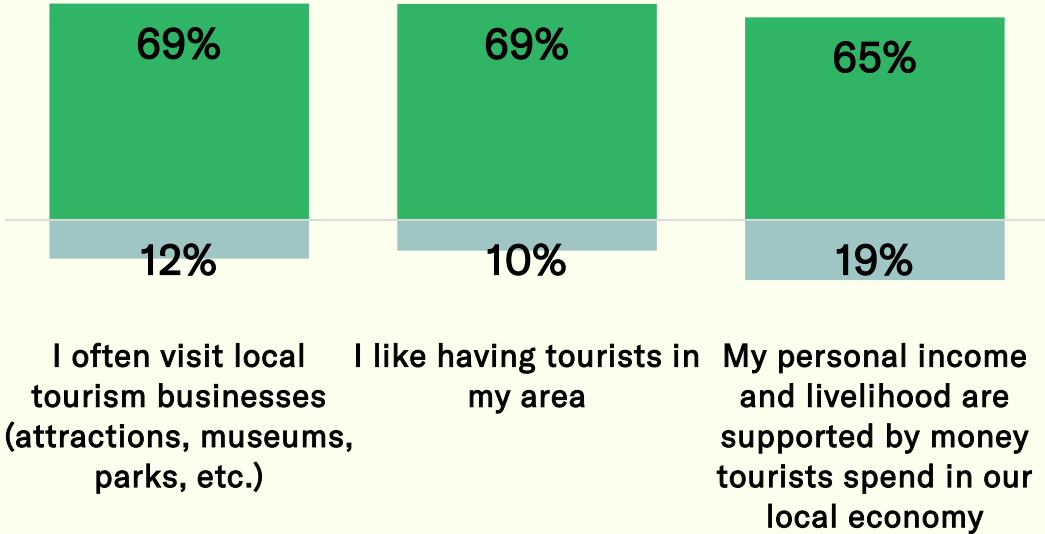
Base: Oregon tourism workforce. 1,800 completed surveys.

Oregon's tourism workforce has notably higher agreement levels around tourism's positive impacts compared to overall residents.

Nearly 7 in 10 of the state's tourism workforces said they often visit local tourism businesses (69% vs. 58% of overall residents), and the same share agree that they like having tourists in their area (69% vs. 50% of overall residents). Additionally, 65% agree that their personal income and livelihood are supported by tourism spending. Perceptions of the negative personal impacts of tourism mirrored that of total residents. Looking at regional differences, the tourism workforce in the Oregon Coast, Eastern, and Central Oregon were the least likely to agree that they like having tourists in their area and most likely to agree that traffic from tourists disrupts their daily routine.

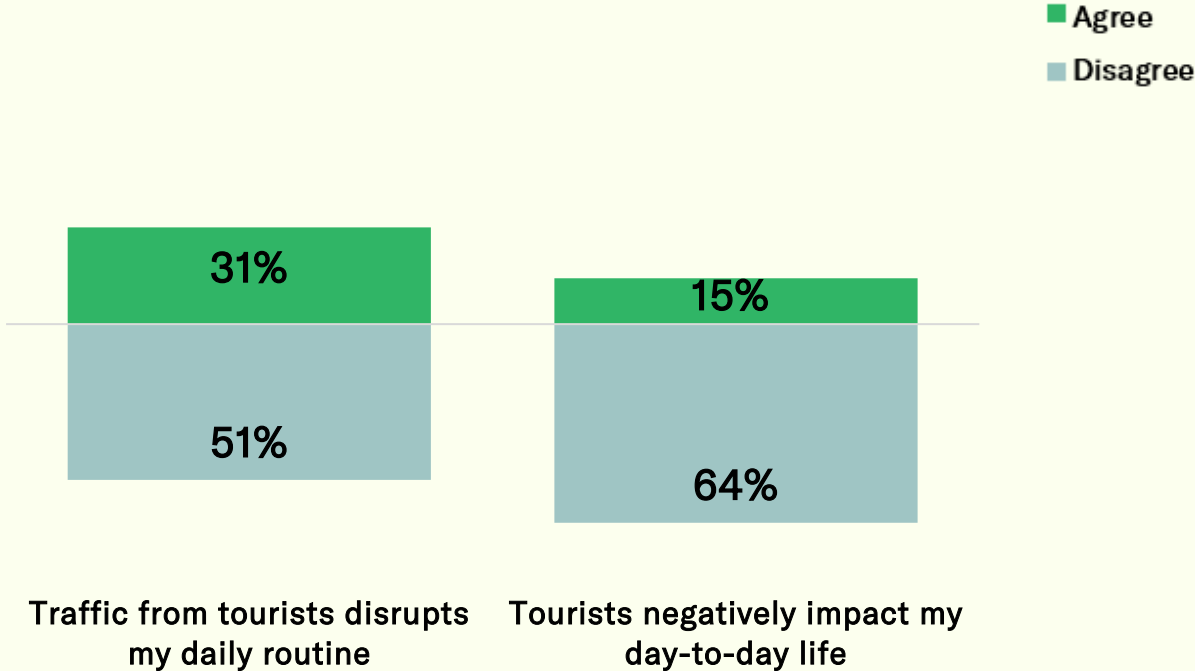
Workforce's Perceptions of Positive Local Tourism Personal Impacts

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



Workforce's Perceptions of Negative Local Tourism Personal Impacts

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



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 tourism workforce. 1,800 completed surveys.

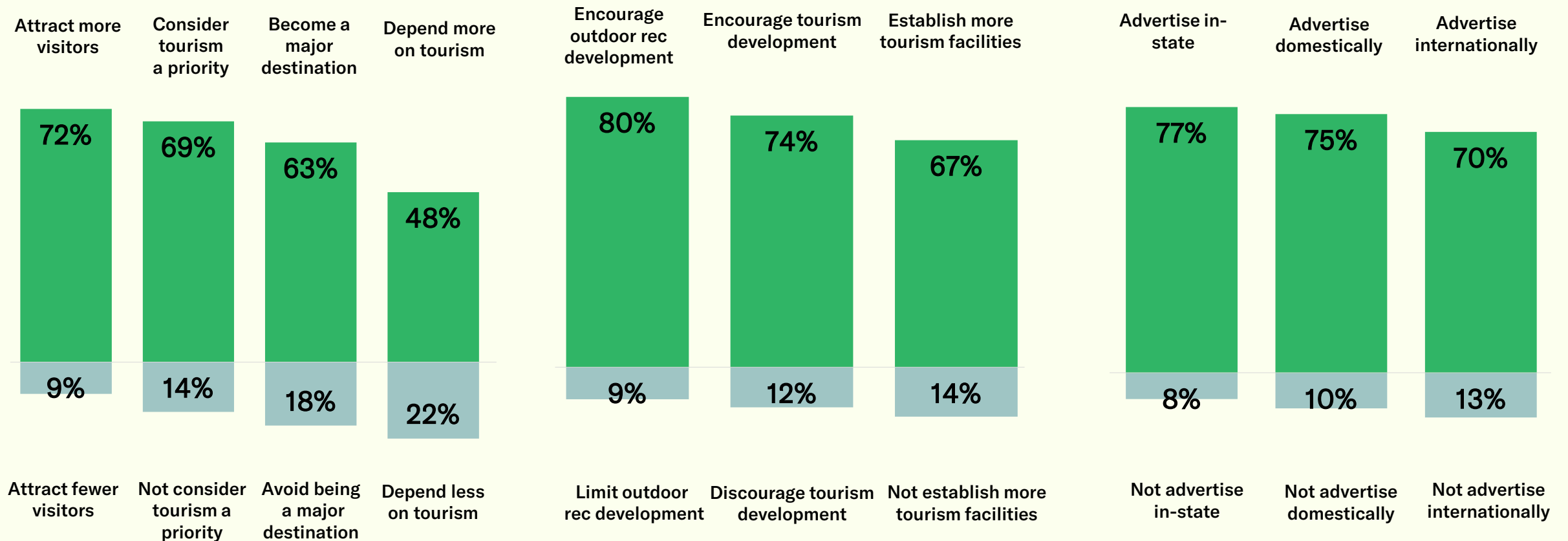
Oregon's tourism workforce supports promoting and developing the industry but balks at becoming too dependent on tourism.

In terms of overall support for tourism, calculated as the mean score across all 10 statements shown below, Oregon's tourism workforce scored a 1.3 out of a highest possible score of 3, with -3 being the lowest possible score. While the majority of Oregon's tourism workforce wants to promote the state in-state (77%), domestically (75%), and abroad (70%), as well as see it become a major destination (63%), only a minority – albeit a large one at 48% – want to depend more on tourism.

Support for Tourism – “Oregon should...”

(On a -3- to 3-point scale)

■ Positive Score (>0)
■ Negative Score (<0)



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...

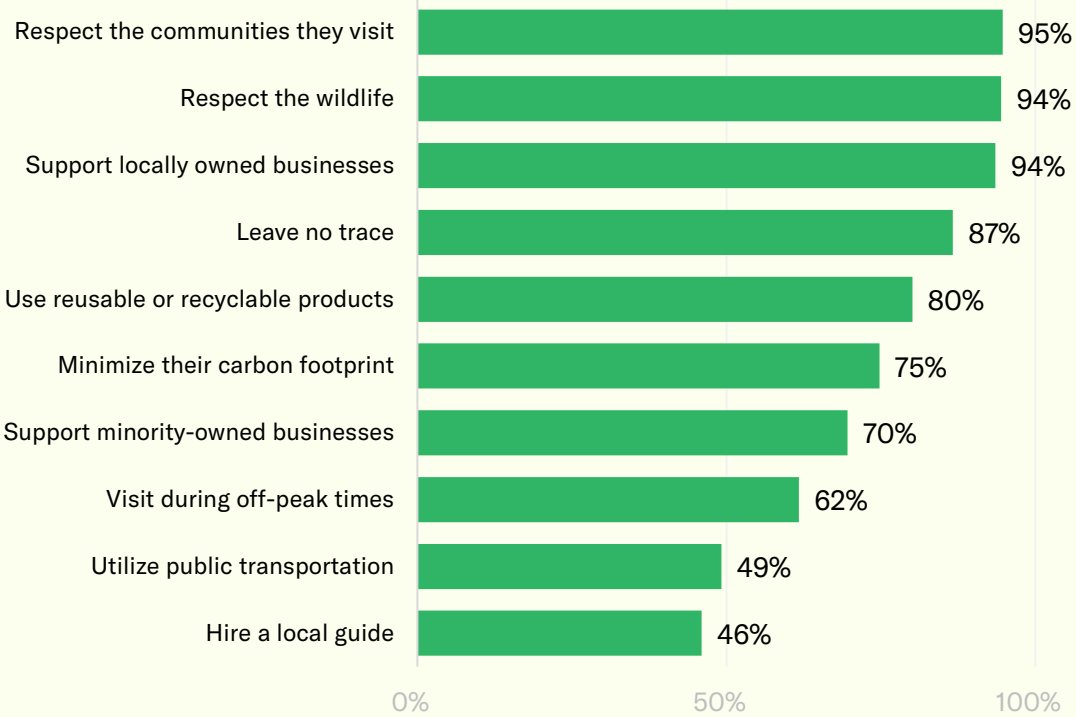
Base: Oregon tourism workforce. 1,800 completed surveys.

Respecting the communities and wildlife and supporting local businesses are the top desired visitor behaviors among Oregon’s tourism workforce.

An overwhelming majority of the state’s tourism workforce wants respect from visitors when it comes to its communities (95%) and wildlife (94%), closely followed by support for local businesses (93%). These sentiments closely aligned with overall residents. The regions are closely aligned across all behaviors, with a few exceptions. The tourism workforce in the Portland Region was significantly more likely to desire visitors to support minority-owned businesses (74%), while visiting during off-peak times was especially important to Central (68%) and Southern (67%). While a minority of the workforce in each of the regions wants visitors to utilize public transportation or hire a local guide, the former was notably important to the majority of the tourism workforce in the Portland Region (68%) and Mt. Hood/CRG (58%), while the latter was of particular importance to a small majority of the tourism workforce in Southern Oregon (56%).

Visitor Behavior Importance

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



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

Base: Oregon tourism workforce. 1,800 completed surveys.

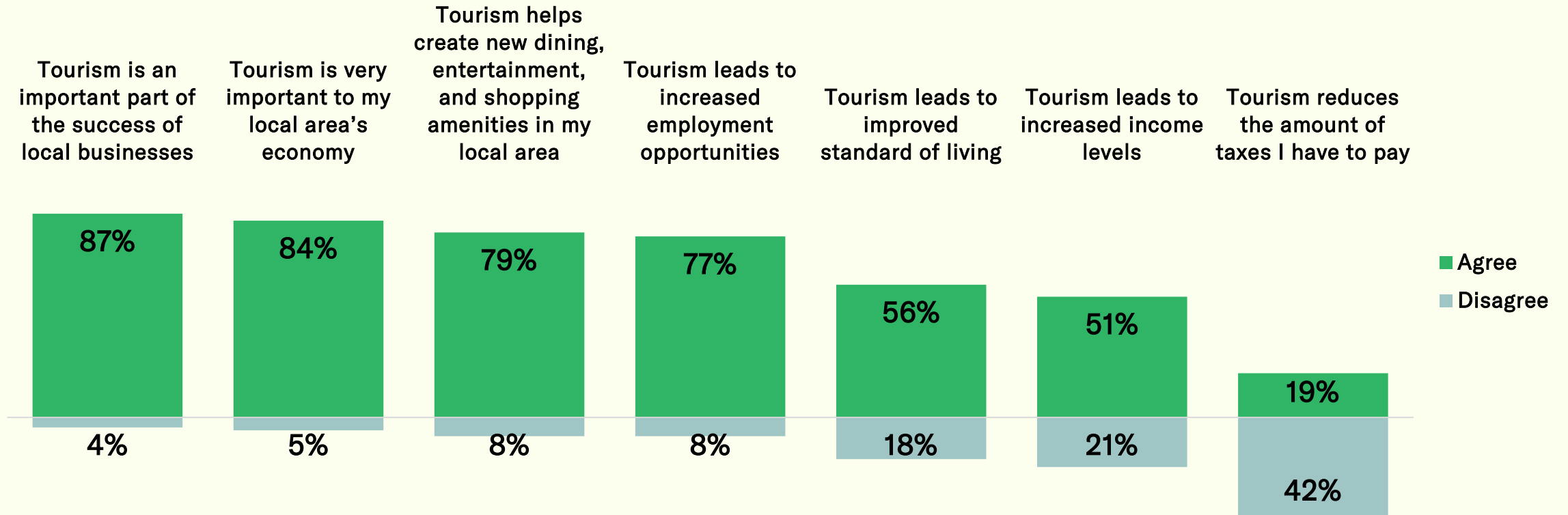
Economic

Besides tax reductions, the majority of Oregon’s tourism workforce recognizes the positive economic impacts of tourism.

The tourism workforce reported a higher level of agreement across all positive economic impact statements. It is significantly more likely to agree that tourism is very important to its local economy (84% vs. 70% of overall residents). However, the tourism workforce expressed similar skepticism that tourism reduces the taxes it has to pay (42% disagree for both tourism workforce and overall residents). Among the regions, the Oregon Coast had the lowest agreement levels around tourism improving the standard of living (42%) as well as increasing income levels (40%). Conversely, Southern Oregon had the highest shares of agreement levels for both statements (65% and 64%, respectively).

Workforce's Perceptions of Tourism’s Positive Economic Impacts

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



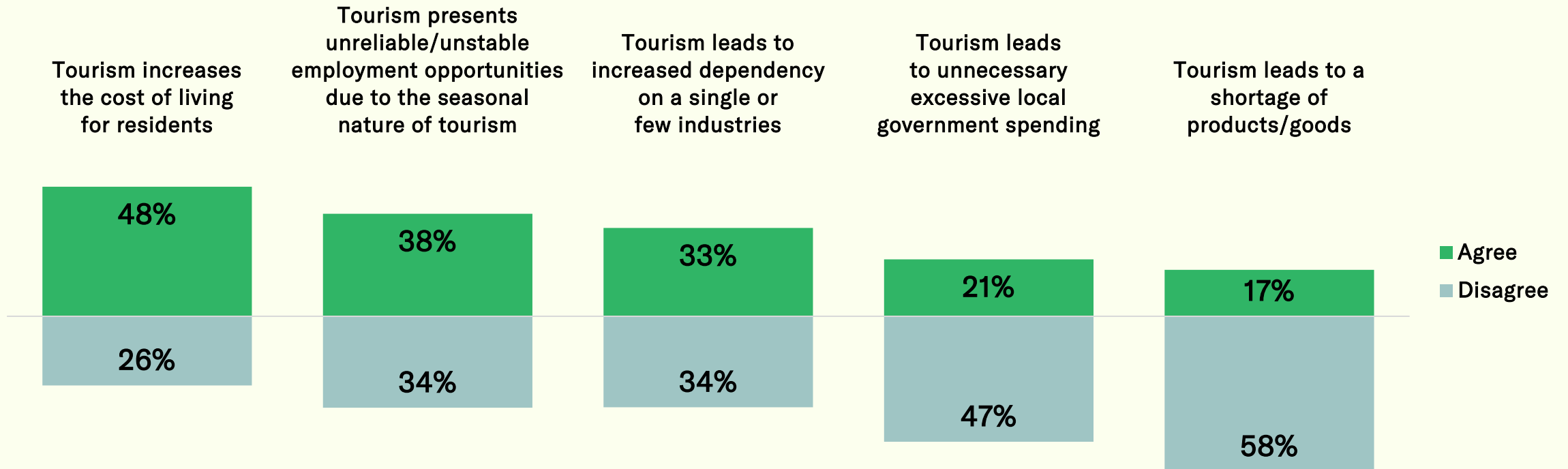
Question: Thinking about Oregon’s tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Oregon tourism workforce. 1,800 completed surveys.

Oregon's tourism workforce is slightly more likely to agree that tourism increases the cost of living compared to overall residents.

At 48% (vs. 44% of total residents), perceptions that tourism leads to higher cost of living is the leading negative economic impact for the state's tourism workforce. 4 in 10 agree that employment opportunities are unstable because of seasonality (38%), though a similar share disagree with that statement (34%). Agreement on whether tourism causes dependency on a limited number of industries was also split (33% agree, 34% disagree), while residents in the tourism workforce were more inclined to disagree that tourism leads to unnecessary or excessive local government spending (47%) and/or that the industry leads to a shortage of goods (58%). Among the regions, the majority of the tourism workforces in Central Oregon (69%), Oregon Coast (60%), and Mt. Hood/CRG (56%) agree that tourism increases the cost of living for residents. Oregon Coast had the only majority in agreement that tourism causes unreliable or unstable employment opportunities because of its seasonal nature (54%).

Workforce's 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 tourism workforce. 1,800 completed surveys.

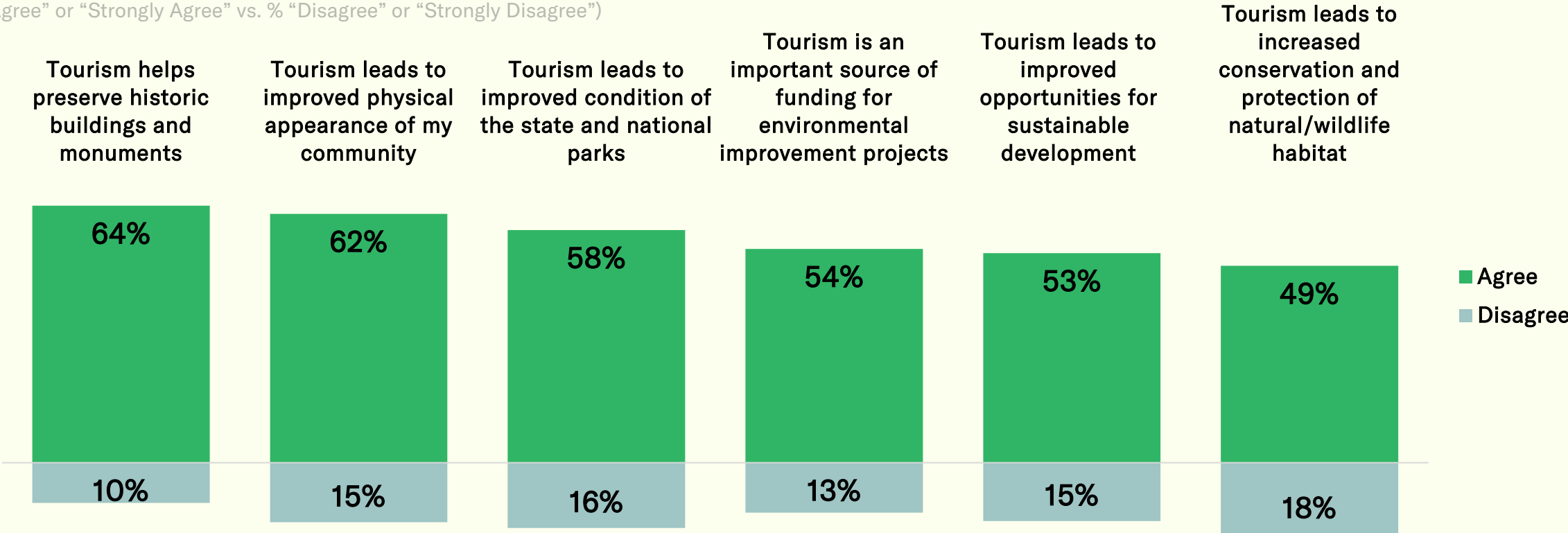
Environmental

Agreement with tourism’s positive environmental impacts is less pronounced among the state’s tourism workforce.

While the majority agree with all positive impact statements excepting increased nature conservation (49%), unlike with all other dimensions, agreement levels never exceed two-thirds of the workforce. The highest agreement rate was reported for preservation of historic buildings and monuments (64%), followed by improved physical appearance of communities (62%). Among the regions, the highest agreement levels were posted by Southern Oregon across all statements, while lowest agreement levels were seen from the Oregon Coast for all statements.

Workforce's Perceptions of Tourism’s Positive Environmental Impacts

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



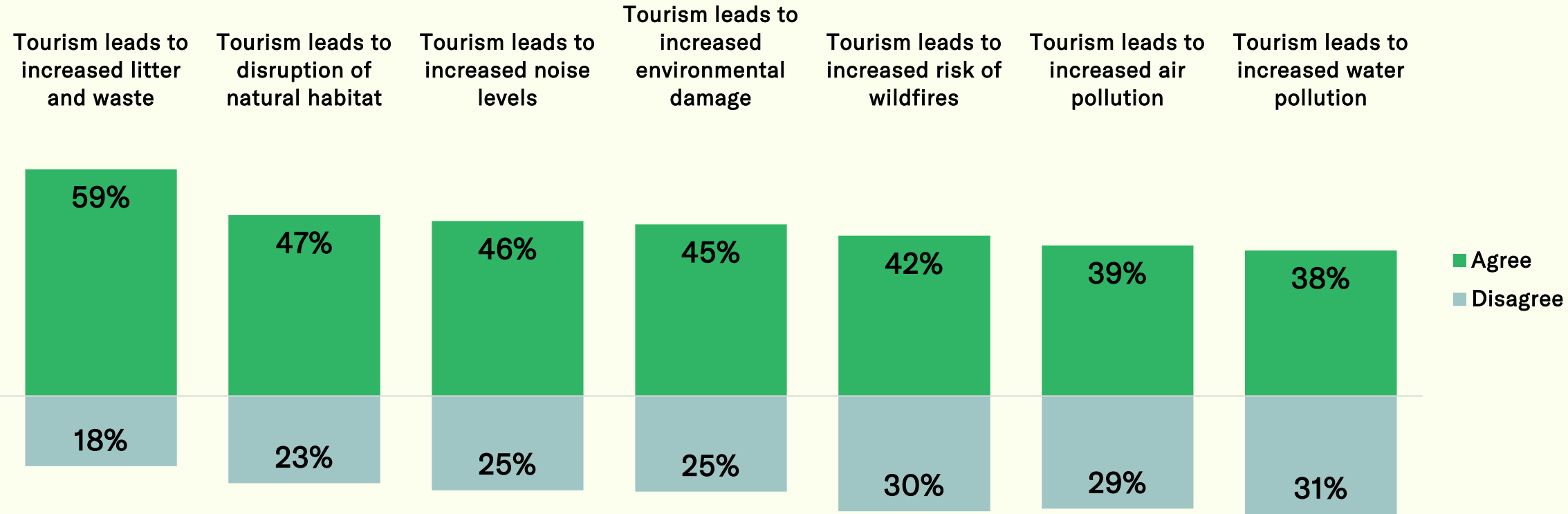
Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s environment, please rate how much you agree or disagree with the following statements.
 Base: Oregon tourism workforce. 1,800 completed surveys.

The tourism workforce’s perceptions of tourism’s negative environmental impacts align closely with overall residents.

Of the workforce, 6 in 10 agree that tourism leads to increased litter/waste (59%), while just under half agree that tourism disrupts natural habitats (47%) and/or increases noise levels (46%) and/or environmental damage (45%). Residents in the tourism workforce in the Oregon Coast and Central Oregon had the highest agreement levels across all negative environmental impact statements, while a small majority of Mt. Hood/CRG agree that tourism leads to increased environmental damage (57%) and/or risk of wildfires (51%).

Workforce's 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 tourism workforce. 1,800 completed surveys.

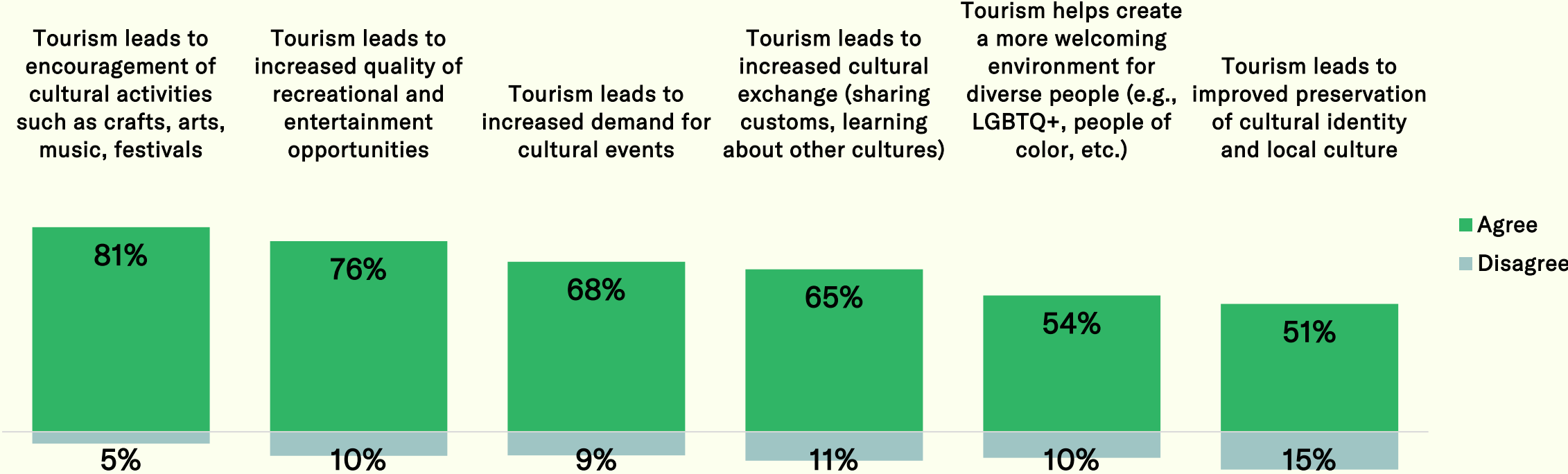
Cultural

Oregon’s tourism workforce feels the most positive cultural impact of tourism from the activities and entertainment it generates.

Just over 8 in 10 agree that tourism leads to the encouragement of cultural activities (81%), while three-fourths agree that it increases the quality of recreation and entertainment options (76%). The majority agreed with all positive cultural impact statements, though only a small majority agree that tourism creates a more welcoming environment for diverse people (54%) and/or preserving cultural identity and local culture (51%). Among the regions, the tourism workforce in the Oregon Coast was the least likely to agree across all statements, while Southern Oregon was most likely to agree that tourism increases the quality of recreation and entertainment impacts (86%) and/or cultural exchange (75%).

Workforce's Perceptions of Tourism’s Positive Cultural Impacts

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



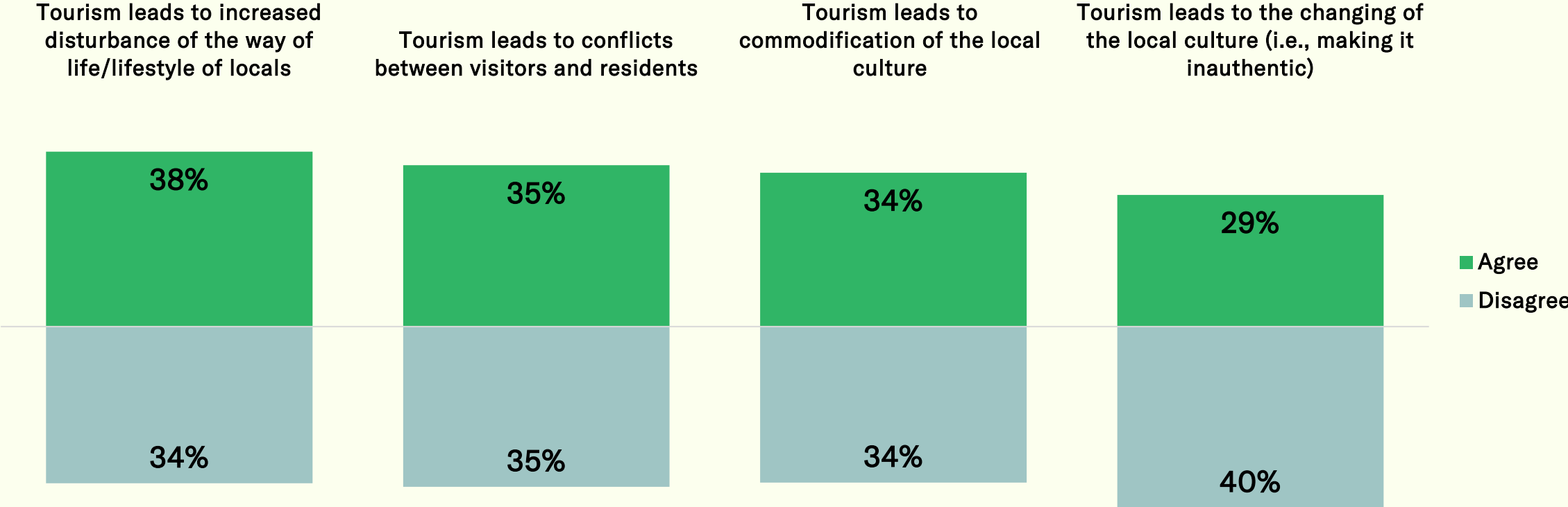
Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s culture, please rate how much you agree or disagree with the following statements.
 Base: Oregon tourism workforce. 1,800 completed surveys.

Perceptions around tourism’s negative cultural impacts are divided.

Agreement that tourism increases disturbances to locals’ lifestyles outweighs disagreement levels (38% vs. 34%), but the inverse is true for the statement that tourism changes local culture (29% agree vs. 40% disagree). When it comes to tourism causing conflict between visitors and residents and/or the commodification of local culture, agreement is split. Among the regions, the majority of residents in the tourism workforce in Central Oregon agree with all negative cultural impact statements, while the majority of the Oregon Coast agree that tourism increases disturbances to locals’ lifestyles (54%) and/or leads to conflicts between visitors and residents (53%).

Workforce's 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 tourism workforce. 1,800 completed surveys.

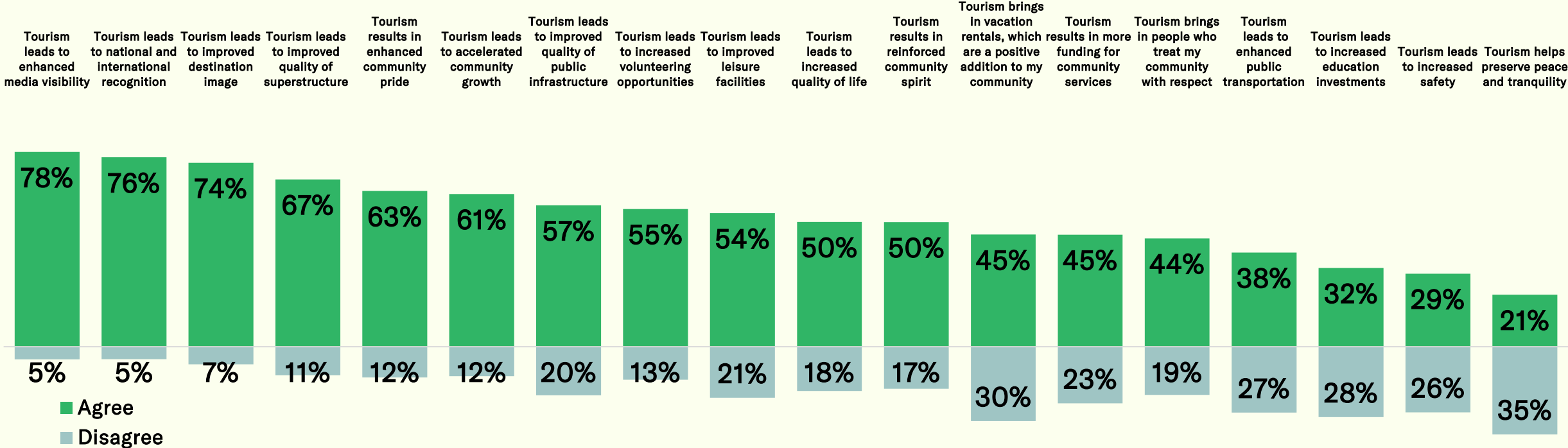
Social

Three-quarters of the tourism workforce agree that tourism generates good PR for Oregon.

Nearly 8 in 10 (78%) agree that tourism enhances media visibility for the state, while 76% agree that it leads to increased recognition at home and abroad. A similar 74% agree that tourism improves the destination’s image. The lowest agreement levels were posted for enhanced public transportation (38%), increased education investments (32%), increased safety (29%), and/or preserving peace and tranquility (21%). For the regions, Southern Oregon had the highest agreement levels with most of these positive social impact statements, though Central Oregon took the lead for enhanced media visibility (83%), national and international recognition (80%), and accelerated community growth (78%); and Mt. Hood/CRG (64%) and the Portland Region (57%) posted the highest agreement levels for enhanced public transportation. The Portland Region had the highest agreement levels for increased safety (44%) and preserving peace and tranquility (34%).

Workforce's 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.

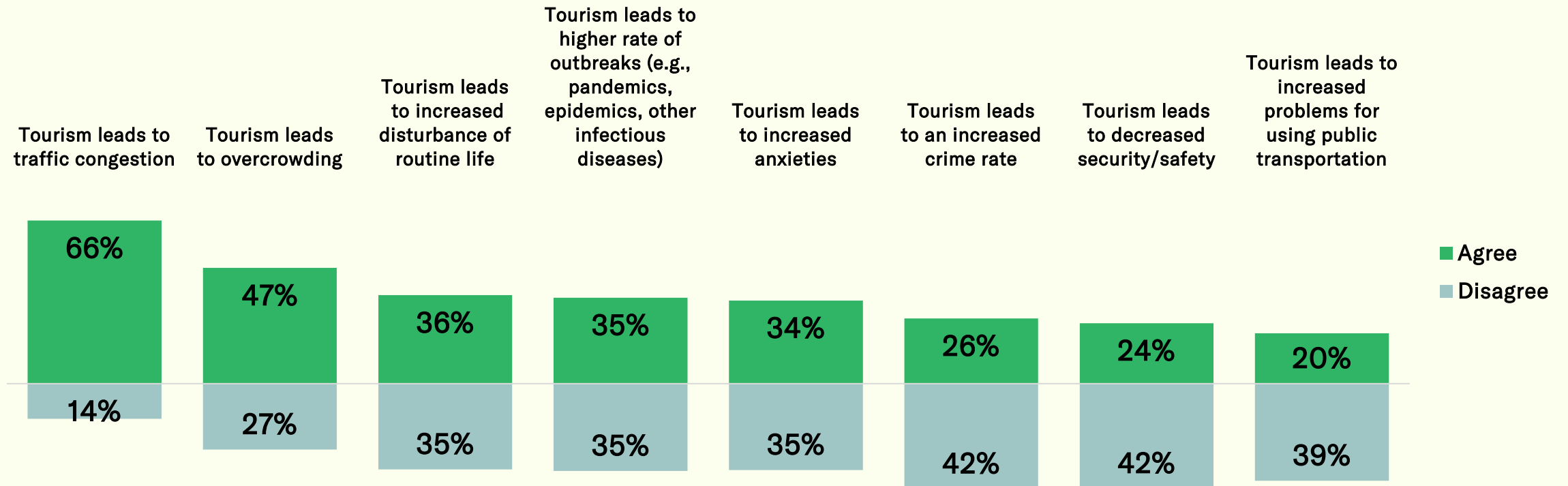
Base: Oregon tourism workforce. 1,800 completed surveys.

Traffic congestion leads Oregon's tourism workforce's perceptions of tourism's negative social impacts.

Two-thirds agree that tourism leads to traffic congestion (66%), while nearly half feel that it leads to overcrowding (47%). Agreement levels are split around disturbances to routine life, higher rates of outbreaks, and increased anxieties. The tourism workforce was more likely to disagree than to agree that tourism leads to an increased crime rate, decreased safety, or issues with public transportation. Among the regions, the Oregon Coast and Central Oregon were the most likely to agree that tourism causes traffic congestion, overcrowding, disturbances to routine life, higher rates of outbreaks, and increased anxieties.

Workforce's 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 tourism workforce. 1,800 completed surveys.

Detailed Findings: Workforce Breakouts

Tourism Business Owners

The following slides present findings specific to Oregon residents who own a business that serves the tourism industry, including demographics, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and support for tourism in Oregon.

Tourism Business Owners Demographic Snapshot

Total residents surveyed:	779
Average age:	48 years old
Average household income:	\$101,042
College graduate:	65%
Married/domestic partnership:	73%
Have children in household:	39%
Gender*	
• Female:	59%
• Male:	39%
• Non-binary/Other:	0%
Ethnicity*	
• White/Caucasian:	86%
• Native American, Alaskan Native:	6%
• African American/Black:	5%
• Asian, Native Hawaiian, or Pacific Islander:	5%
• Hispanic/Latino:	4%
• Other:	2%
LGBTQ+:	19%
Accessibility needs in household:	24%

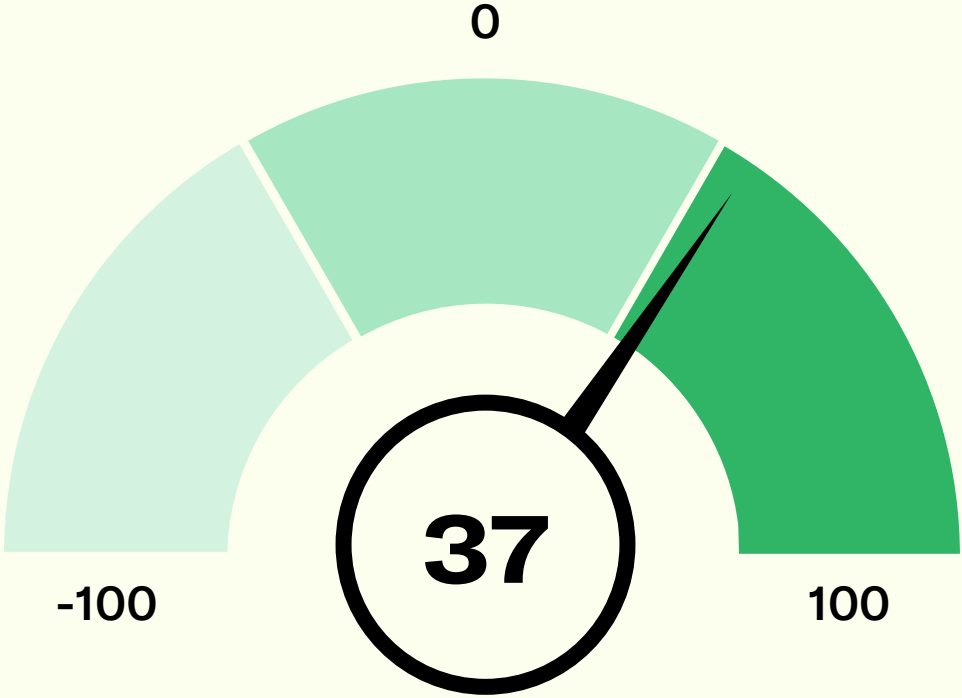
*Percentages sum to more than 100% as respondents could select more than one race/ethnicity.



Tourism business owners significantly outpace the overall tourism workforce's likelihood to recommend their community as a tourism destination.

Nearly 6 in 10 Oregon tourism business owners are promoters of their local community as a tourism destination (58% scored a 9 or 10 on a 0- to 10-point scale). When subtracting the detractors (tourism business owners who scored a 6 or lower) from the promoters (those who scored a 9 or 10), the likelihood-to-recommend score for tourism business owners is 37, compared to the overall tourism workforce score of 28. Both scores substantially exceed the overall resident 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?

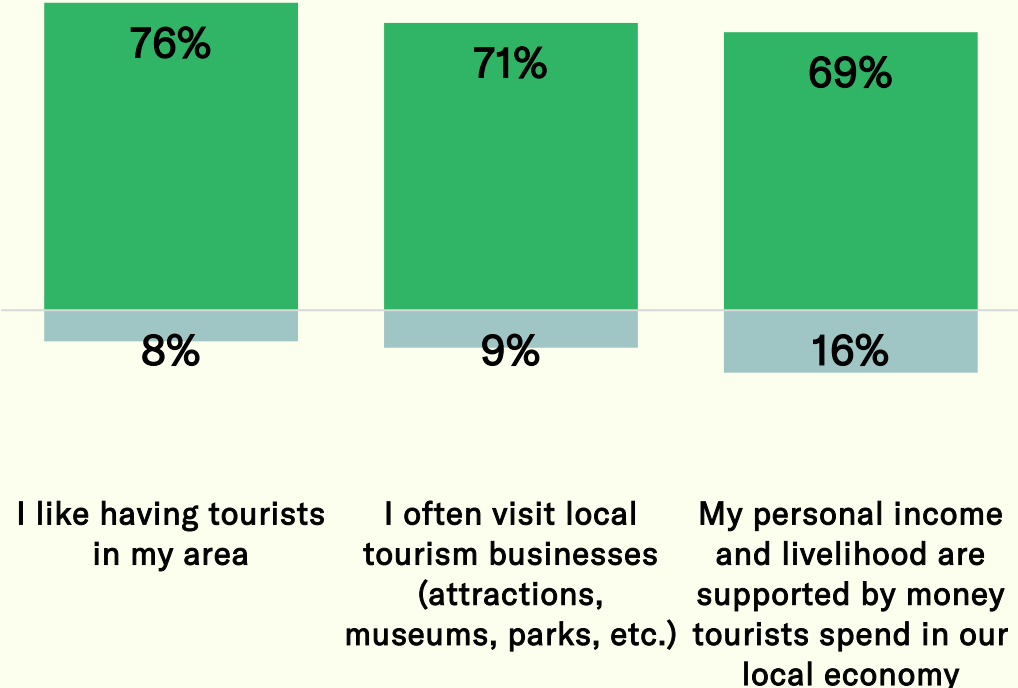
Base: Tourism business owners. 779 completed surveys.

Tourism business owners largely perceive tourism as positively impacting them personally, and the majority disagree with the negative impact statements.

Just over 3 in 4 like having tourists in their area (76%), while 7 in 10 often visit local tourism businesses (71%) and/or agree that their personal income is supported by tourism spend (69%). More than half disagree that traffic from tourists disrupts their daily routine (53%), while an even greater two-thirds disagree that tourism negatively impacts their day-to-day life (66%).

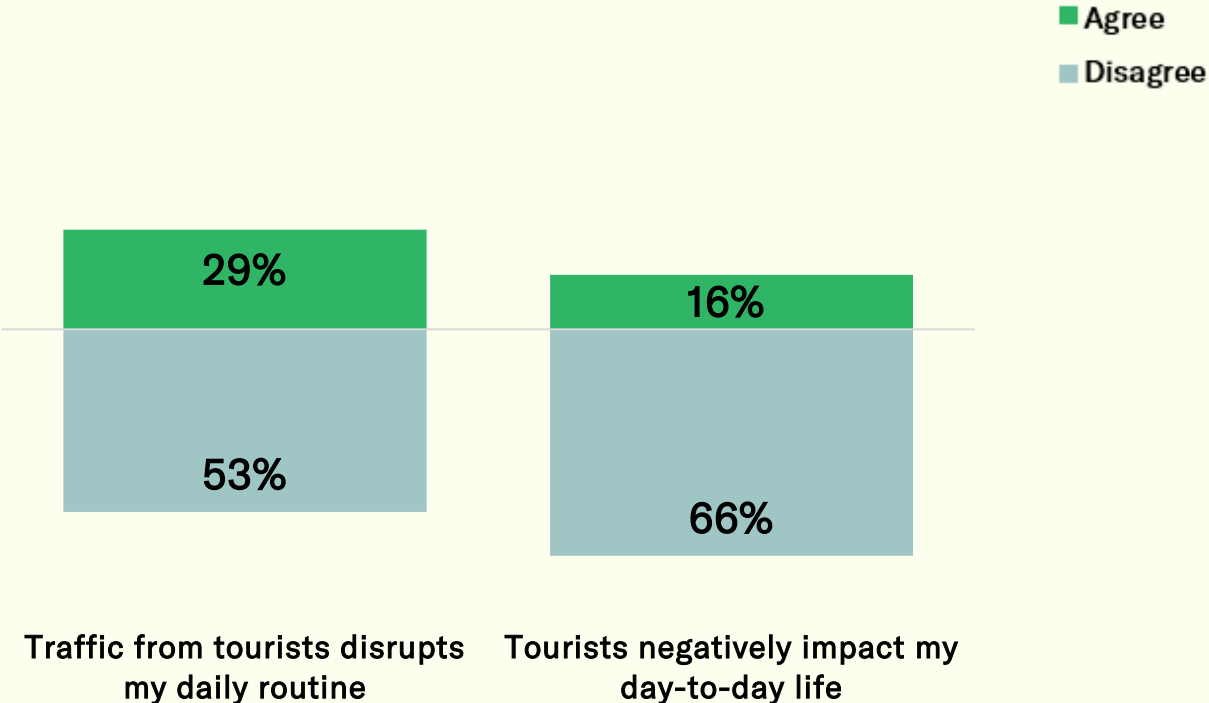
Tourism Business Owners' Perceptions of Positive Local Tourism Personal Impacts

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



Tourism Business Owners' Perceptions of Negative Local Tourism Personal Impacts

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



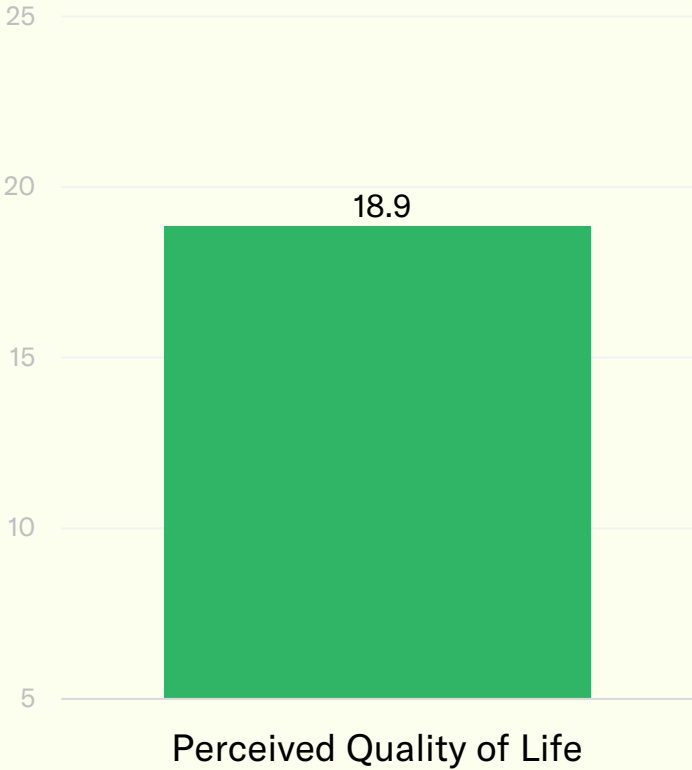
Question: Thinking about tourism in your local area and its impact on you personally, please rate how much you agree with the following statements.

Base: Tourism business owners. 779 completed surveys.

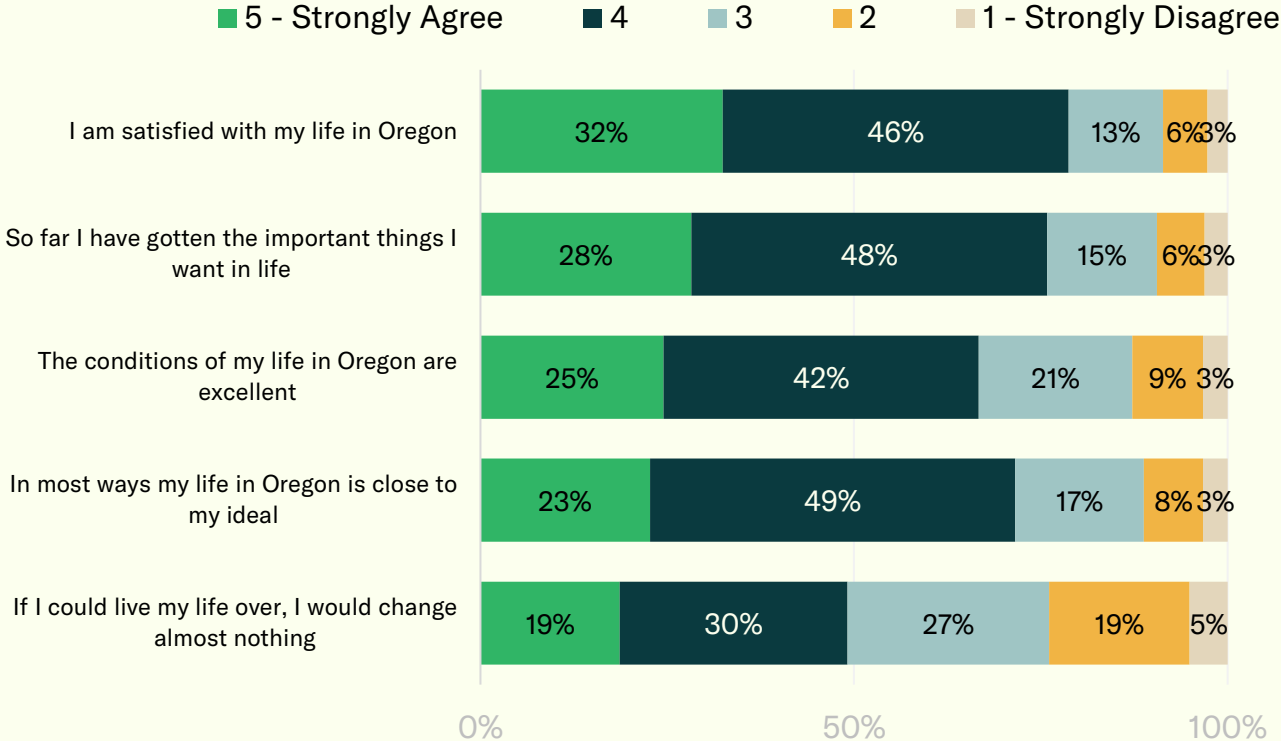
Oregon's tourism workforce has a high perceived quality of life.

Tourism business owners have an even higher perceived quality of life compared to the overall statewide tourism workforce's score of 18.3, summing to an 18.9 out of a possible 25. This significantly outpaces the overall total resident score (18.1). Nearly eight in ten tourism business owners are satisfied with their life in Oregon (79% agree or strongly agree), and approximately three in four say they feel they have gotten the most important things they want in life (76%). Just under half, though, say they would change nothing about their life if they could do everything over (49%).

Tourism Business Owners' Score*



Perceived Quality-of-Life Statements Included in 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).

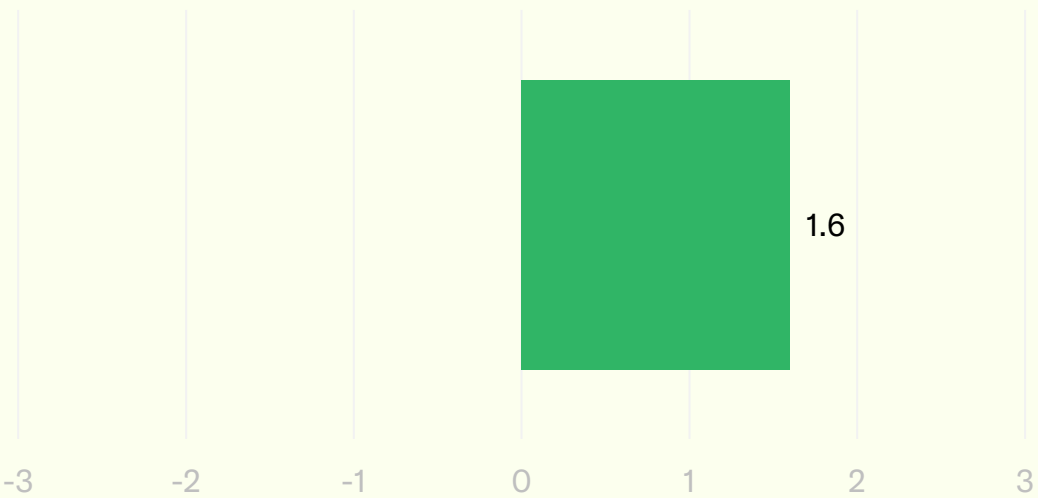
Note: Percentages may not sum to 100% due to rounding.
 Question: Please rate your level of agreement with the following statements.
 Base: Oregon tourism workforce. 1,800 completed surveys.

Tourism business owners are more likely than the overall tourism workforce to support tourism.

In terms of overall support for tourism, calculated as the mean score across all 10 statements shown in the following slide, Oregon's tourism business owners scored a 1.6 out of a highest possible score of 3, with -3 being the lowest possible score. This slightly outpaces the statewide tourism workforce's overall support for tourism at a mean score of 1.3.

Overall Support for Tourism Mean Score*

Tourism Business Owners' Overall Support for Tourism



*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 47 for detailed scores for each included statement.

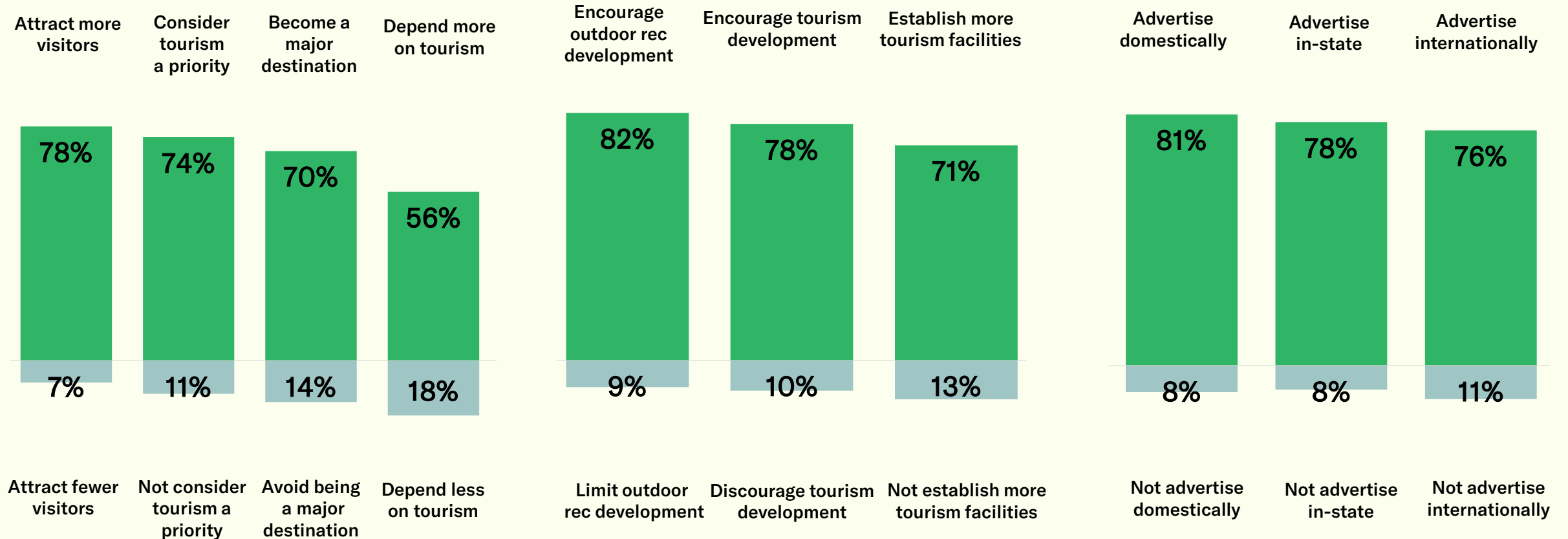
With their reliance on tourism for revenue, the majority of industry business owners agree that Oregon should depend more on tourism.

At 56%, over half had a positive score (over a 0 on a -3- to 3-point scale) in favor of depending more on tourism, which contrasts with the minority of tourism employees who selected the same score ranges. Across all tourism support statements, tourism business owners were more likely to select a positive score compared to tourism employees.

Support for Tourism – “Oregon should...”

(On a -3- to 3-point scale)

■ Positive Score (>0)
■ Negative Score (<0)



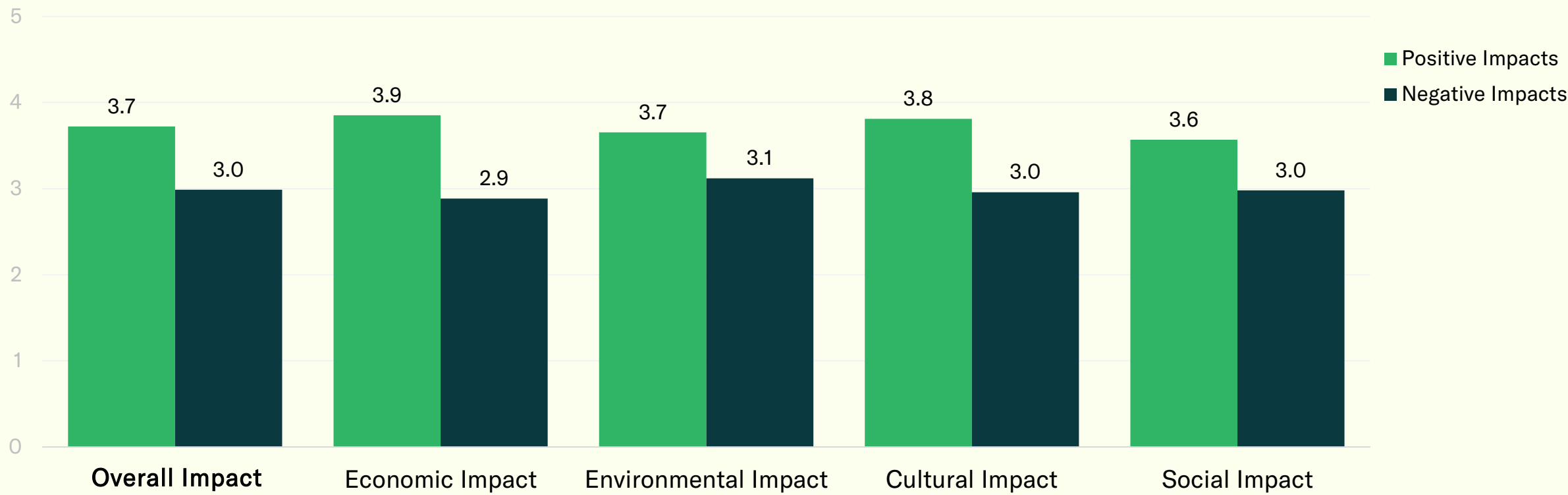
Question: Thinking of tourism in Oregon, please read each statement and complete it by using the slider scales below to plot how closely you agree to each statement. Oregon should...

Base: Tourism business owners. 779 completed surveys.

Tourism business owners index significantly higher for tourism's positive impacts over its negative impacts.

In particular, they posted the largest positive gap for the economic impact (3.9 vs. 2.9, a 1.0-point gap) and the cultural impact (3.8 vs. 3.0, a 0.8-point gap). As seen across other segments, both by region as well as tourism employment, the negative environmental impact score was the highest of the dimensions at 3.1, while the negative economic impact score was lowest at 2.9.

Index of Tourism Business Owners' Perceptions of Tourism Impacts



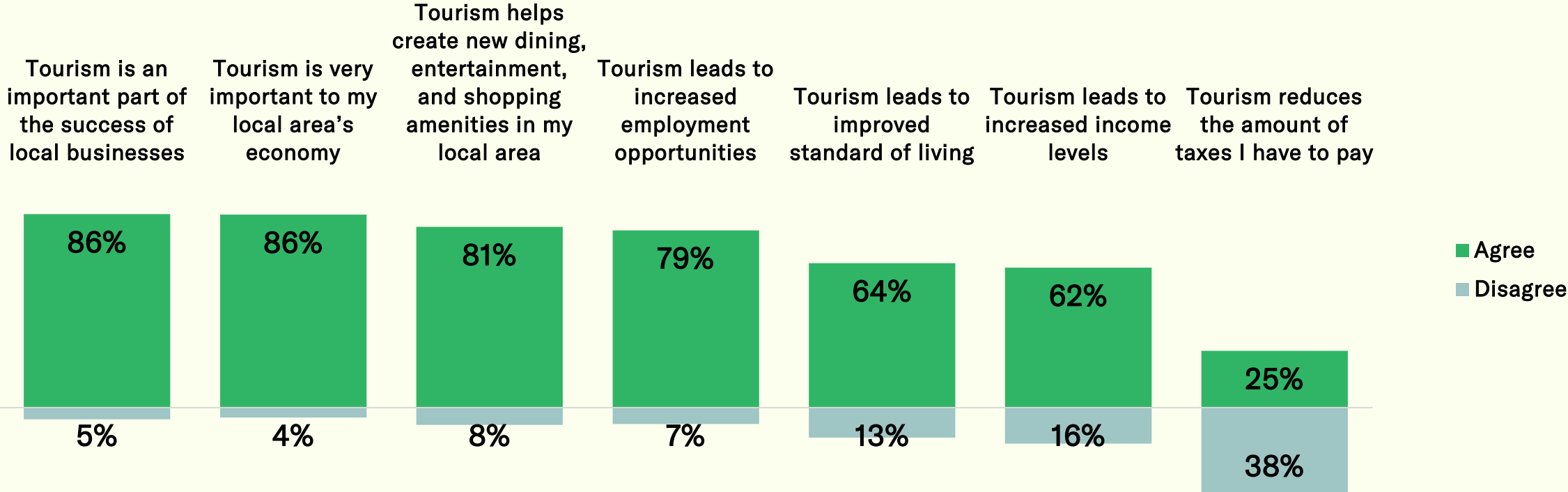
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Tourism business owners. 779 completed surveys.

Except for tax reductions, most tourism business owners agree with tourism’s positive economic impact statements.

At well over 8 in 10, the vast majority agree that tourism is important to the success of local businesses (86%) and/or that tourism is very important to their local economy (86%). Slightly fewer agree that tourism creates new local amenities (81%) and/or that tourism increases employment opportunities. Over 6 in 10 agree that tourism raises the standard of living (64%) and/or increases income levels (62%). Only 1 in 4, however, agree that tourism reduces the amount of taxes they have to pay.

Tourism Business Owners' 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.

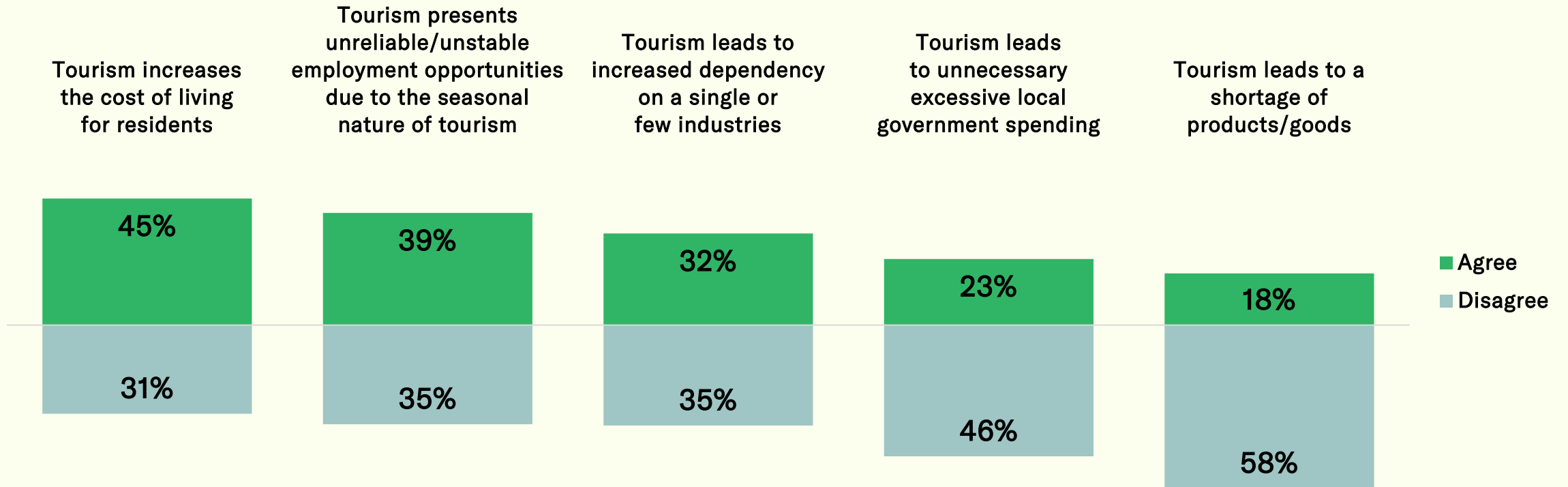
Base: Tourism business owners. 779 completed surveys.

Across all statements, less than half of tourism business owners agree with tourism's negative economic impact statements.

The highest share of agreement was posted by perceived increased cost of living (45%), followed by unreliable or unstable employment caused by seasonality (39%). The percent of those who agree were outweighed by those who disagree with the statements that tourism leads to increased dependency on a limited number of industries (32% agree vs. 35% disagree), unnecessary excessive local government spending (23% agree vs. 46% disagree), and a shortage of products/goods (18% agree, 58% disagree).

Tourism Business Owners' 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.

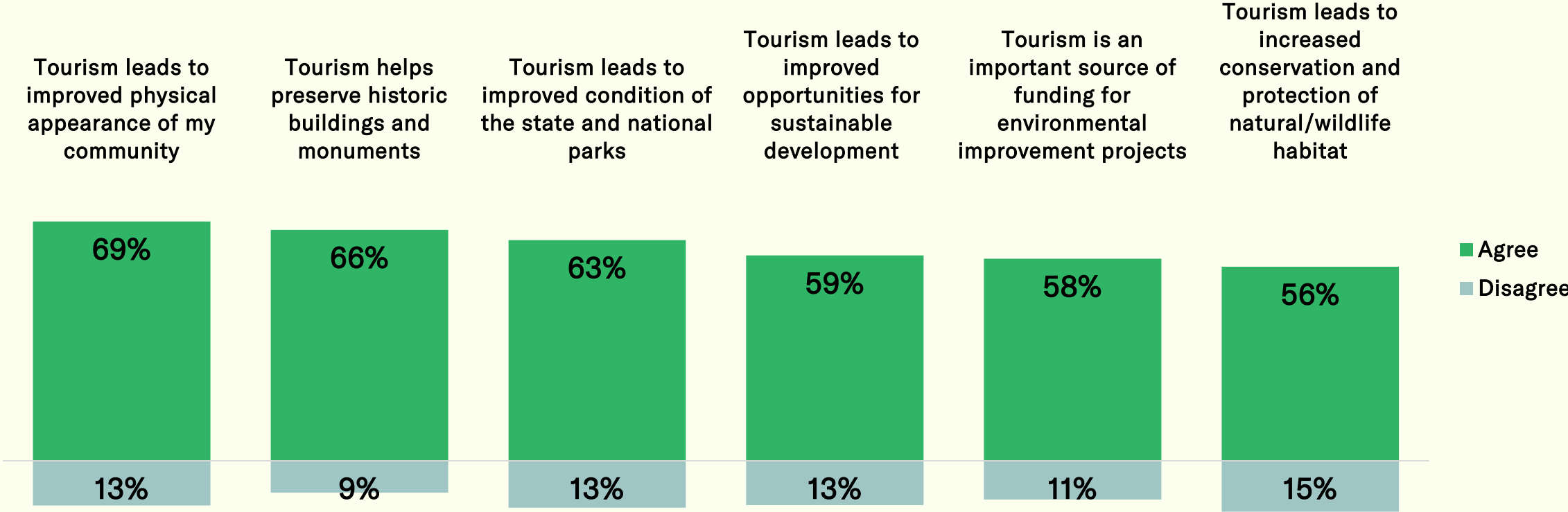
Base: Tourism business owners. 779 completed surveys.

For positive environmental impacts, the highest agreement levels center around destination improvement.

Roughly two-thirds of tourism business owners agree that tourism leads to the improved appearance of local businesses (69%), helps preserve historic spaces (66%), and/or improves the condition of parks (63%). A smaller majority agree that tourism generates improved opportunities for sustainable development (59%), is a key funding source for environmental improvement projects (58%), and/or leads to increased nature conservation (56%).

Tourism Business Owners' Perceptions of Tourism's Positive Environmental Impacts

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



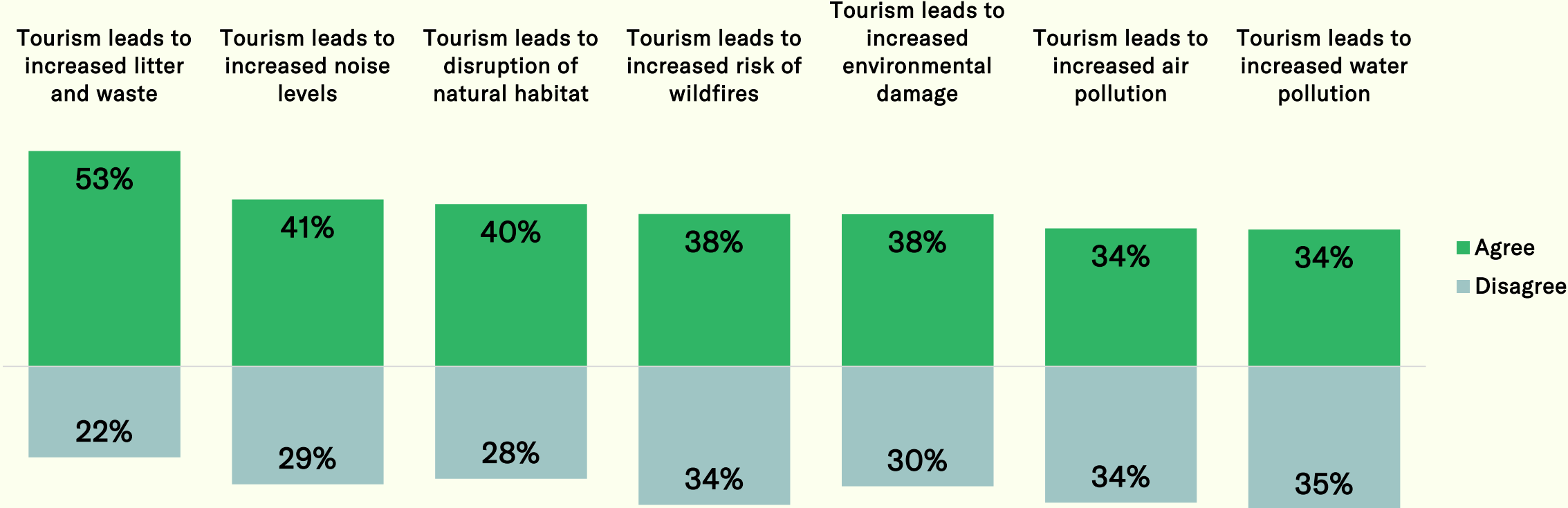
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
 Base: Tourism business owners. 779 completed surveys.

There is a dominant perception that tourism leads to more litter, increased noise, and habitat disruptions.

Though for the most part only a small majority of tourism business owners agree with the litter statement (53%), and less than half agree that tourism leads to increased noise levels (41%) and/or disrupts natural habitats (40%), the share of those who agree with those three statements outweighs those who disagree. However, agreement is more divided for the remaining statements around tourism’s negative environmental impacts.

Tourism Business Owners' Perceptions of Tourism’s Negative Environmental Impacts

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



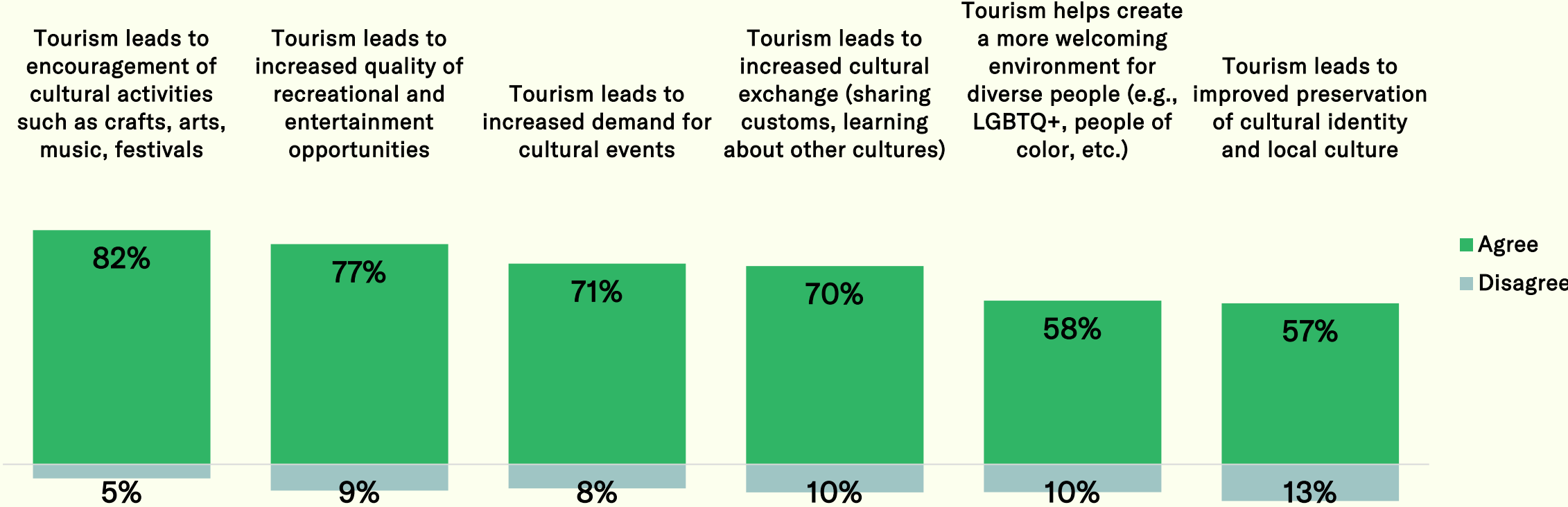
Question: Thinking about Oregon’s tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Tourism business owners. 779 completed surveys.

As with economic impact perceptions, most tourism business owners agree with tourism’s positive cultural impact statements.

Just over 8 in 10 tourism business owners agree that tourism encourages cultural activities (82%), while more than three in four agree it increases the quality of recreational and entertainment opportunities (77%). More than two-thirds agree that tourism increases demand for cultural events (71%) and increases cultural exchange (70%). While a smaller majority, just under six in ten agree that tourism creates a more welcoming environment for diverse people (58%) and/or improves preservation of local cultural identity (57%).

Tourism Business Owners' 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.

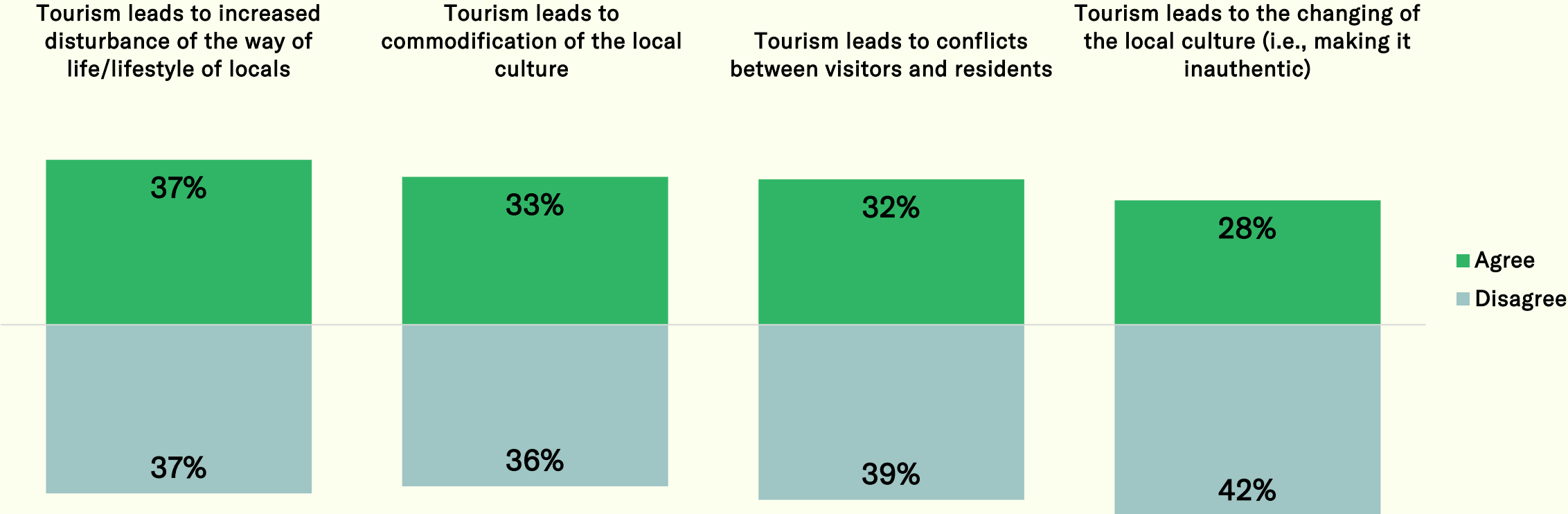
Base: Tourism business owners. 779 completed surveys.

Disagreement with tourism’s negative cultural impact statements outweighs agreement levels among tourism business owners.

While about a third of tourism business owners agree that tourism increases disturbances to the local way of life (37%), commodifies the local culture (33%), and/or leads to conflicts between visitors and residents (32%), a slightly larger or similar share disagree. In particular, the percent of tourism business owners who disagree that tourism changes the local culture (42%) is much higher than the percent of those who agree (28%).

Tourism Business Owners' Perceptions of Tourism’s Negative Cultural Impacts

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



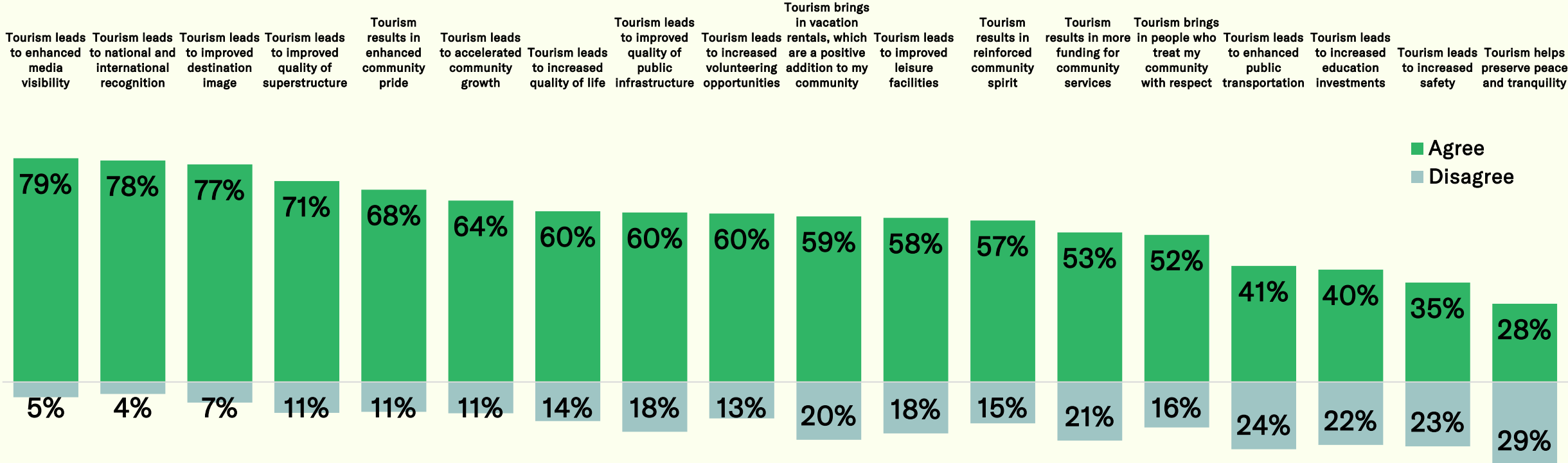
Question: Thinking about Oregon’s tourism industry and its impact on Oregon’s culture, please rate how much you agree or disagree with the following statements.
Base: Tourism business owners. 779 completed surveys.

Tourism business owners are most likely to agree that tourism improves Oregon’s reputation and brings more media visibility.

More than three-fourths of tourism business owners agree that tourism enhances media visibility (79%), brings global recognition (78%), and improves the destination image (77%). When it comes to issues around safety (35%) and preserving peace and tranquility (28%), however, agreement levels are significantly lower. Notably, 6 in 10 agree that tourism leads to increased quality of life.

Tourism Business Owners' 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.

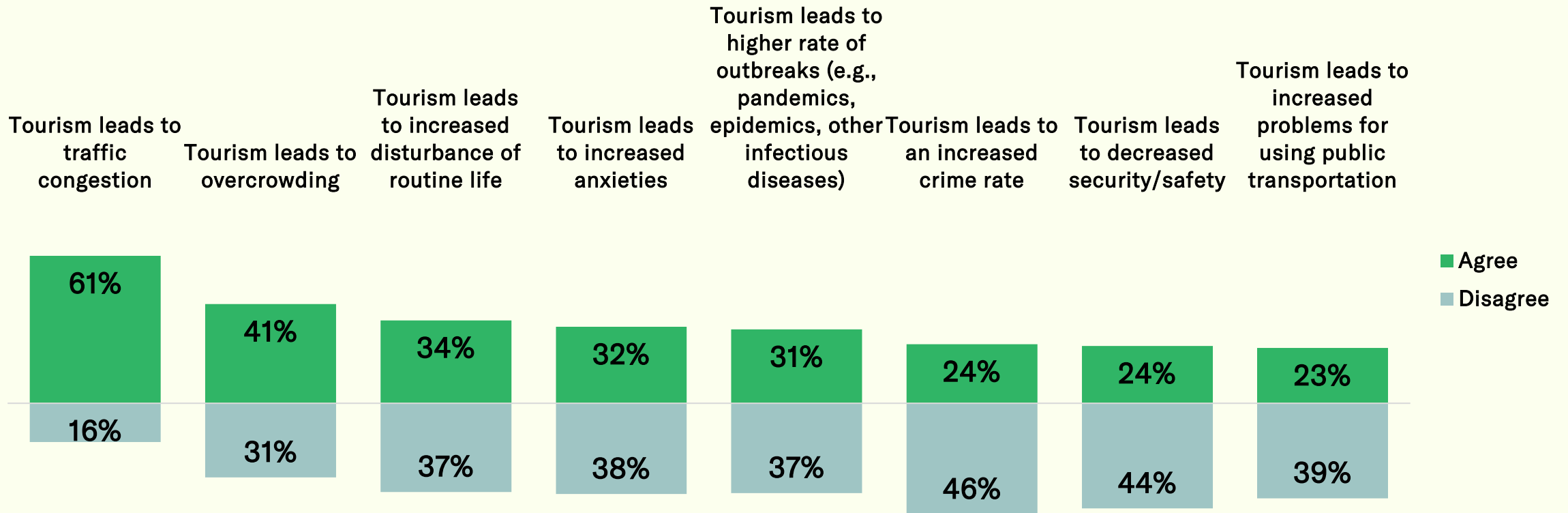
Base: Tourism business owners. 779 completed surveys.

Apart from issues around congestion and crowding, tourism business owners generally disagree with tourism’s negative social impacts.

Just over 6 in 10 (61%) agree that tourism leads to traffic congestion, while more than 4 in 10 (41%) agree that it leads to overcrowding. However, disagreement levels outweigh agreement levels for statements around disturbances to routine life, increased anxieties, risk of outbreaks, crime, safety issues, or public transportation problems.

Tourism Business Owners' 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: Tourism business owners. 779 completed surveys.

Current Tourism Workers

The following slides present findings specific to Oregon residents who are currently employed by a business that serves the tourism industry, including demographics, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and support for tourism in Oregon.

Current Tourism Workers Demographic Snapshot

Total residents surveyed:	1,021
Average age:	45 years old
Average household income:	\$86,947
College graduate:	58%
Married/domestic partnership:	60%
Have children in household:	31%
Gender*	
• Female:	67%
• Male:	31%
• Non-binary/Other:	1%
Ethnicity*	
• White/Caucasian:	88%
• Hispanic/Latino:	7%
• Asian, Native Hawaiian, or Pacific Islander:	4%
• Native American, Alaskan Native:	3%
• African American/Black:	2%
• Other:	2%
LGBTQ+:	14%
Accessibility needs in household:	15%

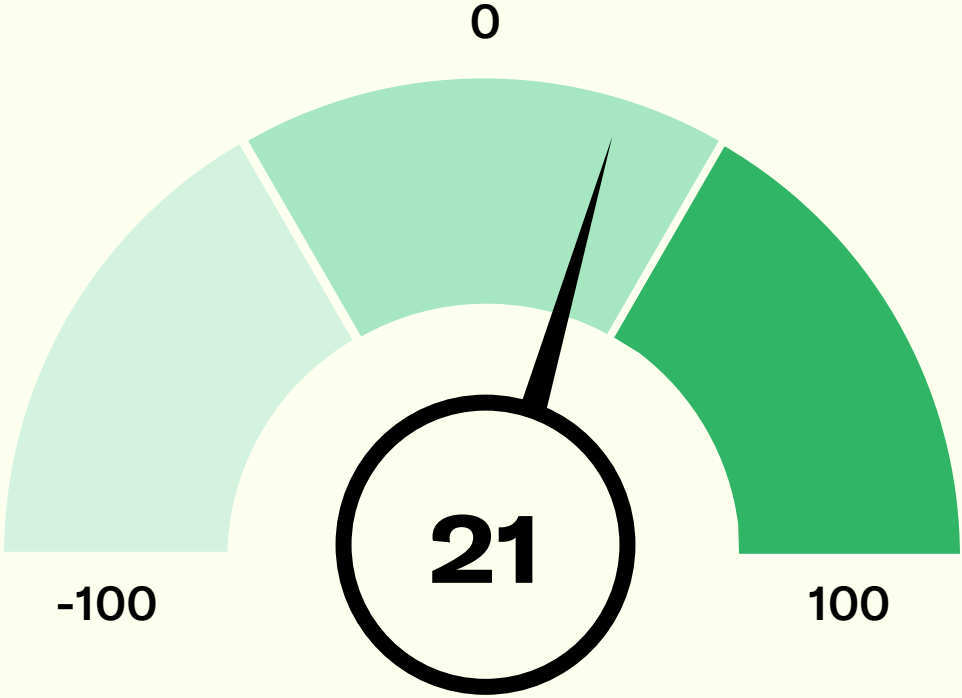
*Percentages sum to more than 100% as respondents could select more than one race/ethnicity.



Current tourism workers' likelihood-to-recommend score falls behind that of the overall tourism workforce.

Nearly half of current tourism workers are promoters of their local community as a tourism destination (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 tourism workers is 21, compared to the overall tourism workforce score of 28. However, the current tourism workers' score does significantly outpace the overall residents' 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?

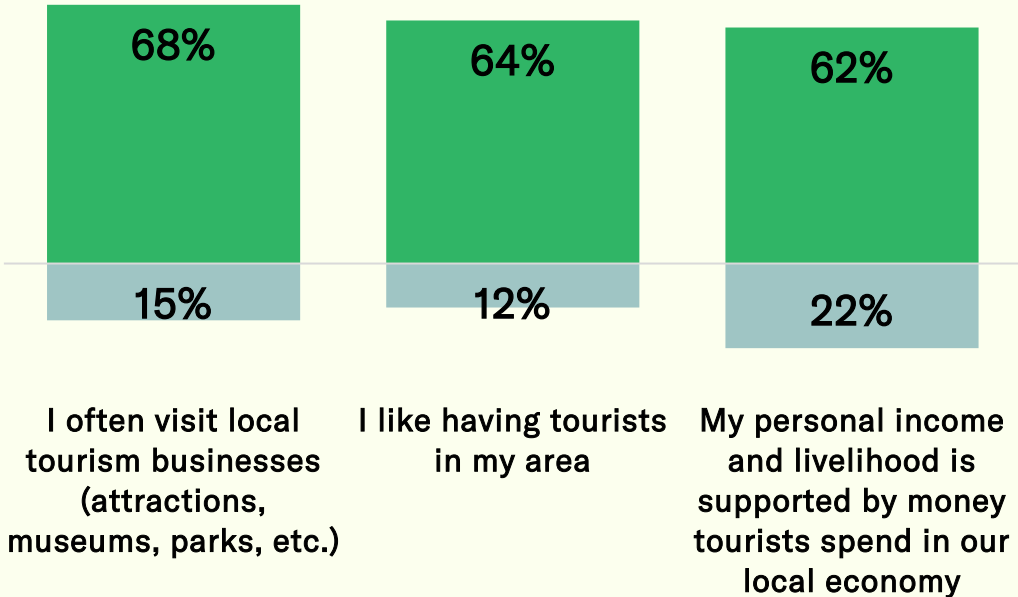
Base: Current tourism workers. 1,021 completed surveys.

Current tourism workers are slightly less likely to agree with tourism’s positive personal impacts compared to tourism business owners.

Nevertheless, more than 6 in 10 agree that they often visit local tourism businesses (68%), enjoy having tourists in their area (64%), and/or feel that their personal livelihood is supported by tourism spend (62%). Nearly half disagree that traffic from tourism disrupts their daily routine (49%), while the majority disagree that tourists negatively impact their day-to-day life (63%).

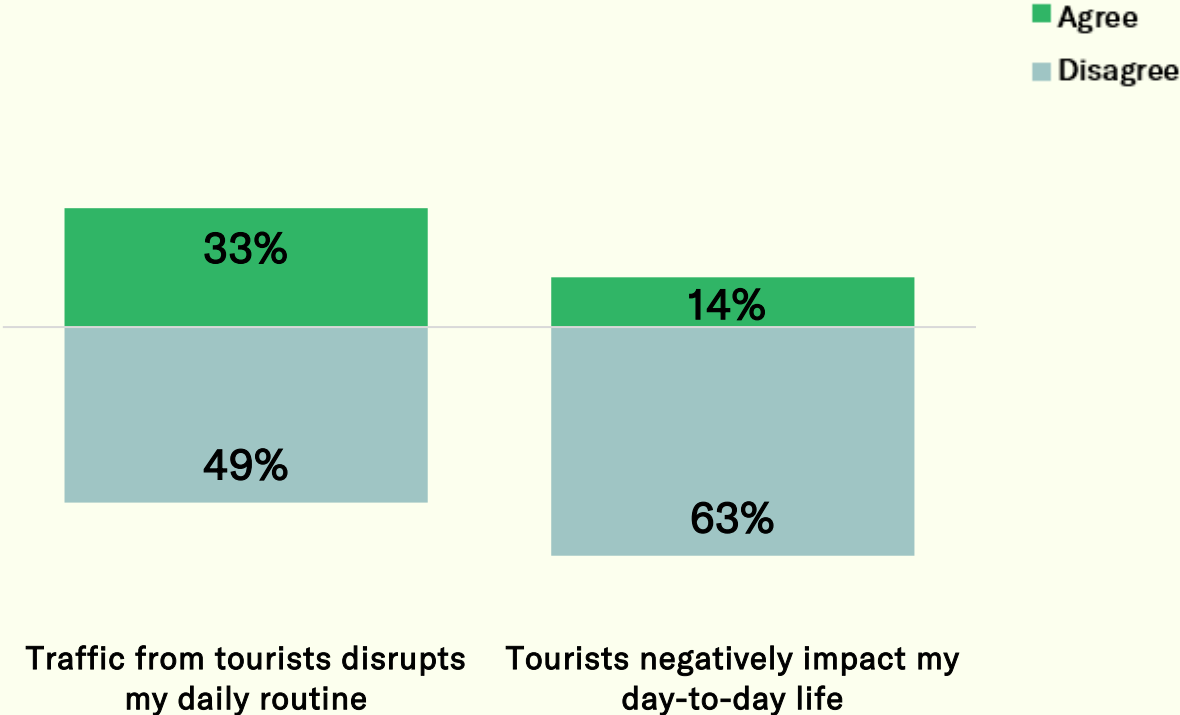
Current Tourism Workers' Perceptions of Positive Local Tourism Personal Impacts

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



Current Tourism Workers' Perceptions of Negative Local Tourism Personal Impacts

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



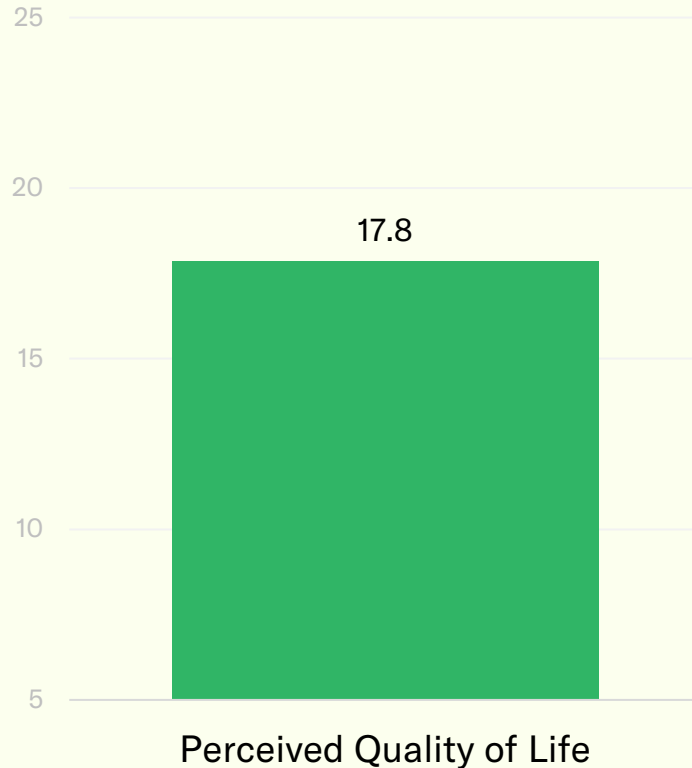
Question: Thinking about tourism in your local area and its impact on you personally, please rate how much you agree with the following statements.

Base: Current tourism workers. 1,021 completed surveys.

Perceived quality of life is lower among current tourism workers.

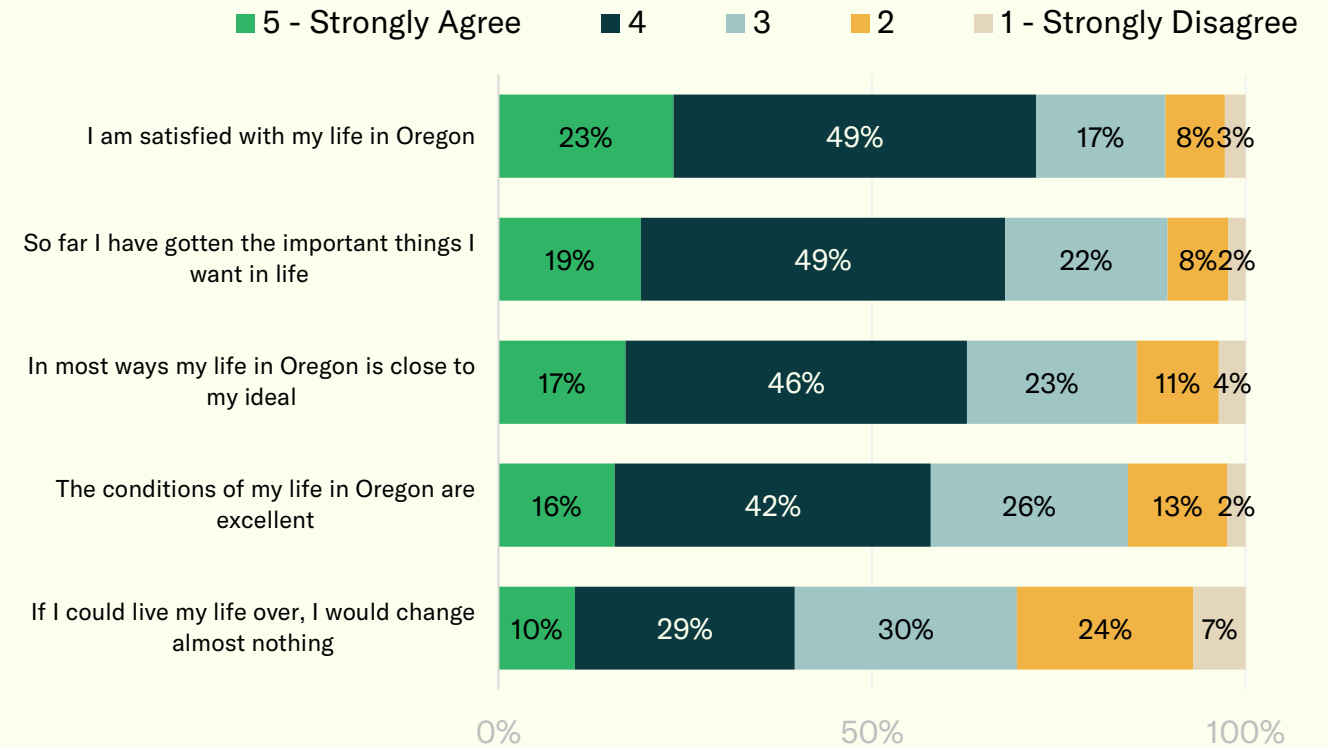
Current tourism workers have a perceived quality of life score of 17.8 out of a possible 25. When compared to other segments studied in this report, this is the lowest perceived quality of life score, falling -1.1 points behind tourism business owners (18.9), and also behind the overall statewide tourism workforce’s score (18.3) as well as the overall total resident score (18.1). While a majority still agreed with most of the statements included in the score, these were notably smaller majorities especially compared to tourism business owners’ agreement levels.

Current Tourism Workers’ 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.

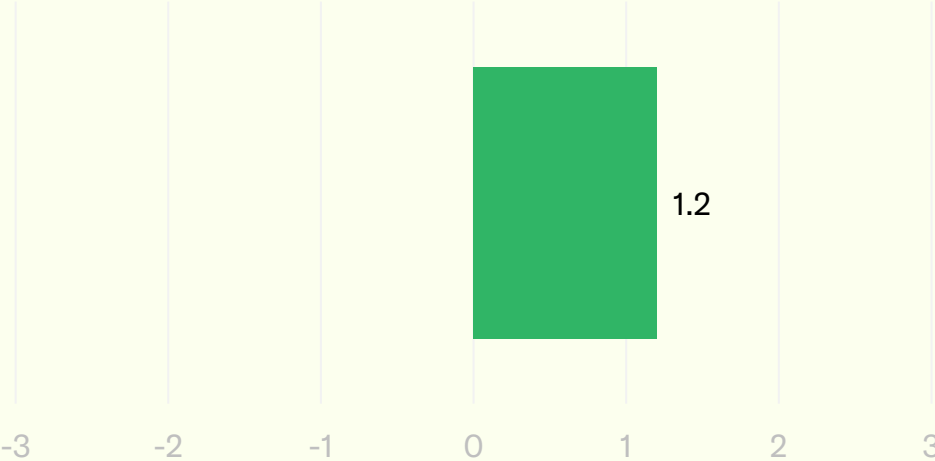
Base: Oregon tourism workforce. 1,800 completed surveys.

Current tourism workers have a positive but slightly lower overall mean score for support for tourism.

In terms of overall support for tourism, calculated as the mean score across all 10 statements shown in the following slide, Oregon's current tourism workers scored a 1.2 out of a highest possible score of 3, with -3 being the lowest possible score. This is slightly behind the statewide tourism workforce's overall mean score for support for tourism of 1.3, and notably lower than tourism business owners' mean score of 1.6 and the statewide (all residents) mean score of 0.9.

Overall Support for Tourism Mean Score*

Current Tourism Workers' Overall Support for Tourism



*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 62 for detailed scores for each included statement.

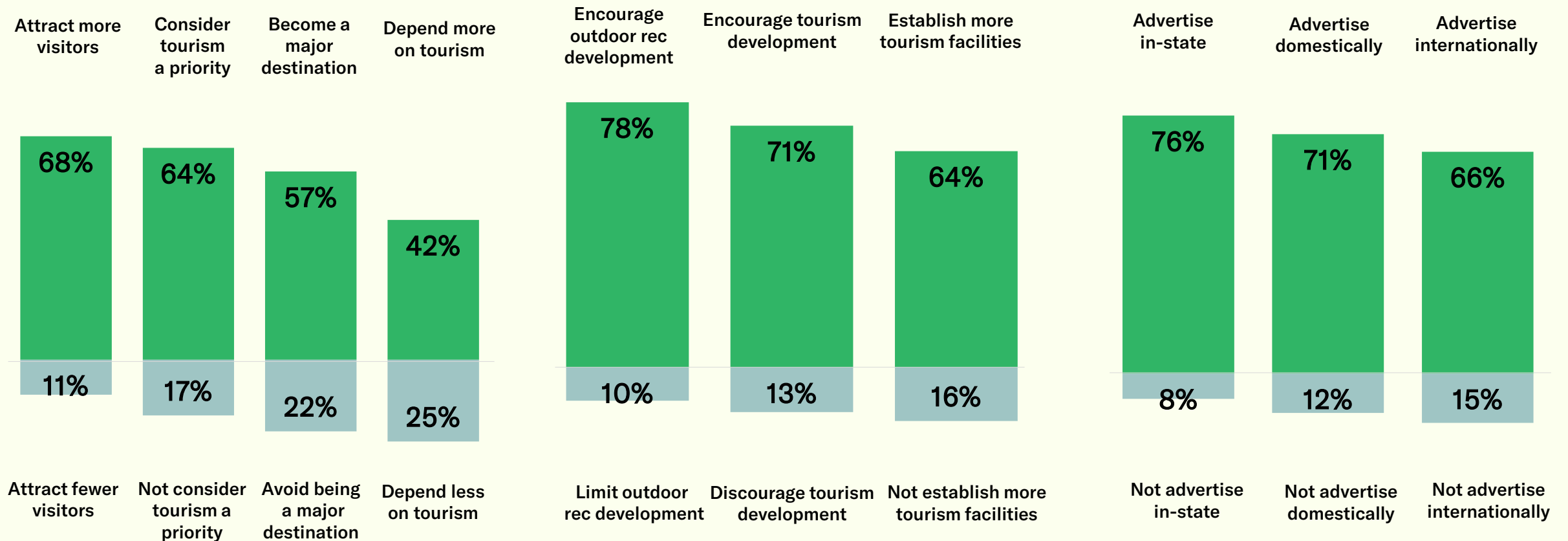
Current tourism workers agree more with encouraging infrastructure development and advertising than with increasing visitation.

More than 7 in 10 agree with 2 of the 3 statements for both the categories for infrastructure and advertising Oregon, while agreement levels were generally lower for attracting more visitors (68%), prioritizing tourism (64%), becoming a major destination (57%), and/or depending more on tourism (42%).

Support for Tourism – “Oregon should...”

(On a -3- to 3-point scale)

■ Positive Score (>0)
■ Negative Score (<0)



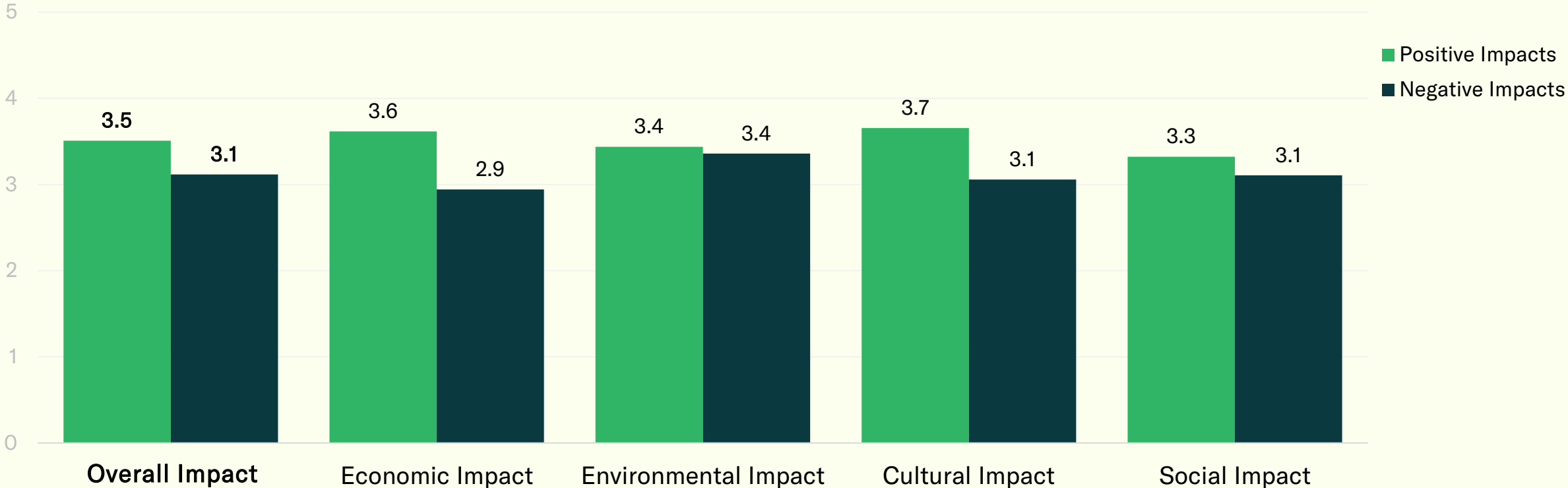
Question: Thinking of tourism in Oregon, please read each statement and complete it by using the slider scales below to plot how closely you agree to each statement. Oregon should...

Base: Current tourism workers. 1,021 completed surveys.

Tourism's negative environmental and social impacts index closely with perceived positive impacts for current tourism workers.

While, as with tourism business owners, the highest positive impact scores and largest positive/negative gaps are seen with the economic impact and cultural impact indexes, for current tourism workers, the negative environmental impact score is nearly on par with the positive environmental impact score (3.44 vs. 3.36), whereas the gap was much larger for tourism business owners and the overall tourism workforce. Similarly, the positive/negative gap for the perceived social impacts of tourism is markedly narrower (3.32 vs. 3.11) among current tourism workers.

Index of Current Tourism Workers' Perceptions of Tourism Impacts



Note: decimals are rounded, thus bar heights may not align.

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.

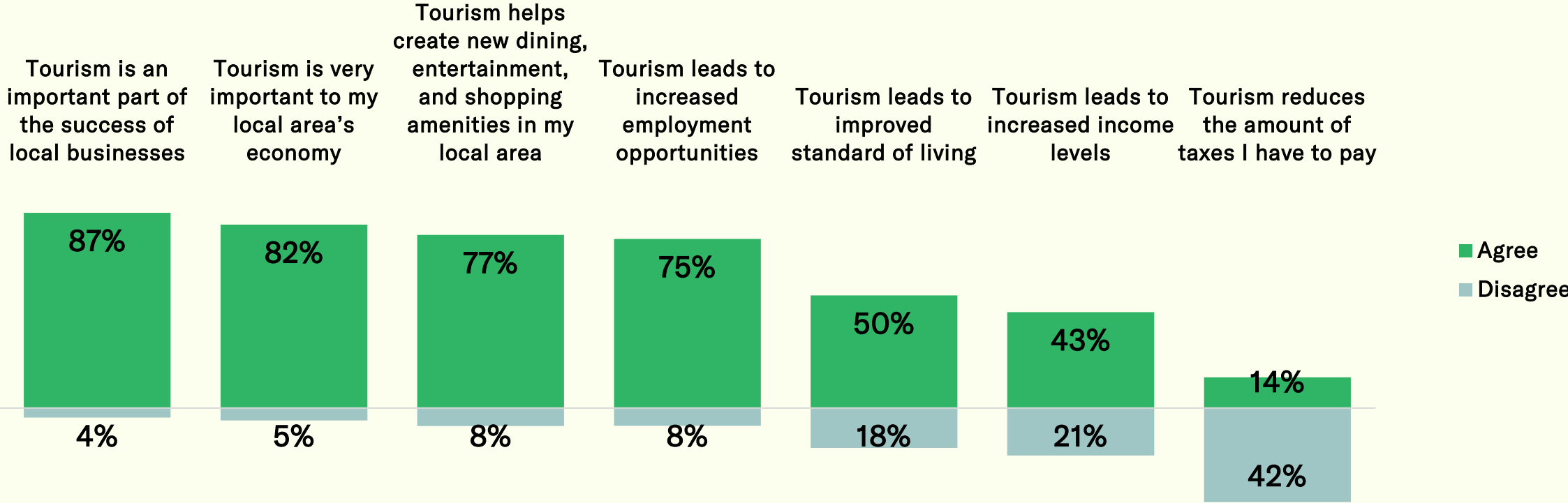
Base: Current tourism workers. 1,021 completed surveys.

Current tourism workers are less likely to perceive the personal economic benefits of tourism.

While the vast majority agree that tourism brings in positive economic impacts to local business, the community, and the local economy, only half agree that it improves the standard of living (50%), while less than half agree that tourism increases income levels (43%). Most notably, a scant 14% agree that tourism reduces their individual taxes.

Current Tourism Workers' 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.

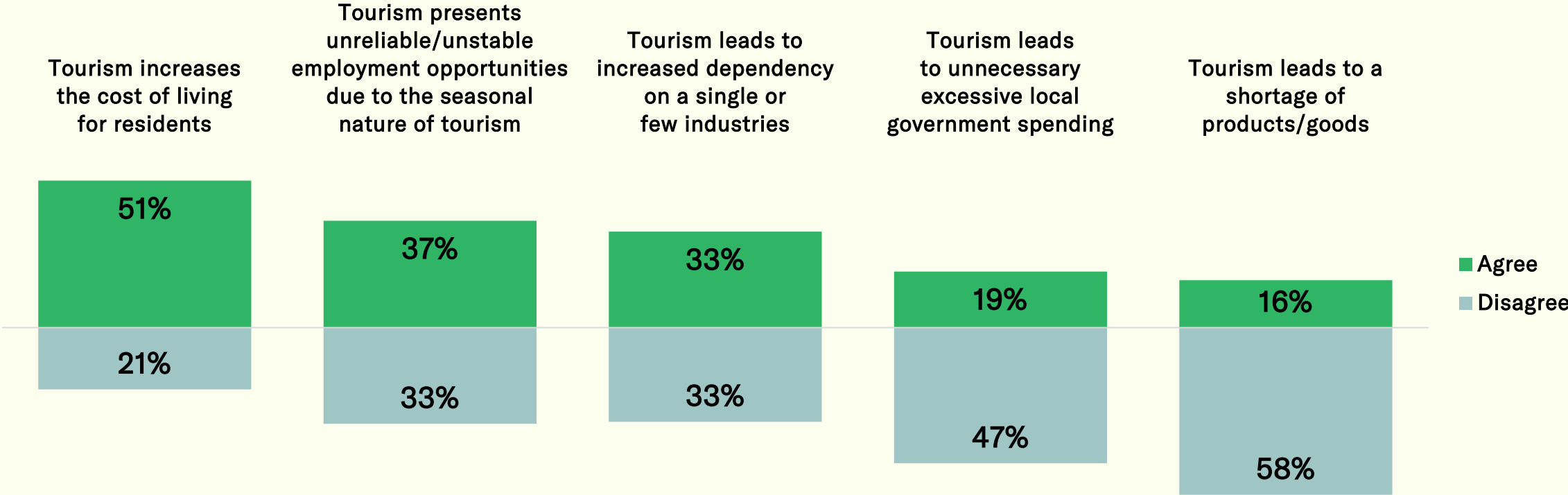
Base: Current tourism workers. 1,021 completed surveys.

Apart from cost of living, current tourism workers' agreement levels with tourism's negative economic impacts are relatively lower.

Compared to tourism business owners, current tourism workers are less likely to agree that tourism presents unreliable or unstable employment opportunities due to its seasonal nature (37% vs. 40% of tourism business owners), leads to unnecessary excessive local government spending (19% vs. 23%), or that tourism leads to a shortage of goods (16% vs. 18%). On the other hand, a small majority of current tourism workers agree that tourism increases the cost of living for residents (51% vs. 45% of tourism business owners).

Current Tourism Workers' Perceptions of Tourism's Negative Economic Impacts

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



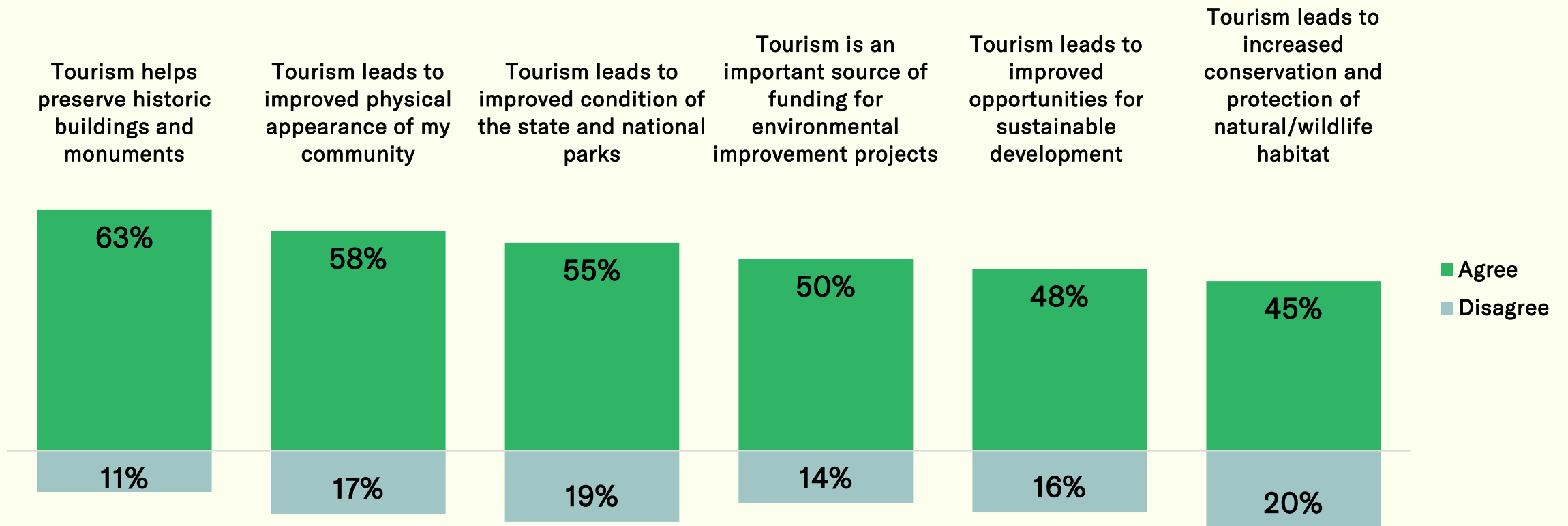
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
 Base: Current tourism workers. 1,021 completed surveys.

The majority of current tourism workers agree that tourism has a positive impact on the communities' conditions.

Roughly 6 in 10 agree that tourism helps preserve historic sites (63%) and/or improves the physical appearance of their community (58%). On the other hand, slightly less than half agree that tourism leads to improved opportunities for sustainable development (48%) or increased nature conservation (45%).

Current Tourism Workers' 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.

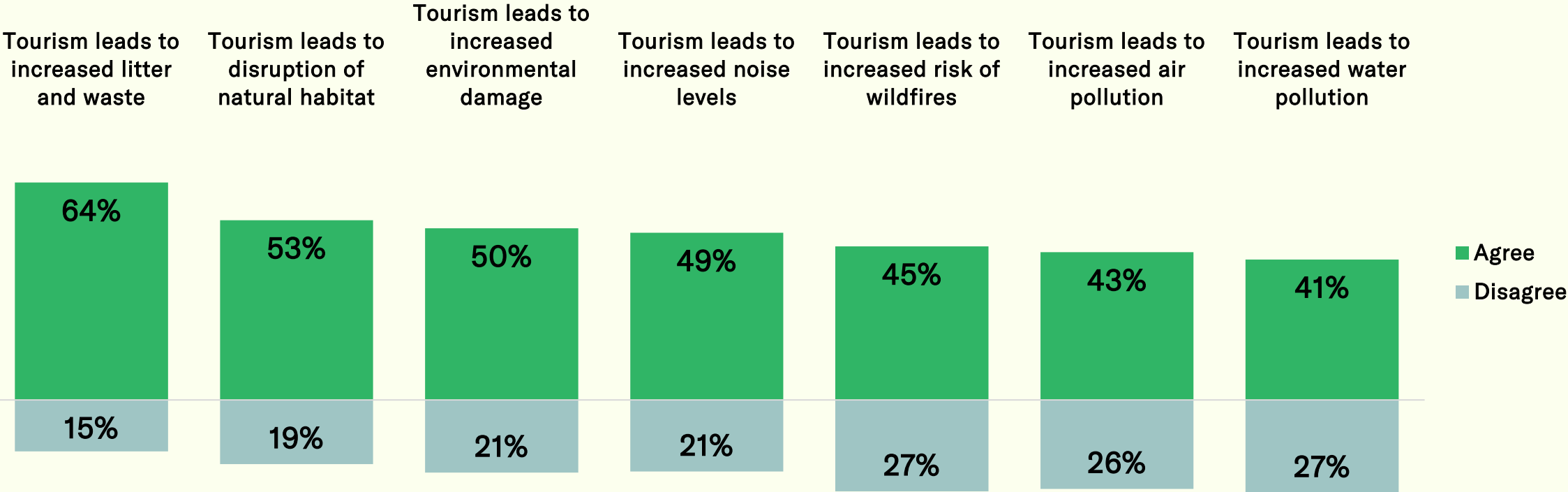
Base: Current tourism workers. 1,021 completed surveys.

Current tourism workers are much more likely to agree with tourism's negative environmental impacts.

Across all negative environmental impact statements, current tourism workers were more likely to agree than tourism business owners. In particular, current tourism workers are much more likely to agree that tourism increases environmental damage (50% vs. 38% of tourism business owners), disrupts natural habitats (53% vs. 40%), and increases litter and waste (64% vs. 53%).

Current Tourism Workers' 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.

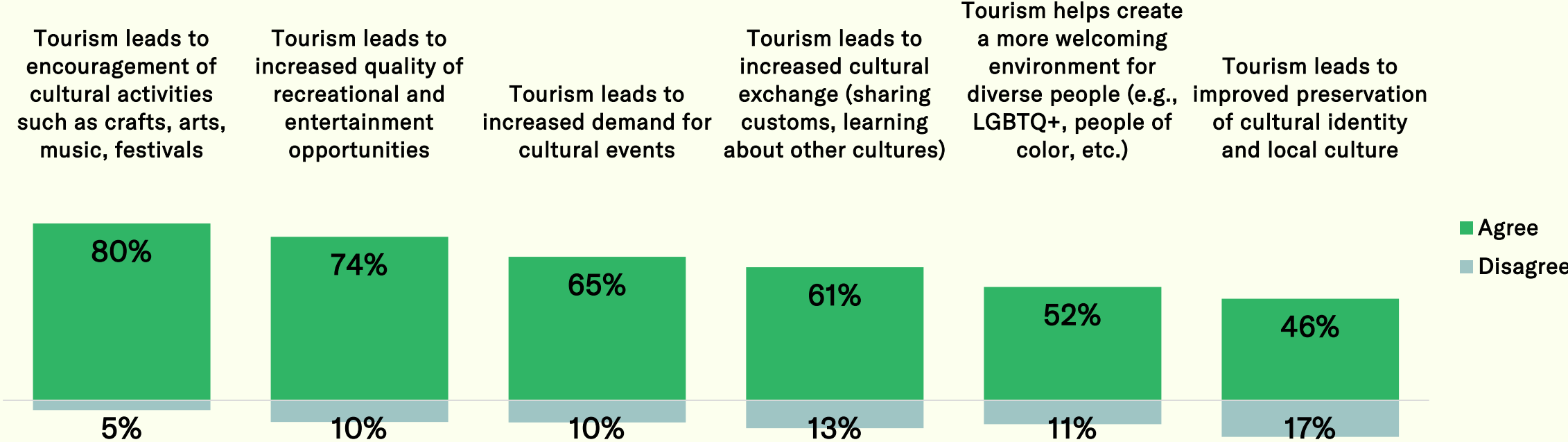
Base: Current tourism workers. 1,021 completed surveys.

Current tourism workers agree with most of tourism’s positive cultural impact statements, except around preserving cultural identity.

Agreement levels are highest around tourism’s benefits for community activities and events: 8 in 10 agree that tourism encourages cultural activities (80%), while three-fourths agree that it increases the quality of recreational and entertainment opportunities (74%). Two-thirds agree that tourism propels demand for cultural events (65%). Notably, less than half agree that tourism helps preserve local cultural identities (46%).

Current Tourism Workers' 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: Current tourism workers. 1,021 completed surveys.

Agreement with tourism’s negative cultural impacts is slightly higher for current tourism workers, particularly around conflicts between visitors and residents.

Nearly 4 in 10 current tourism workers agree that tourism leads to conflicts between visitors and residents (38%), which is higher than the share of tourism business owners who agree (32%). Interestingly, while 46% of current tourism workers agree that tourism *preserves* local cultural identity (see previous slide), 30% agree that tourism *negatively changes* the local culture, suggesting a divide in perceptions around the influence of tourism on local identity. Further, 34% of current tourism workers agree that tourism leads to the commodification of local culture, which is also counterproductive to its preservation.

Current Tourism Workers' 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.

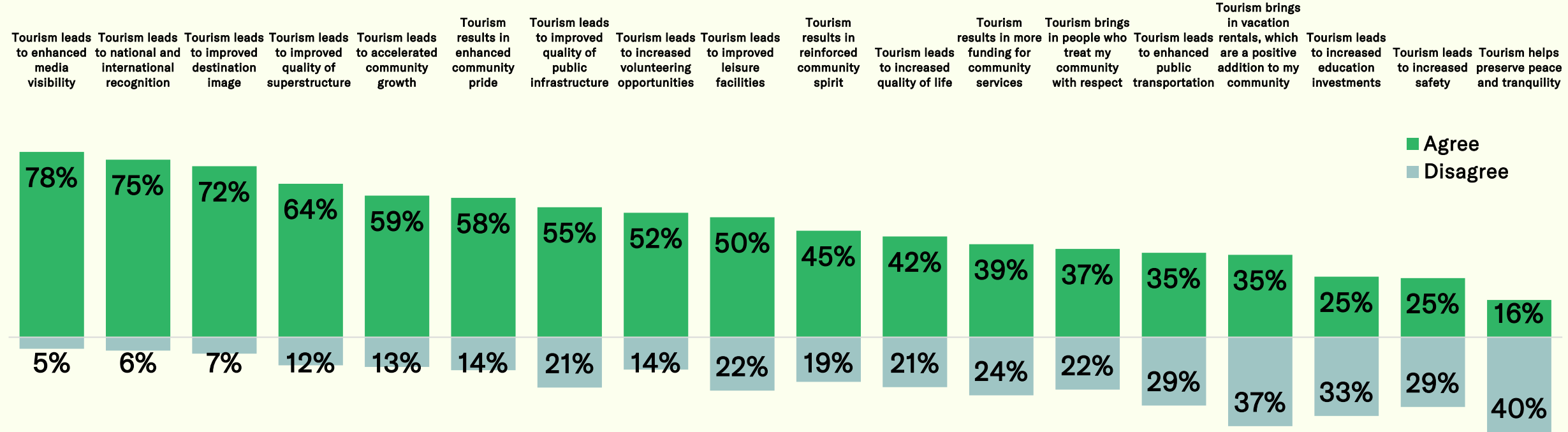
Base: Current tourism workers. 1,021 completed surveys.

Current tourism workers' agreement with tourism's positive social impacts is generally lower compared to business owners.

In particular, current tourism workers are much less likely to agree that vacation rentals are a positive addition to the community (35% vs. 59% of business owners) or that tourism increases the quality of life (42% vs. 60%). However, the two workforce segments are closely aligned on the top three positive social impacts of tourism, surrounding enhanced media visibility (78% vs. 79%), global recognition (75% vs. 78%), and improved destination image (72% vs. 79%).

Current Tourism Workers' Perceptions of Tourism's Positive Social Impacts

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



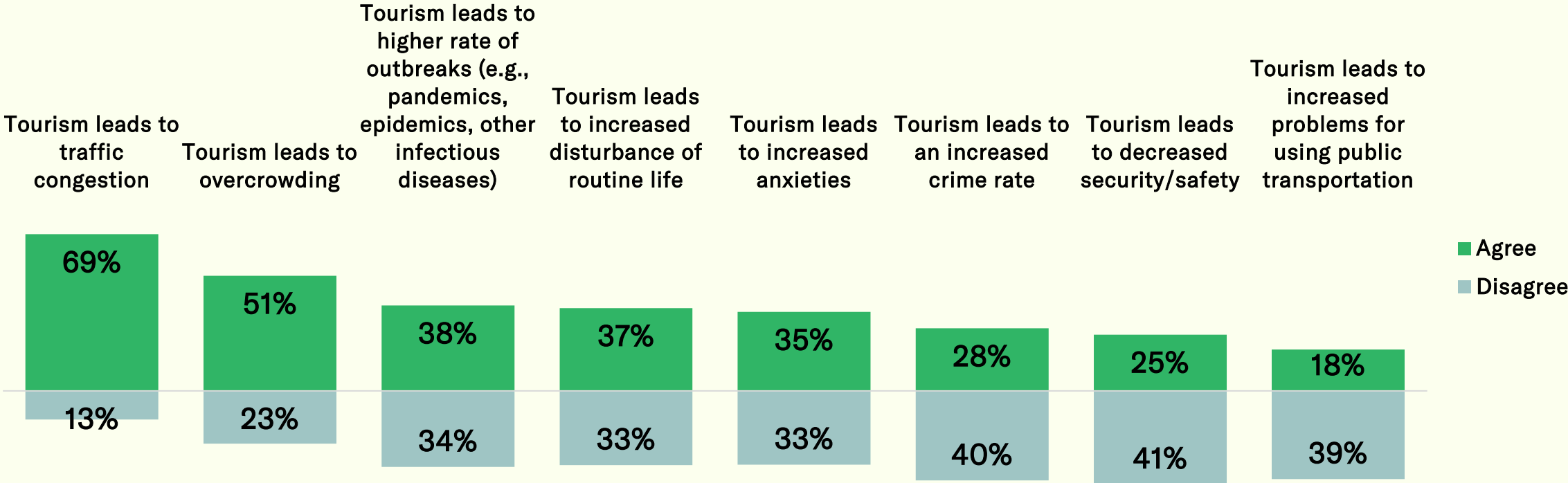
Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Current tourism workers. 1,021 completed surveys.

Except for public transportation problems, current tourism workers are more likely to agree with tourism’s negative social impacts.

As with other segments, tourism leading to traffic congestion saw the highest agreement levels among current tourism workers (69%). Current tourism workers were also much more likely to agree that tourism leads to overcrowding (51% vs. 41% of tourism business owners) or to a higher rate of outbreaks (38% vs. 31% of tourism business owners). However, only 18% agree that tourism leads to more problems around using public transportation, compared to 23% of tourism business owners.

Current Tourism Workers' 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: Current tourism workers. 1,021 completed surveys.

Appendix – Regional Breakouts

Portland Region Tourism Workforce

The following slides present findings specific to Portland Region residents who are currently employed by a business that serves the tourism industry, including demographics, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and support for tourism in Oregon.

Portland Region Tourism Workforce Demographic Snapshot

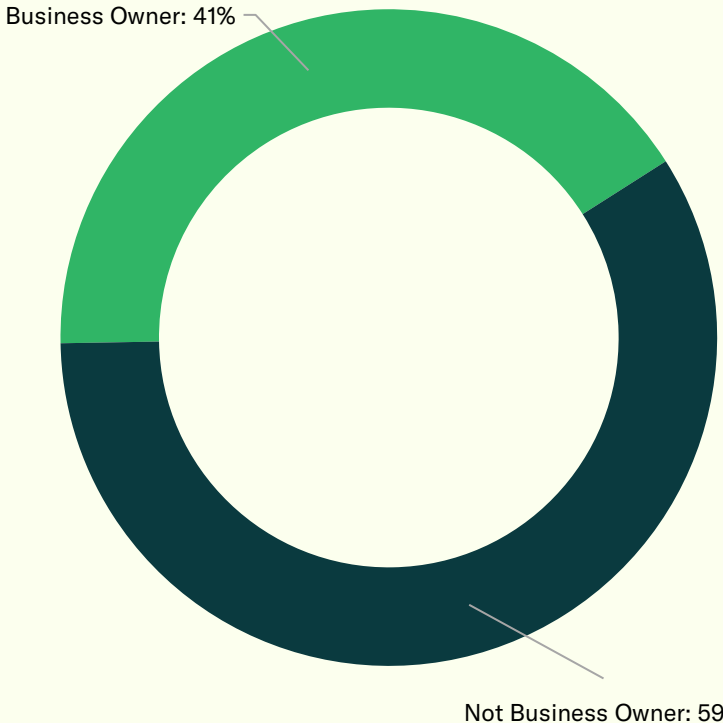
Total residents surveyed:	401
Average age:	39 years old
Average household income:	\$94,219
College graduate:	60%
Married/domestic partnership:	59%
Have children in household:	38%
Gender*	
• Female:	39%
• Male:	59%
• Non-binary/Other:	1%
Ethnicity*	
• White/Caucasian:	77%
• African American/Black:	9%
• Asian, Native Hawaiian, or Pacific Islander:	7%
• Hispanic/Latino:	7%
• Native American, Alaskan Native:	5%
• Other:	3%
LGBTQ+:	25%
Accessibility needs in household:	26%

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



Portland Region – Tourism-Industry Business Owners

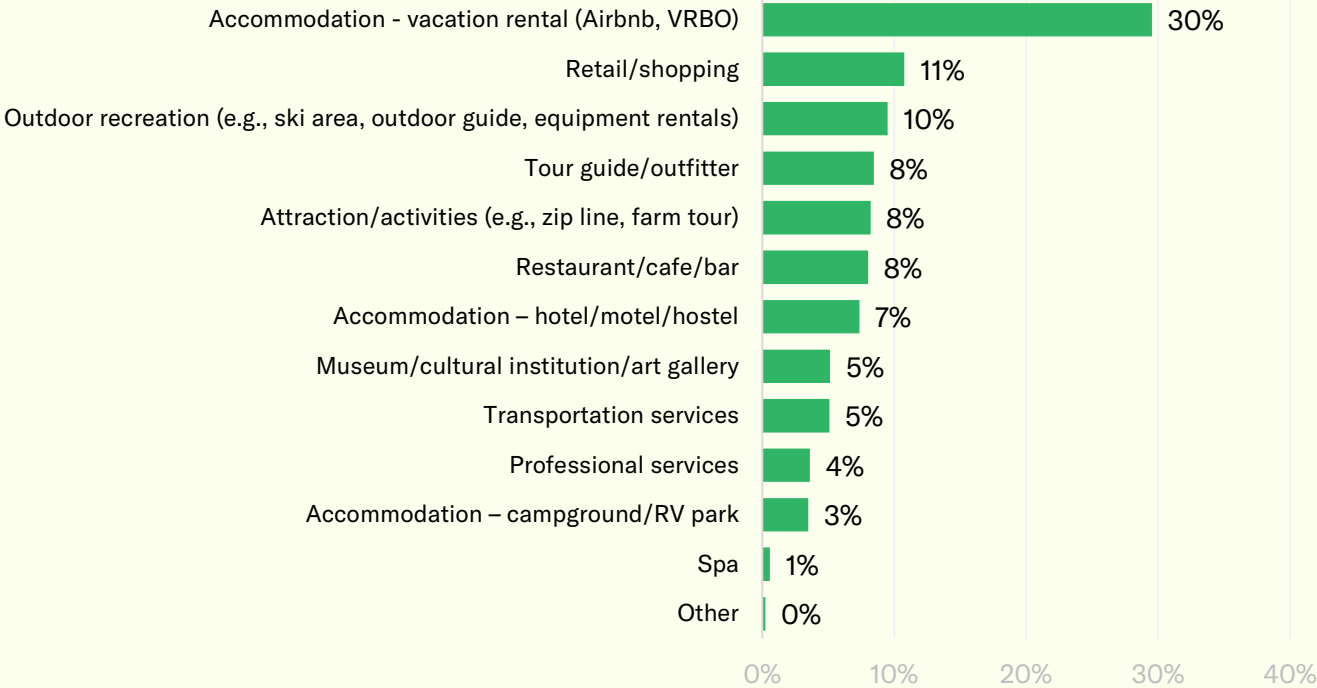
Share of Tourism Workforce who are Business Owners



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

Base: Portland Region tourism workforce. 401 completed surveys.

Type of Business Owned



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

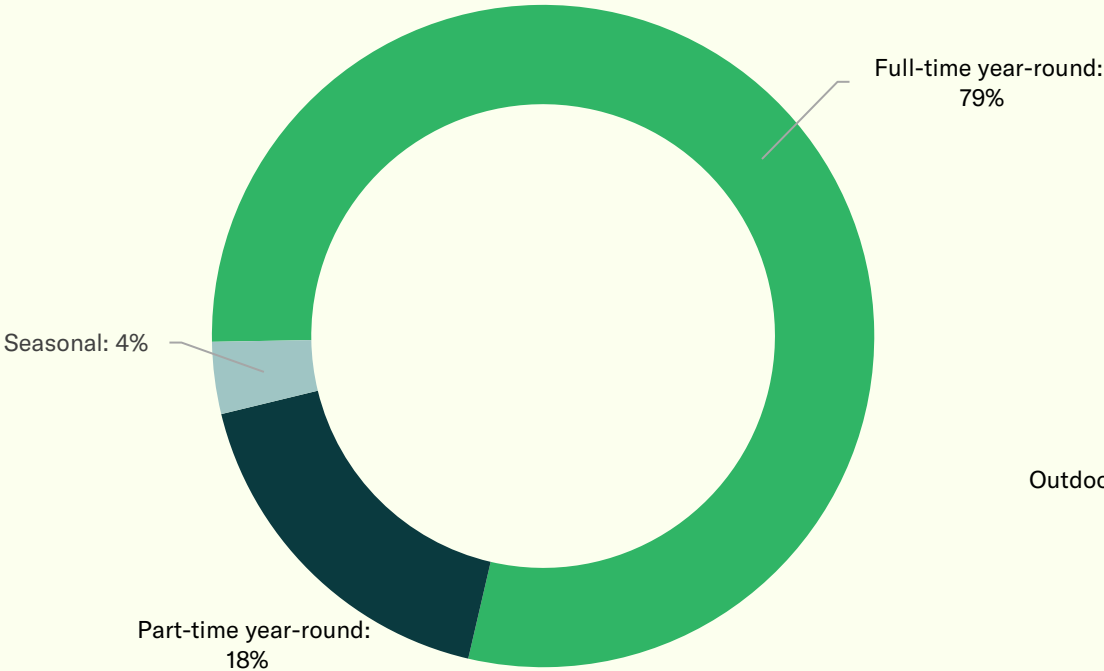
Question: Which of the following best describes your business?

Base: Portland Region residents who own a business that serves the tourism industry. 171 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, real estate, and other businesses that serve the needs of tourists outside of the hospitality industry (i.e., legal assistance, emergency/health services, tourism advocacy, etc.).

Portland Region – Current Tourism Employees

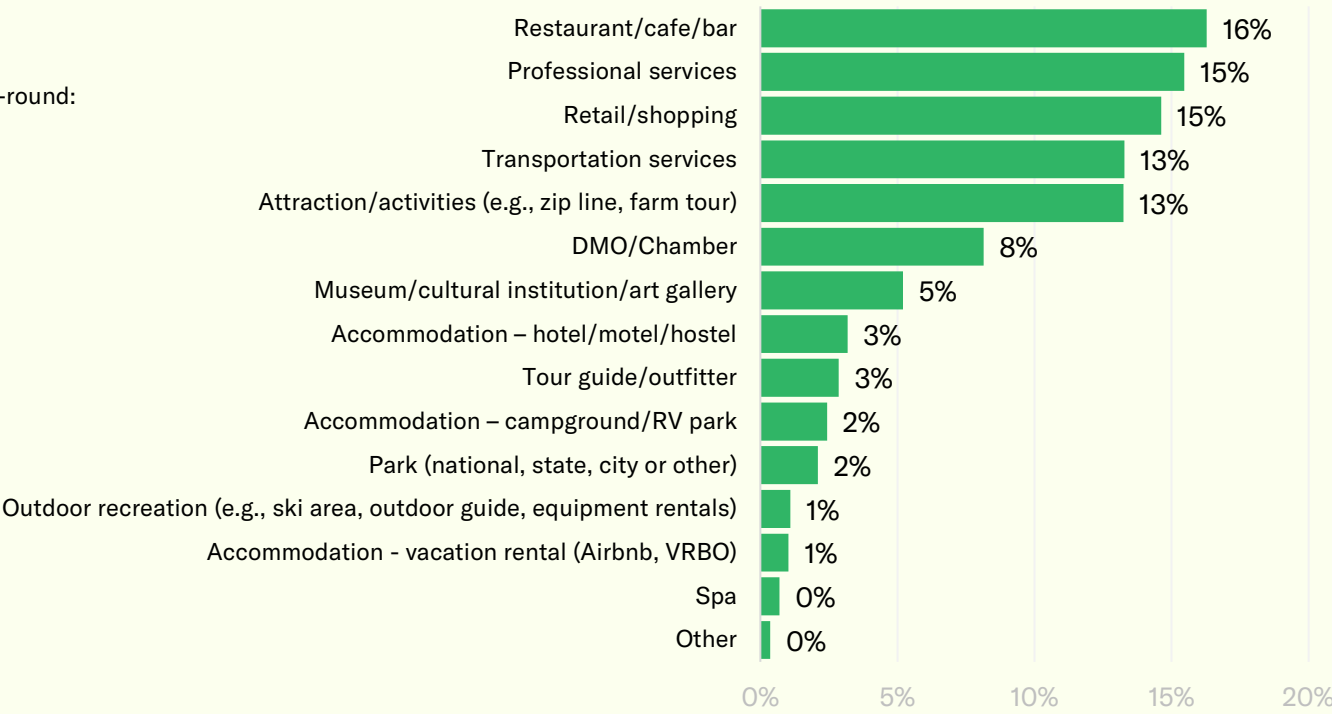
Current Employees: Employment Type



Question: Are you currently employed...?

Base: Portland Region current tourism business employees. 230 completed surveys.

Place of Employment



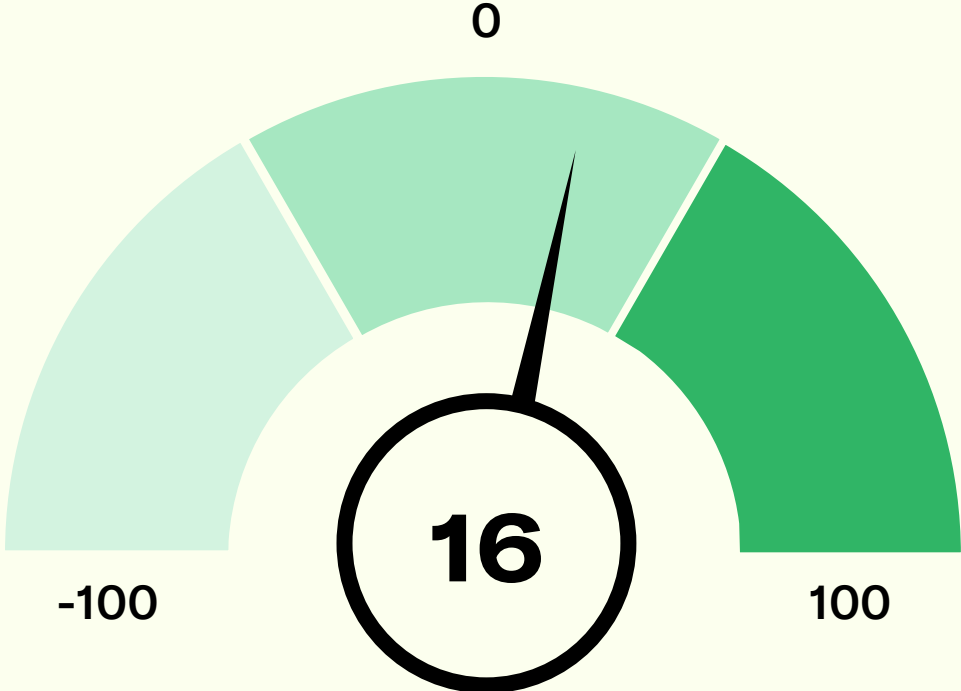
Note: Percentages may not sum to 100% due to rounding.

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

Base: Portland Region current tourism business employees. 230 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, real estate, and other businesses that serve the needs of tourists outside of the hospitality industry (i.e., legal assistance, emergency/health services, tourism advocacy, etc.).

Portland Region – Likelihood to Recommend Local Community as a Tourism Destination



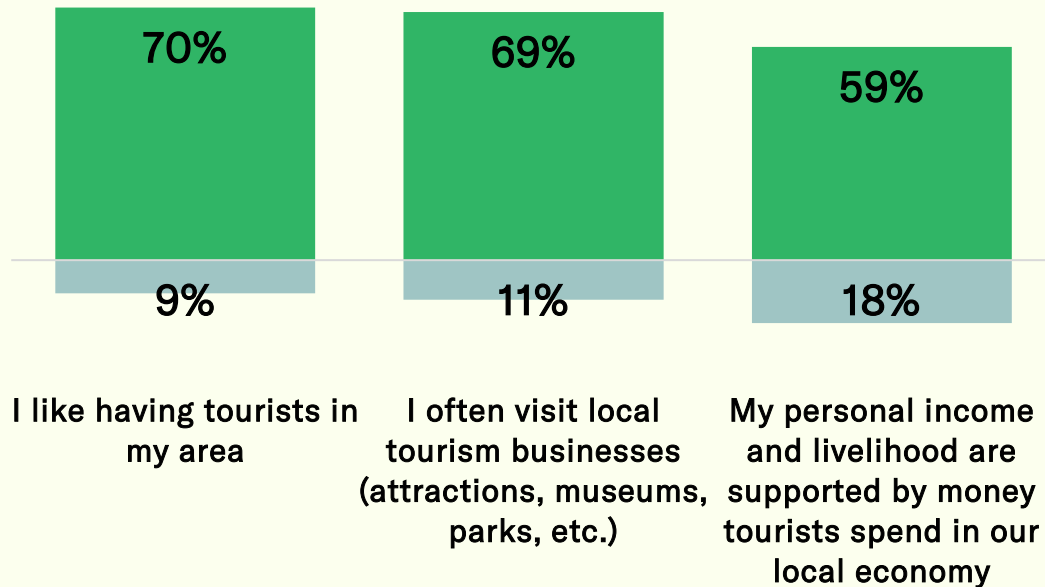
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?
Base: Portland Region tourism workforce. 401 completed surveys.

Portland Region – Workforce's Perceptions of Local Tourism

Personal Impacts

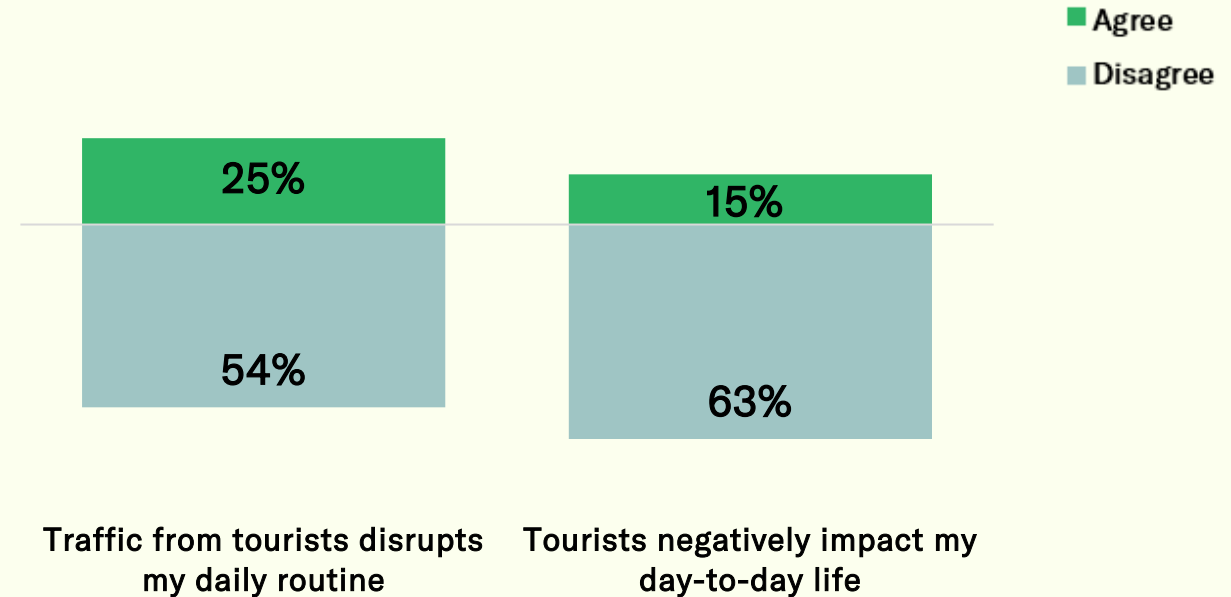
Workforce's Perceptions of Positive Local Tourism Personal Impacts

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



Workforce's Perceptions of Negative Local Tourism Personal Impacts

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

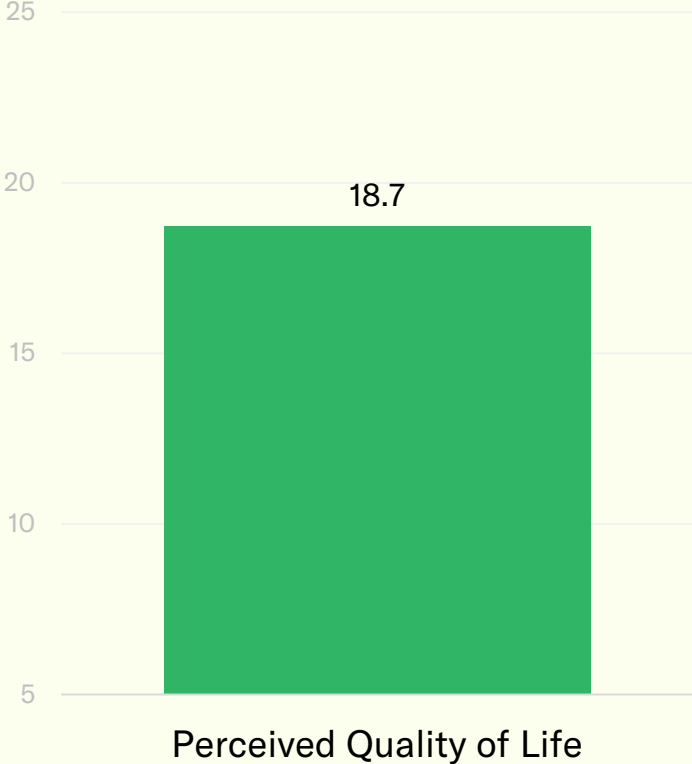


Question: Thinking about tourism in your local area and its impact on you personally, please rate how much you agree with the following statements.

Base: Portland Region tourism workforce. 401 completed surveys.

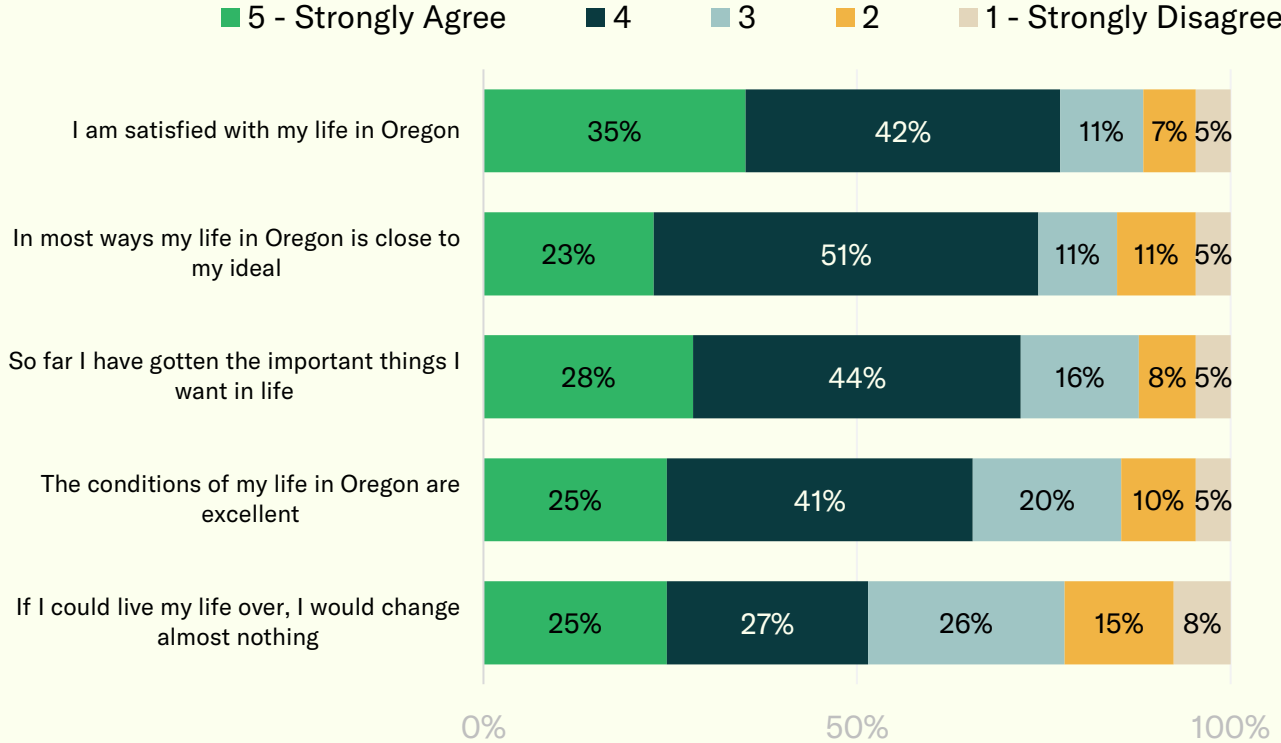
Portland Region –Tourism Business Owners’ Perceived Quality of Life

Tourism Business Owners’ 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



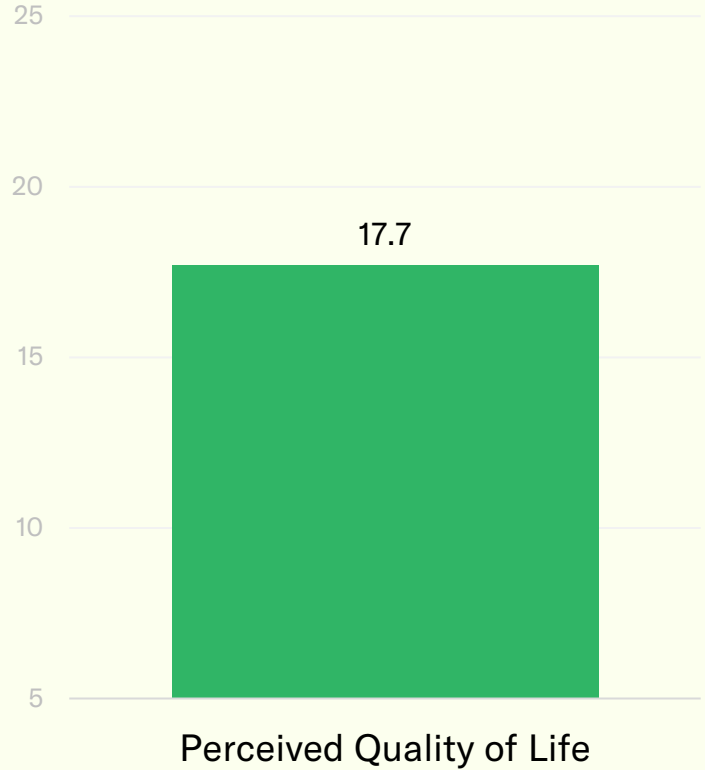
Note: Percentages may not sum to 100% due to rounding.

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

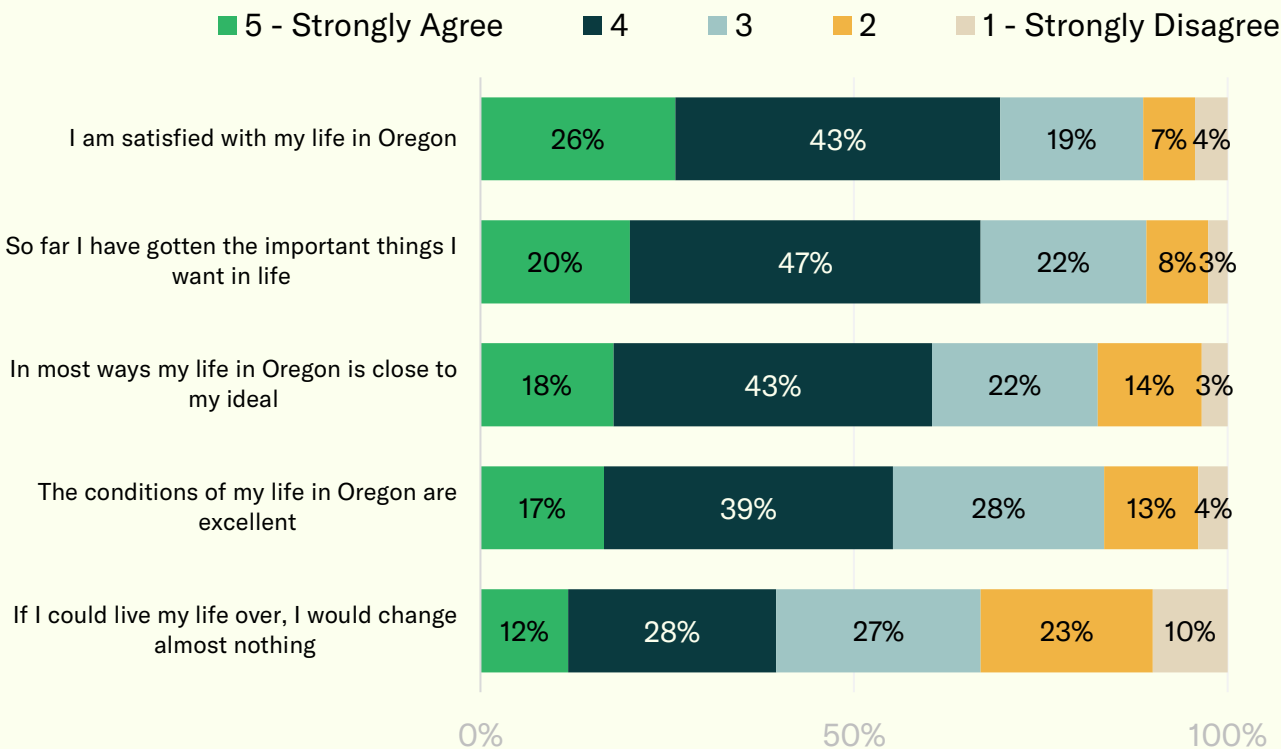
Base: Portland Region residents who own a business that serves the tourism industry. 171 completed surveys.

Portland Region –Tourism Workers’ Perceived Quality of Life

Current Tourism Workers’ Score*



Perceived Quality-of-Life Statements Included in Score



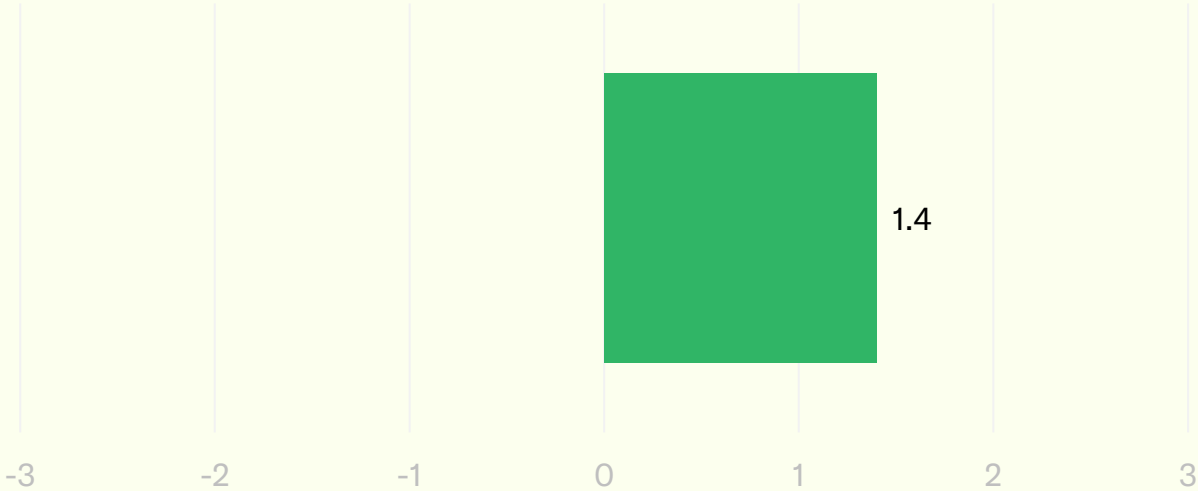
*Calculated as a sum of the mean scores for each statement included in the index, with a minimum possible score of 5 (extremely dissatisfied) and a maximum possible score of 25 (extremely satisfied).

Note: Percentages may not sum to 100% due to rounding.
 Question: Please rate your level of agreement with the following statements.
 Base: Portland Region current tourism workers. 230 completed surveys.

Portland Region – Overall Support for Tourism

Overall Support for Tourism Mean Score*

Portland Region Tourism Workforce’s Overall Support for Tourism



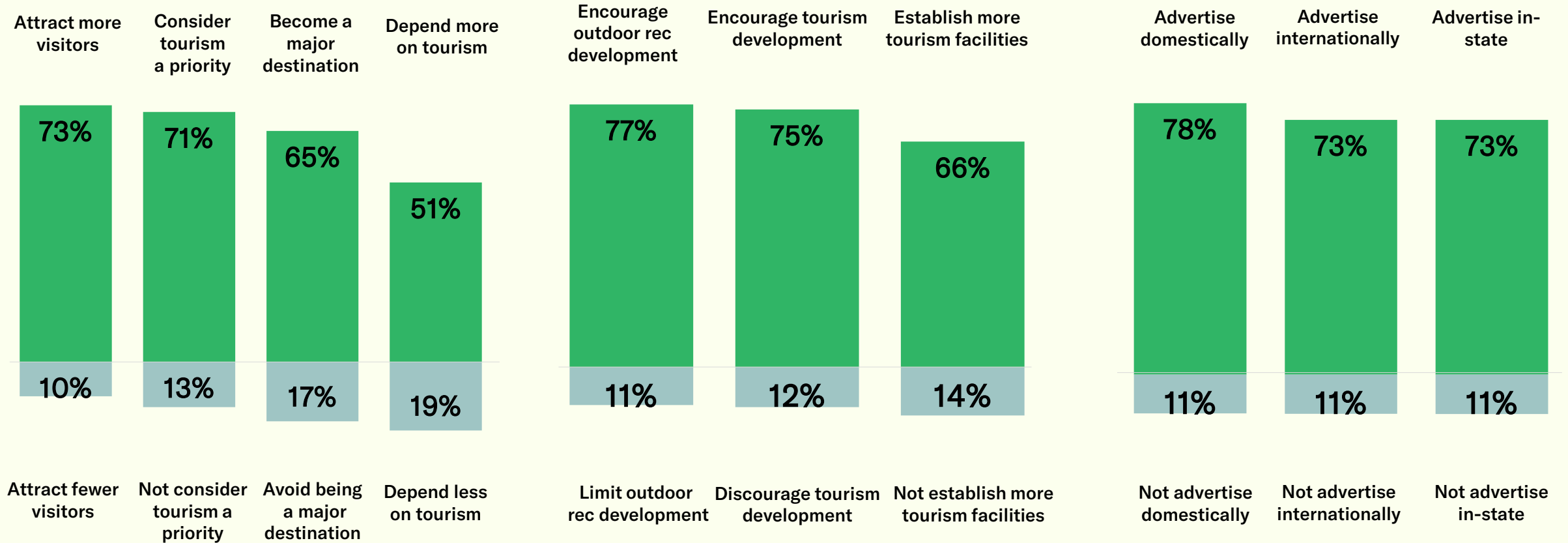
* Calculated as the mean scores for statements included in the index, with a minimum possible mean score of -3 and a maximum possible mean score of 3. See page 80 for detailed scores for each included statement.

Portland Region – Support for Tourism Statements

“Oregon should...”

(On a -3- to 3-point scale)

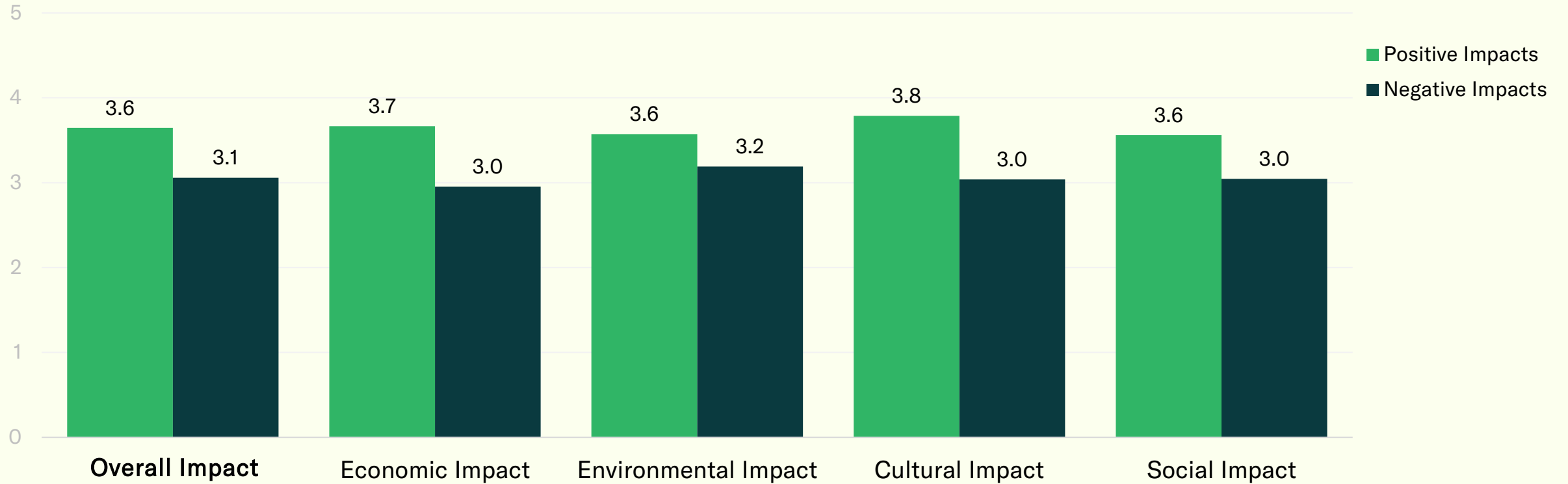
■ Positive Score (>0)
■ Negative Score (<0)



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: Portland Region tourism workforce. 401 completed surveys.

Portland Region – Index of Workforce's Perceptions of Tourism Impacts



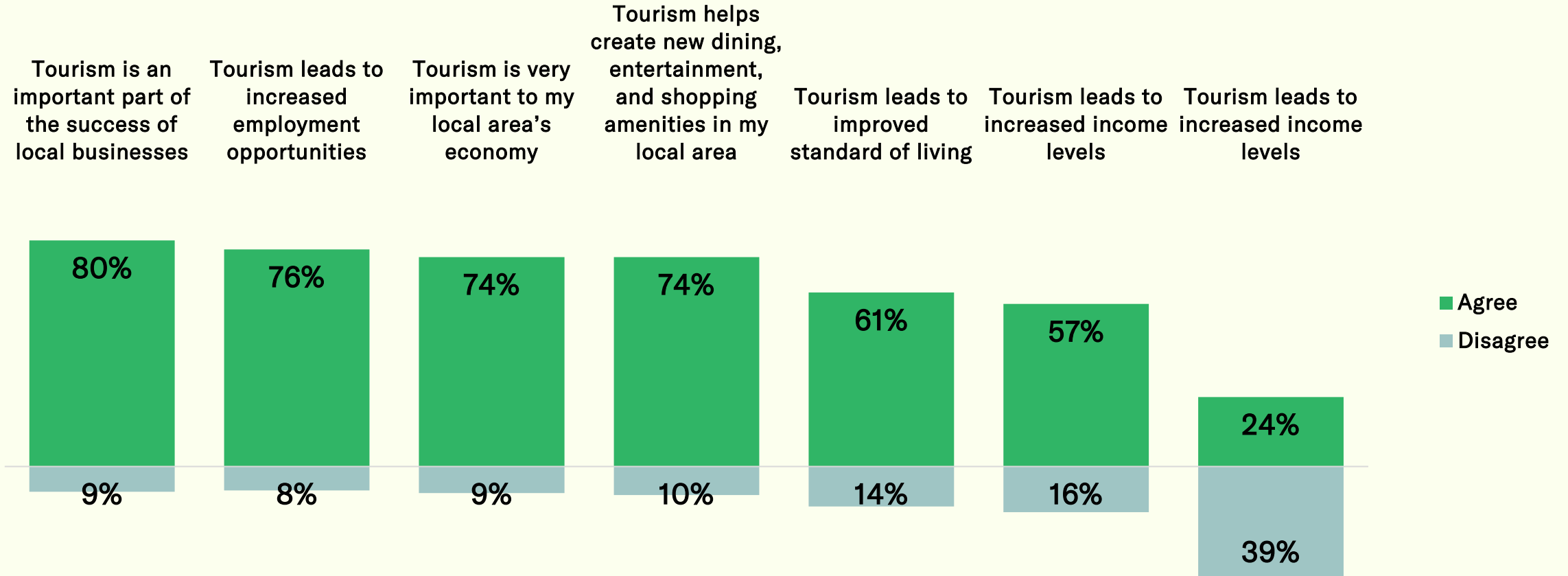
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Portland Region tourism workforce. 401 completed surveys.

Portland Region – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Positive Economic Impacts

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



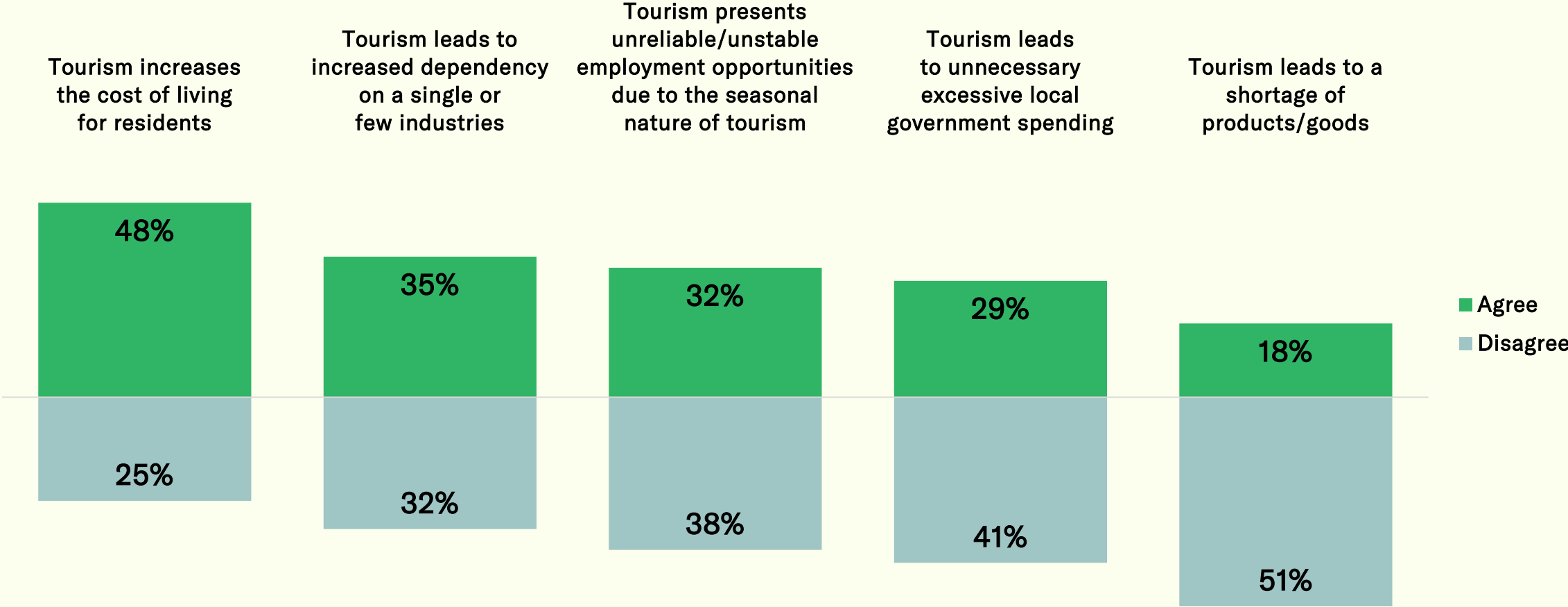
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Portland Region tourism workforce. 401 completed surveys.

Portland Region – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Negative Economic Impacts

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

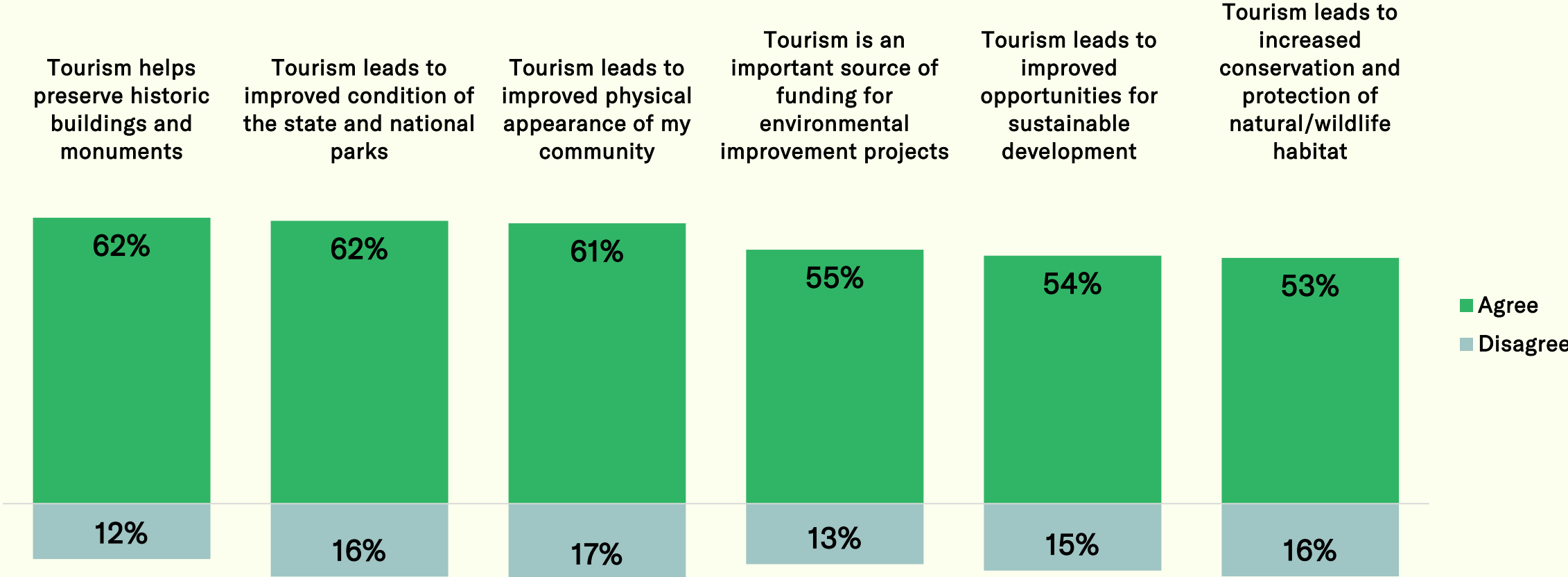


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Portland Region tourism workforce. 401 completed surveys.

Portland Region – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Positive Environmental Impacts

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

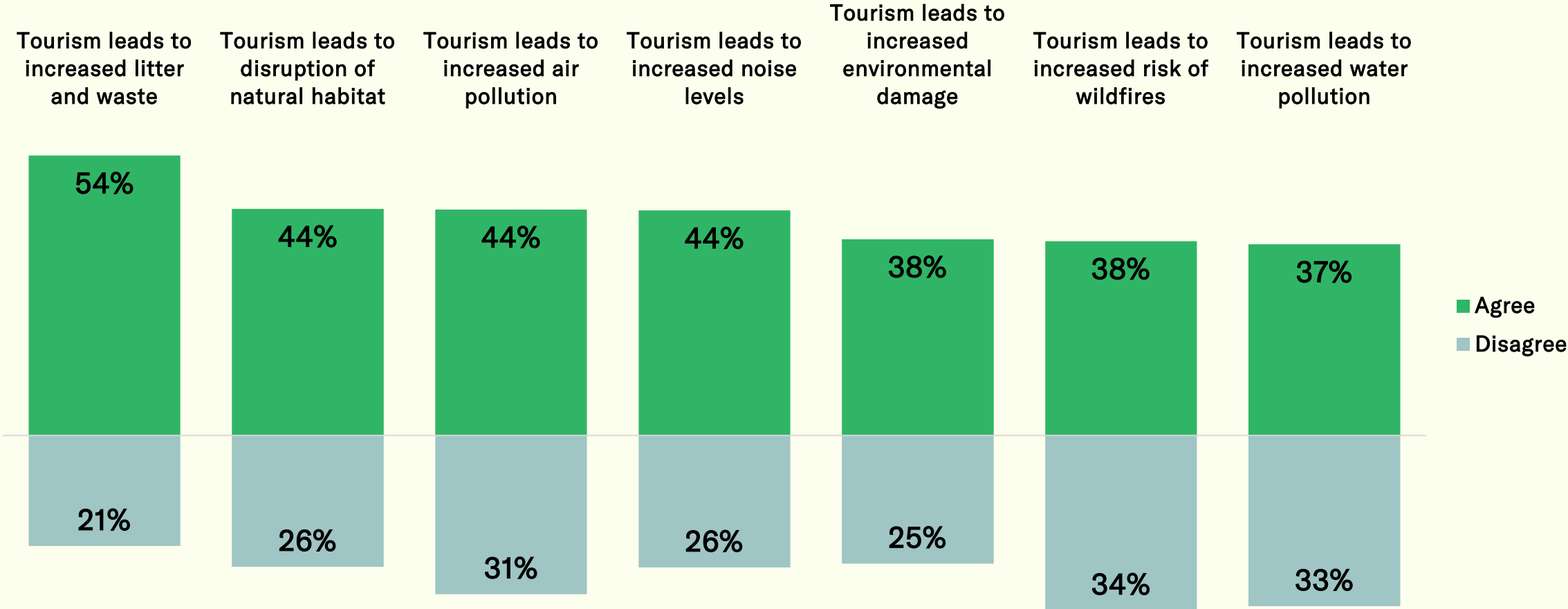


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Portland Region tourism workforce. 401 completed surveys.

Portland Region – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Negative Environmental Impacts

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



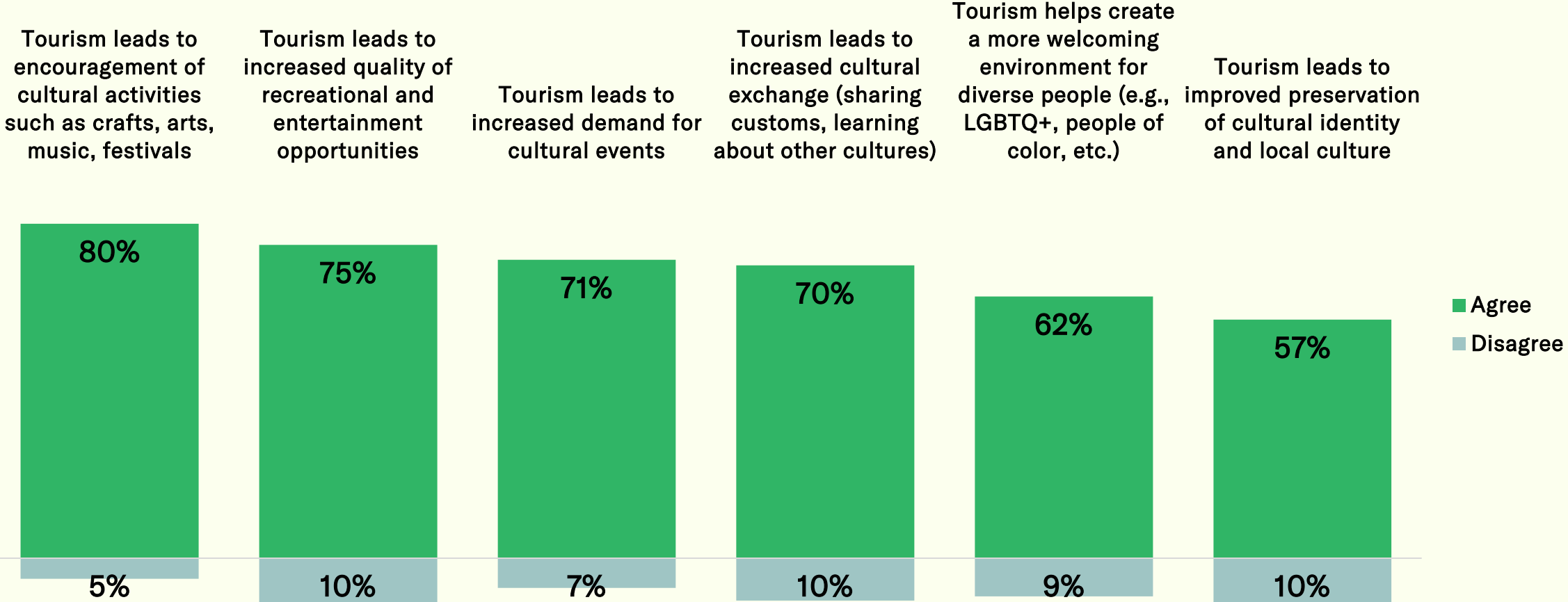
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Portland Region tourism workforce. 401 completed surveys.

Portland Region – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Positive Cultural Impacts

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



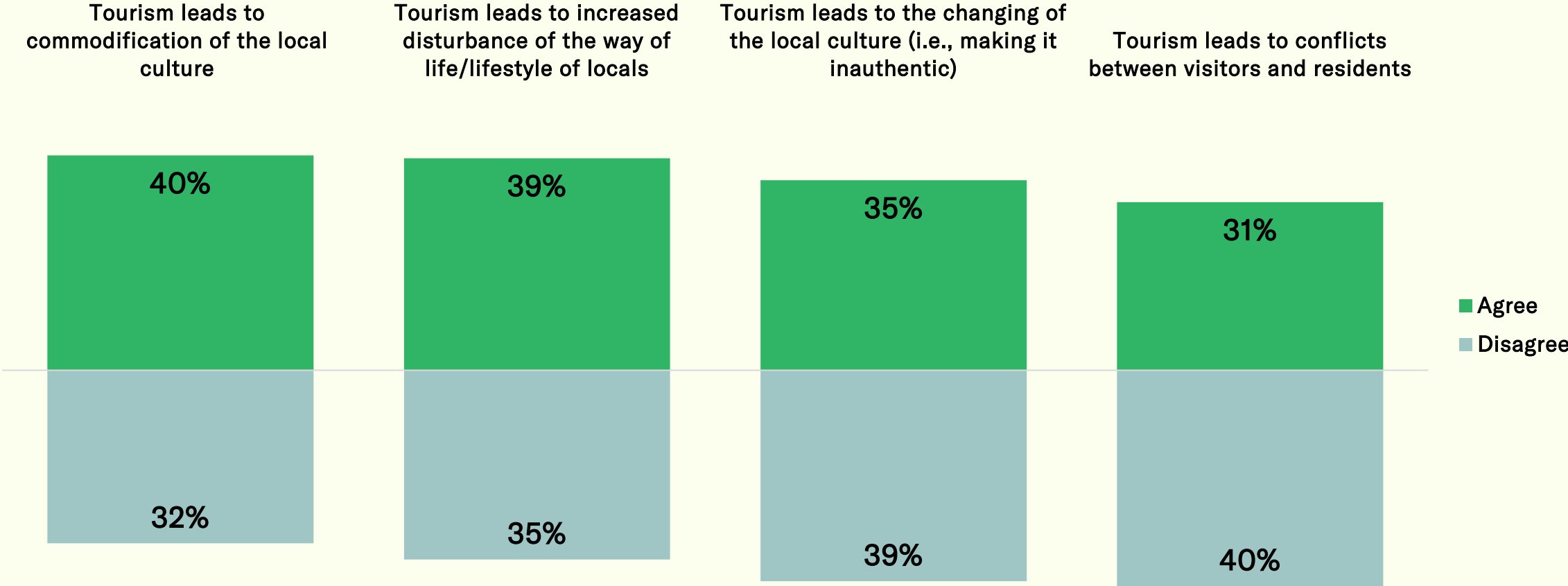
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Portland Region tourism workforce. 401 completed surveys

Portland Region – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Negative Cultural Impacts

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



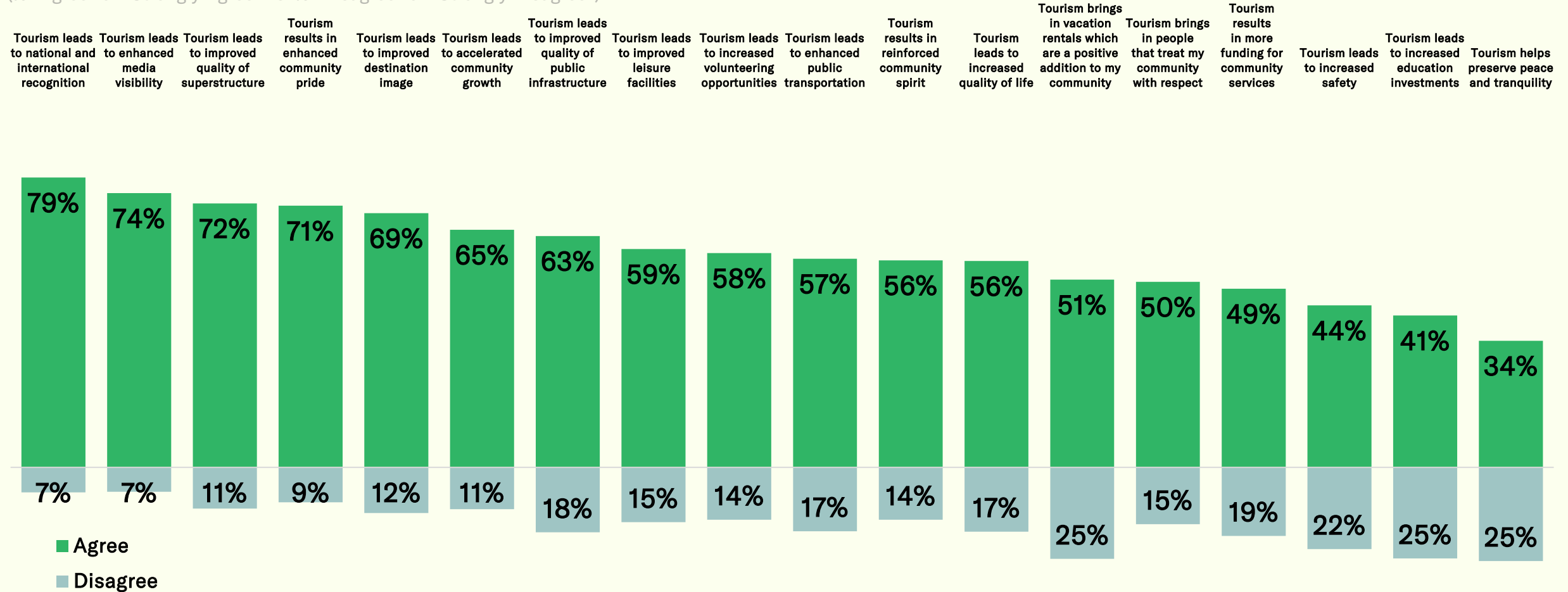
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Portland Region tourism workforce. 401 completed surveys

Portland Region – Social Impact Index Statements

Workforce's Perceptions of Tourism's Positive Social Impacts

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



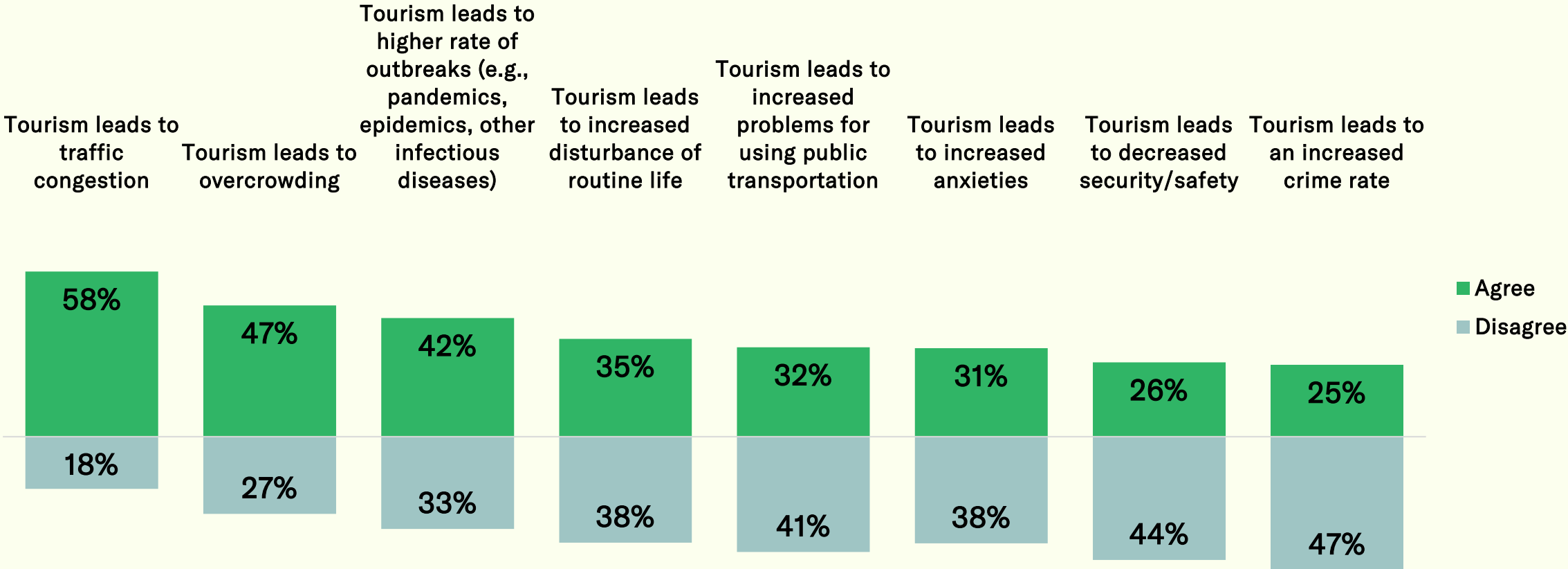
Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.

Base: Portland Region tourism workforce. 401 completed surveys

Portland Region – Social Impact Index Statements

Workforce's 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 tourism workforce. 401 completed surveys.

Willamette Valley Tourism Workforce

The following slides present findings specific to Willamette Valley residents who are currently employed by a business that serves the tourism industry, including demographics, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and support for tourism in Oregon.

Willamette Valley Tourism Workforce Demographic Snapshot

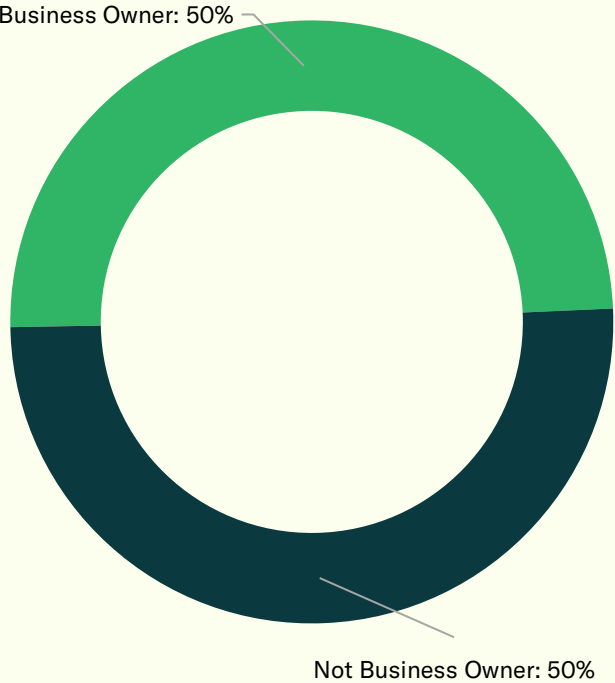
Total residents surveyed:	281
Average age:	41 years old
Average household income:	\$94,760
College graduate:	59%
Married/domestic partnership:	61%
Have children in household:	43%
Gender*	
• Female:	48%
• Male:	50%
• Non-binary/Other:	0%
Ethnicity*	
• White/Caucasian:	83%
• Hispanic/Latino:	9%
• Asian, Native Hawaiian, or Pacific Islander:	8%
• Native American, Alaskan Native:	6%
• African American/Black:	0%
• Other:	2%
LGBTQ+:	20%
Accessibility needs in household:	19%

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



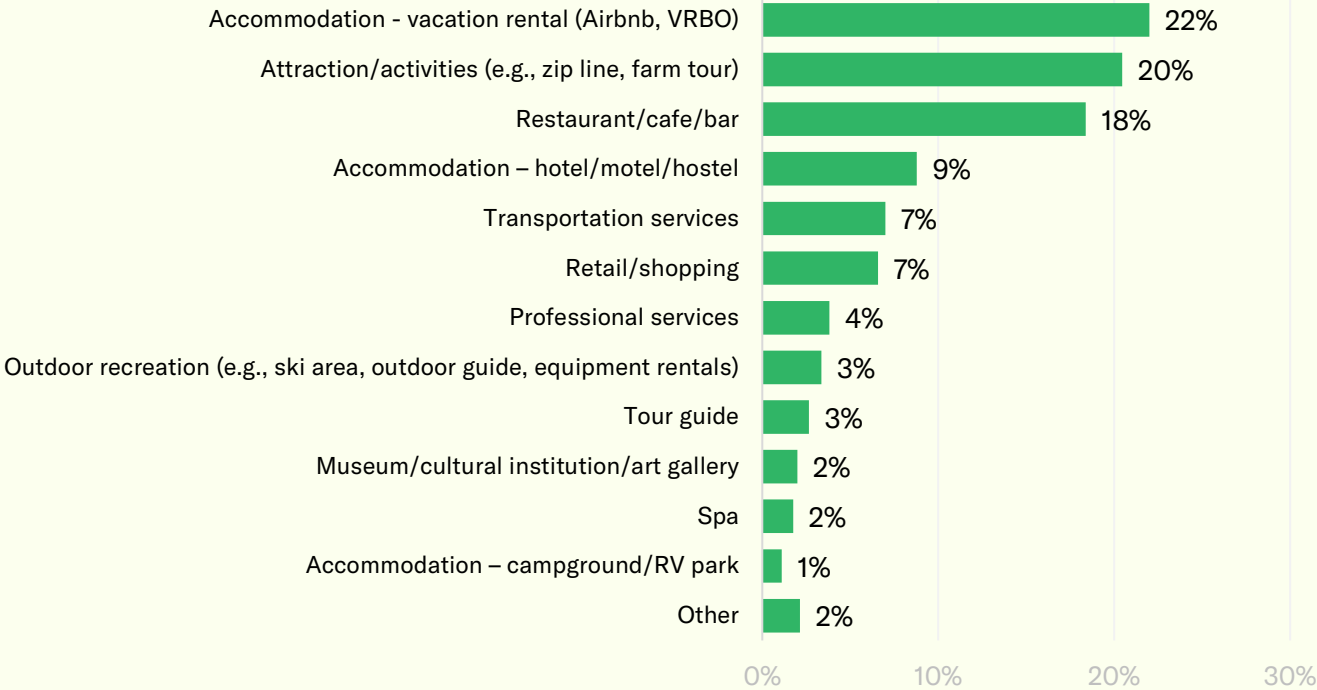
Willamette Valley – Tourism-Industry Business Owners

Share of Tourism Workforce who are Business Owners



Question: Do you own a business that serves Oregon’s tourism industry?
 Base: Willamette Valley tourism workforce. 281 completed surveys.

Type of Business Owned

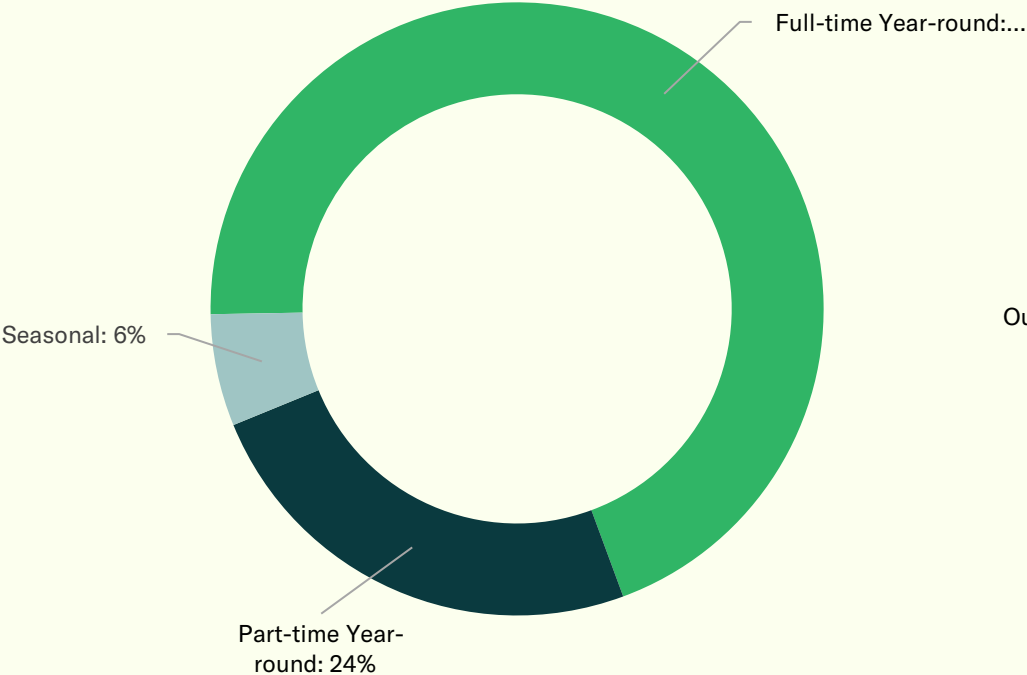


Note: Percentages may not sum to 100% due to rounding.
 Question: Which of the following best describes your business?
 Base: Willamette Valley residents who own a business that serves the tourism industry. 140 completed surveys.

*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, real estate, and other businesses that serve the needs of tourists outside of the hospitality industry (i.e., legal assistance, emergency/health services, tourism advocacy, etc.).

Willamette Valley – Current Tourism Employees

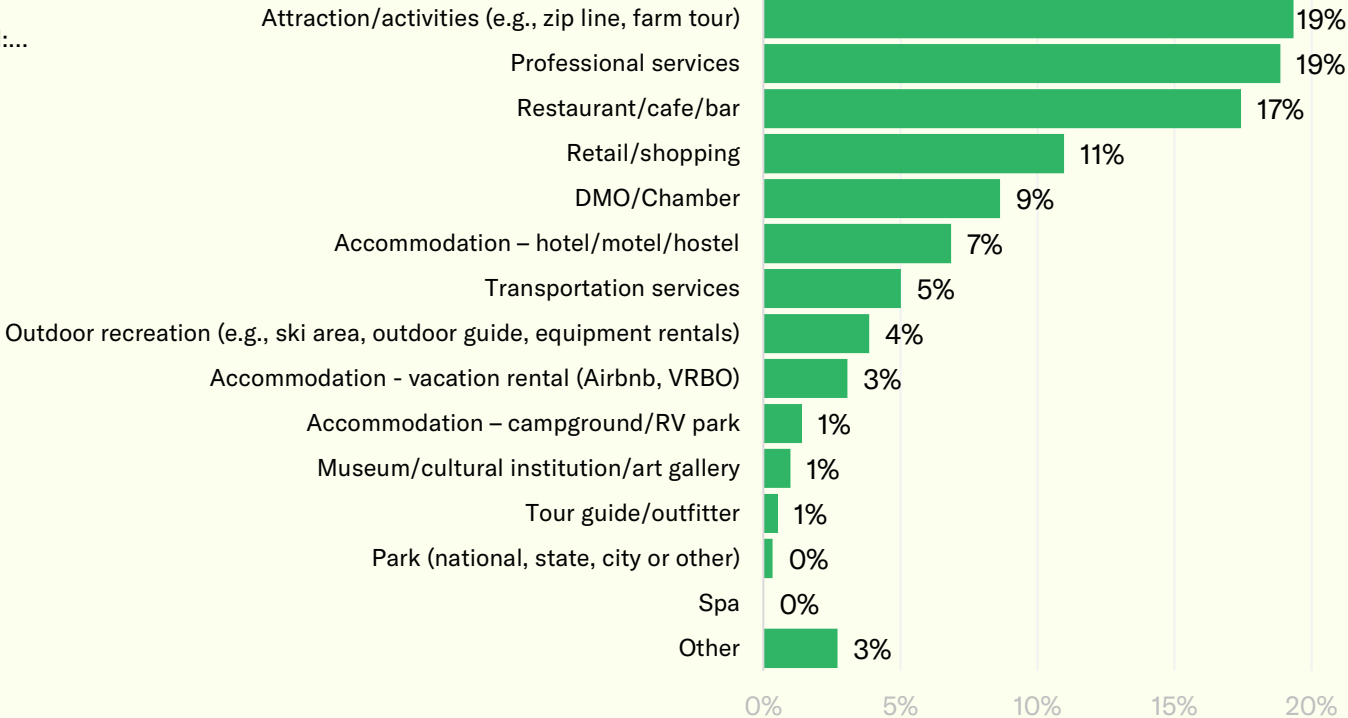
Current Employees: Employment Type



Question: Are you currently employed...?

Base: Willamette Valley current tourism business employees. 141 completed surveys.

Place of Employment



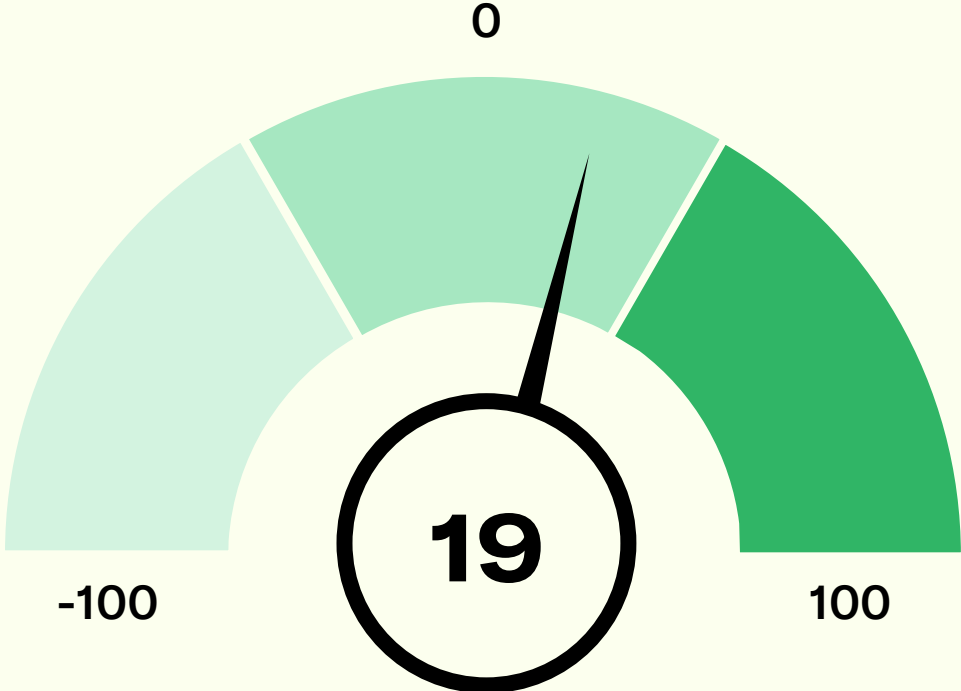
Note: Percentages may not sum to 100% due to rounding.

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

Base: Willamette Valley current tourism business employees. 141 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, real estate, and other businesses that serve the needs of tourists outside of the hospitality industry (i.e., legal assistance, emergency/health services, tourism advocacy, etc.).

Willamette Valley – Likelihood to Recommend Local Community as a Tourism Destination



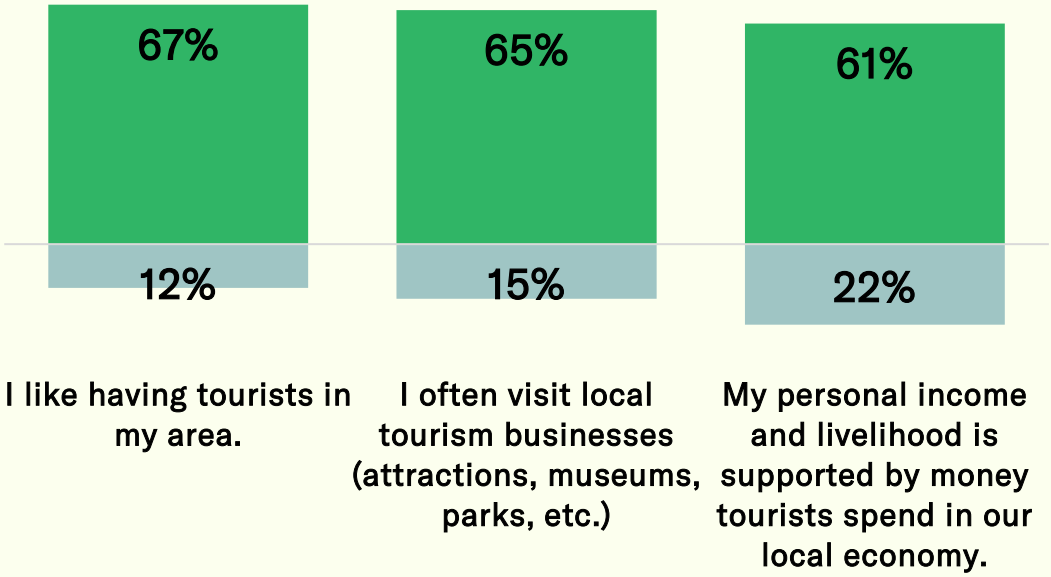
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?
Base: Willamette Valley tourism workforce. 281 completed surveys.

Willamette Valley – Workforce's Perceptions of Local Tourism

Personal Impacts

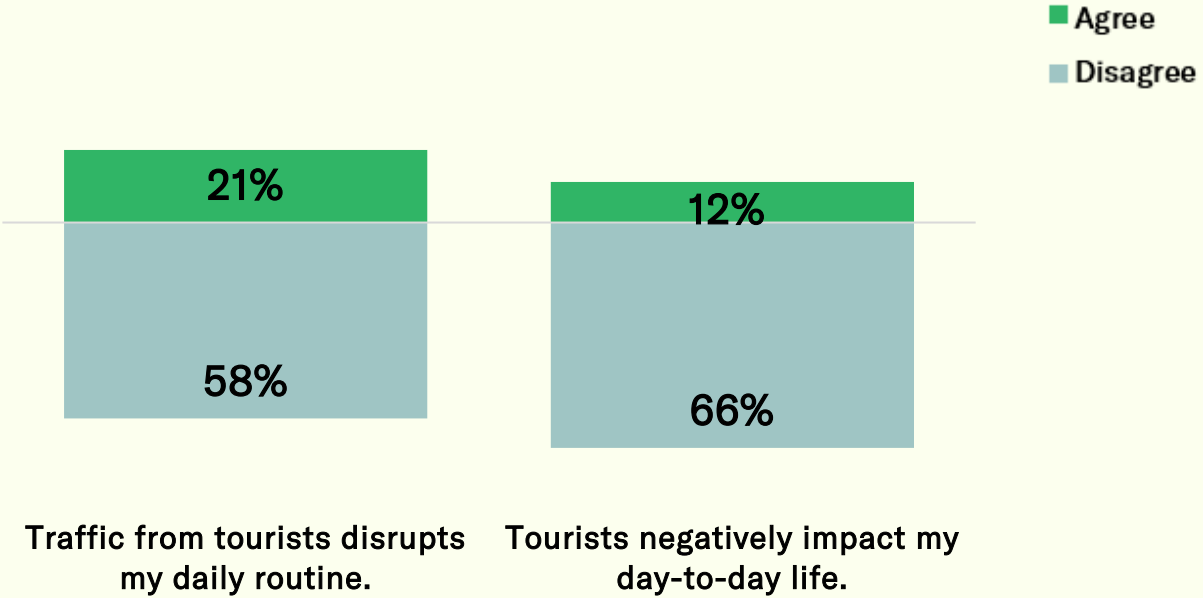
Workforce's Perceptions of Positive Local Tourism Personal Impacts

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



Workforce's Perceptions of Negative Local Tourism Personal Impacts

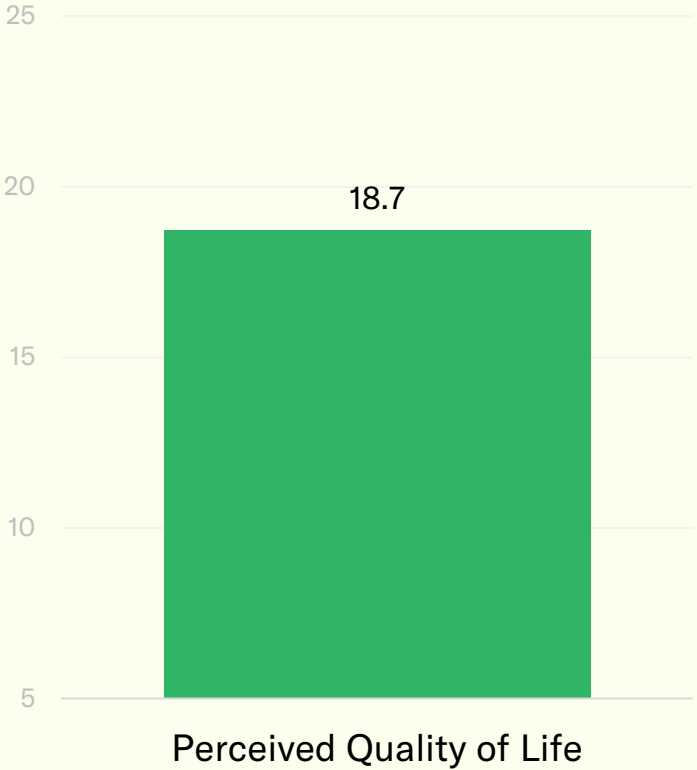
(% “Agree” or “Strongly Agree” vs. % “Disagree” or “Strongly Disagree”)



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: Willamette Valley tourism workforce. 281 completed surveys.

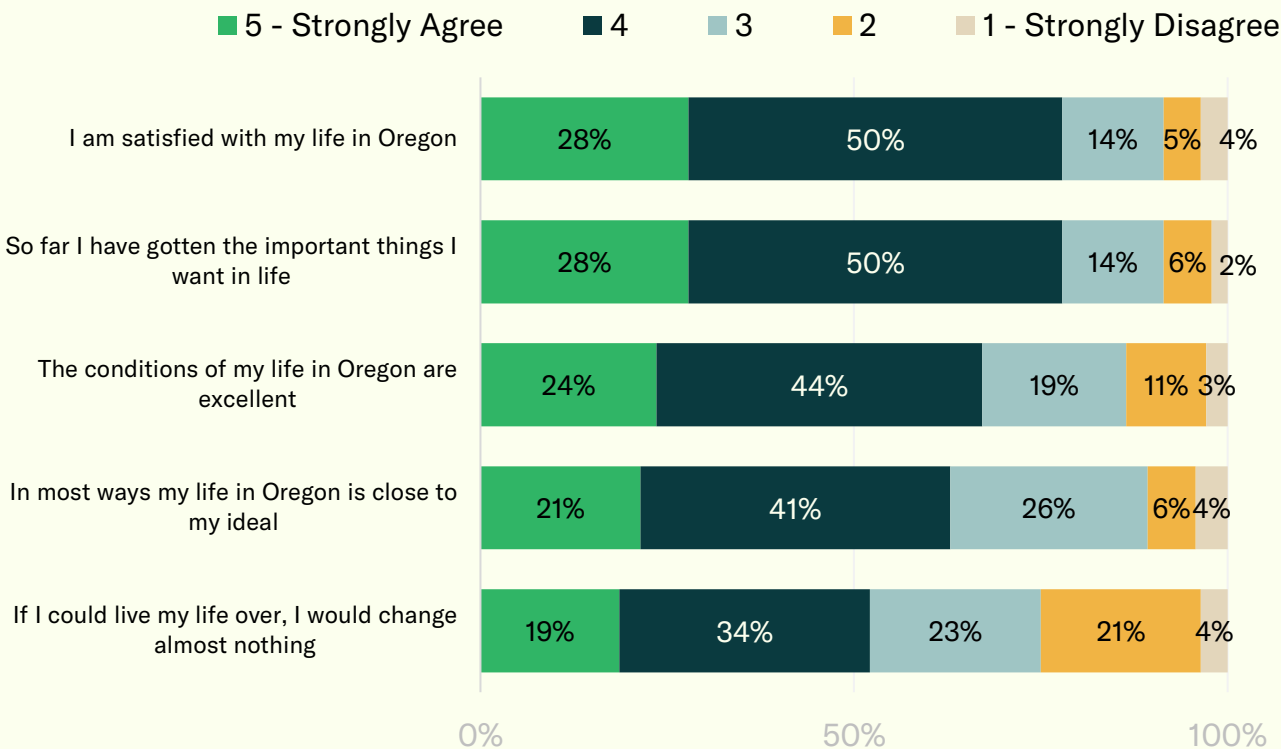
Willamette Valley –Tourism Business Owners’ Perceived Quality of Life

Tourism Business Owners’ 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



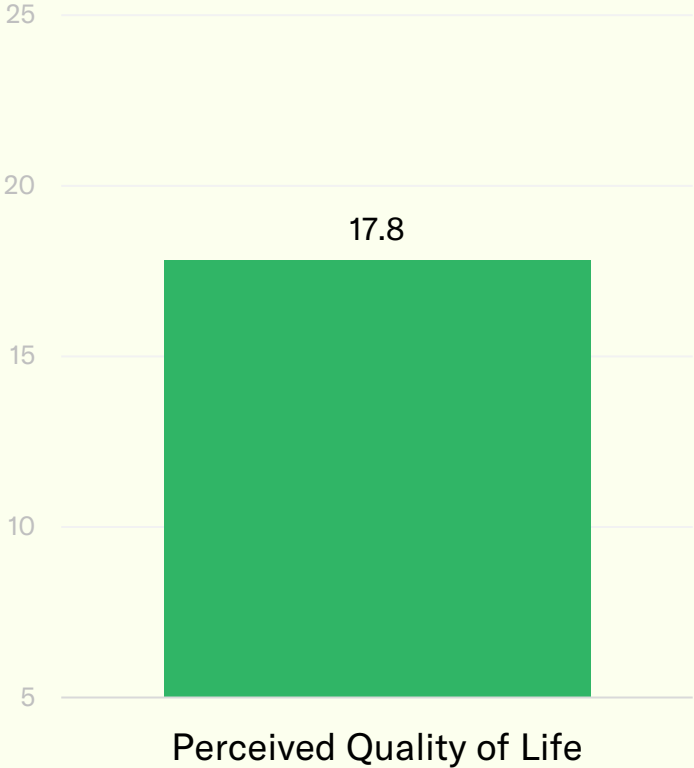
Note: Percentages may not sum to 100% due to rounding.

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

Base: Willamette Valley residents who own a business that serves the tourism industry. 140 completed surveys.

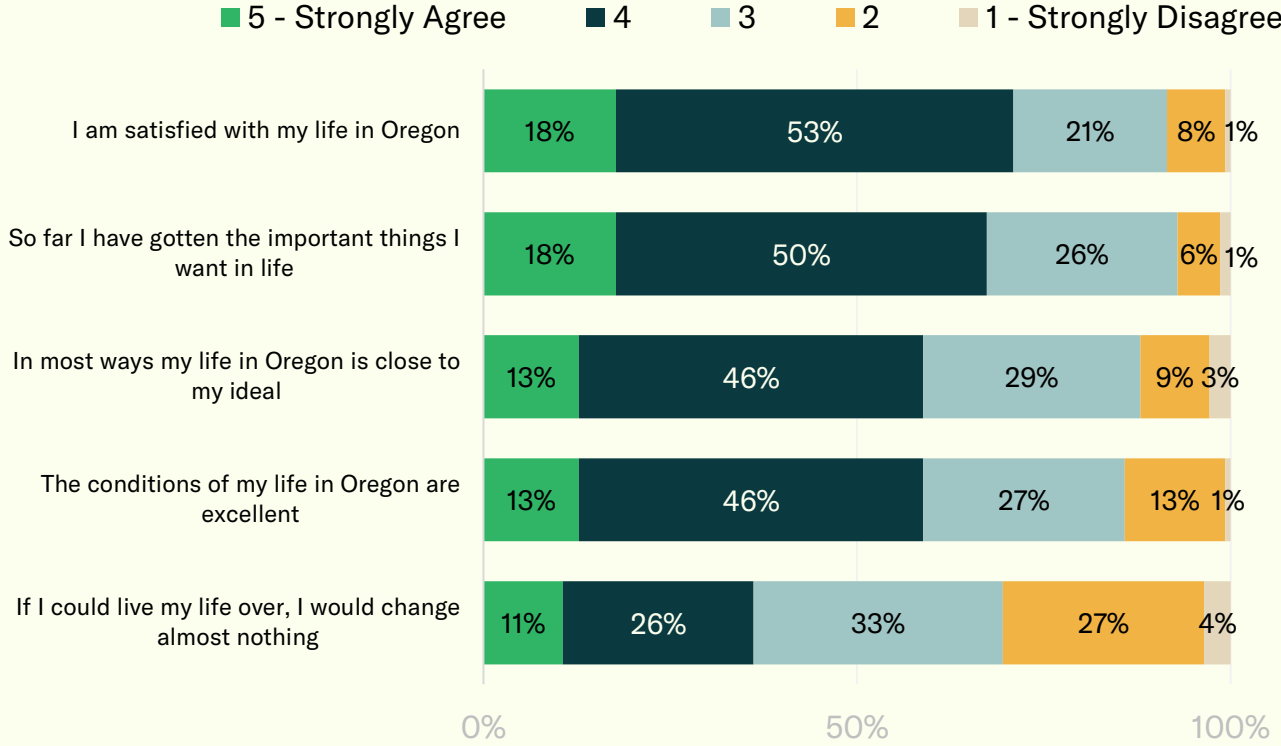
Willamette Valley – Current Tourism Workers’ Perceived Quality of Life

Current Tourism Workers’ 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.

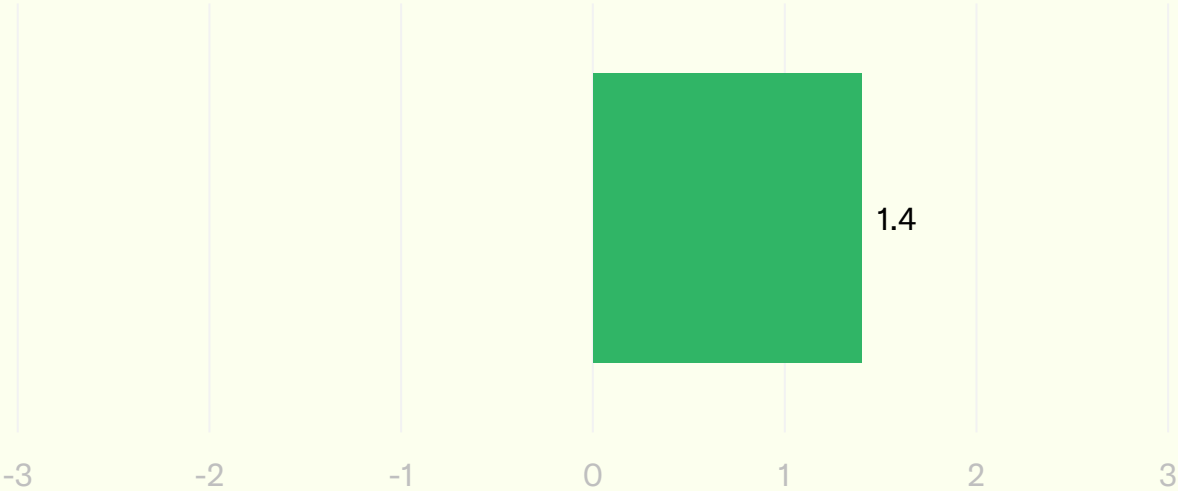
Question: Please rate your level of agreement with the following statements.

Base: Willamette Valley current tourism workers. 141 completed surveys.

Willamette Valley – Overall Support for Tourism

Overall Support for Tourism Mean Score*

Willamette Valley Tourism Workforce’s Overall Support for Tourism



* 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.

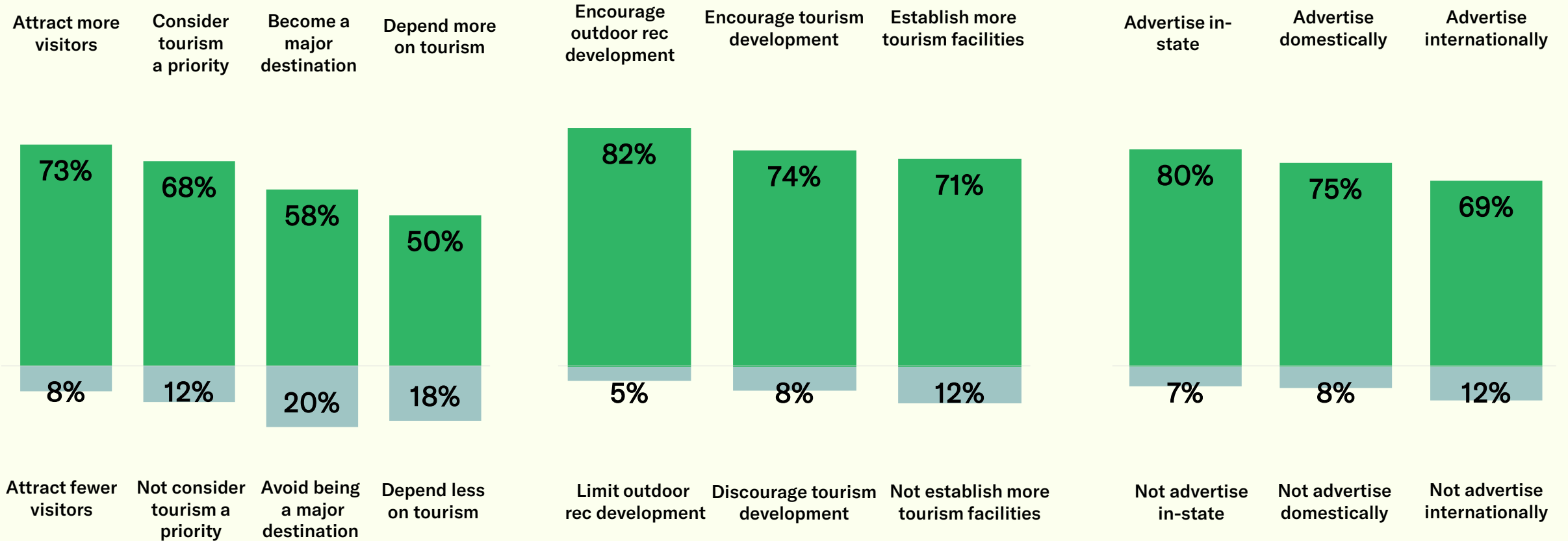
Willamette Valley – Support for Tourism Statements

“Oregon should...”

(On a -3- to 3-point scale)

■ Positive Score (>0)

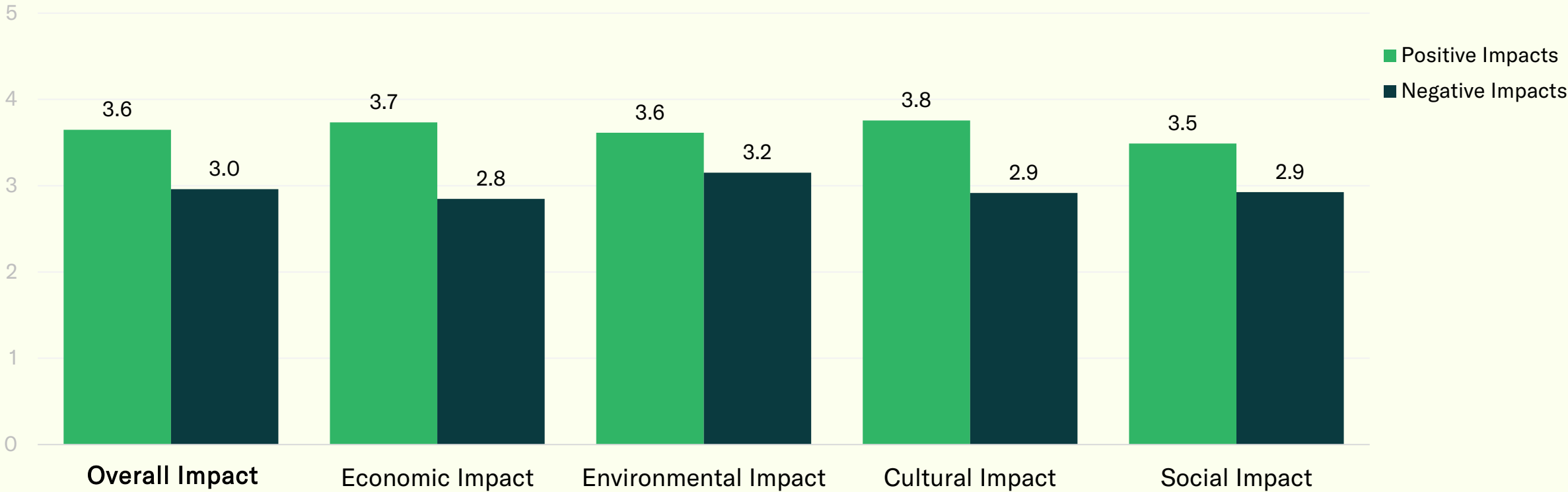
■ Negative Score (<0)



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: Willamette Valley tourism workforce. 281 completed surveys.

Willamette Valley – Index of Workforce's Perceptions of Tourism Impacts

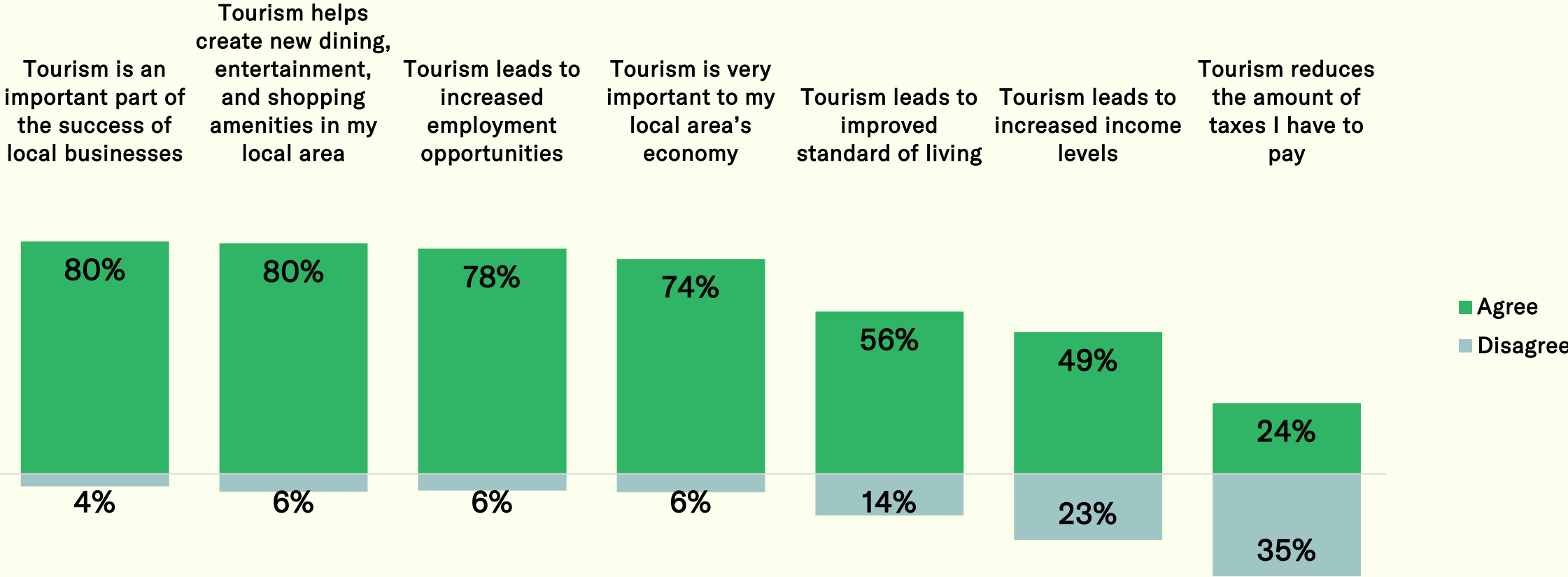


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Willamette Valley tourism workforce. 281 completed surveys.

Willamette Valley – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Positive Economic Impacts

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



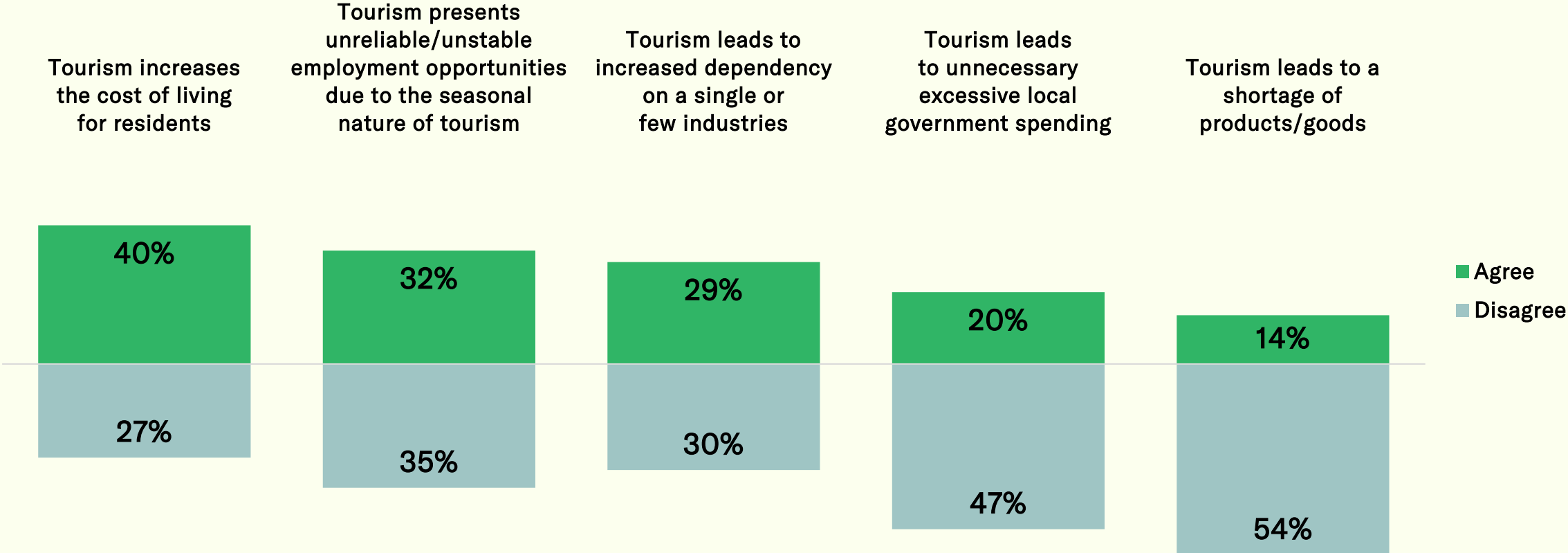
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Willamette Valley tourism workforce. 281 completed surveys.

Willamette Valley – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Negative Economic Impacts

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

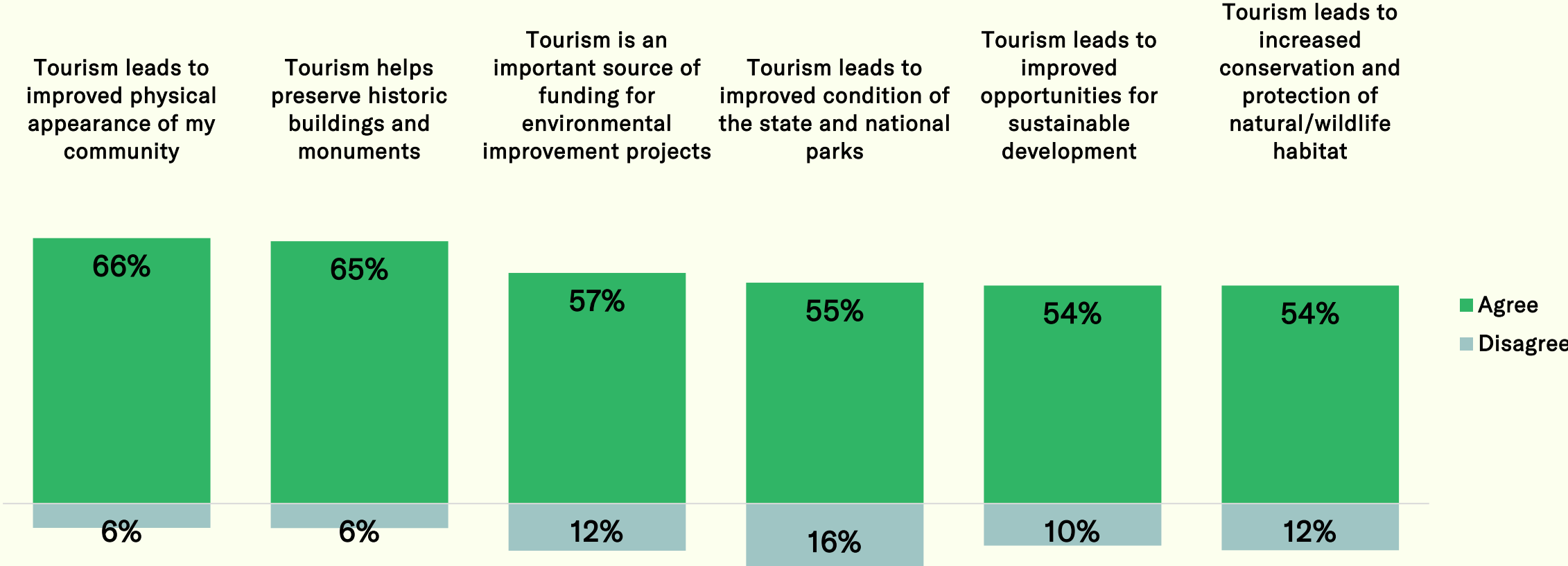


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Willamette Valley tourism workforce. 281 completed surveys.

Willamette Valley – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Positive Environmental Impacts

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



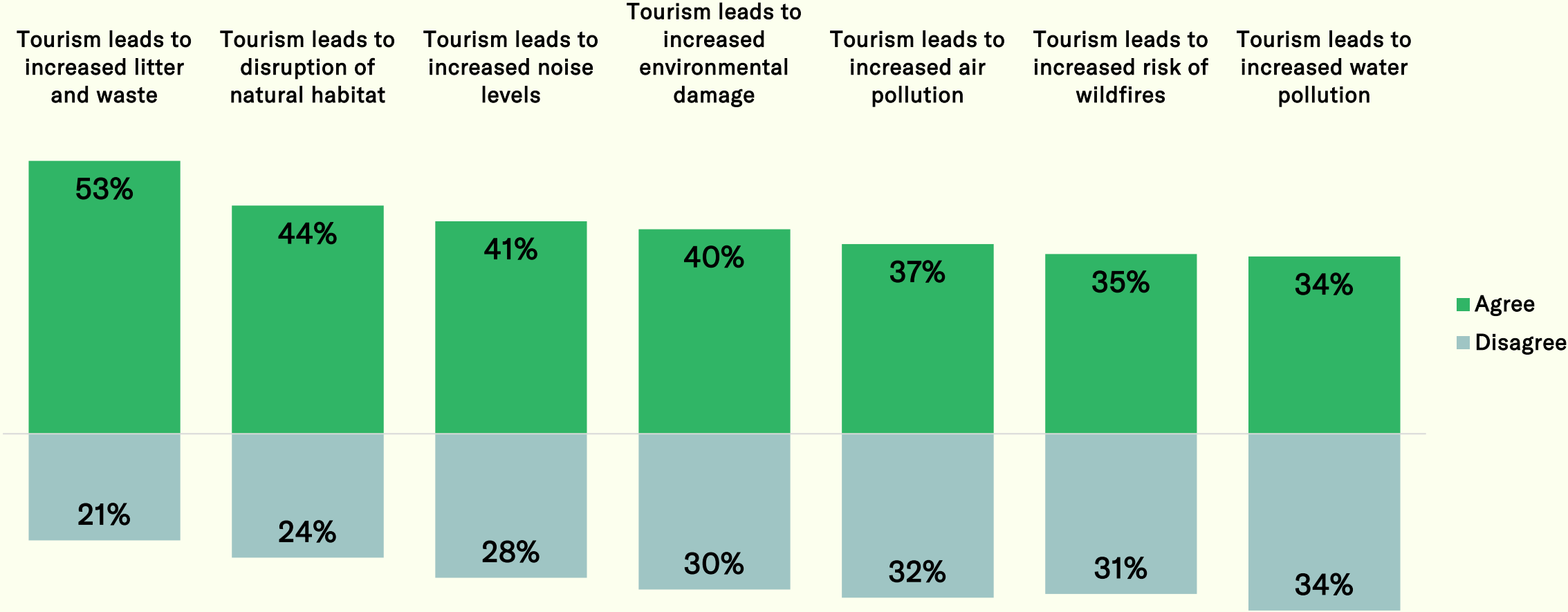
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Willamette Valley tourism workforce. 281 completed surveys.

Willamette Valley – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Negative Environmental Impacts

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



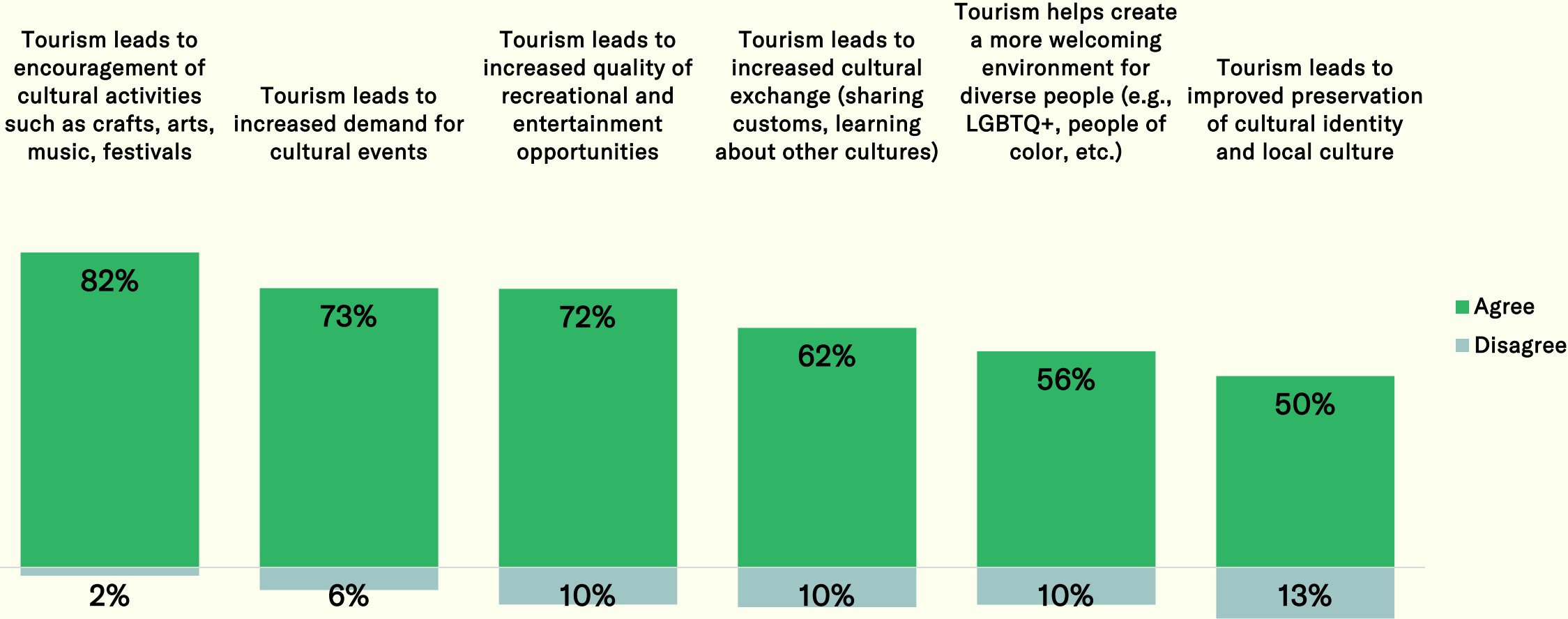
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Willamette Valley tourism workforce. 281 completed surveys.

Willamette Valley – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Positive Cultural Impacts

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



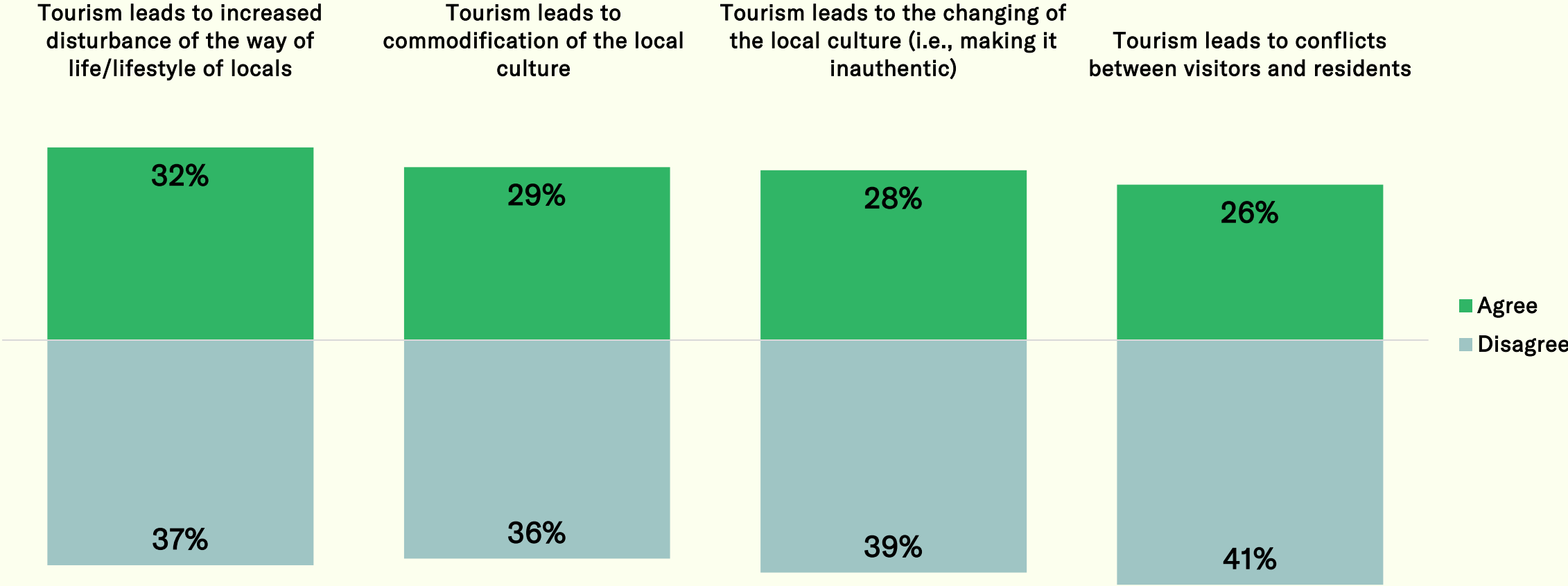
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Willamette Valley tourism workforce. 281 completed surveys.

Willamette Valley – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Negative Cultural Impacts

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



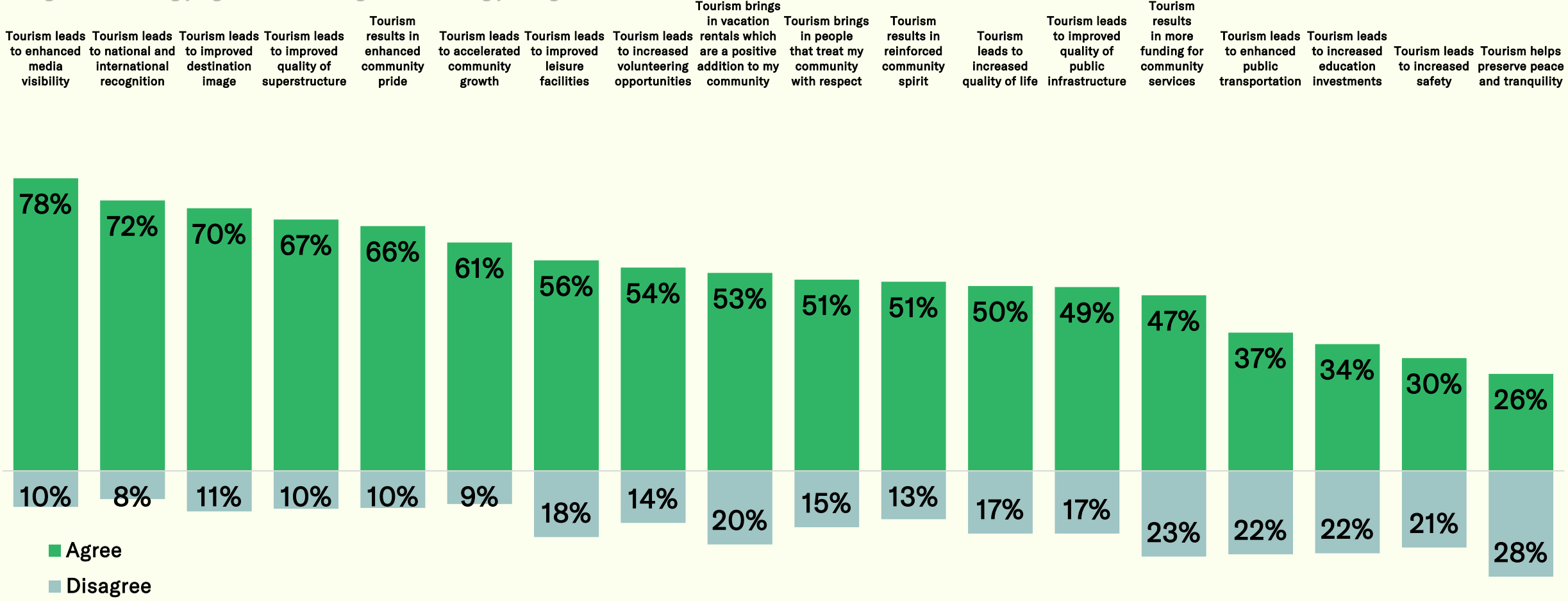
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Willamette Valley tourism workforce. 281 completed surveys.

Willamette Valley – Social Impact Index Statements

Workforce's Perceptions of Tourism's Positive Social Impacts

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

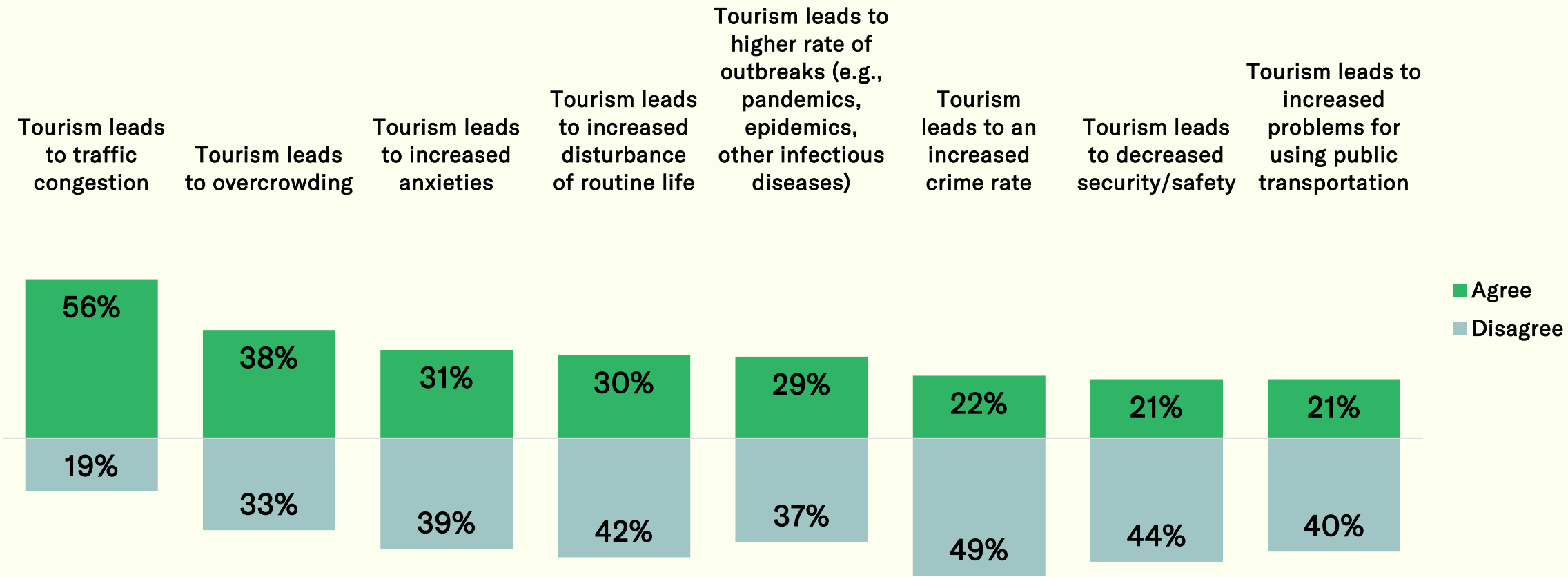


Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Willamette Valley tourism workforce. 281 completed surveys.

Willamette Valley – Social Impact Index Statements

Workforce's 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 tourism workforce. 281 completed surveys.

Central Oregon

The following slides present findings specific to Central Oregon residents, including demographics, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and support for tourism in Oregon.

Central Oregon Tourism Workforce Demographic Snapshot

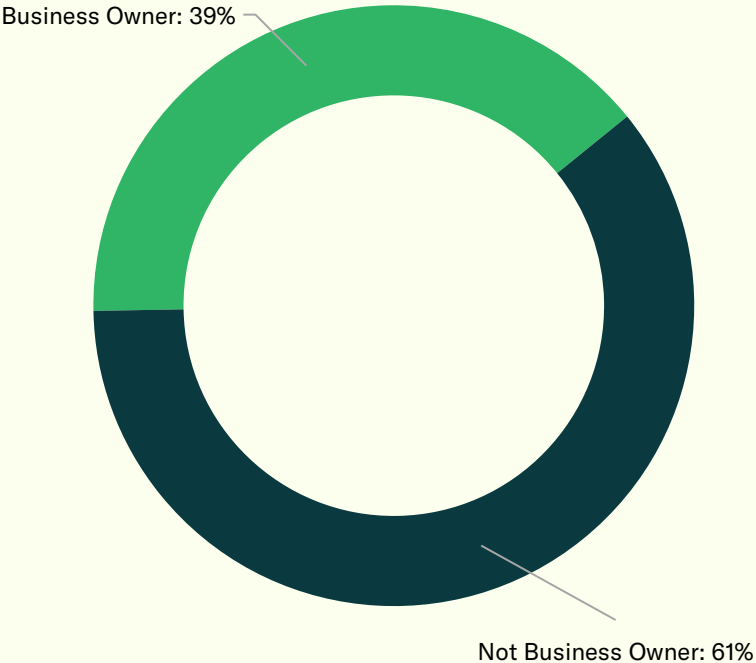
Total residents surveyed:	251
Average age:	44 years old
Average household income:	\$98,049
College graduate:	71%
Married/domestic partnership:	73%
Have children in household:	38%
Gender*	
• Female:	48%
• Male:	52%
• Non-binary/Other:	0%
Ethnicity*	
• White/Caucasian:	91%
• Hispanic/Latino:	8%
• Native American, Alaskan Native:	4%
• African American/Black:	2%
• Asian, Native Hawaiian, or Pacific Islander:	1%
• Other:	1%
LGBTQ+:	12%
Accessibility needs in household:	12%

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



Central Oregon – Tourism-Industry Business Owners

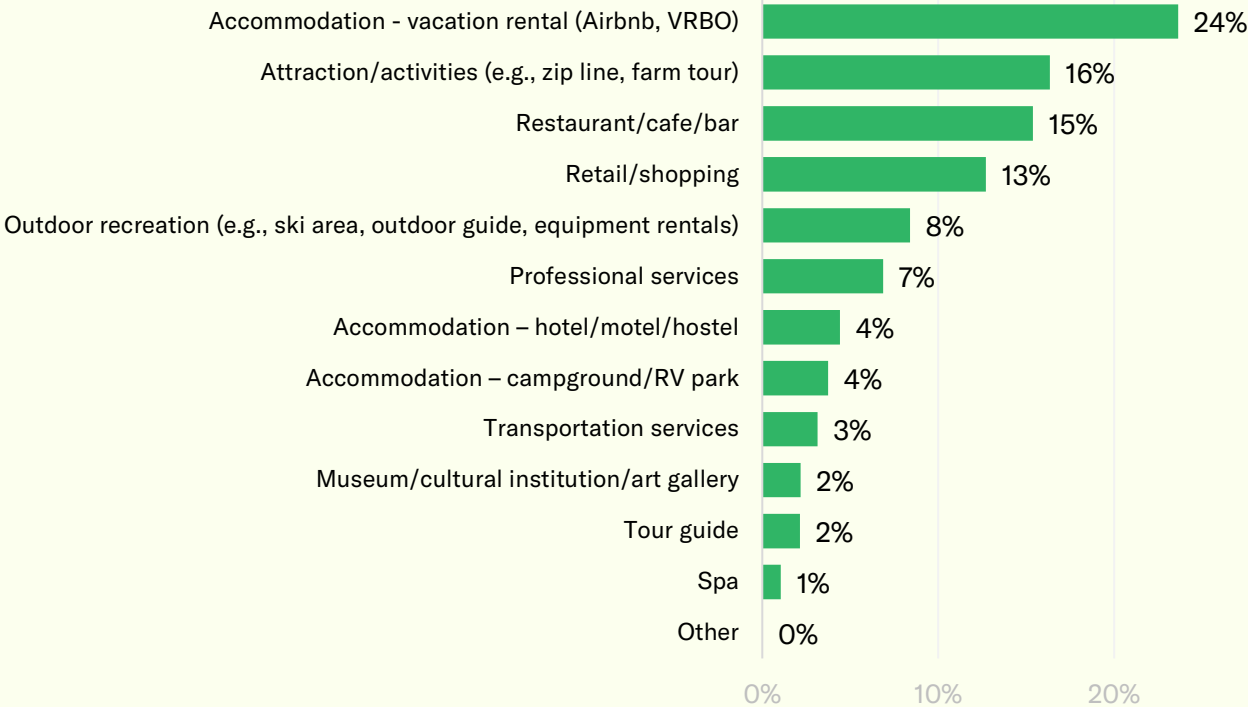
Share of Tourism Workforce who are Business Owners



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

Base: Central Oregon tourism workforce. 251 completed surveys.

Type of Business Owned



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

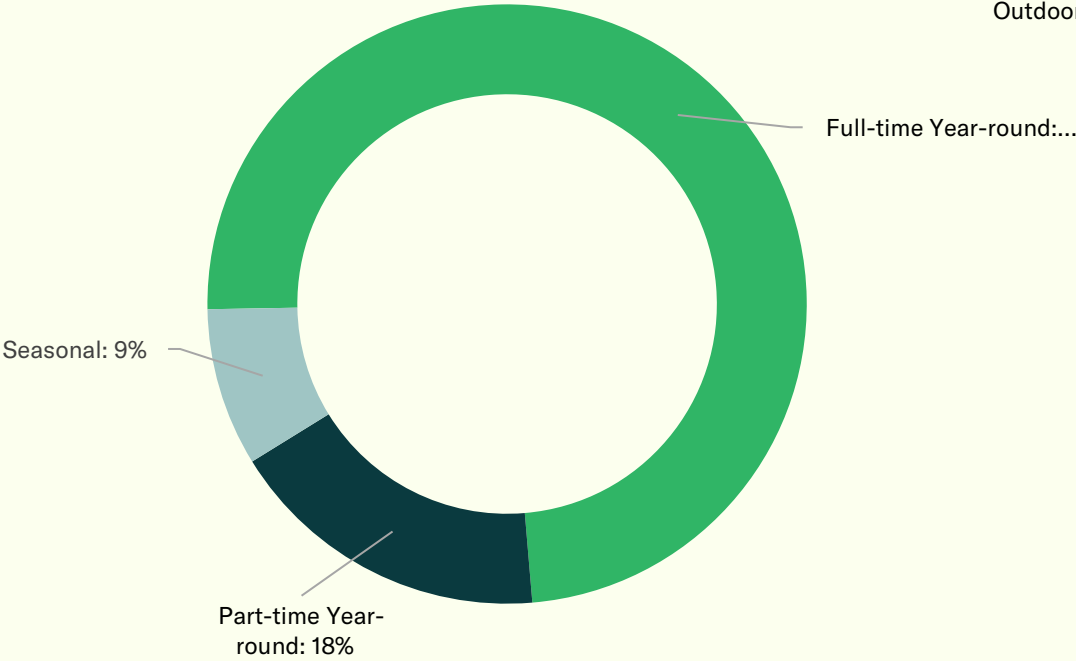
Question: Which of the following best describes your business?

Base: Central Oregon residents who own a business that serves the tourism industry. 90 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, real estate, and other businesses that serve the needs of tourists outside of the hospitality industry (i.e., legal assistance, emergency/health services, tourism advocacy, etc.).

Central Oregon – Current Tourism Employees

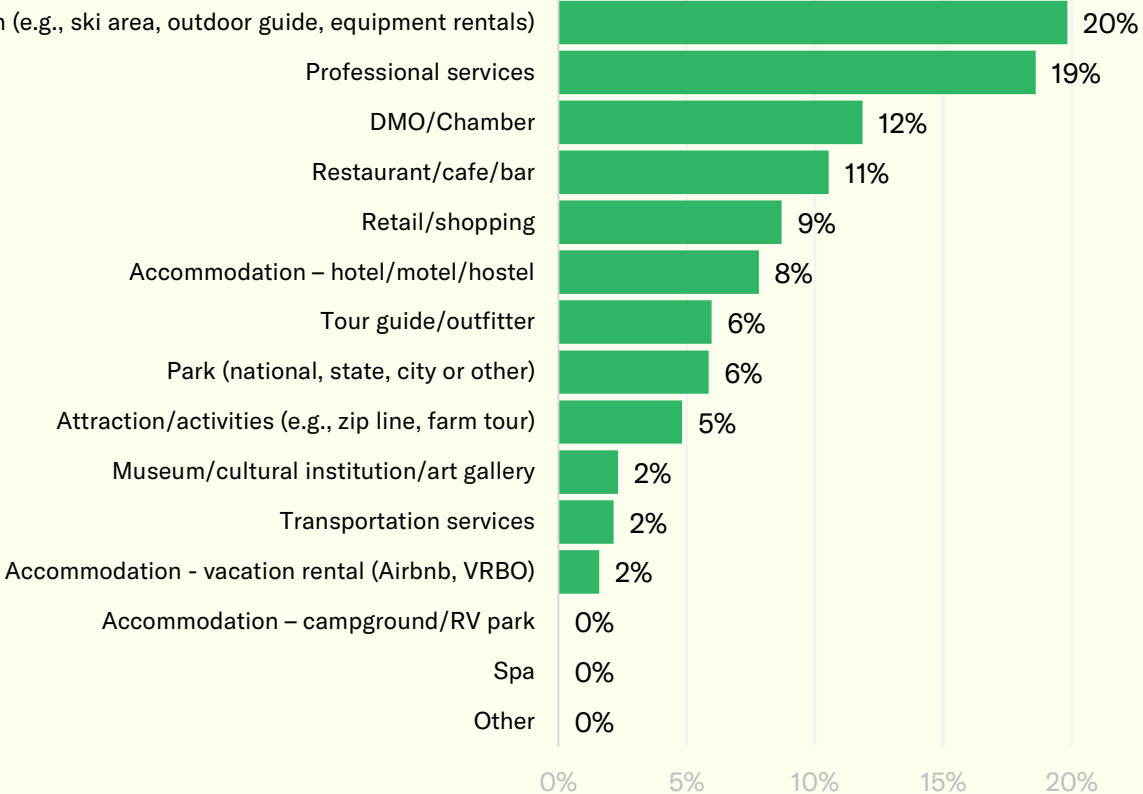
Current Employees: Employment Type



Question: Are you currently employed...?

Base: Central Oregon current tourism business employees. 161 completed surveys.

Place of Employment

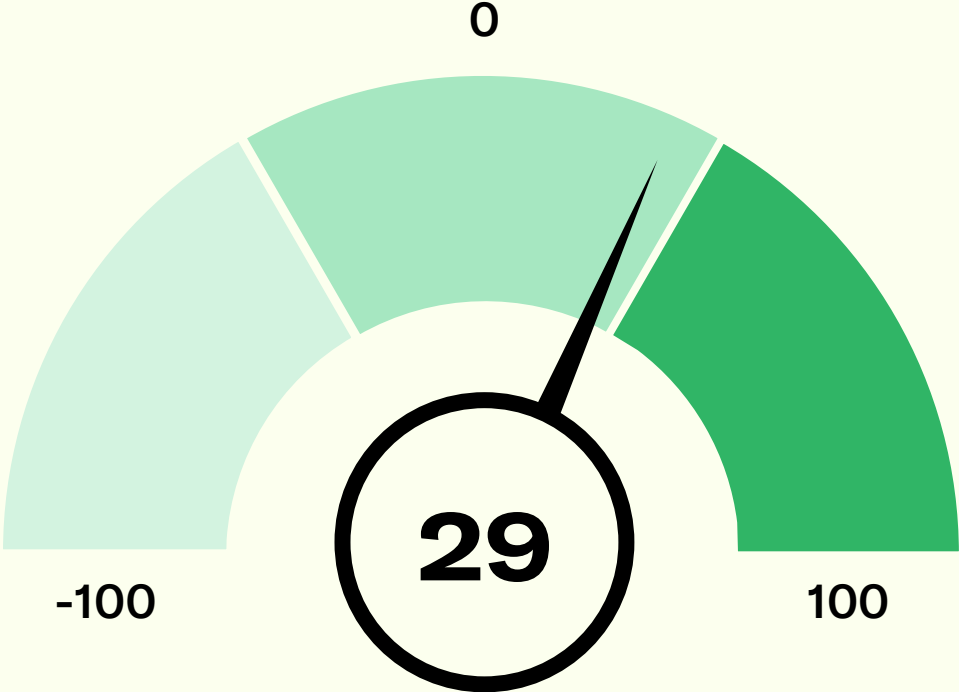


Question: Which of the following best describes your current place of employment?

Base: Central Oregon current tourism business employees. 161 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.

Central Oregon – Likelihood to Recommend Local Community as a Tourism Destination



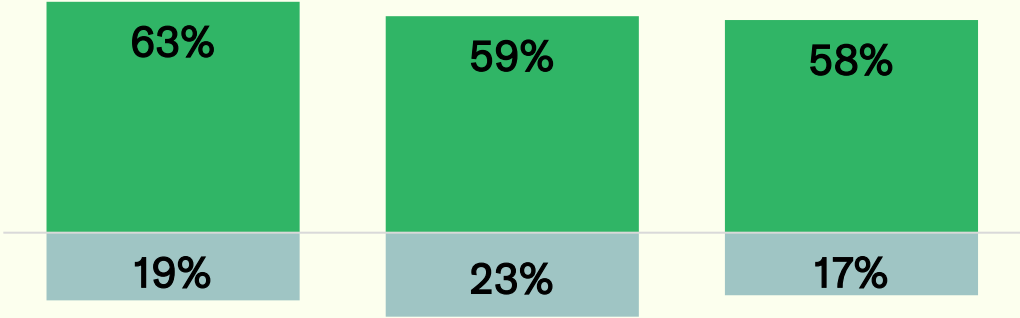
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

Base: Central Oregon tourism workforce. 251 completed surveys.

Central Oregon – Workforce's Perceptions of Local Tourism Personal Impacts

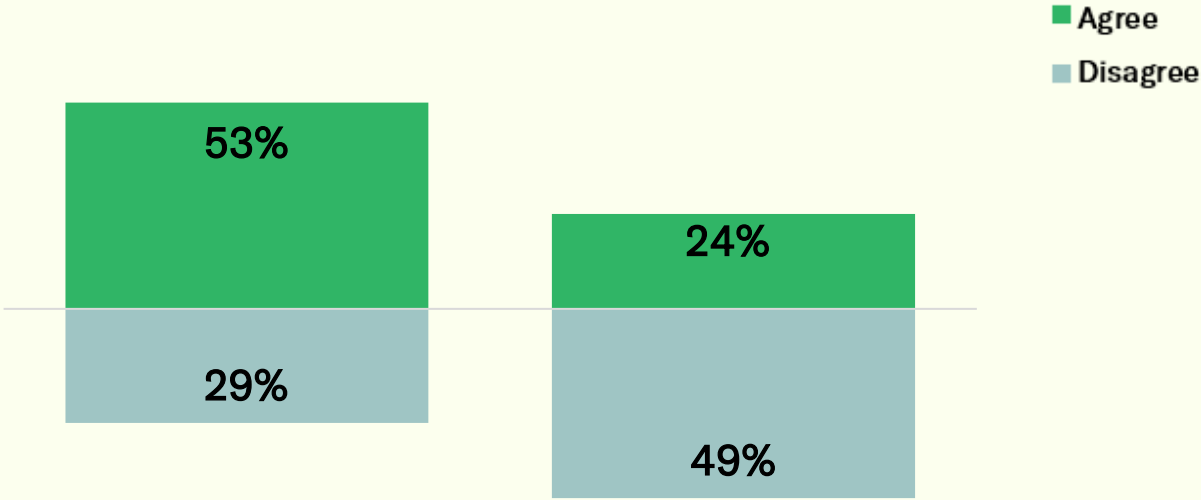
Workforce's Perceptions of Positive Local Tourism Personal Impacts

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



Workforce's 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.)

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

I like having tourists in my area.

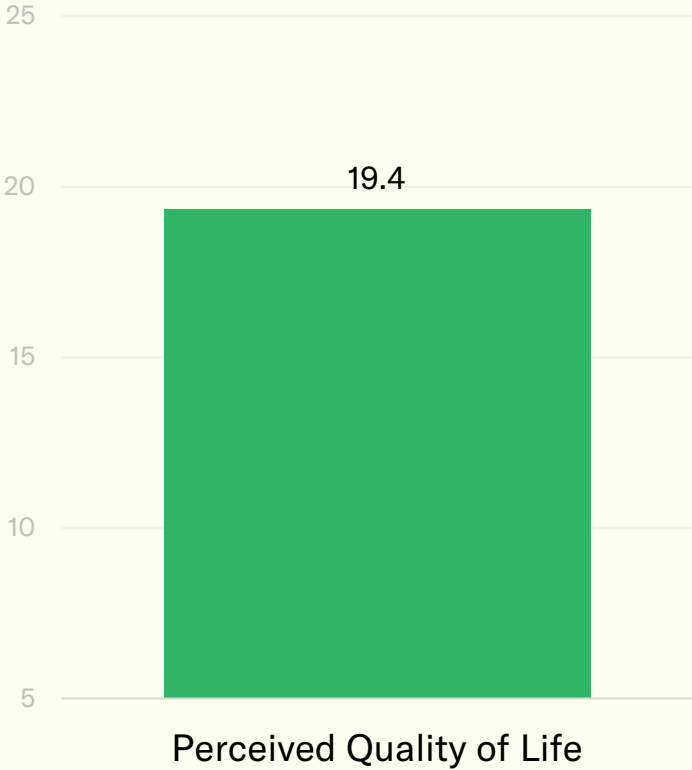
Traffic from tourists disrupts my daily routine.

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: Central Oregon tourism workforce. 251 completed surveys.

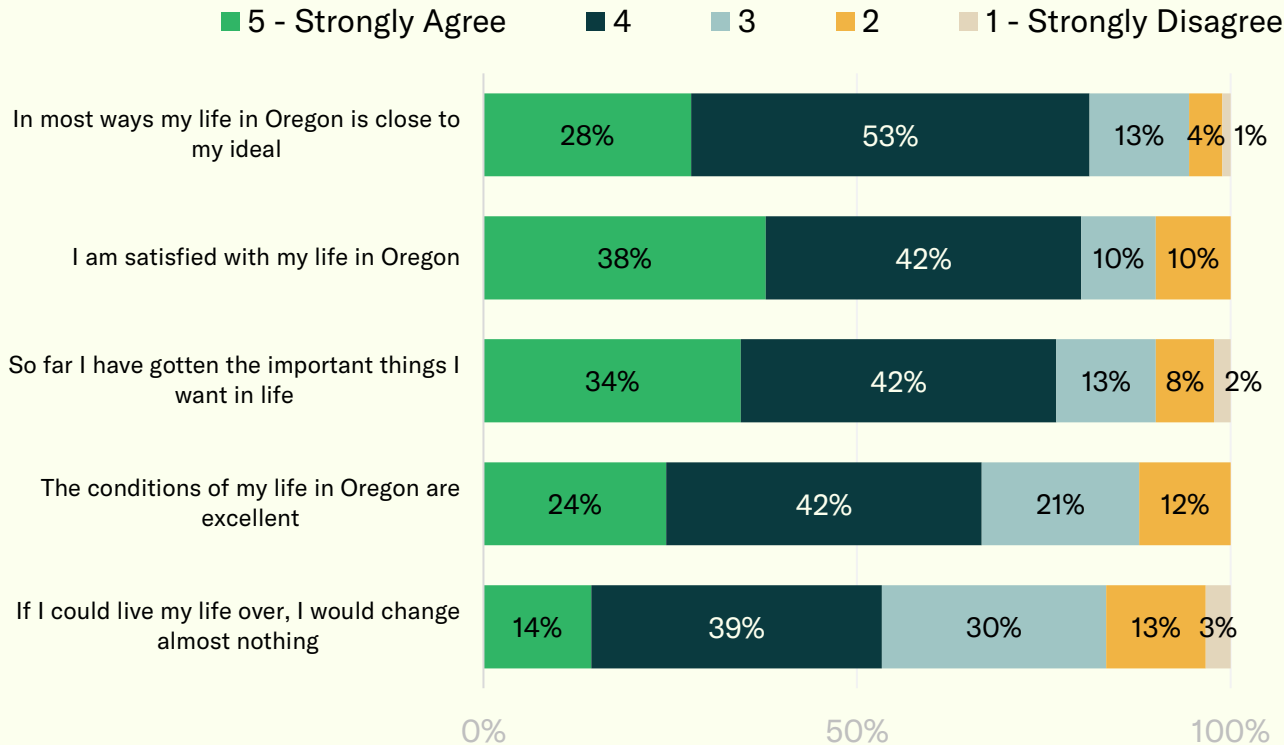
Central Oregon –Tourism Business Owners’ Perceived Quality of Life

Tourism Business Owners’ 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



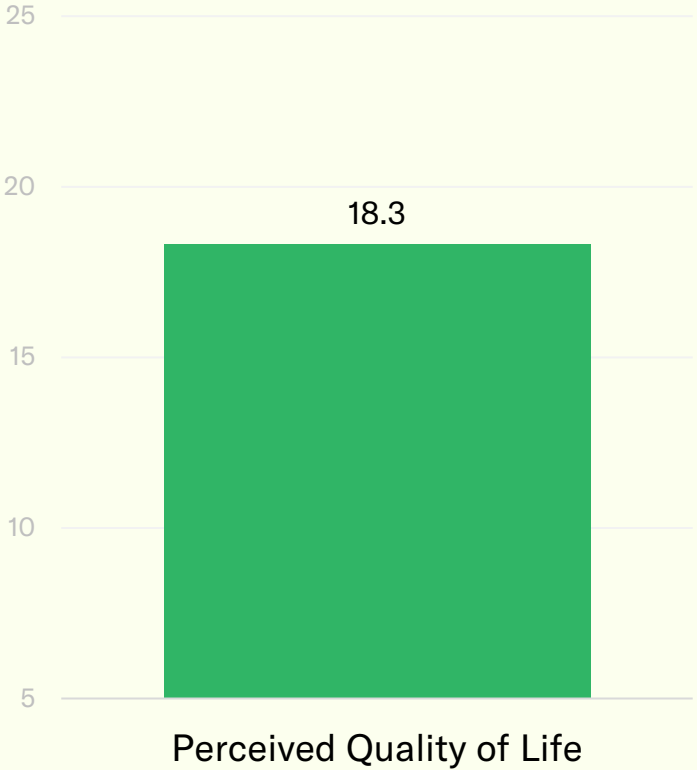
Note: Percentages may not sum to 100% due to rounding.

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

Base: Central Oregon residents who own a business that serves the tourism industry. 90 completed surveys.

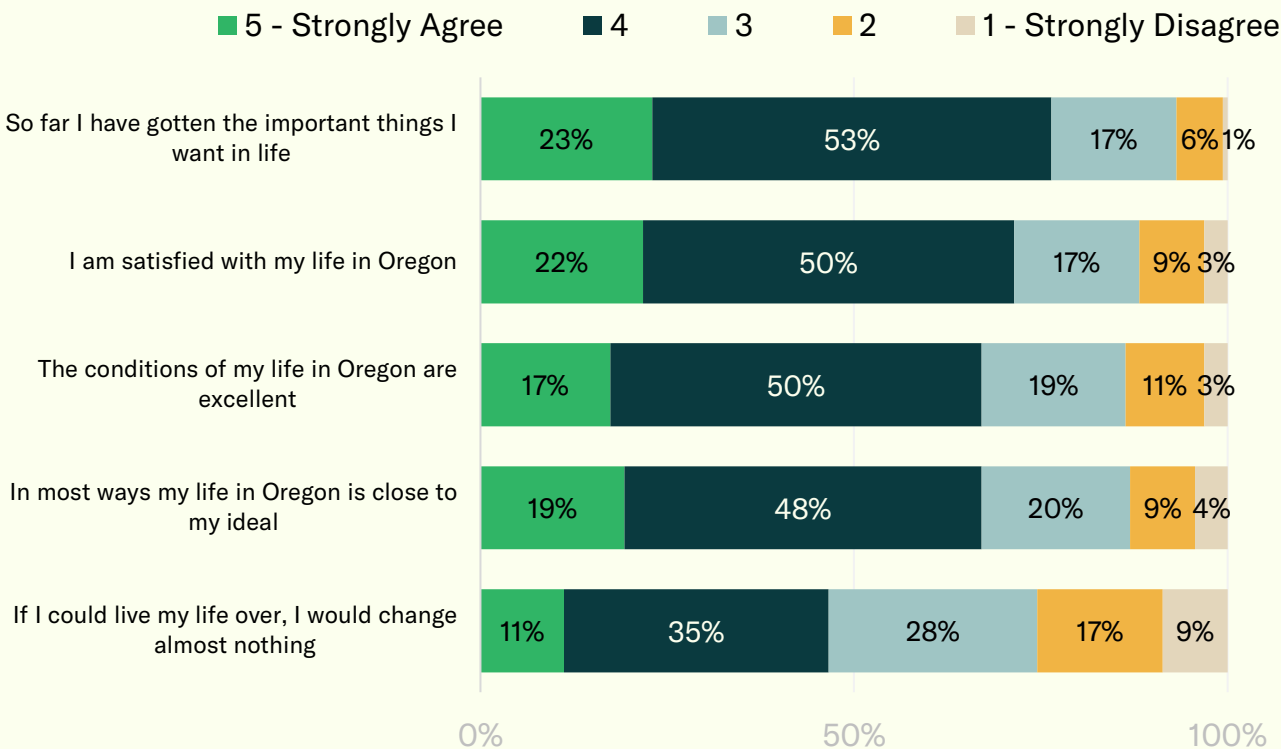
Central Oregon – Current Tourism Workers’ Perceived Quality of Life

Current Tourism Workers’ 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.

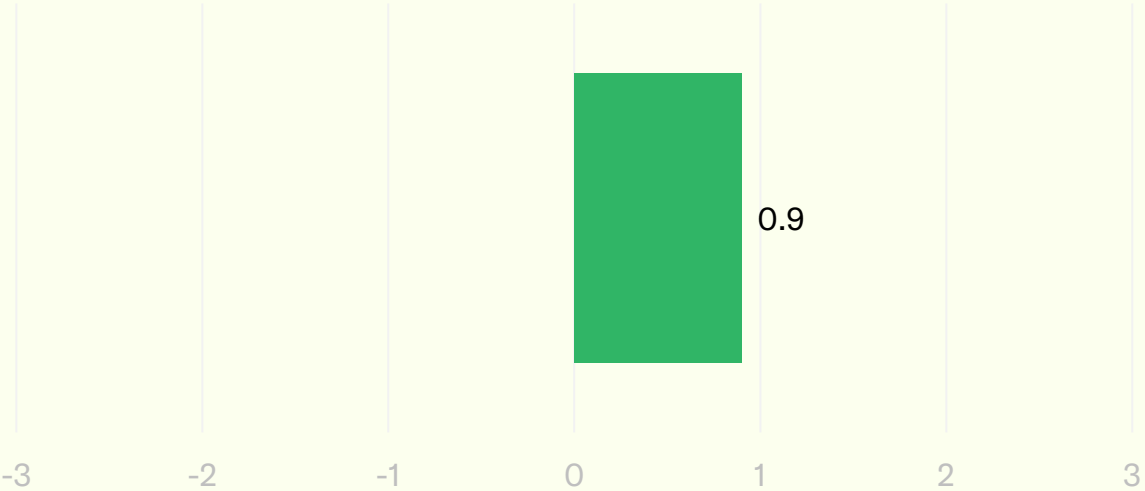
Question: Please rate your level of agreement with the following statements.

Base: Central Oregon current tourism workers. 161 completed surveys.

Central Oregon – Overall Support for Tourism

Overall Support for Tourism Mean Score*

Central Oregon Tourism Workforce’s Overall Support for Tourism



* 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.

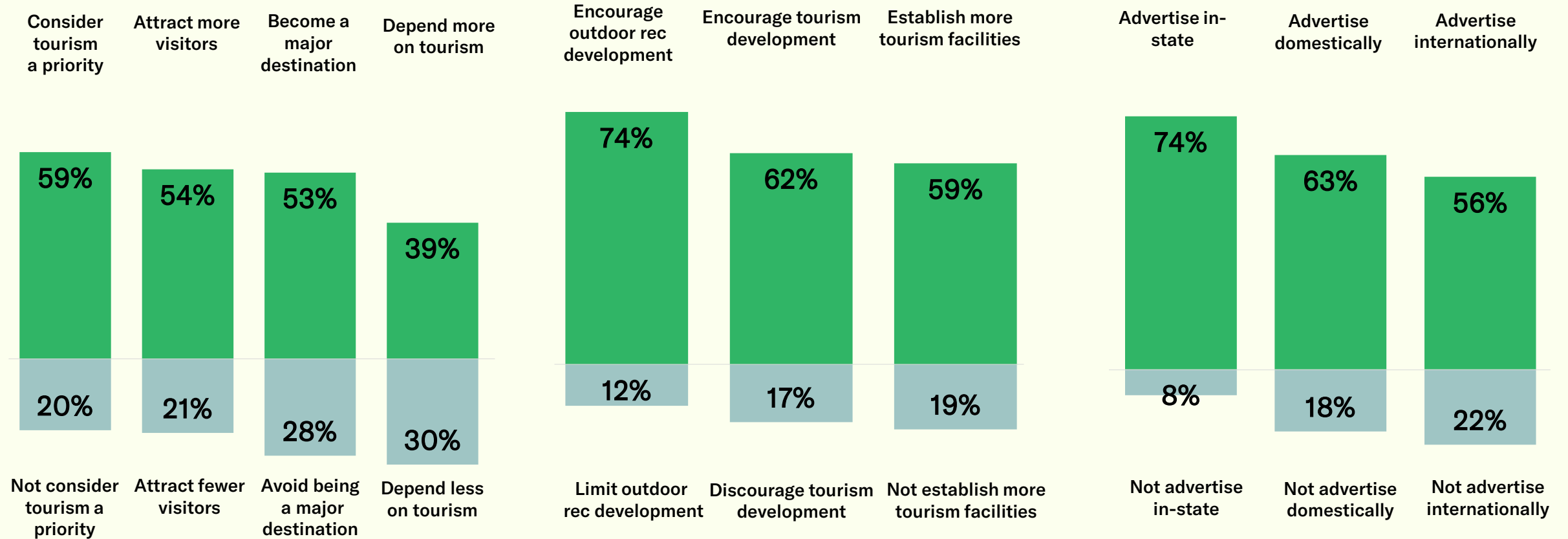
Central Oregon – Support for Tourism Statements

“Oregon should...”

(On a -3- to 3-point scale)

■ Positive Score (>0)

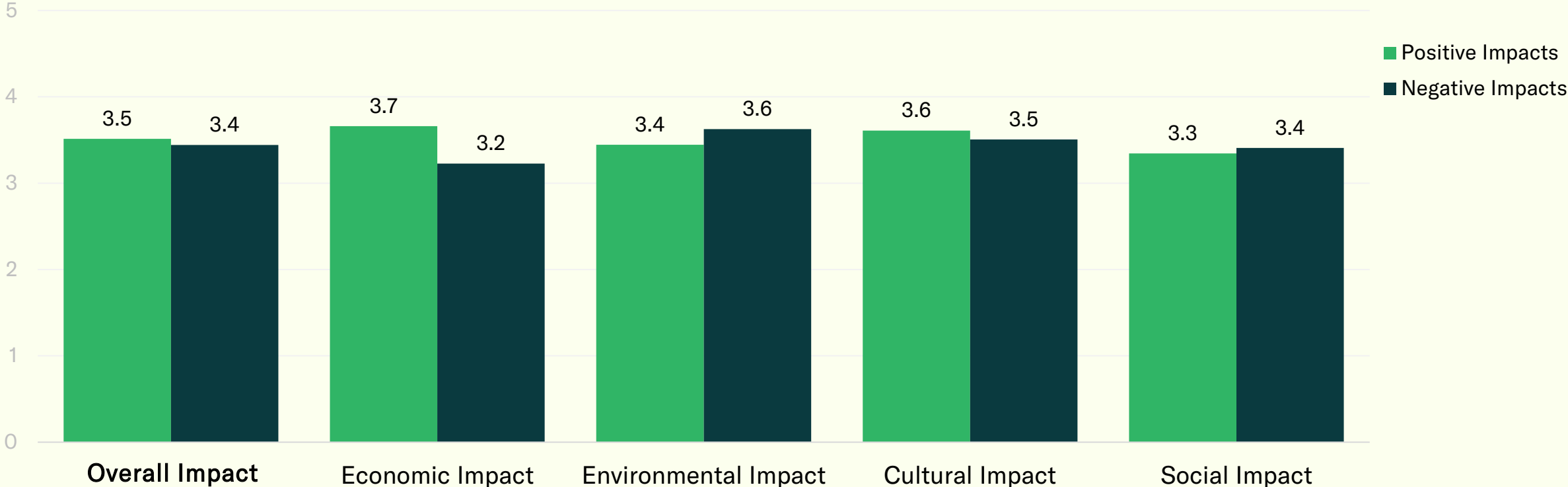
■ Negative Score (<0)



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: Central Oregon tourism workforce. 251 completed surveys.

Central Oregon – Index of Workforce's Perceptions of Tourism Impacts

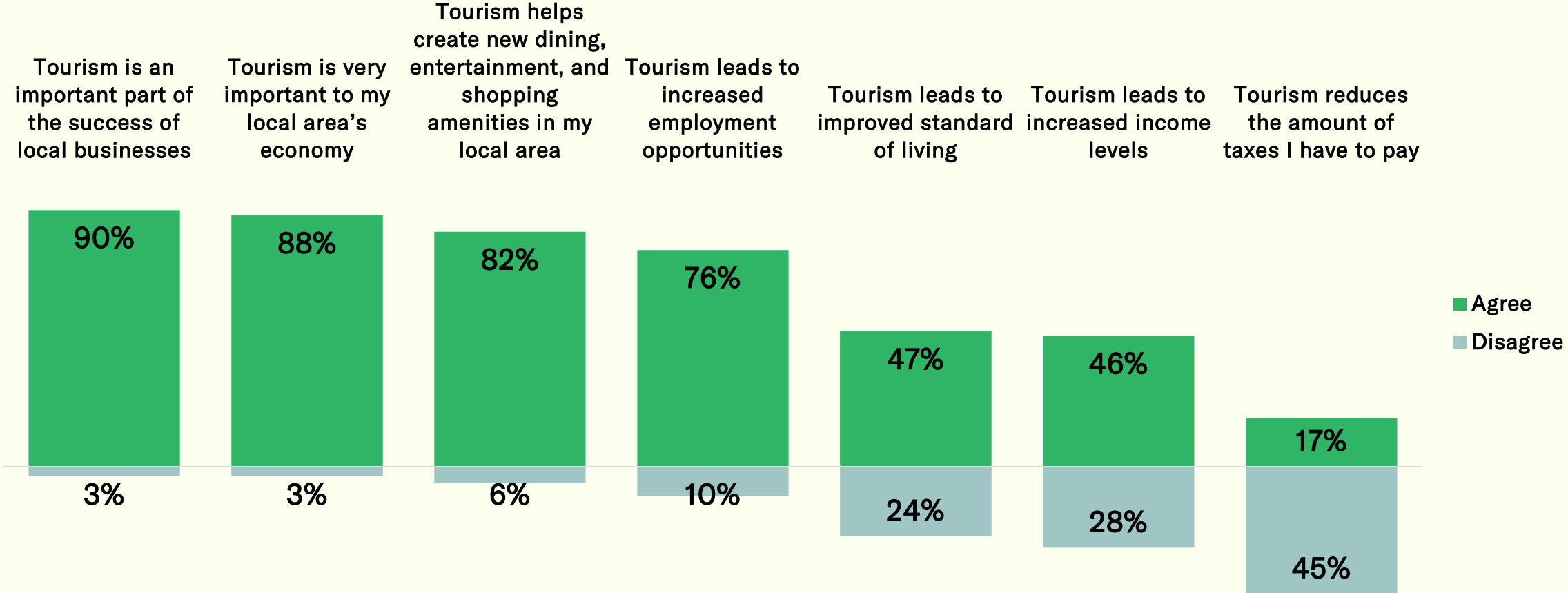


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Central Oregon tourism workforce. 251 completed surveys.

Central Oregon – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Positive Economic Impacts

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

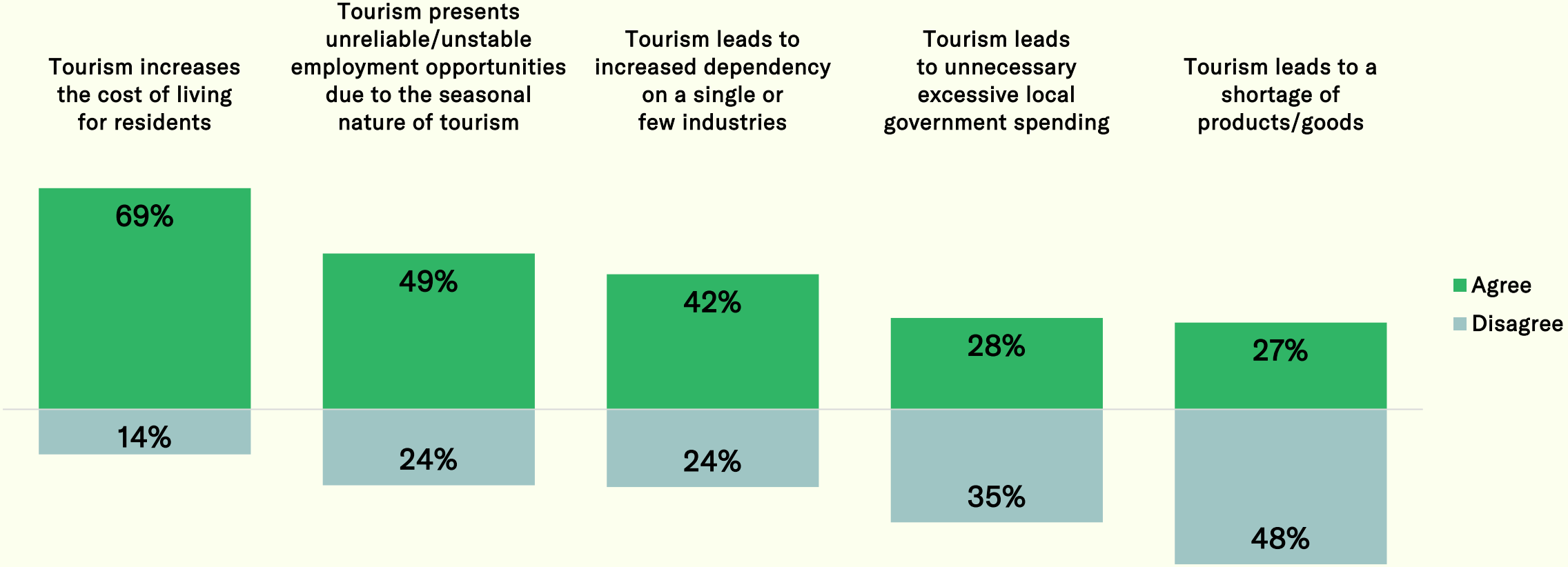


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
 Base: Central Oregon tourism workforce. 251 completed surveys.

Central Oregon – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Negative Economic Impacts

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

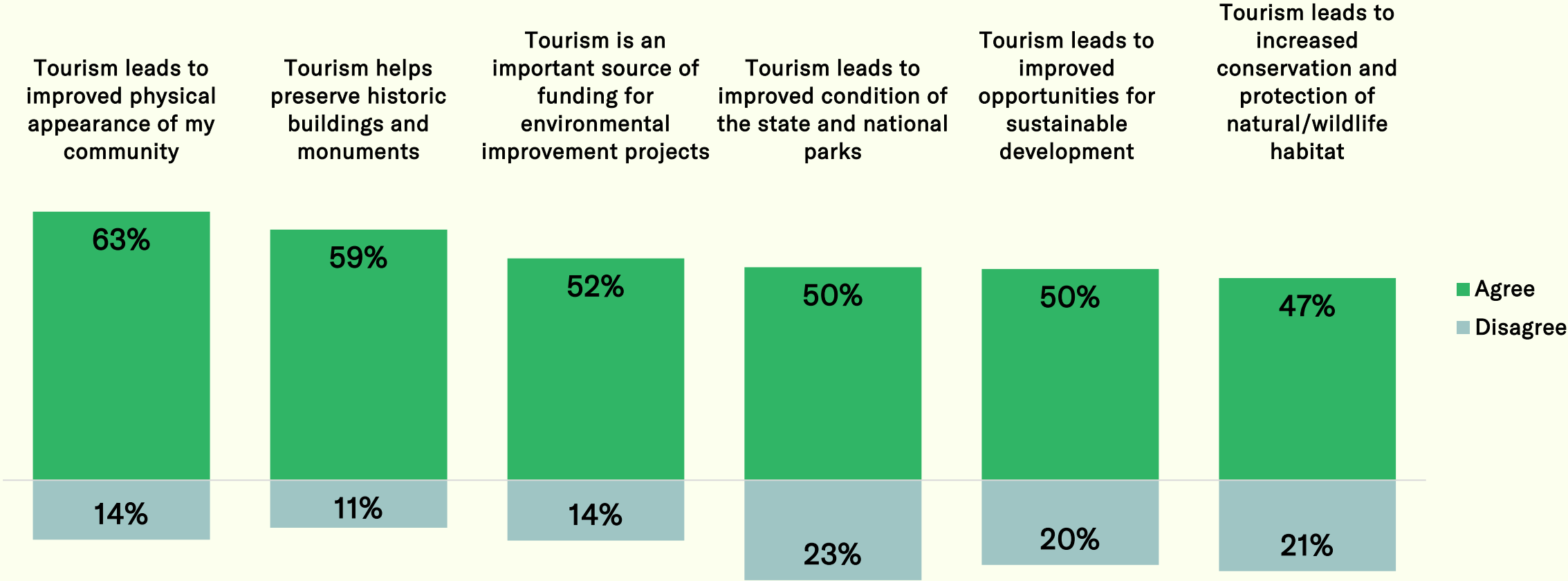


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Central Oregon tourism workforce. 251 completed surveys.

Central Oregon – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Positive Environmental Impacts

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

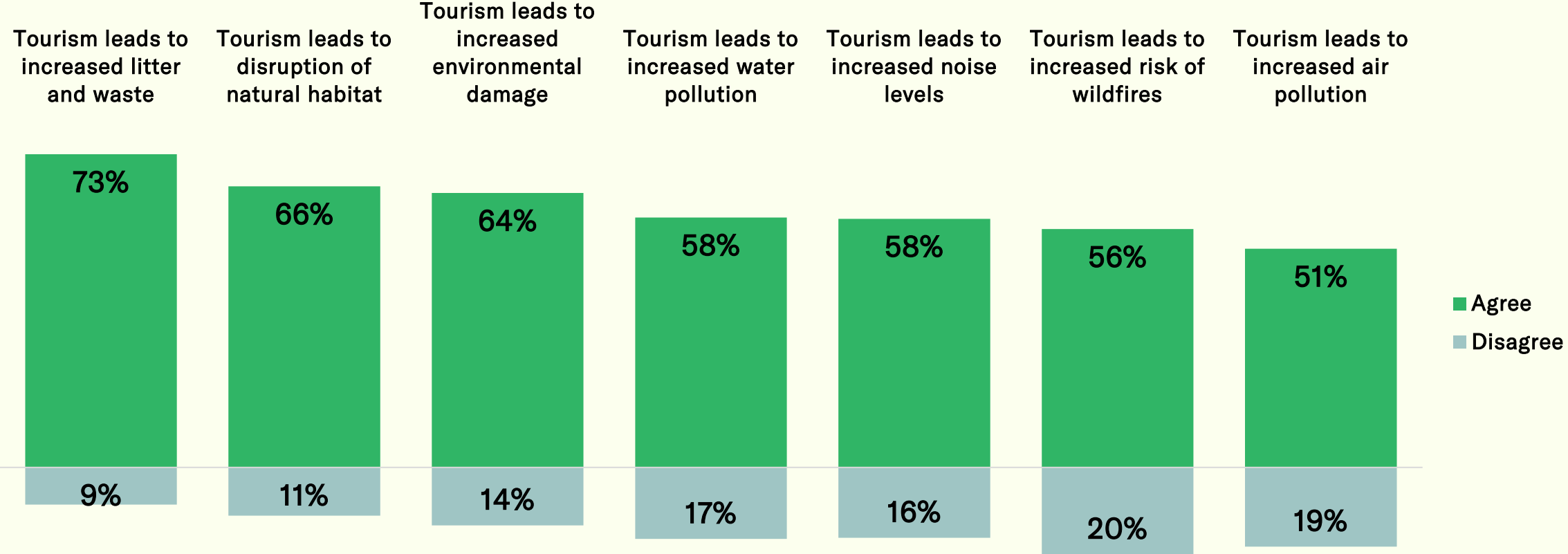


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Central Oregon tourism workforce. 251 completed surveys.

Central Oregon – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Negative Environmental Impacts

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

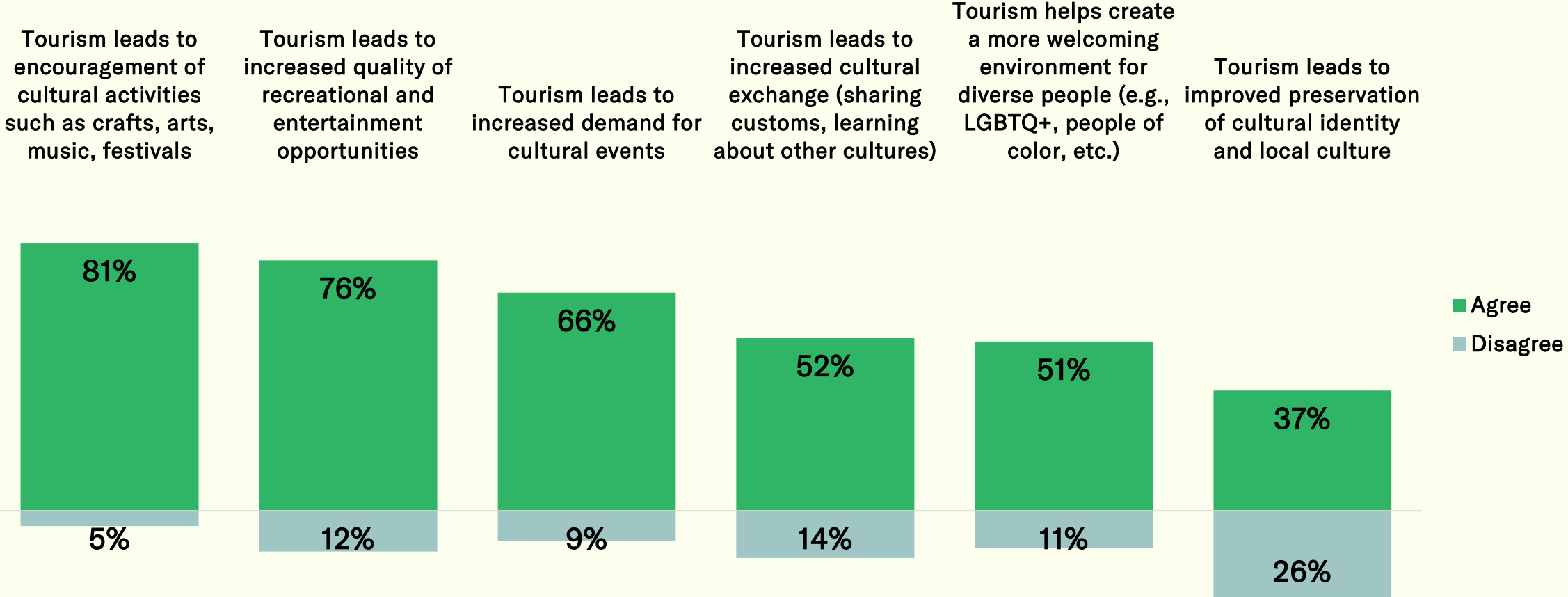


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Central Oregon tourism workforce. 251 completed surveys.

Central Oregon – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Positive Cultural Impacts

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

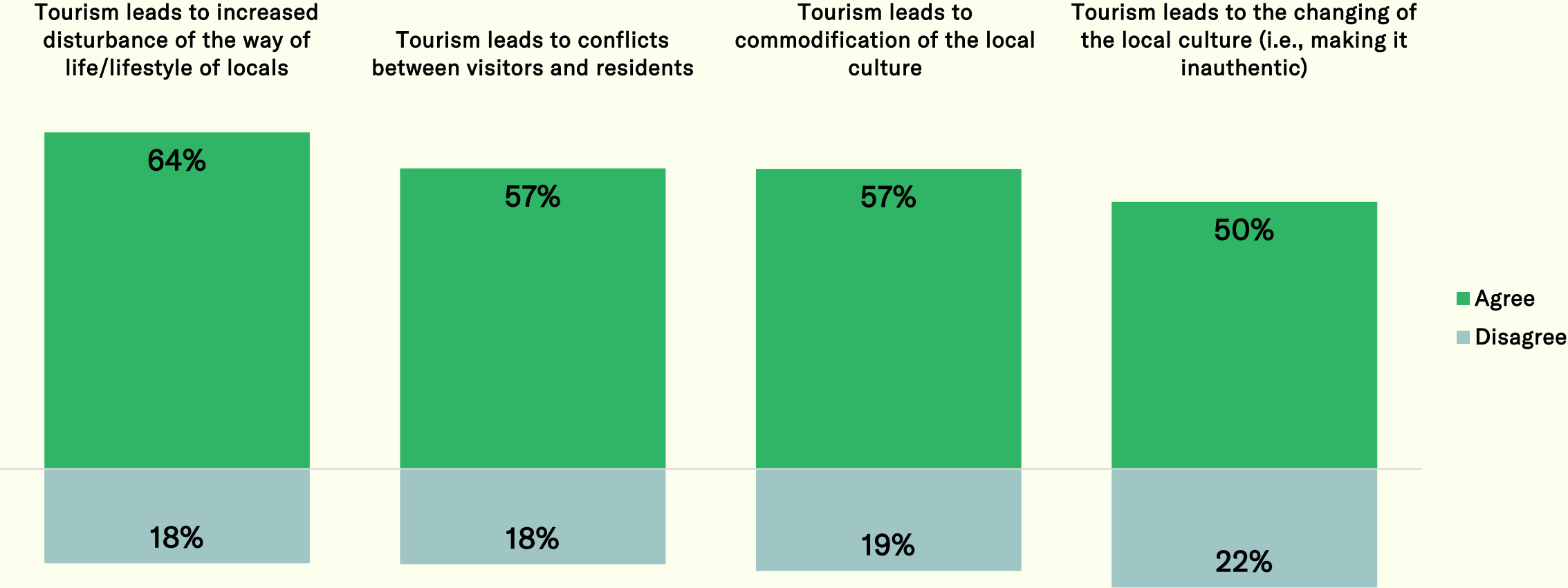


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Central Oregon tourism workforce. 251 completed surveys.

Central Oregon – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Negative Cultural Impacts

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

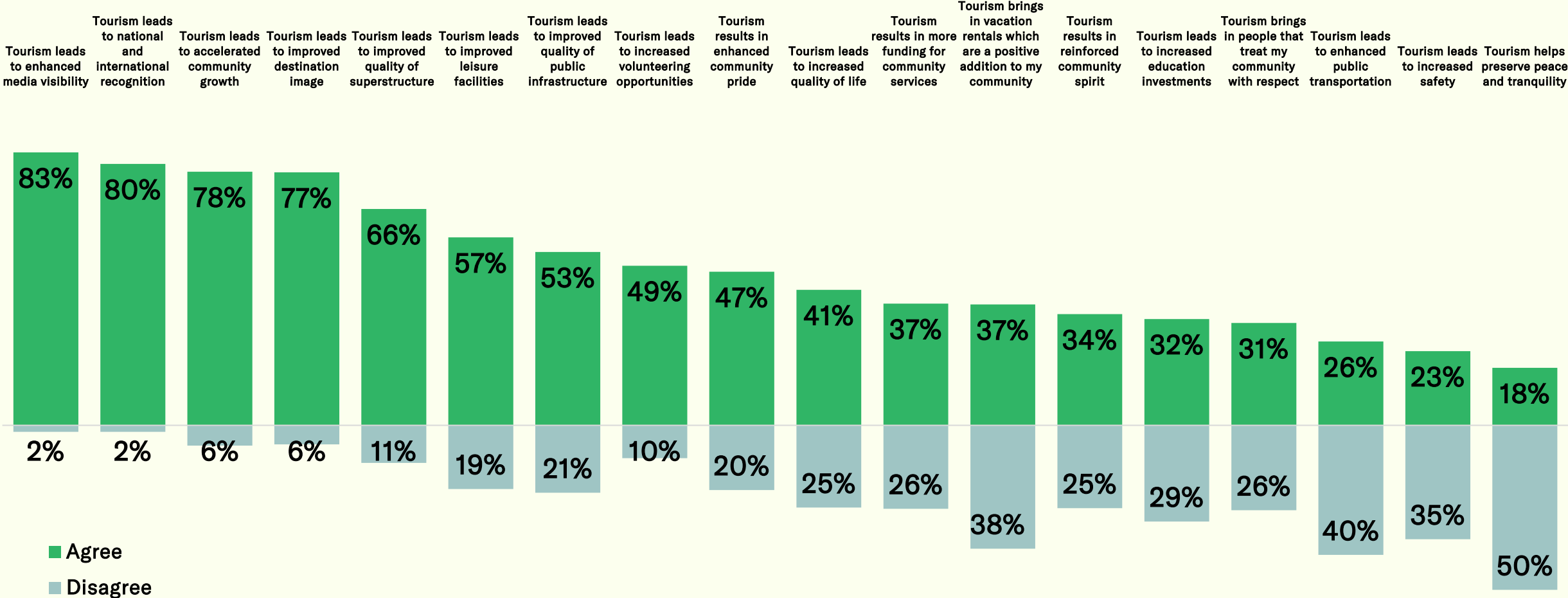


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Central Oregon tourism workforce. 251 completed surveys.

Central Oregon – Social Impact Index Statements

Workforce's Perceptions of Tourism's Positive Social Impacts

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

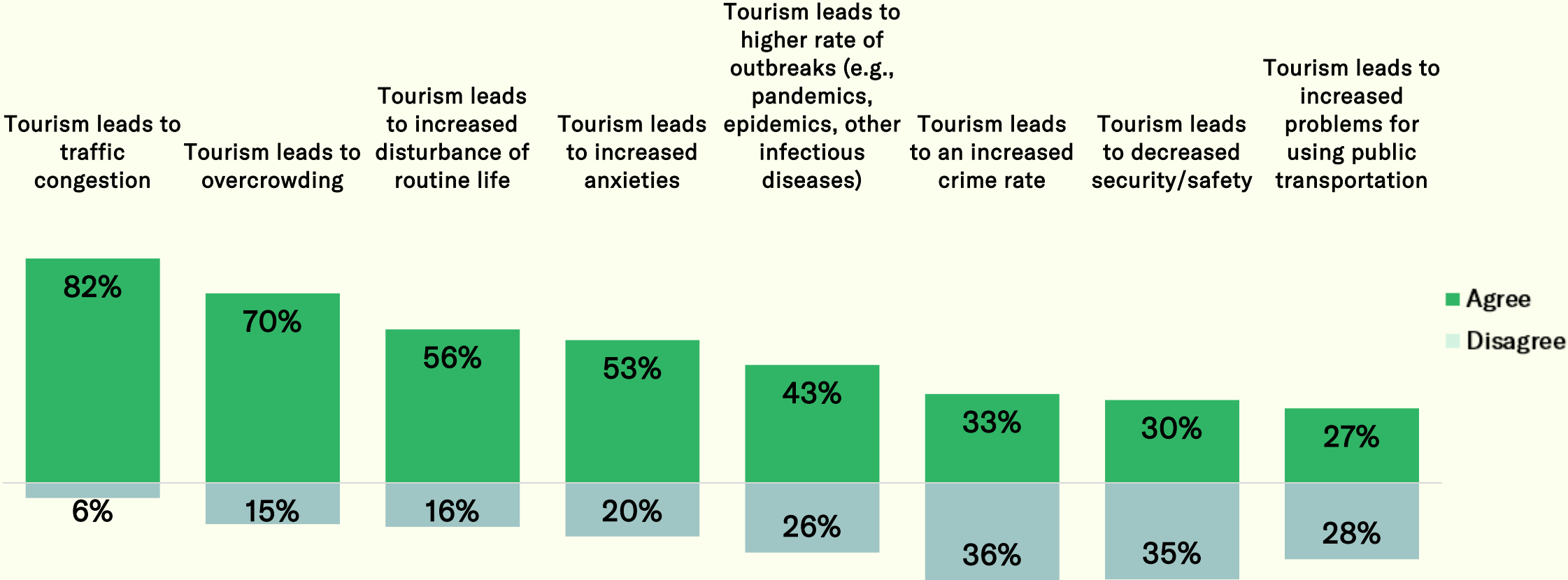


Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Central Oregon tourism workforce. 251 completed surveys.

Central Oregon – Social Impact Index Statements

Workforce's 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 tourism workforce. 251 completed surveys.

Mt. Hood/Columbia River Gorge

The following slides present findings specific to Mt. Hood/Columbia River Gorge residents, including demographics, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and support for tourism in Oregon.

Mt. Hood/CRG Tourism Workforce Demographic Snapshot

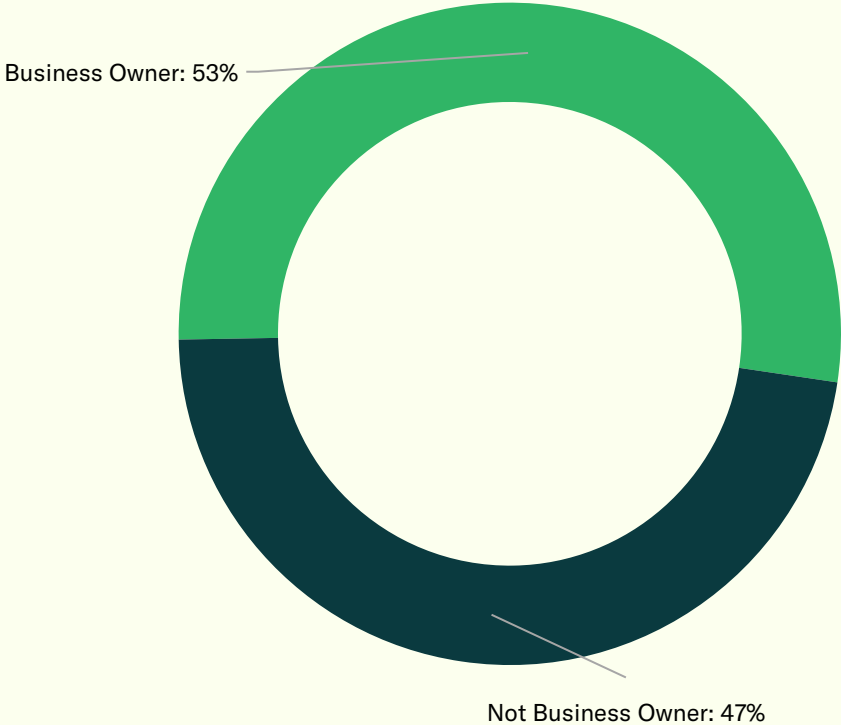
Total residents surveyed:	52
Average age:	42 years old
Average household income:	\$92,555
College graduate:	66%
Married/domestic partnership:	74%
Have children in household:	44%
Gender*	
• Female:	28%
• Male:	69%
• Non-binary/Other:	0%
Ethnicity*	
• White/Caucasian:	82%
• African American/Black:	9%
• Hispanic/Latino:	8%
• Asian, Native Hawaiian, or Pacific Islander:	0%
• Native American, Alaskan Native:	0%
• Other:	1%
LGBTQ+:	14%
Accessibility needs in household:	17%

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



Mt. Hood/CRG – Tourism-Industry Business Owners

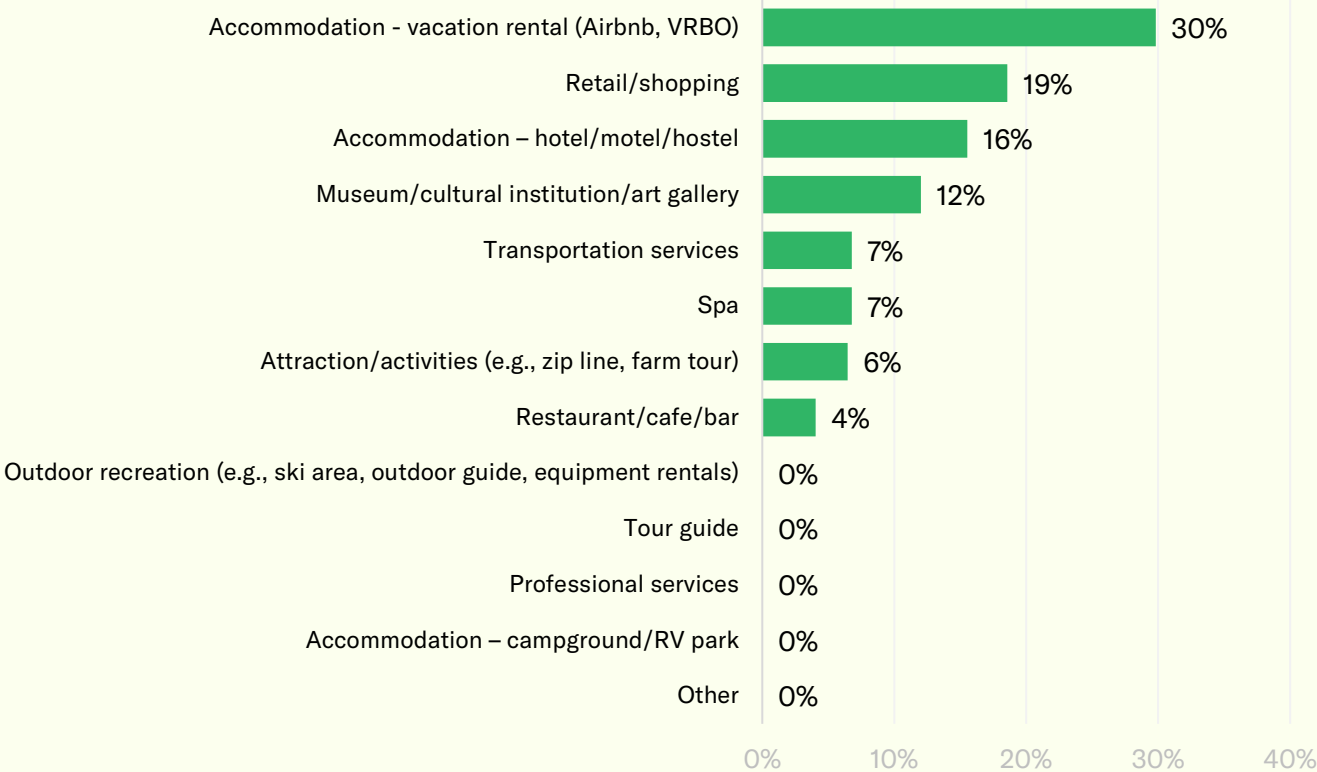
Share of Tourism Workforce who are Business Owners



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

Base: Mt. Hood/CRG tourism workforce. 52 completed surveys.

Type of Business Owned

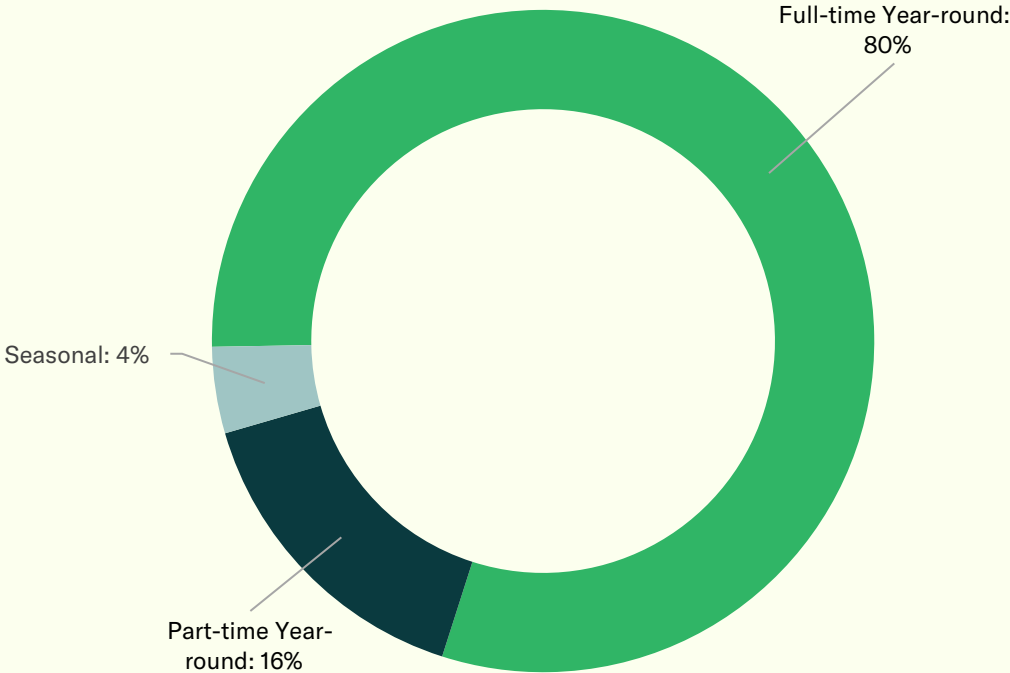


Question: Which of the following best describes your business?

Base: Mt. Hood/CRG residents who own a business that serves the tourism industry. 22 completed surveys.

Mt. Hood/CRG – Current Tourism Employees

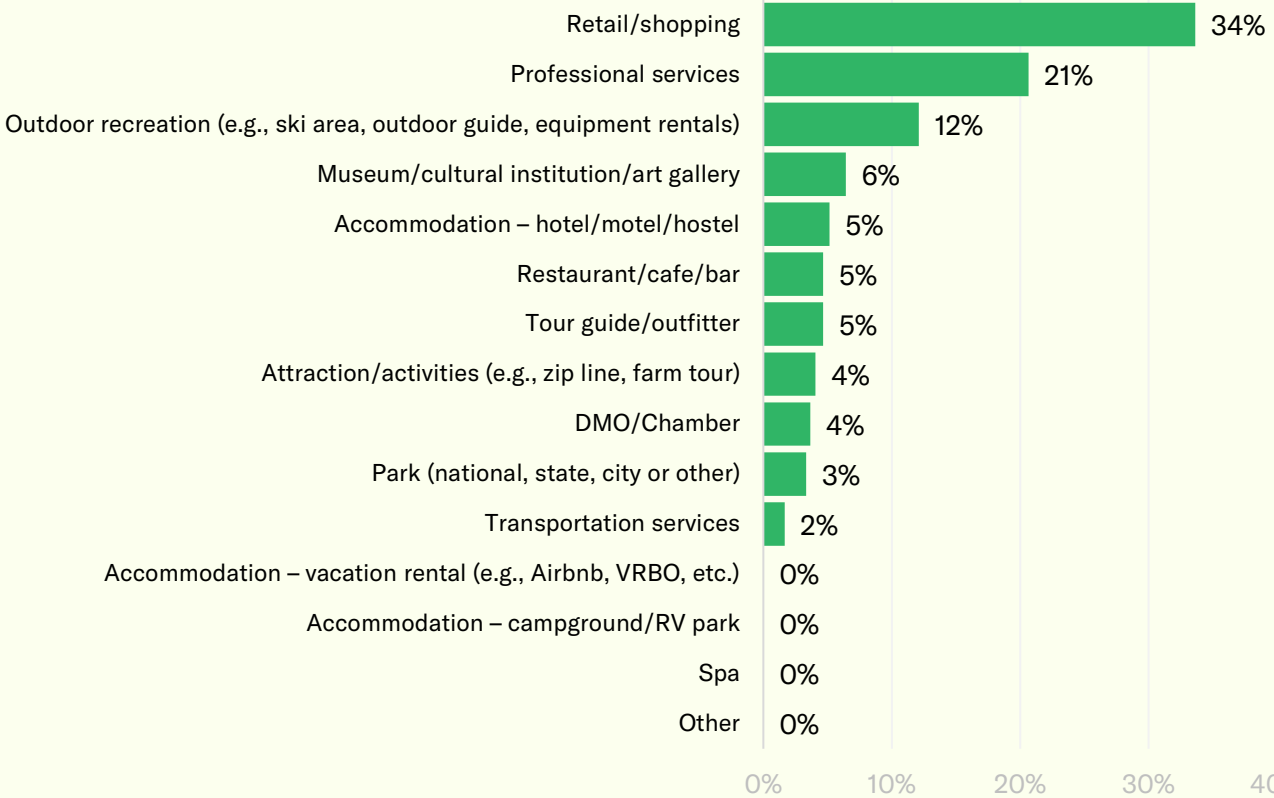
Current Employees: Employment Type



Question: Are you currently employed...?

Base: Mt. Hood/CRG current tourism business employees. 30 completed surveys.

Place of Employment

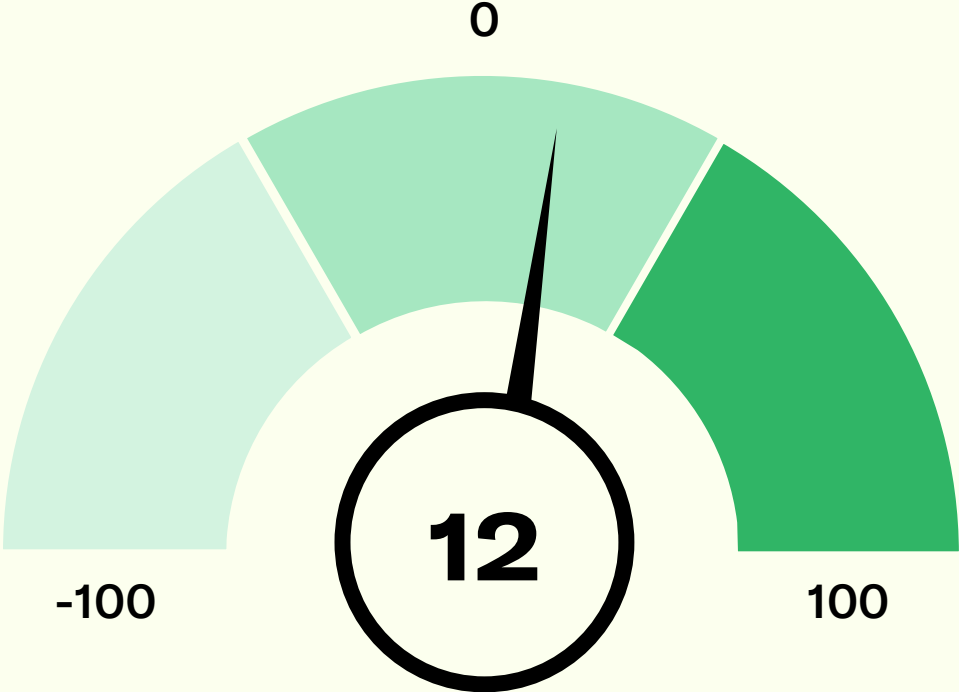


Question: Which of the following best describes your current place of employment?

Base: Mt. Hood/CRG current tourism business employees. 30 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.

Mt. Hood/CRG – Likelihood to Recommend Local Community as a Tourism Destination



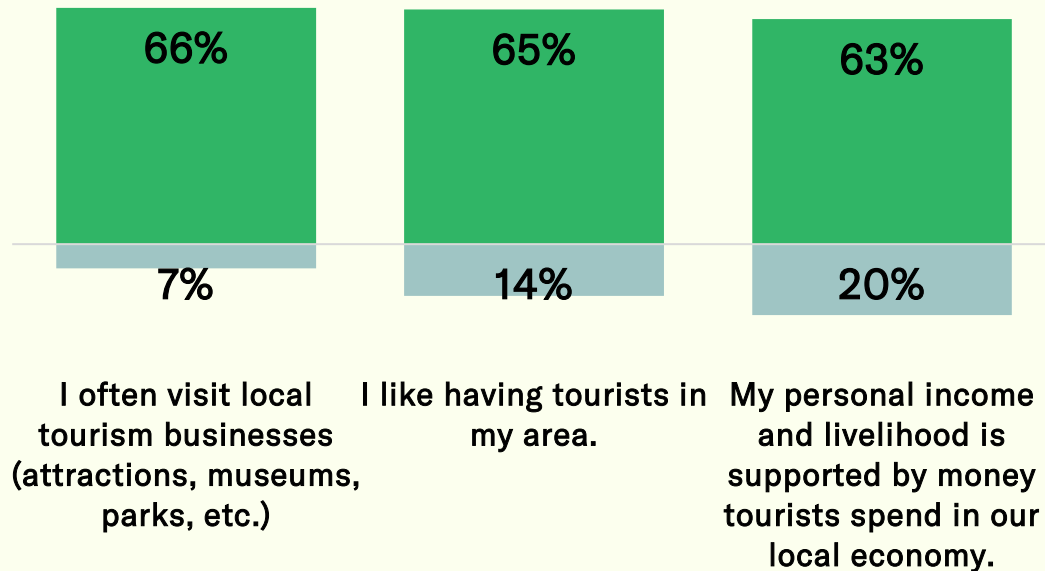
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

Base: Mt. Hood/CRG tourism workforce. 52 completed surveys.

Mt. Hood/CRG – Workforce's Perceptions of Local Tourism Personal Impacts

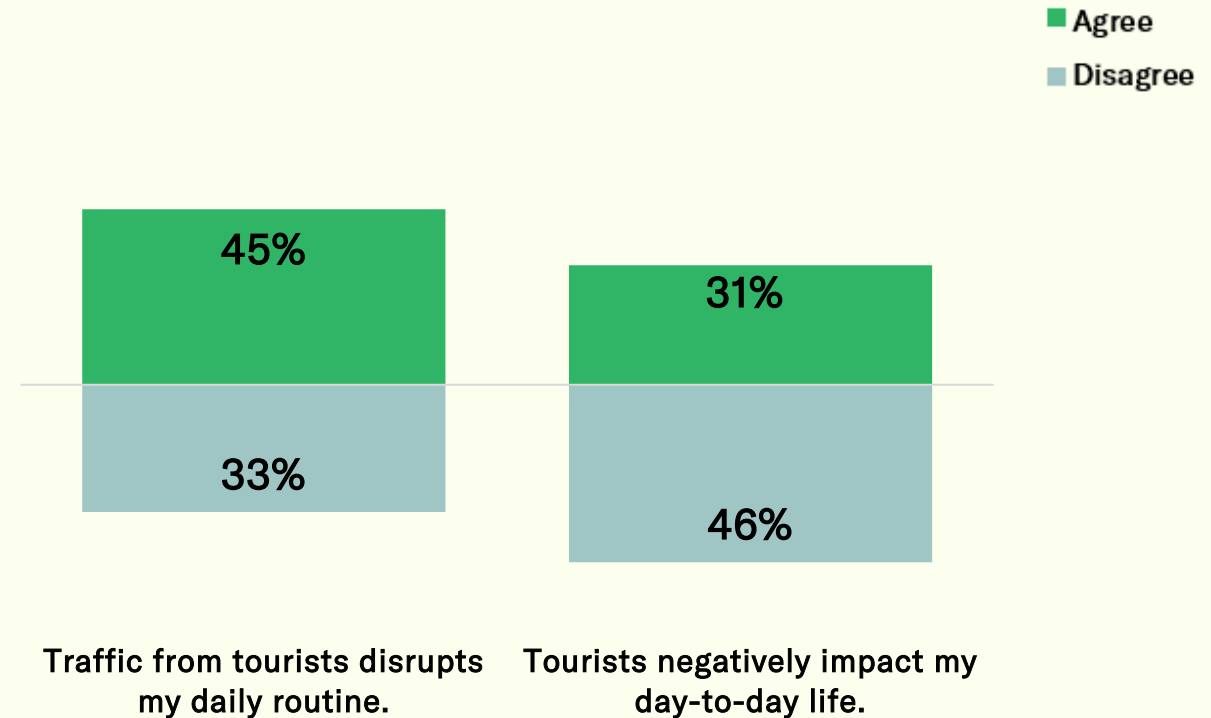
Workforce's Perceptions of Positive Local Tourism Personal Impacts

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



Workforce's Perceptions of Negative Local Tourism Personal Impacts

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

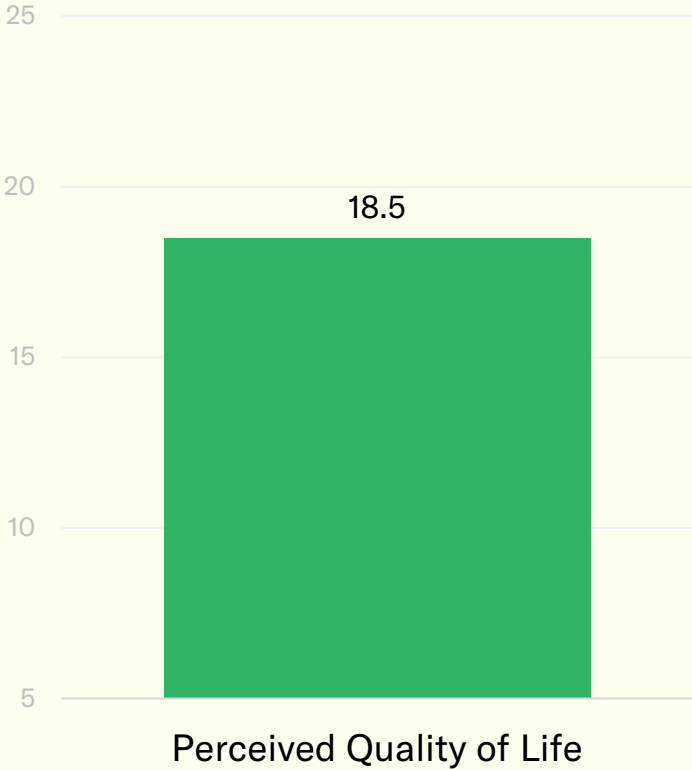


Question: Thinking about tourism in your local area and its impact on you personally, please rate how much you agree with the following statements.

Base: Mt. Hood/CRG tourism workforce. 52 completed surveys.

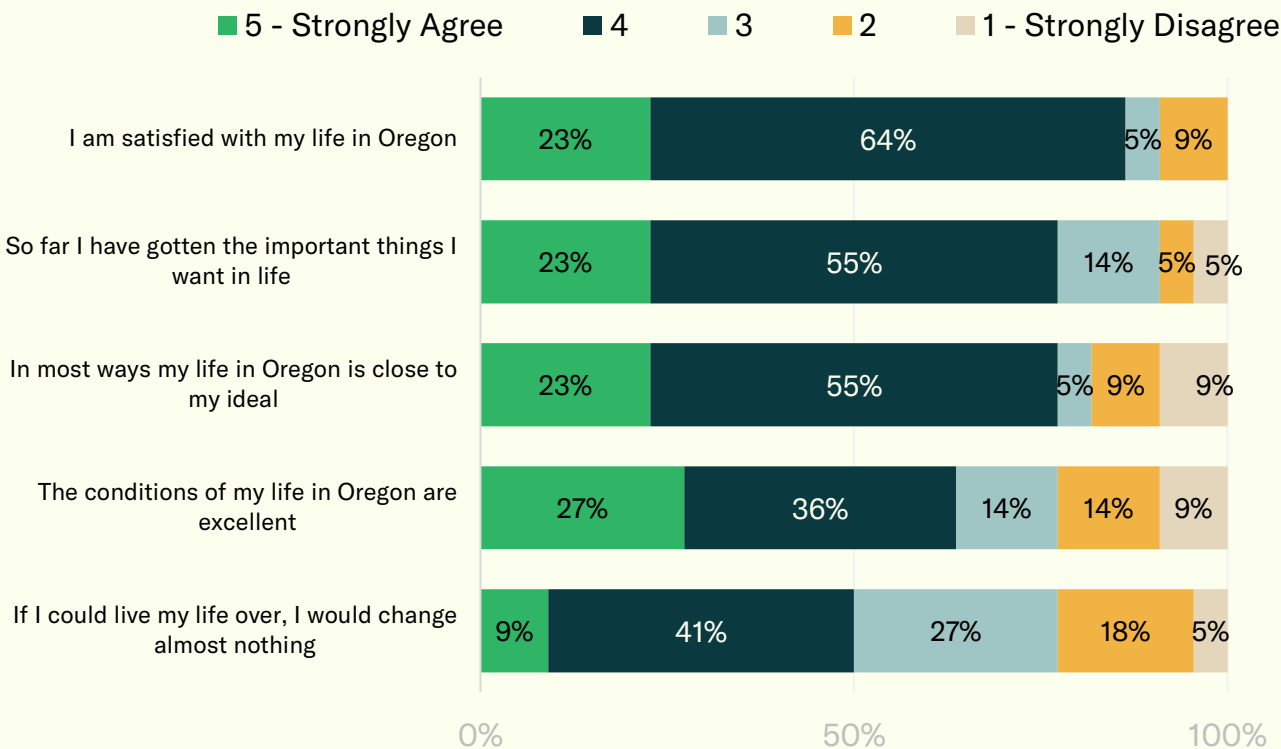
Mt. Hood/CRG –Tourism Business Owners’ Perceived Quality of Life

Tourism Business Owners’ 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



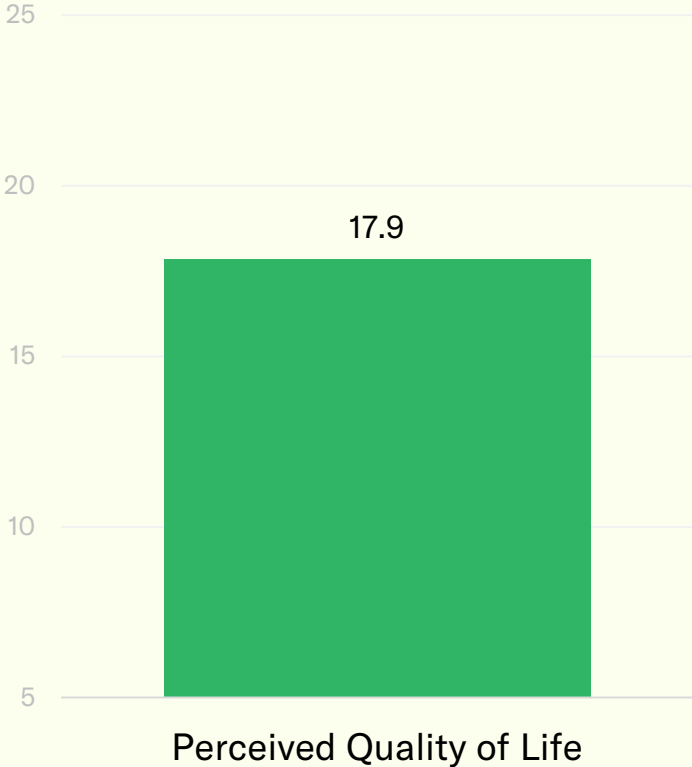
Note: Percentages may not sum to 100% due to rounding.

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

Base: Mt. Hood/CRG residents who own a business that serves the tourism industry. 22 completed surveys.

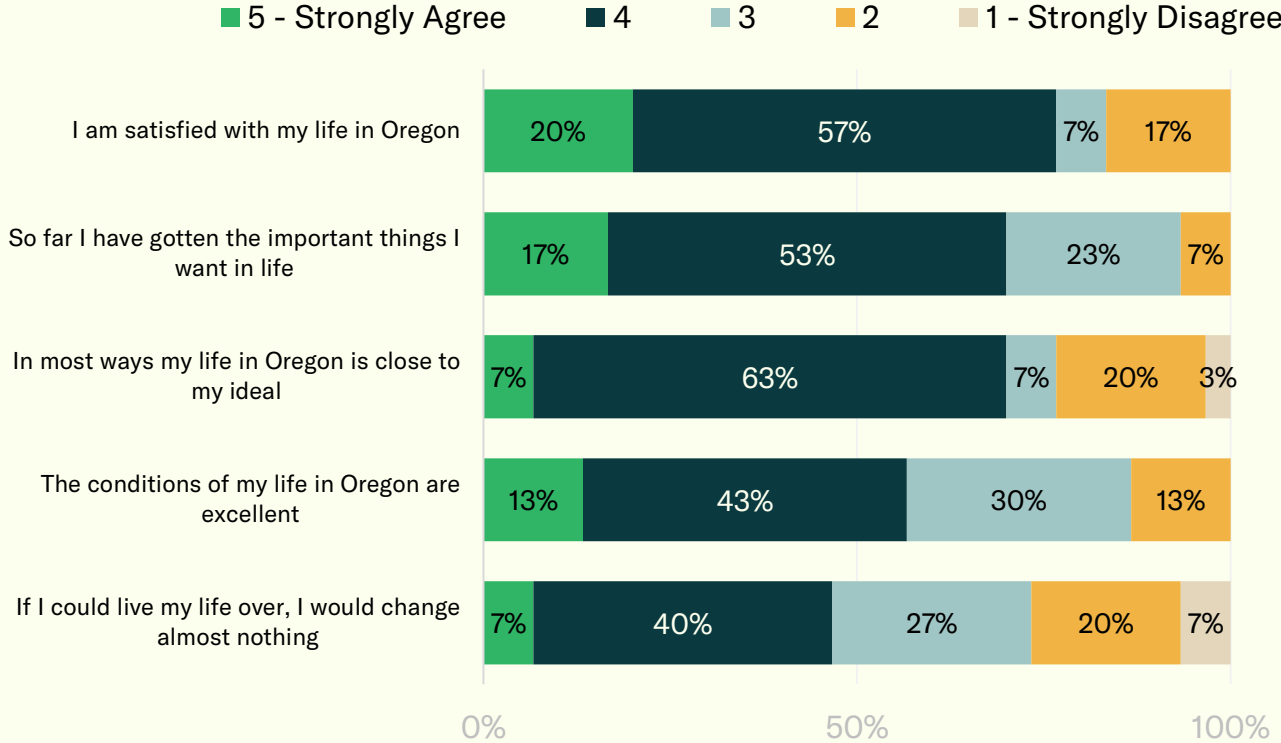
Mt. Hood/CRG – Current Tourism Workers’ Perceived Quality of Life

Current Tourism Workers’ 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.

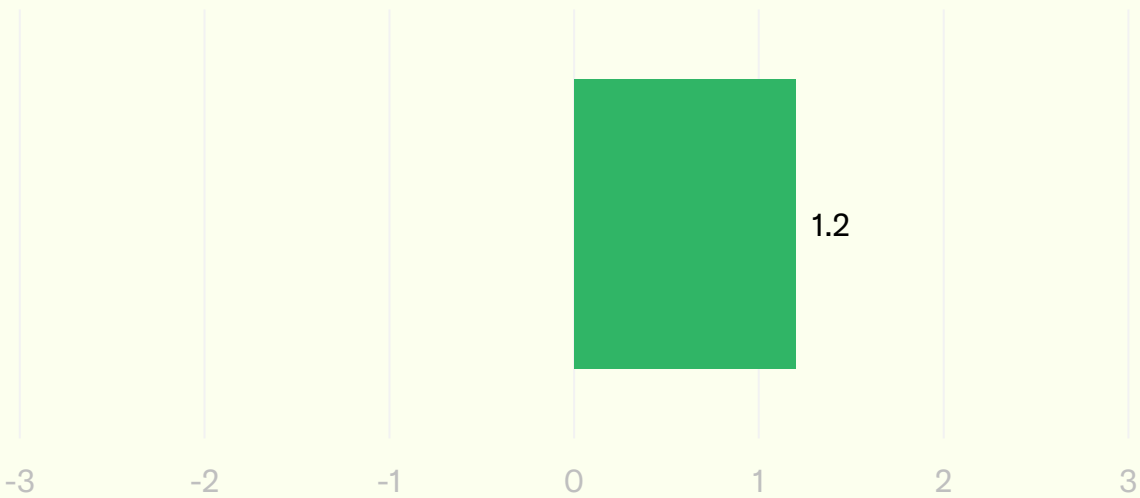
Question: Please rate your level of agreement with the following statements.

Base: Mt. Hood/CRG current tourism workers. 30 completed surveys.

Mt. Hood/CRG – Overall Support for Tourism

Overall Support for Tourism Mean Score*

Mt. Hood/CRG Tourism Workforce’s Overall Support for Tourism



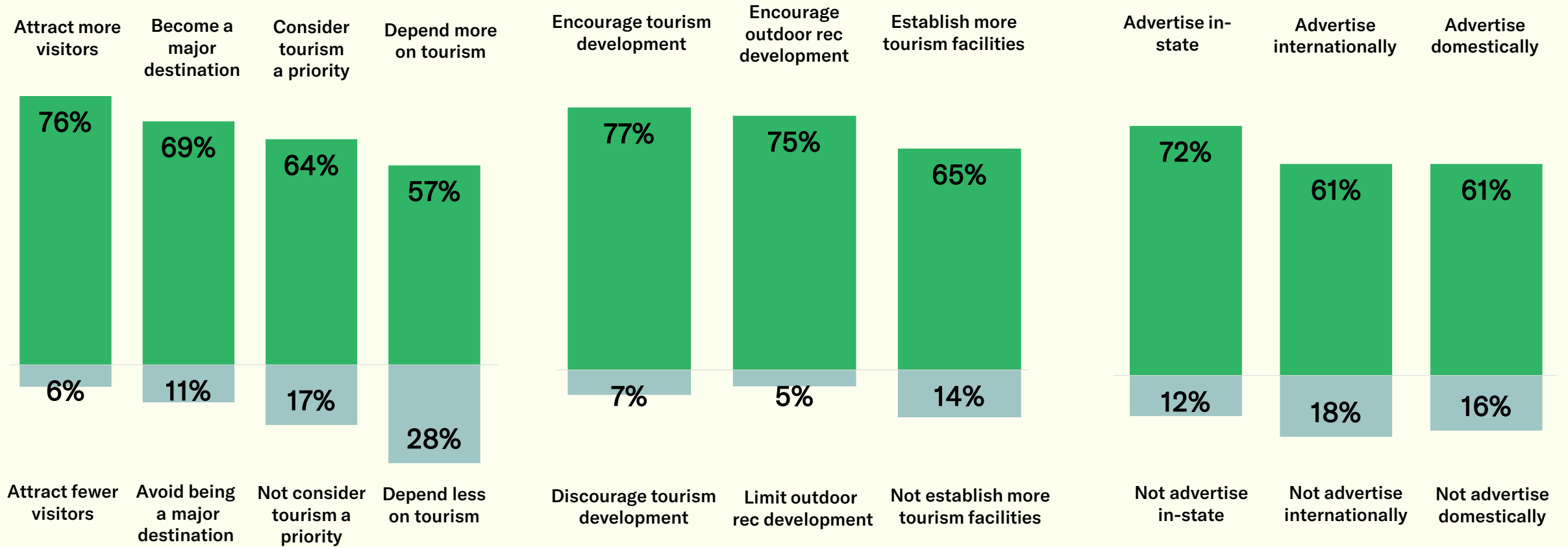
* Calculated as the mean scores for statements included in the index, with a minimum possible mean score of -3 and a maximum possible mean score of 3. See page 30 for detailed scores for each included statement.

Mt. Hood/CRG – Support for Tourism Statements

“Oregon should...”

(On a -3- to 3-point scale)

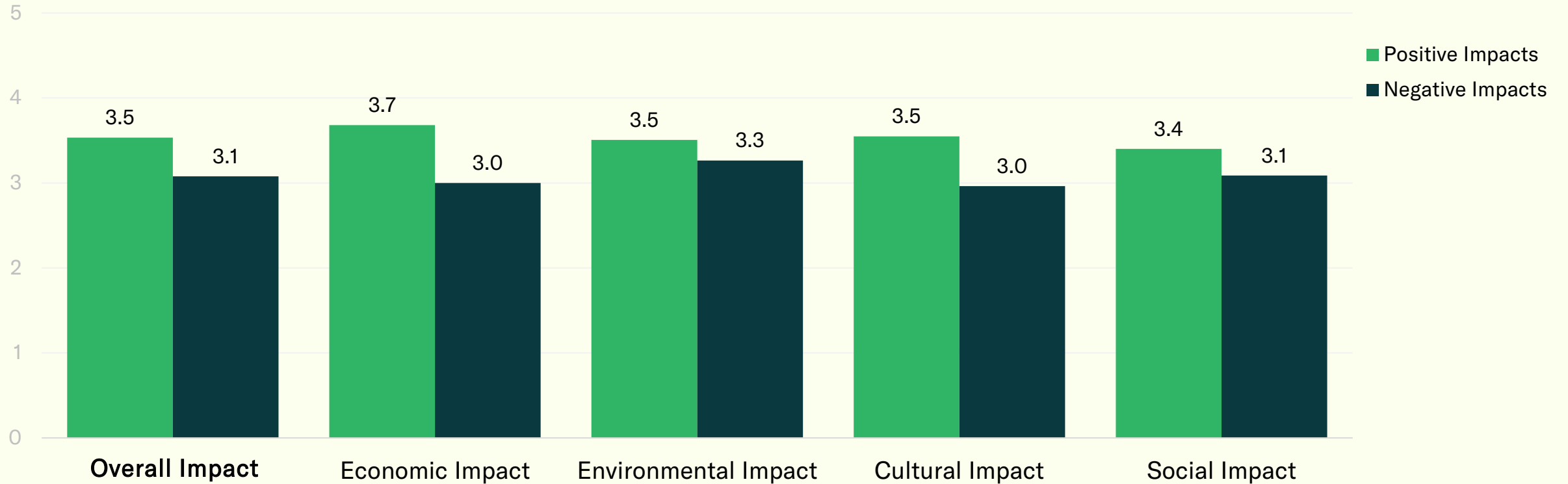
■ Positive Score (>0)
■ Negative Score (<0)



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: Mt. Hood/CRG tourism workforce. 52 completed surveys.

Mt. Hood/CRG – Index of Workforce's Perceptions of Tourism Impacts



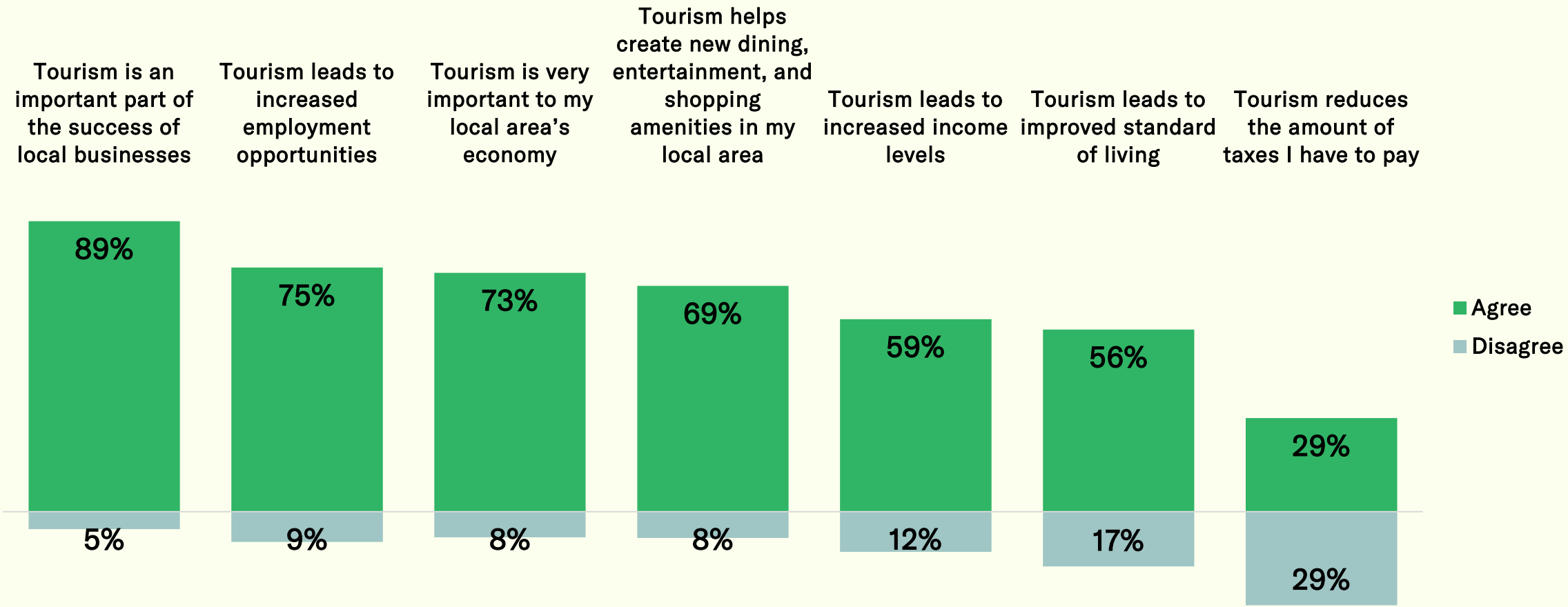
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Mt. Hood/CRG tourism workforce. 52 completed surveys.

Mt. Hood/CRG – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Positive Economic Impacts

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

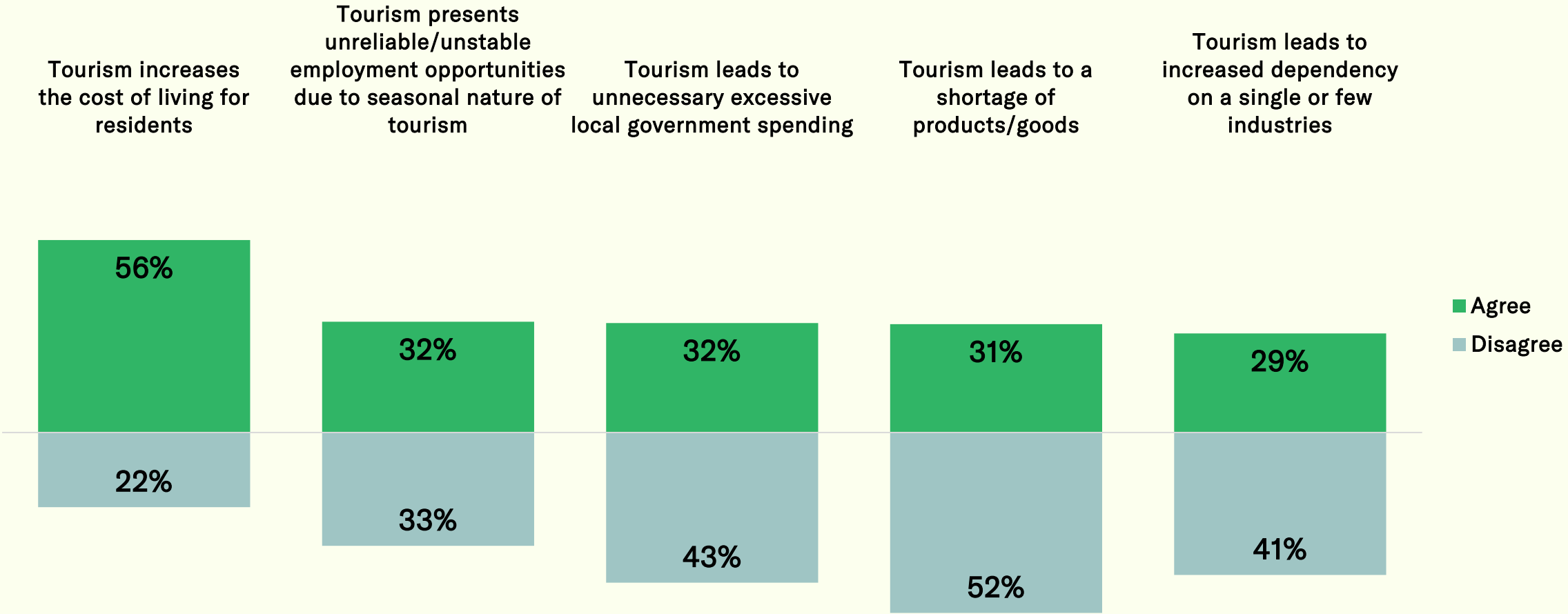


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
 Base: Mt. Hood/CRG tourism workforce. 52 completed surveys.

Mt. Hood/CRG – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Negative Economic Impacts

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

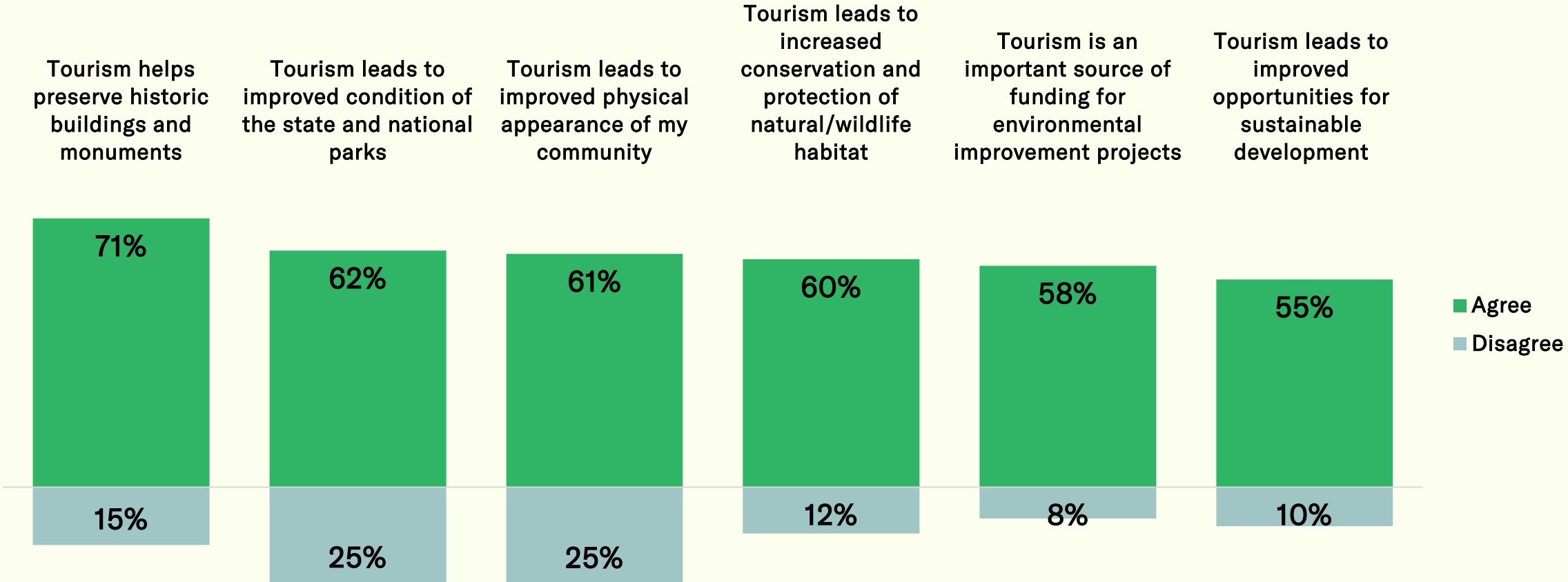


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Mt. Hood/CRG tourism workforce. 52 completed surveys.

Mt. Hood/CRG – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Positive Environmental Impacts

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

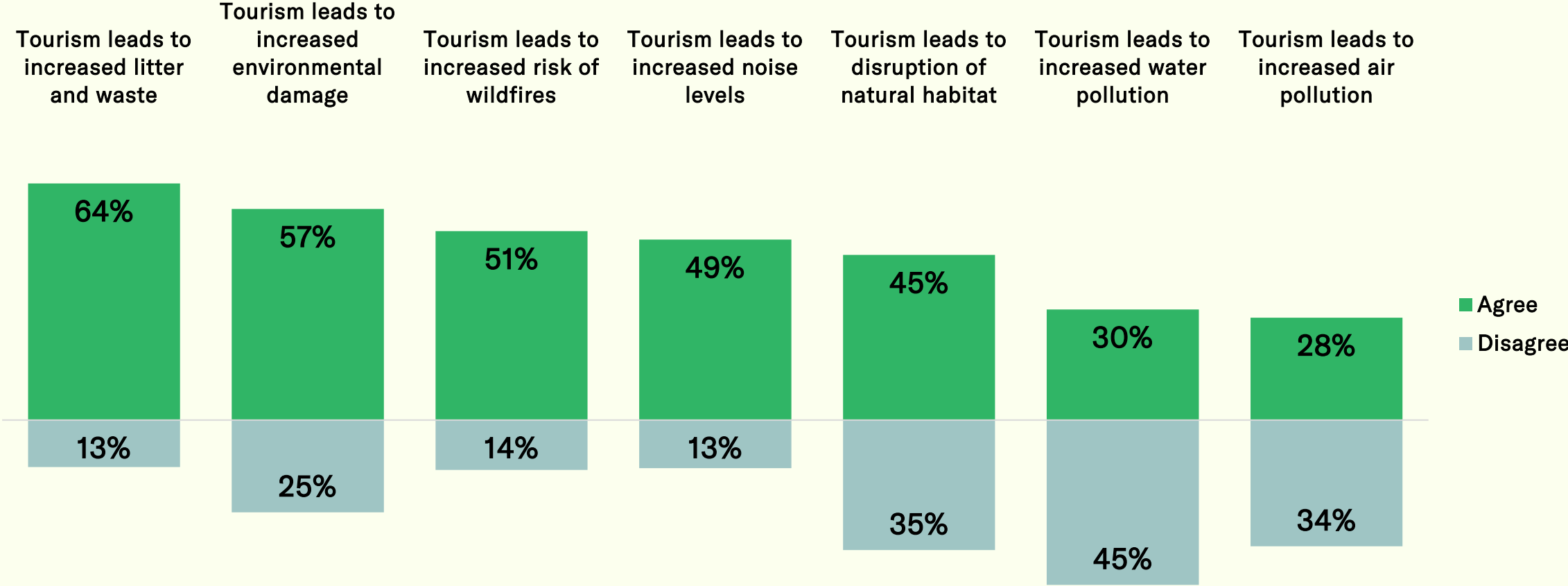


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Mt. Hood/CRG tourism workforce. 52 completed surveys.

Mt. Hood/CRG – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Negative Environmental Impacts

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



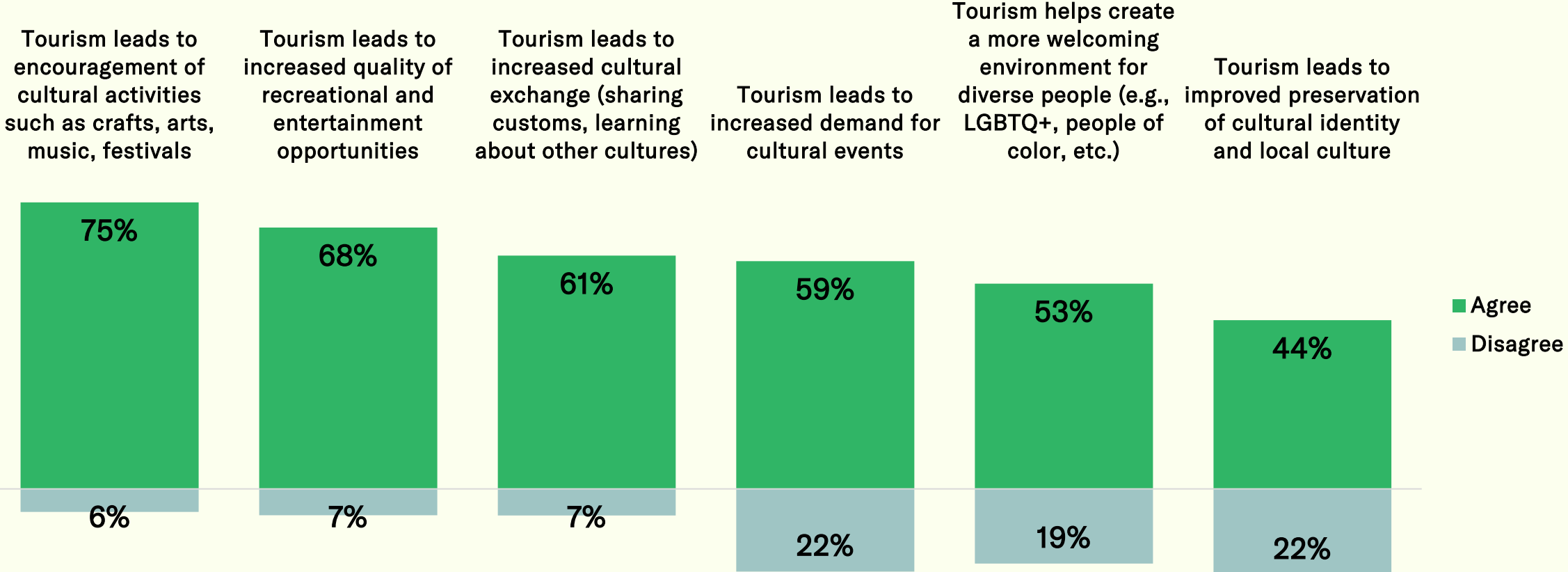
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Mt. Hood/CRG tourism workforce. 52 completed surveys.

Mt. Hood/CRG – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Positive Cultural Impacts

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

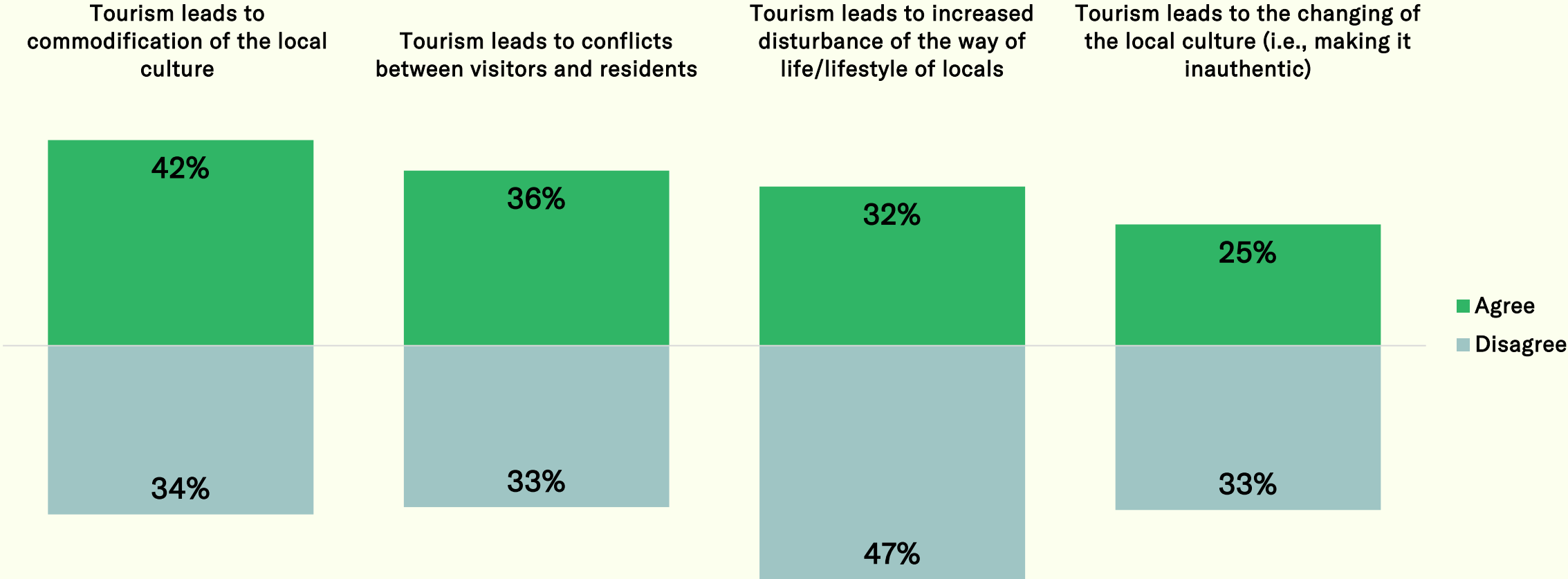


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
 Base: Mt. Hood/CRG tourism workforce. 52 completed surveys.

Mt. Hood/CRG – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Negative Cultural Impacts

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

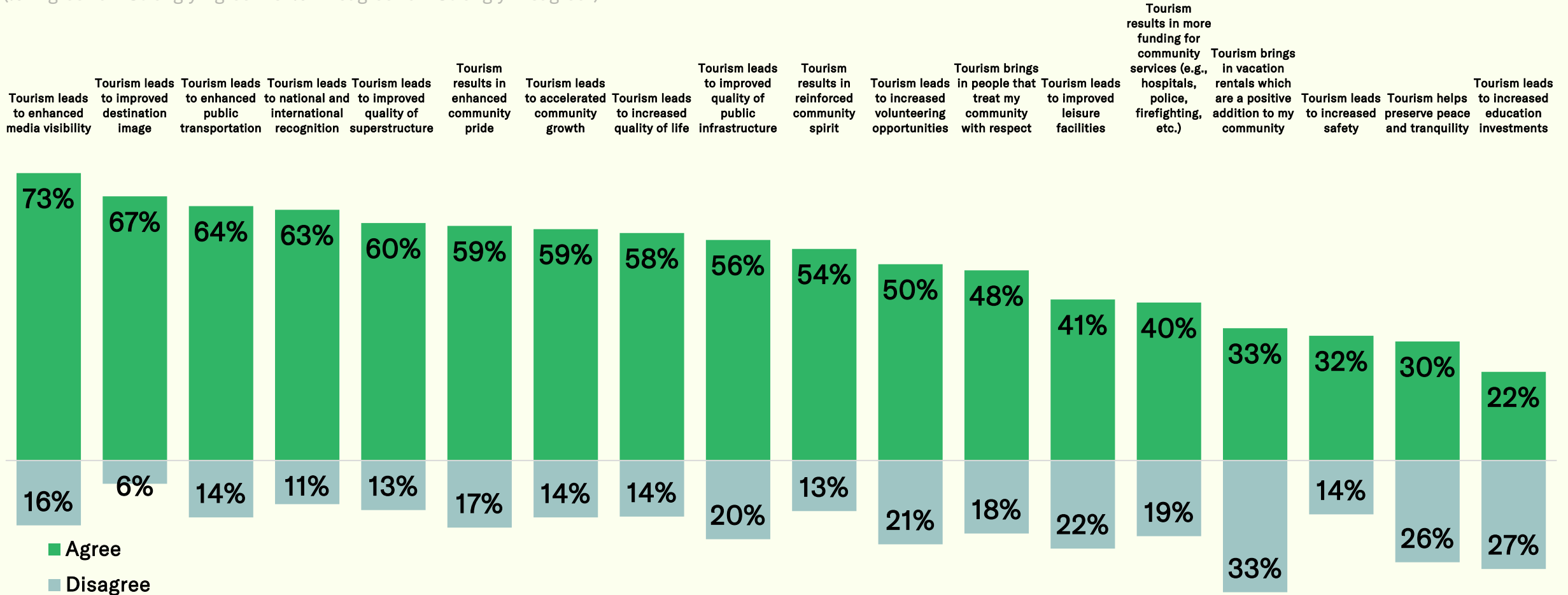


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Mt. Hood/CRG tourism workforce. 52 completed surveys.

Mt. Hood/CRG – Social Impact Index Statements

Workforce's Perceptions of Tourism's Positive Social Impacts

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



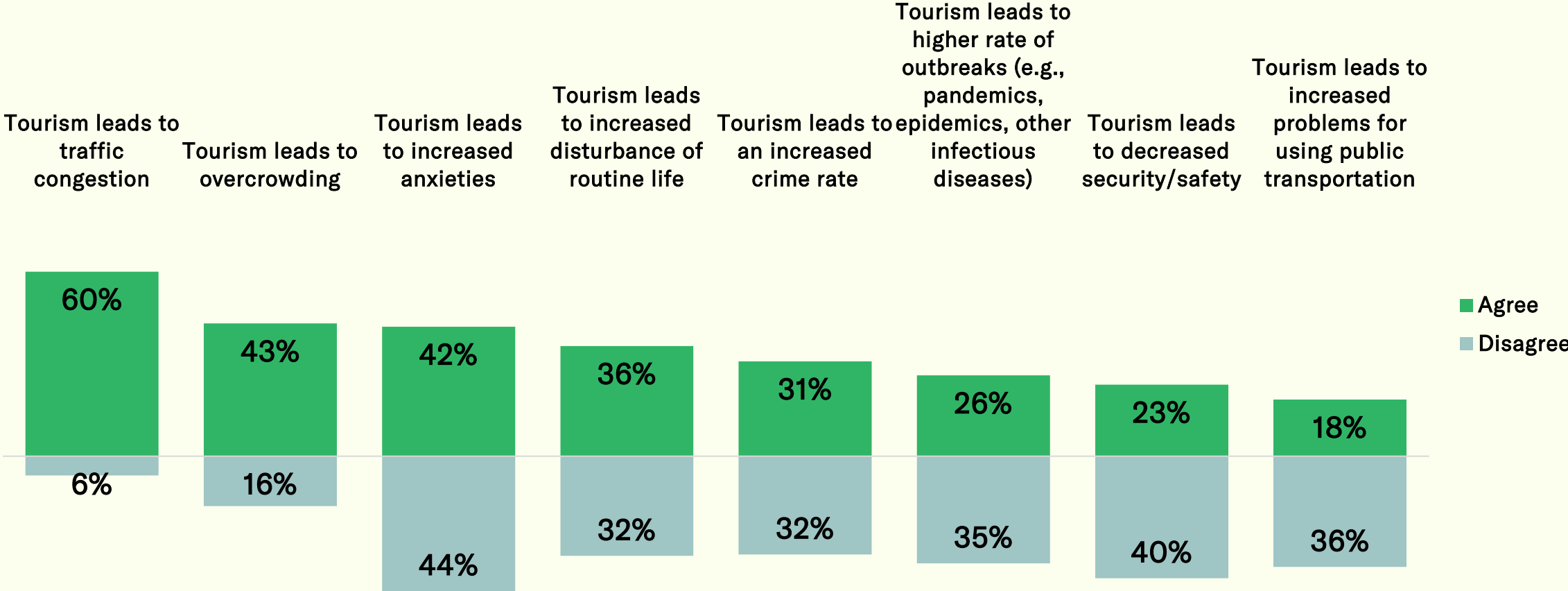
Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.

Base: Mt. Hood/CRG tourism workforce. 52 completed surveys.

Mt. Hood/CRG – Social Impact Index Statements

Workforce's 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 tourism workforce. 52 completed surveys.

Eastern Oregon

The following slides present findings specific to Eastern Oregon residents, including demographics, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and support for tourism in Oregon.

Eastern Oregon Tourism Workforce Demographic Snapshot

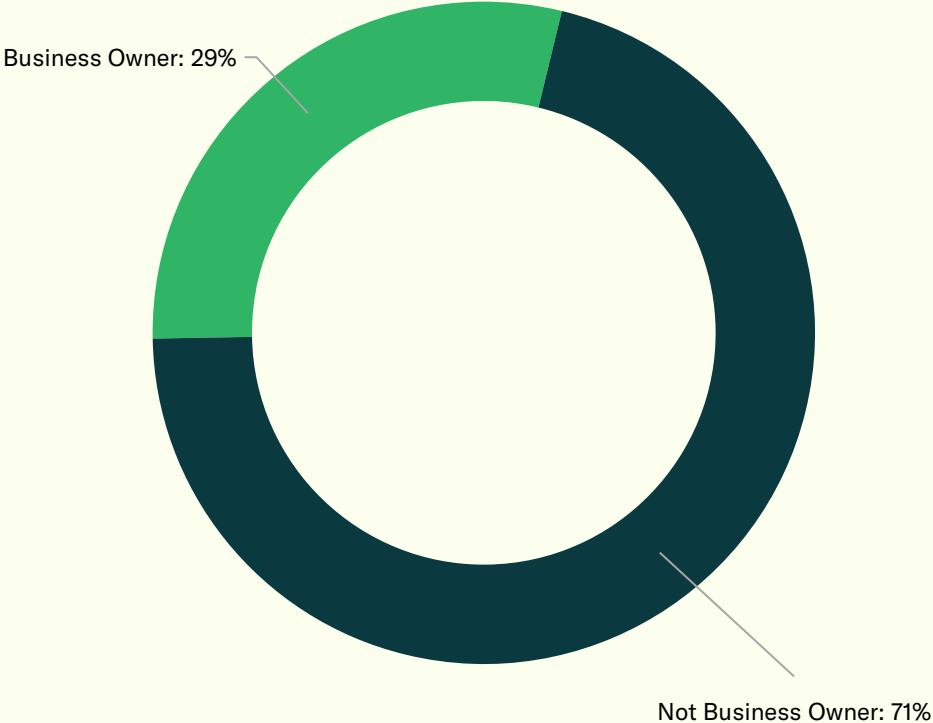
Total residents surveyed:	152
Average age:	42 years old
Average household income:	\$69,751
College graduate:	48%
Married/domestic partnership:	66%
Have children in household:	49%
Gender*	
• Female:	59%
• Male:	39%
• Non-binary/Other:	2%
Ethnicity*	
• White/Caucasian:	81%
• Hispanic/Latino:	15%
• African American/Black:	5%
• Native American, Alaskan Native:	3%
• Asian, Native Hawaiian, or Pacific Islander:	2%
• Other:	2%
LGBTQ+:	16%
Accessibility needs in household:	11%

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



Eastern Oregon – Tourism-Industry Business Owners

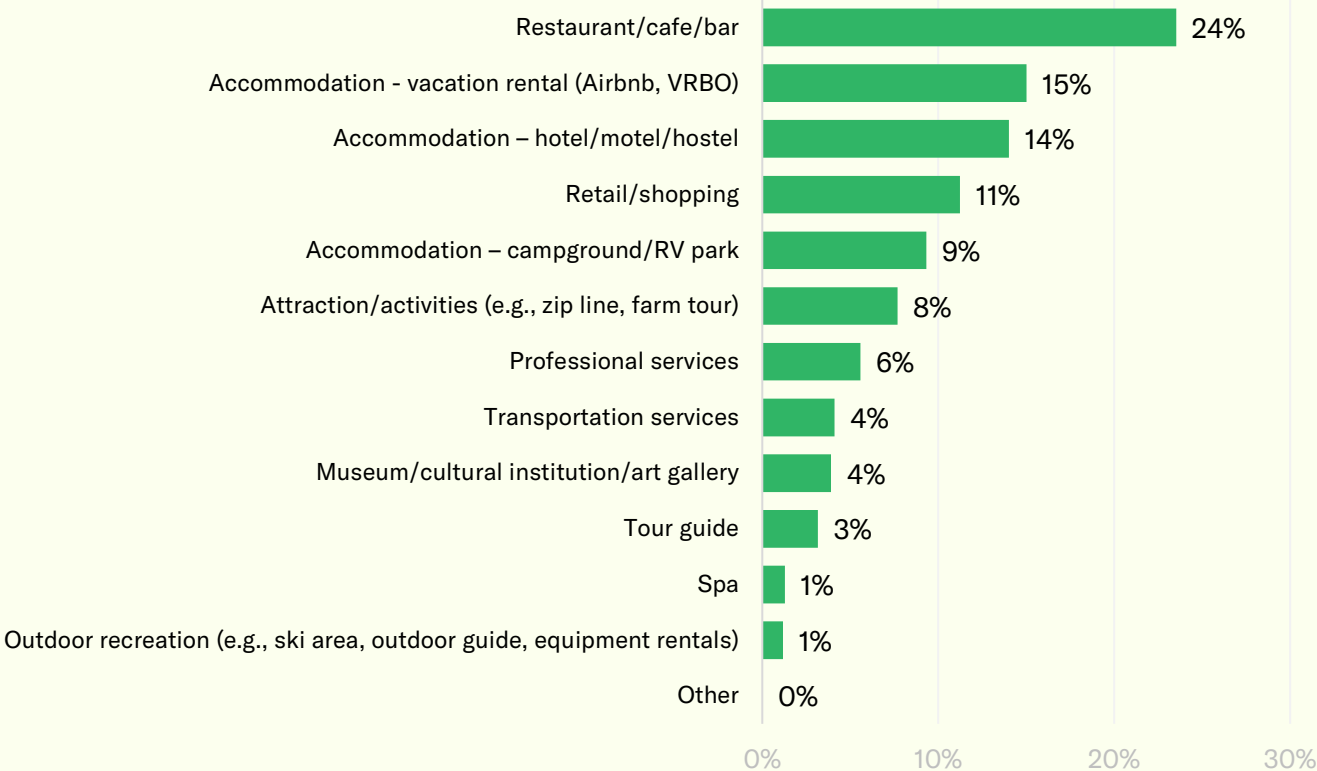
Share of Tourism Workforce who are Business Owners



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

Base: Eastern Oregon tourism workforce. 152 completed surveys.

Type of Business Owned

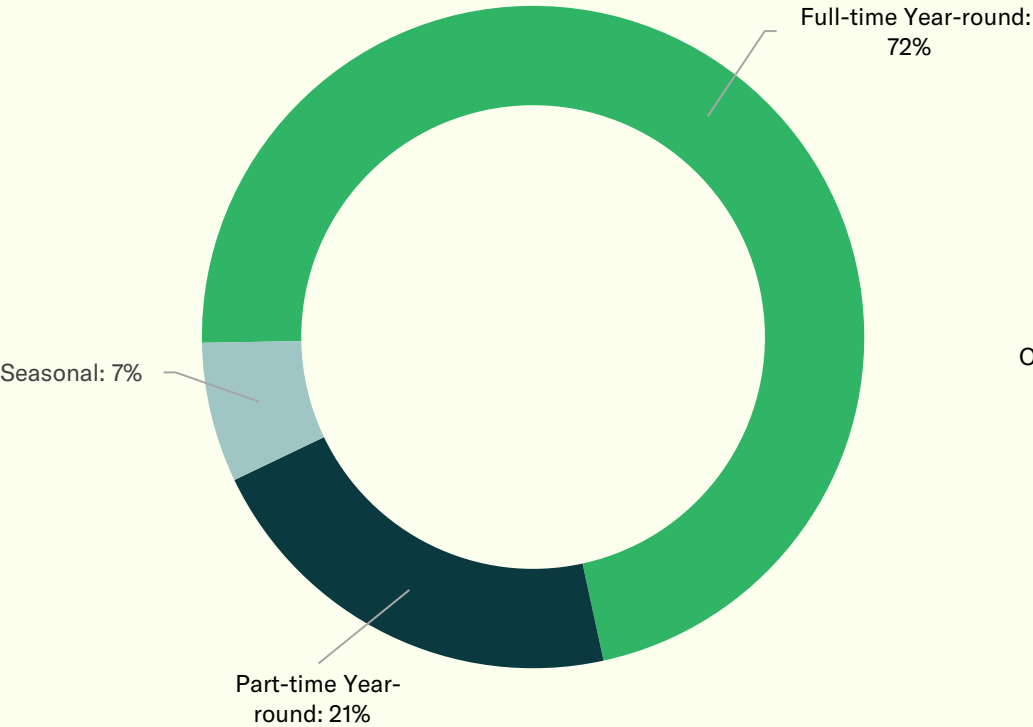


Question: Which of the following best describes your business?

Base: Eastern Oregon residents who own a business that serves the tourism industry. 51 completed surveys.

Eastern Oregon – Current Tourism Employees

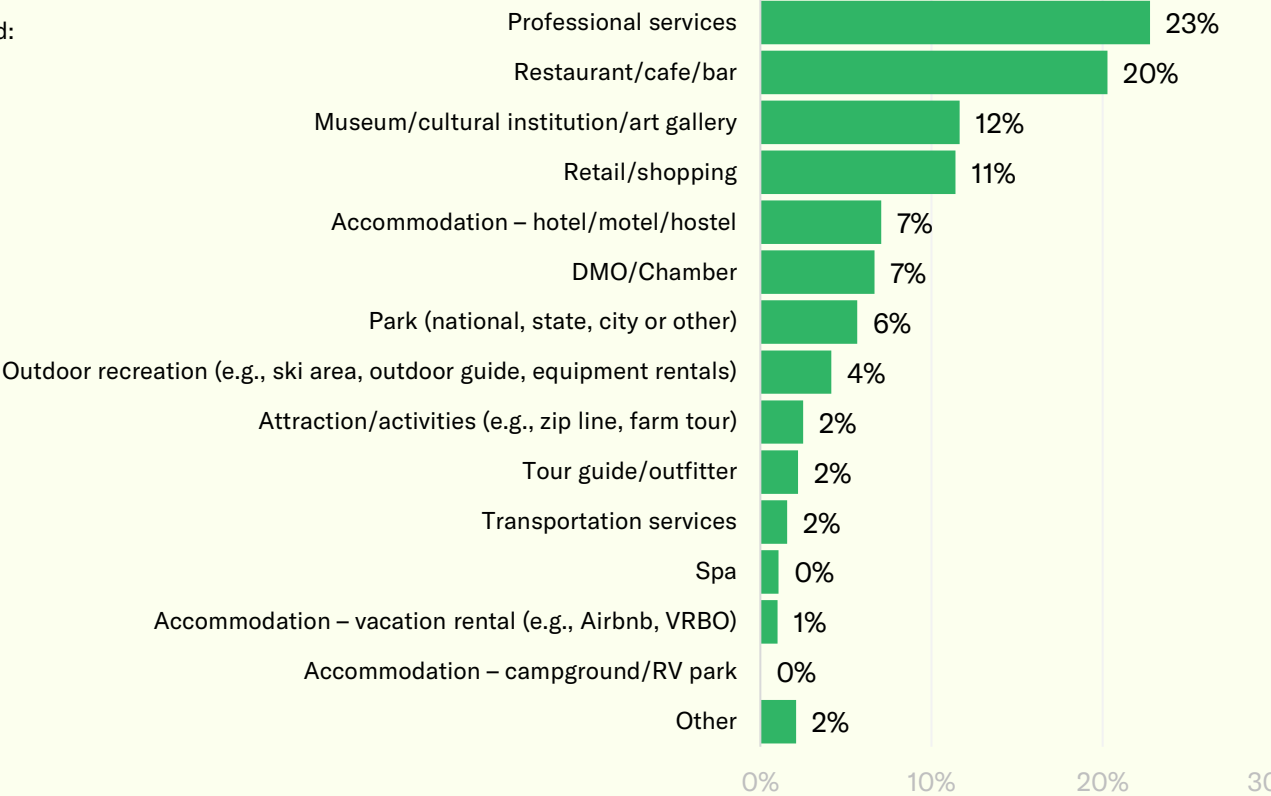
Current Employees: Employment Type



Question: Are you currently employed...?

Base: Eastern Oregon current tourism business employees. 101 completed surveys.

Place of Employment

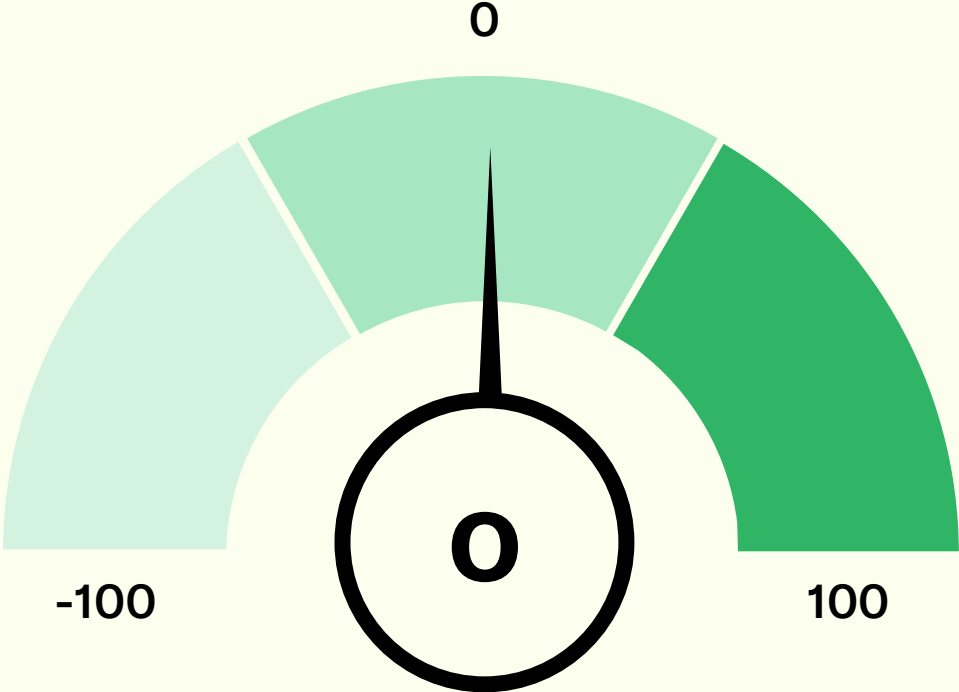


Question: Which of the following best describes your current place of employment?

Base: Eastern Oregon current tourism business employees. 101 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.

Eastern Oregon – Likelihood to Recommend Local Community as a Tourism Destination



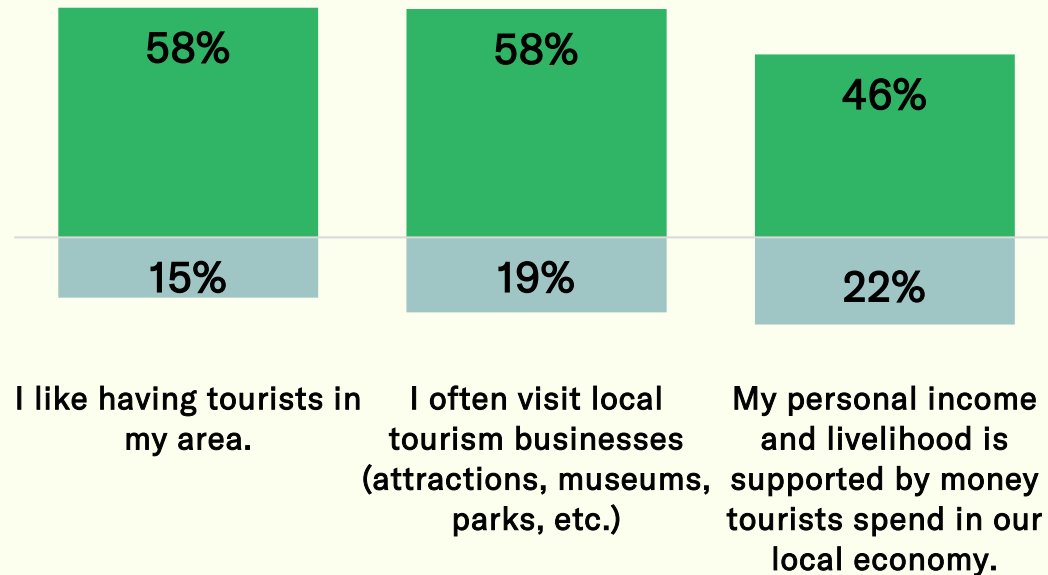
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

Base: Eastern Oregon tourism workforce. 152 completed surveys.

Eastern Oregon – Workforce's Perceptions of Local Tourism Personal Impacts

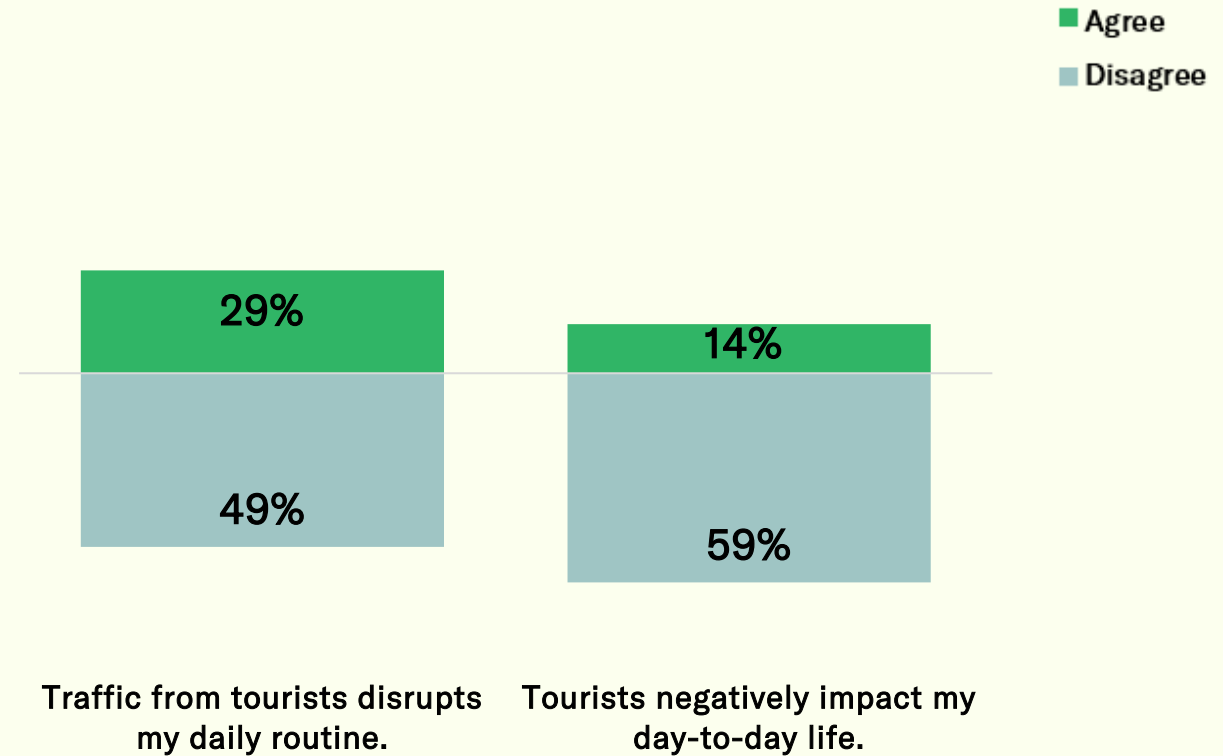
Workforce's Perceptions of Positive Local Tourism Personal Impacts

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



Workforce's Perceptions of Negative Local Tourism Personal Impacts

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

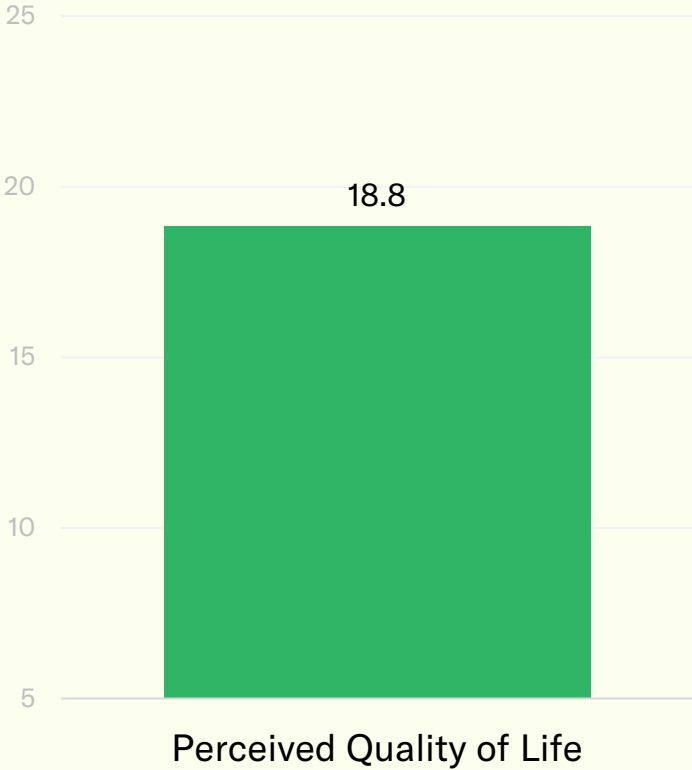


Question: Thinking about tourism in your local area and its impact on you personally, please rate how much you agree with the following statements.

Base: Eastern Oregon tourism workforce. 152 completed surveys.

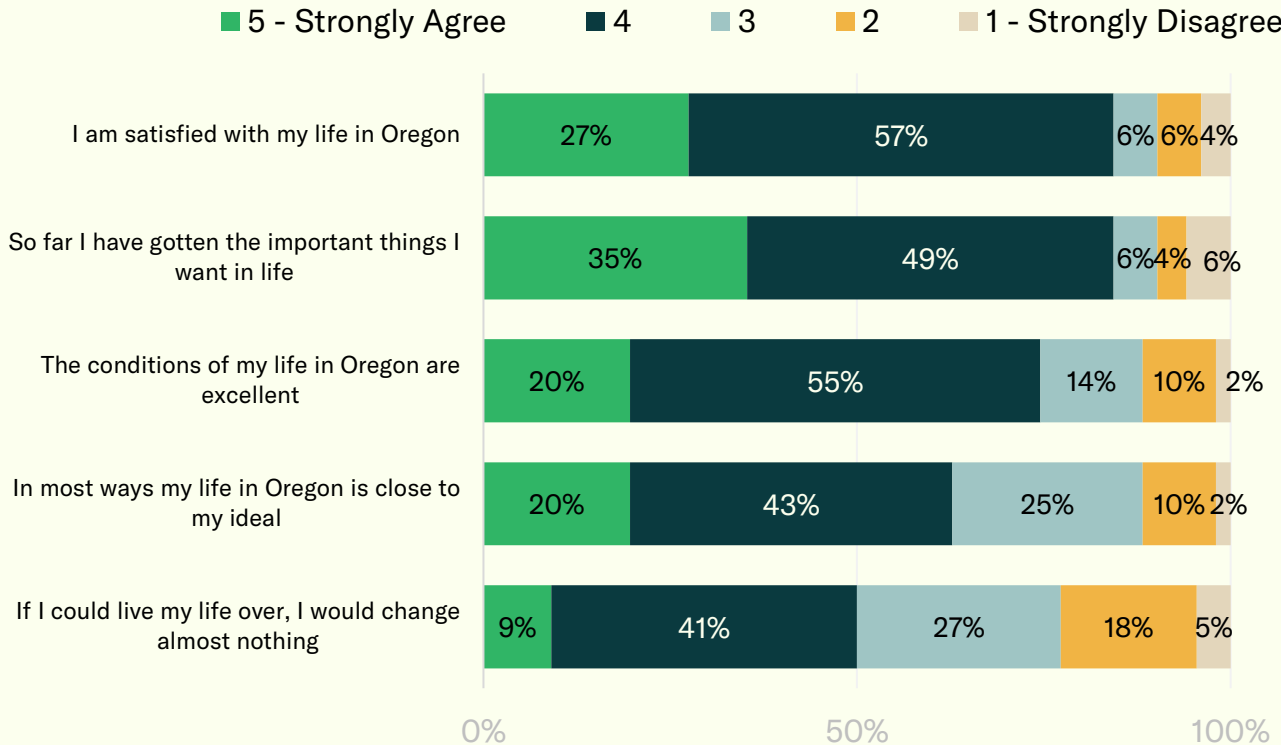
Eastern Oregon –Tourism Business Owners’ Perceived Quality of Life

Tourism Business Owners’ 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



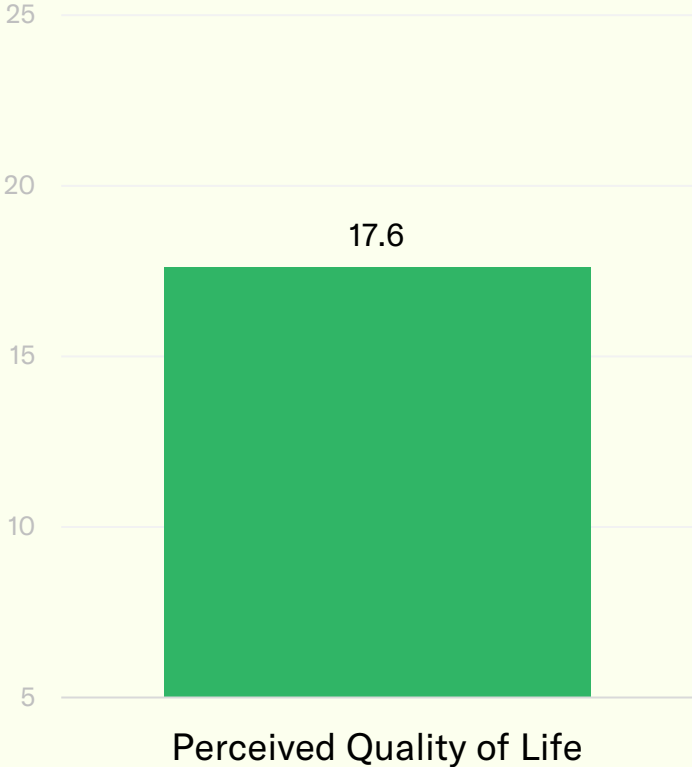
Note: Percentages may not sum to 100% due to rounding.

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

Base: Eastern Oregon residents who own a business that serves the tourism industry. 51 completed surveys.

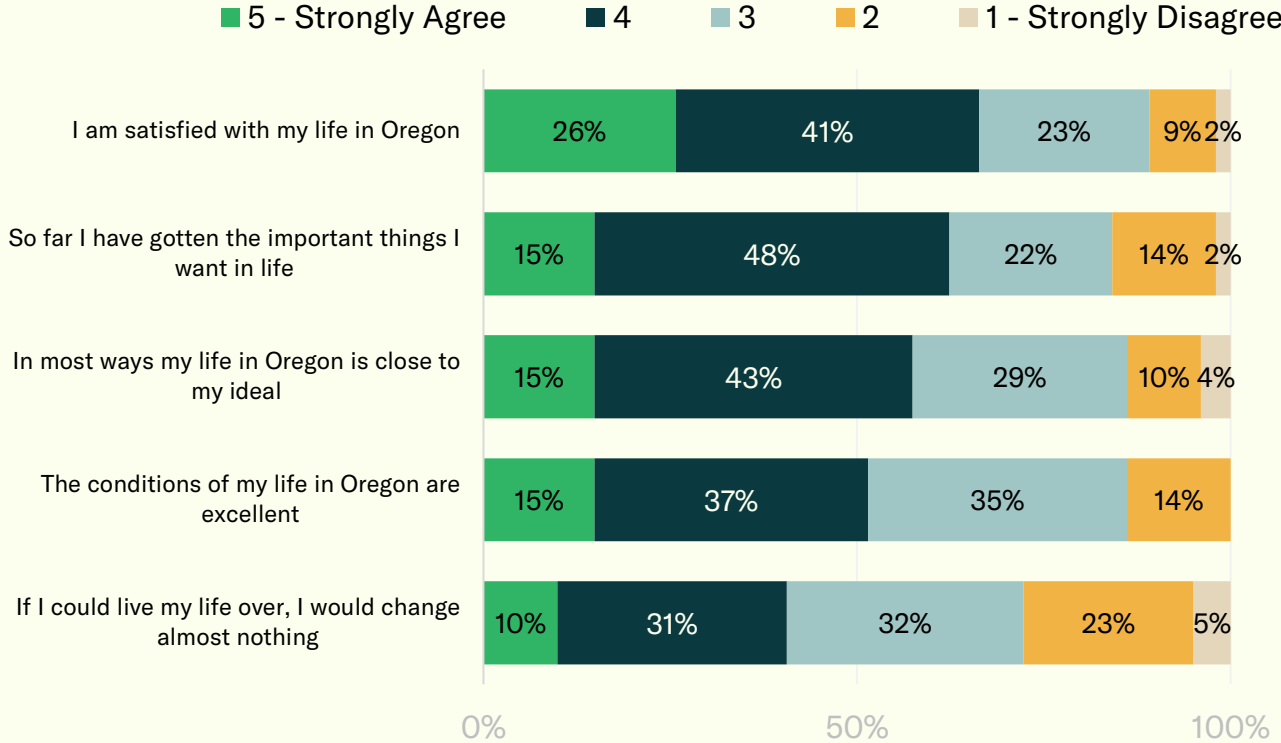
Eastern Oregon – Current Tourism Workers’ Perceived Quality of Life

Current Tourism Workers’ 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.

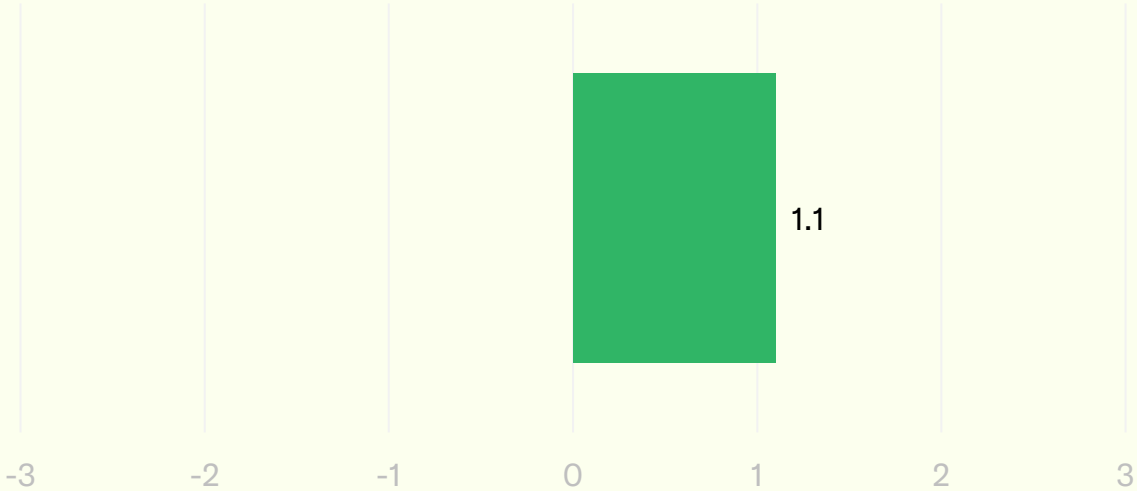
Question: Please rate your level of agreement with the following statements.

Base: Eastern Oregon current tourism workers. 101 completed surveys.

Eastern Oregon – Overall Support for Tourism

Overall Support for Tourism Mean Score*

Eastern Oregon Tourism Workforce’s Overall Support for Tourism



* 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.

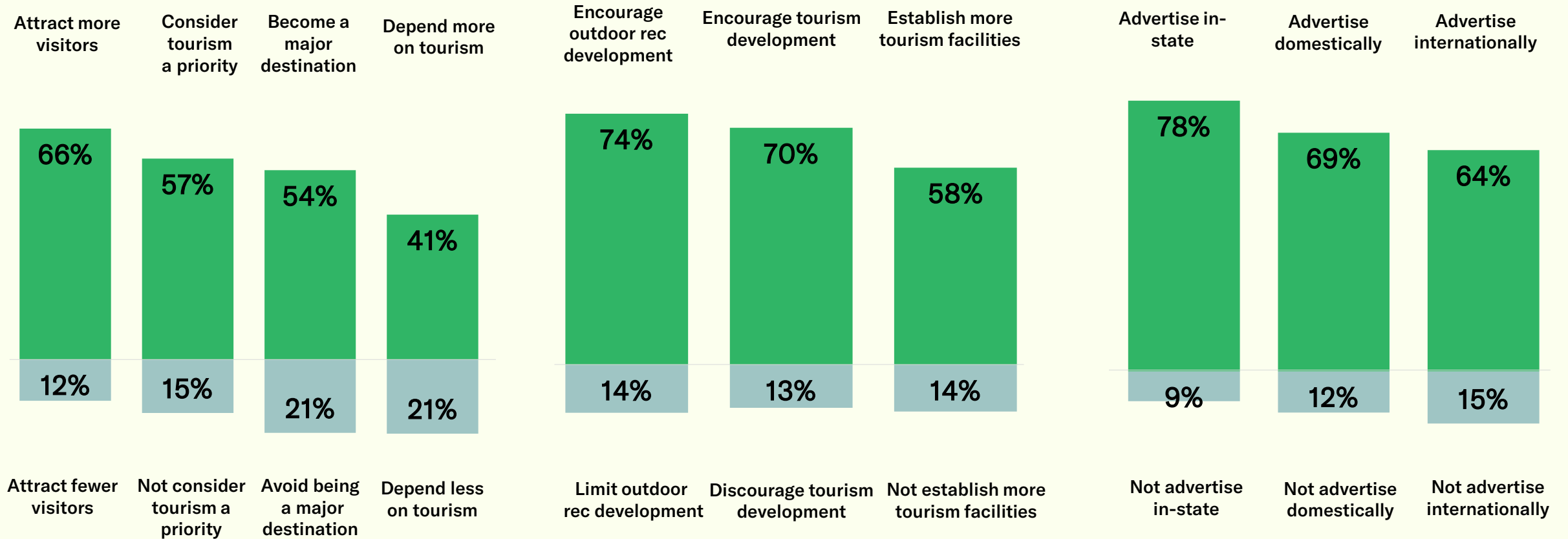
Eastern Oregon – Support for Tourism Statements

“Oregon should...”

(On a -3- to 3-point scale)

■ Positive Score (>0)

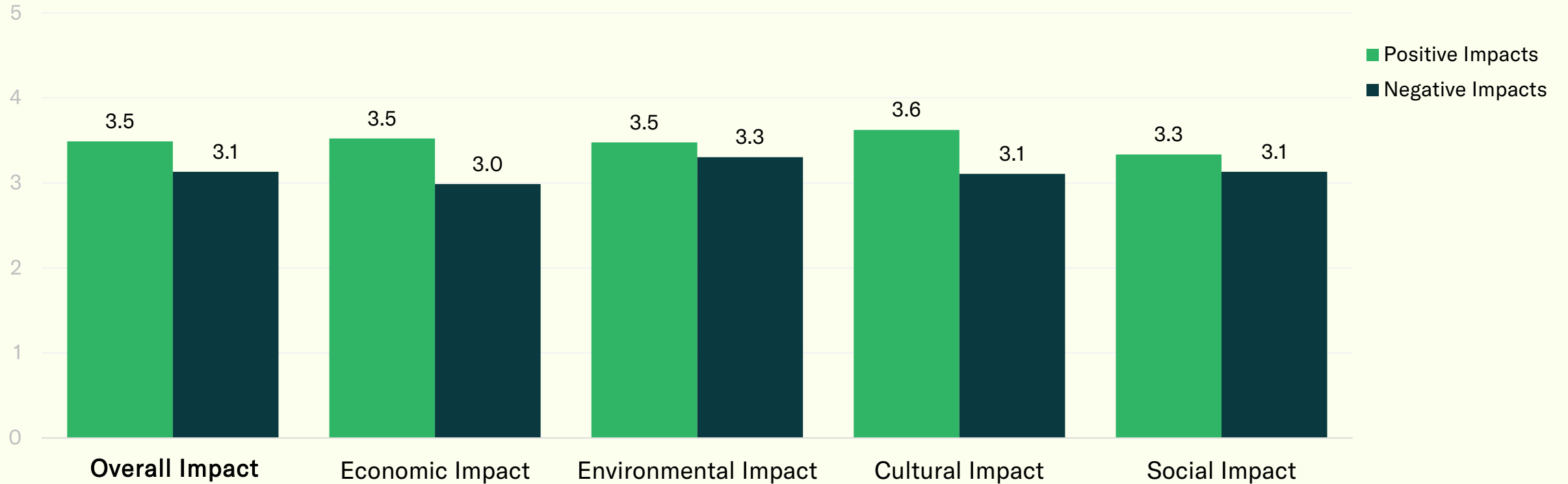
■ Negative Score (<0)



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: Eastern Oregon tourism workforce. 152 completed surveys.

Eastern Oregon – Index of Workforce's Perceptions of Tourism Impacts



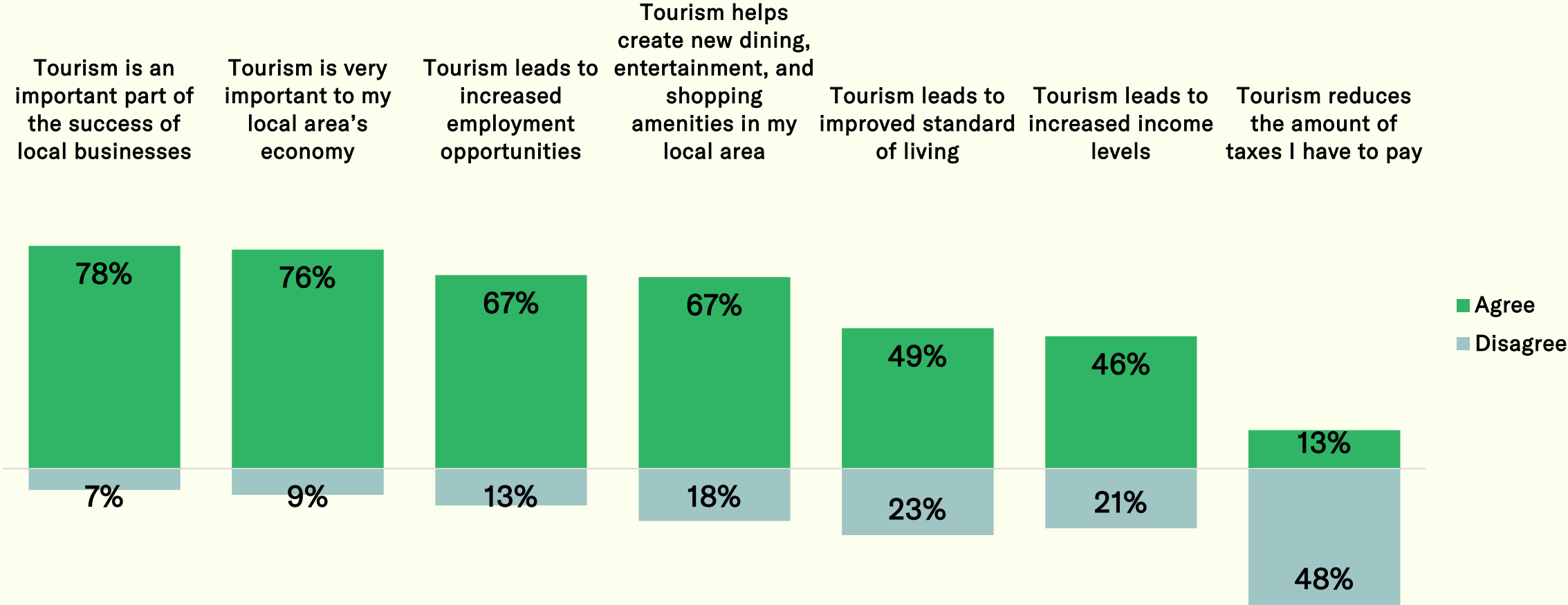
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon tourism workforce. 152 completed surveys.

Eastern Oregon – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Positive Economic Impacts

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



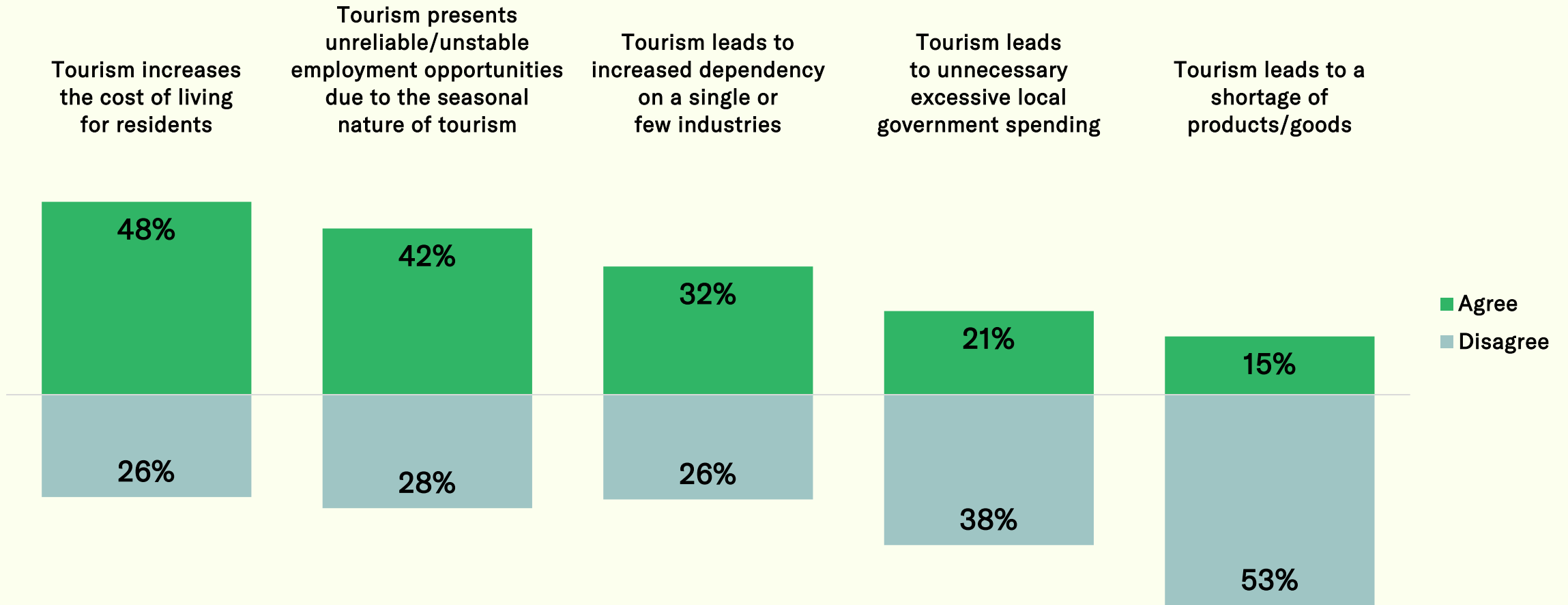
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon tourism workforce. 152 completed surveys.

Eastern Oregon – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Negative Economic Impacts

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



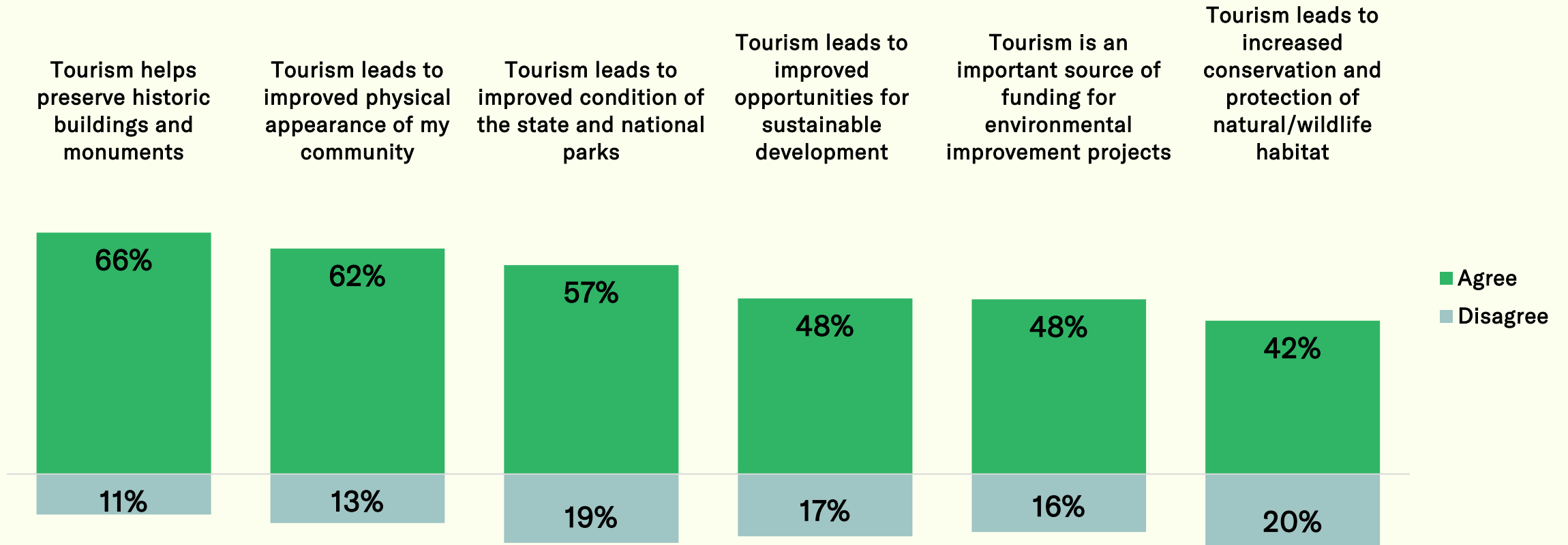
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon tourism workforce. 152 completed surveys.

Eastern Oregon – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Positive Environmental Impacts

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



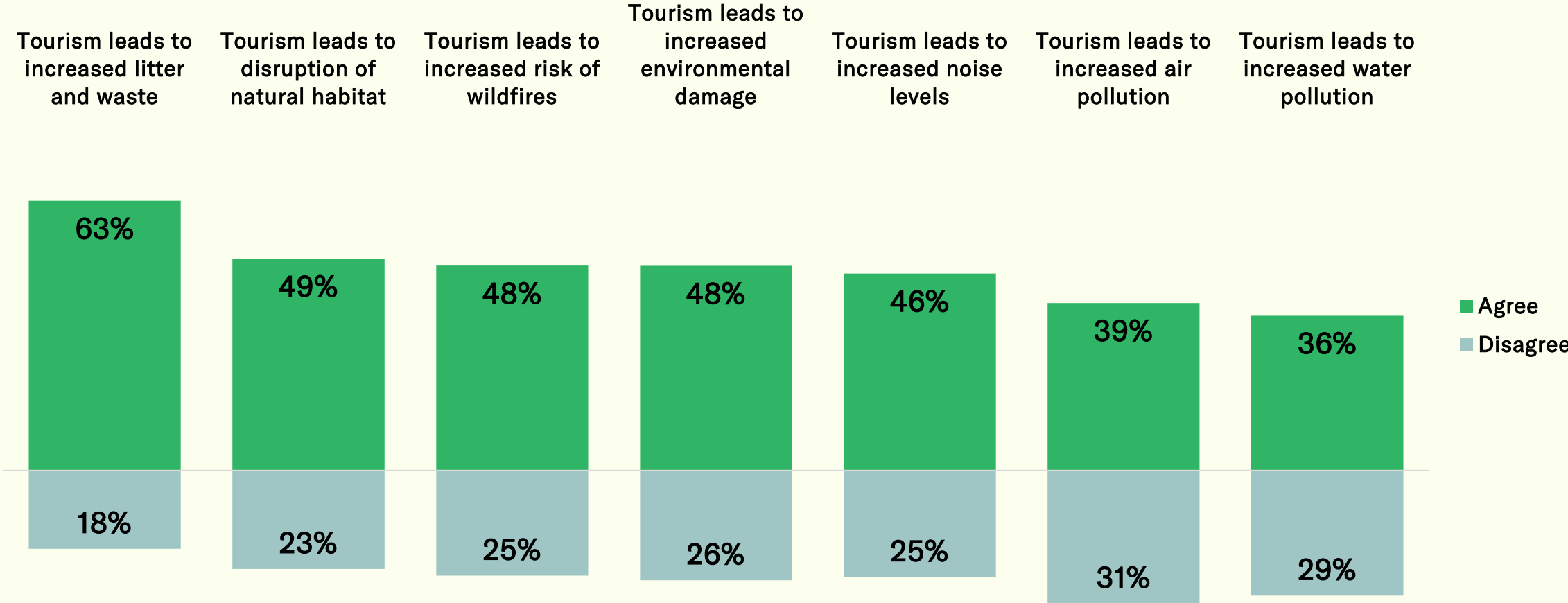
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon tourism workforce. 152 completed surveys.

Eastern Oregon – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Negative Environmental Impacts

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



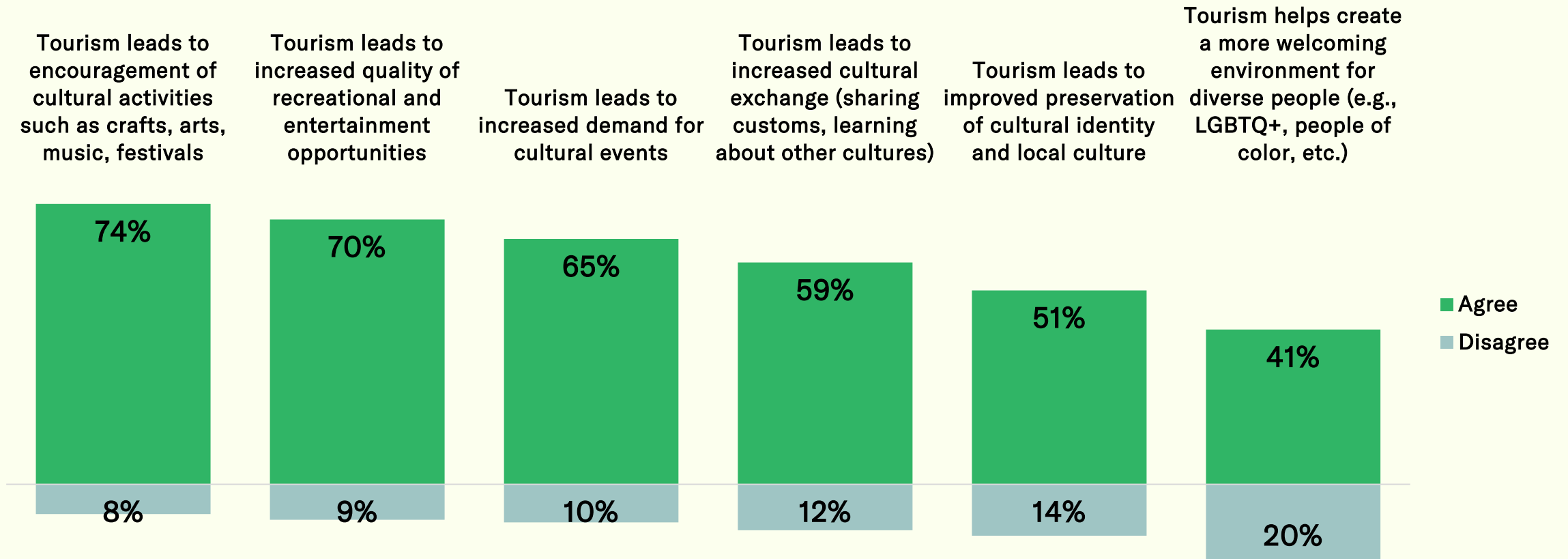
Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon tourism workforce. 152 completed surveys.

Eastern Oregon – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Positive Cultural Impacts

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



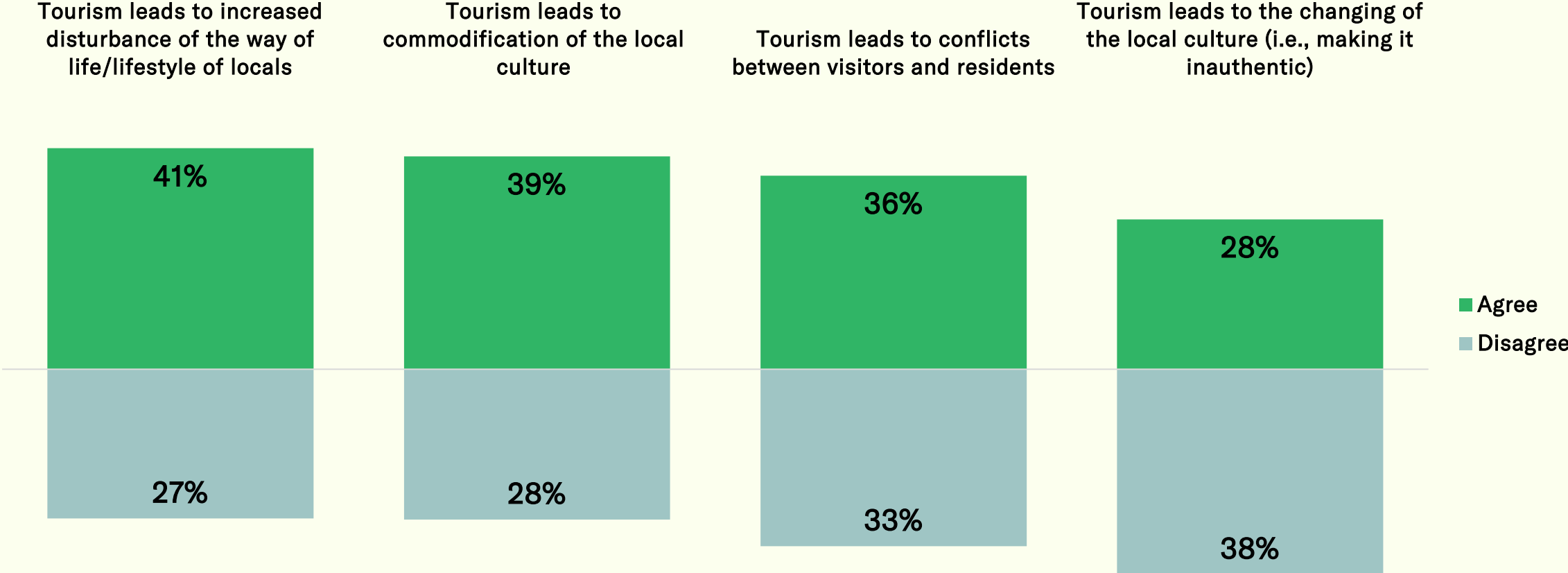
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon tourism workforce. 152 completed surveys.

Eastern Oregon – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Negative Cultural Impacts

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



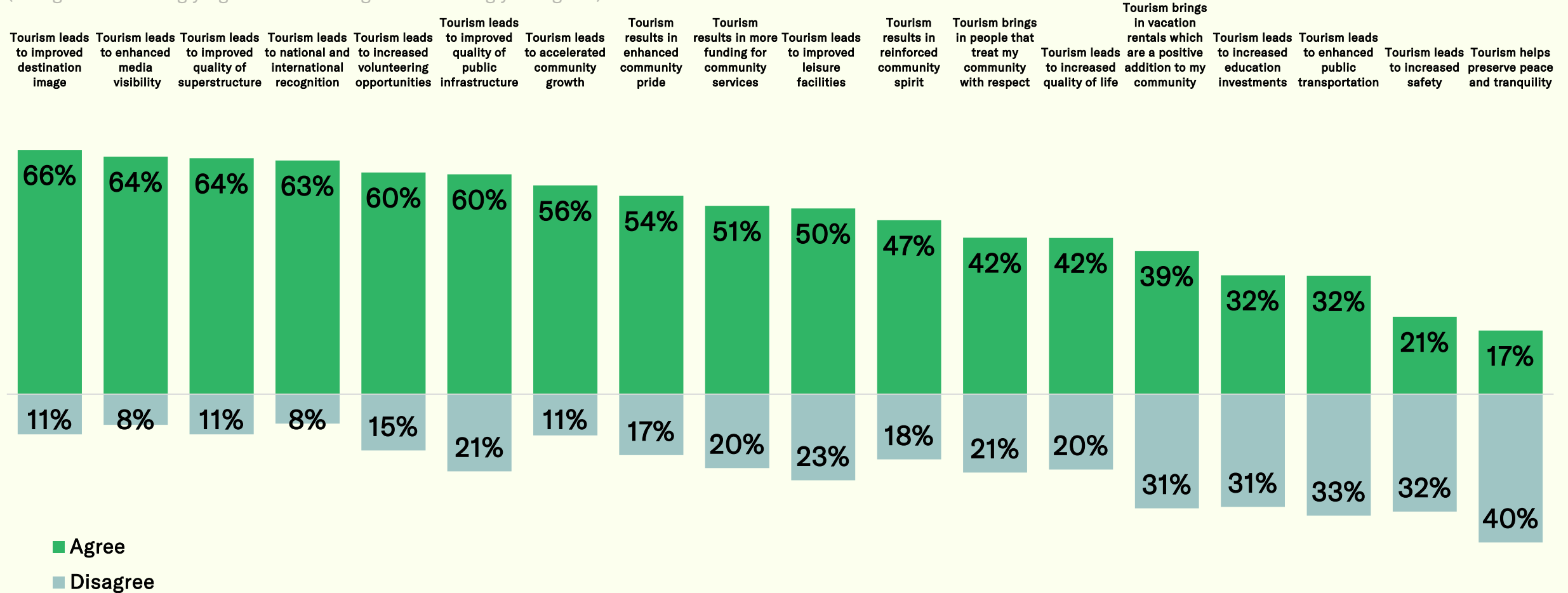
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon tourism workforce. 152 completed surveys.

Eastern Oregon – Social Impact Index Statements

Workforce's Perceptions of Tourism's Positive Social Impacts

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



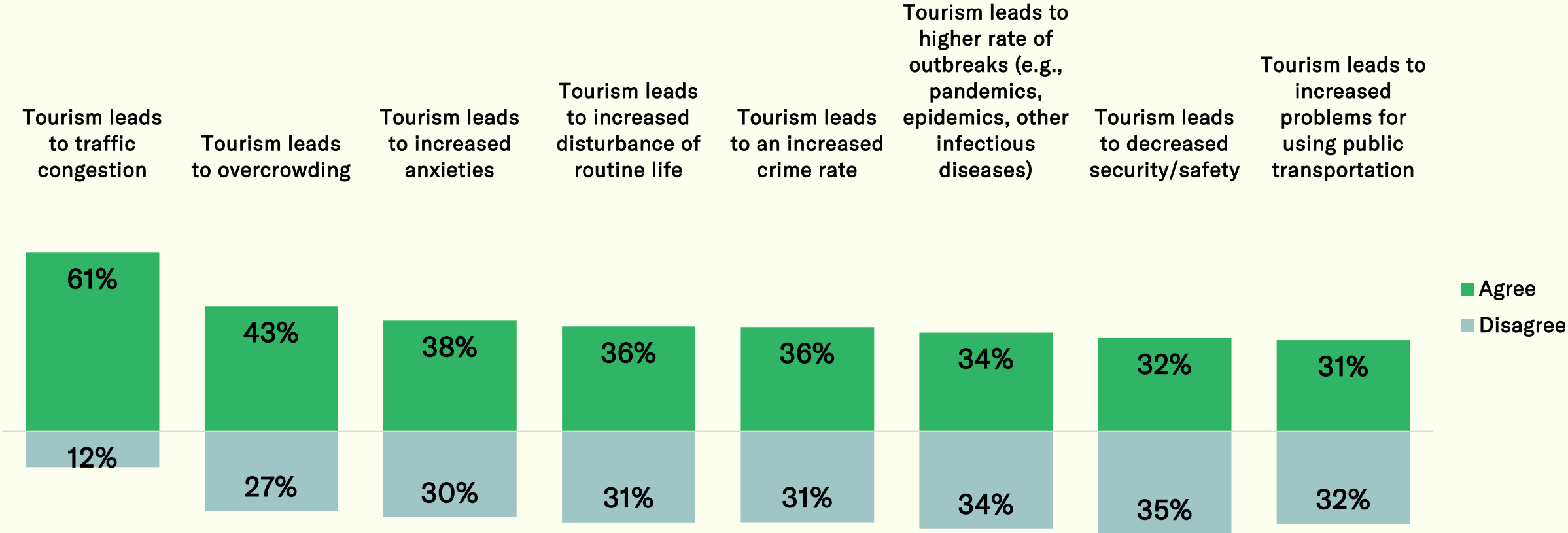
Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.

Base: Eastern Oregon tourism workforce. 152 completed surveys.

Eastern Oregon – Social Impact Index Statements

Workforce's 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 tourism workforce. 152 completed surveys.

Oregon Coast

The following slides present findings specific to Oregon Coast residents, including demographics, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and support for tourism in Oregon.

Oregon Coast Tourism Workforce Demographic Snapshot

Total residents surveyed:	466
Average age:	50 years old
Average household income:	\$80,495
College graduate:	52%
Married/domestic partnership:	66%
Have children in household:	27%
Gender*	
• Female:	53%
• Male:	44%
• Non-binary/Other:	1%
Ethnicity*	
• White/Caucasian:	94%
• Native American, Alaskan Native:	4%
• Hispanic/Latino:	3%
• Asian, Native Hawaiian, or Pacific Islander:	3%
• African American/Black:	3%
• Other:	1%
LGBTQ+:	14%
Accessibility needs in household:	19%

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



Oregon Coast – Tourism-Industry Business Owners

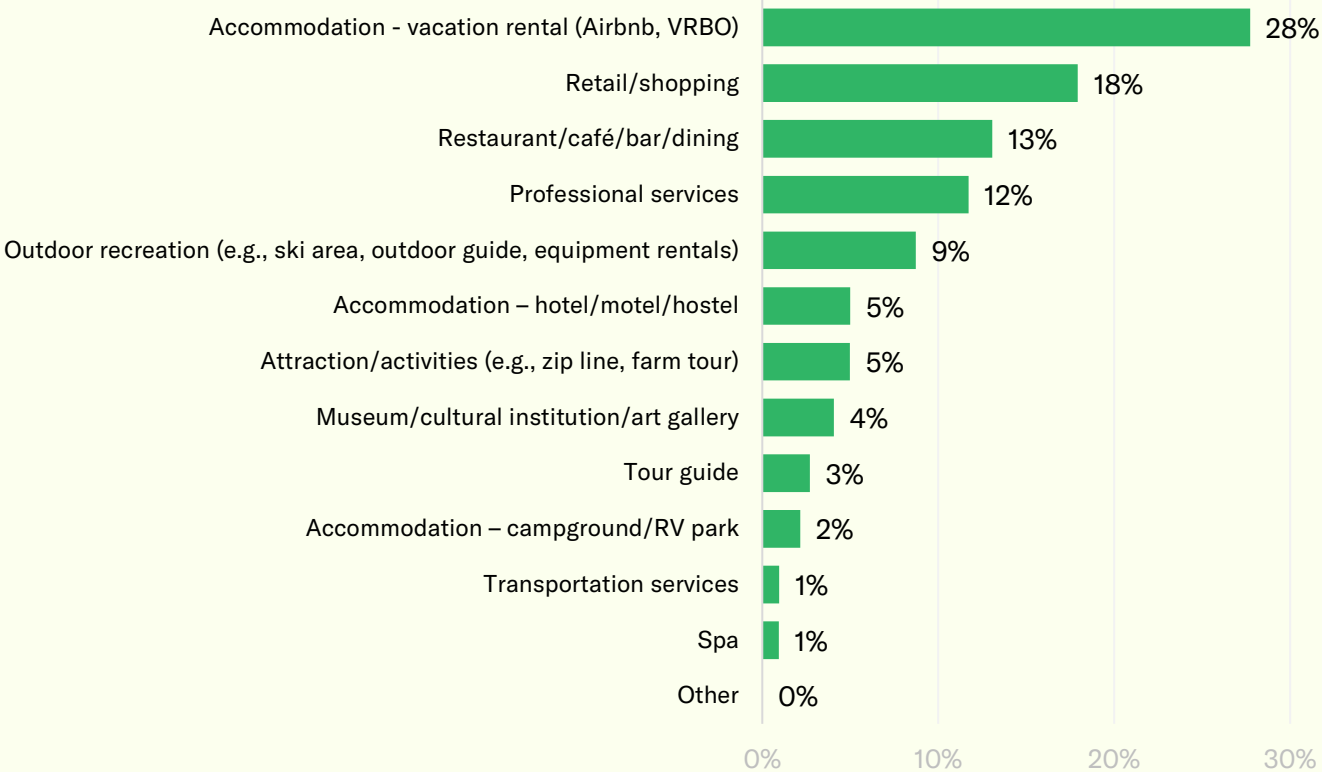
Share of Tourism Workforce who are Business Owners



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

Base: Oregon Coast tourism workforce. 466 completed surveys.

Type of Business Owned

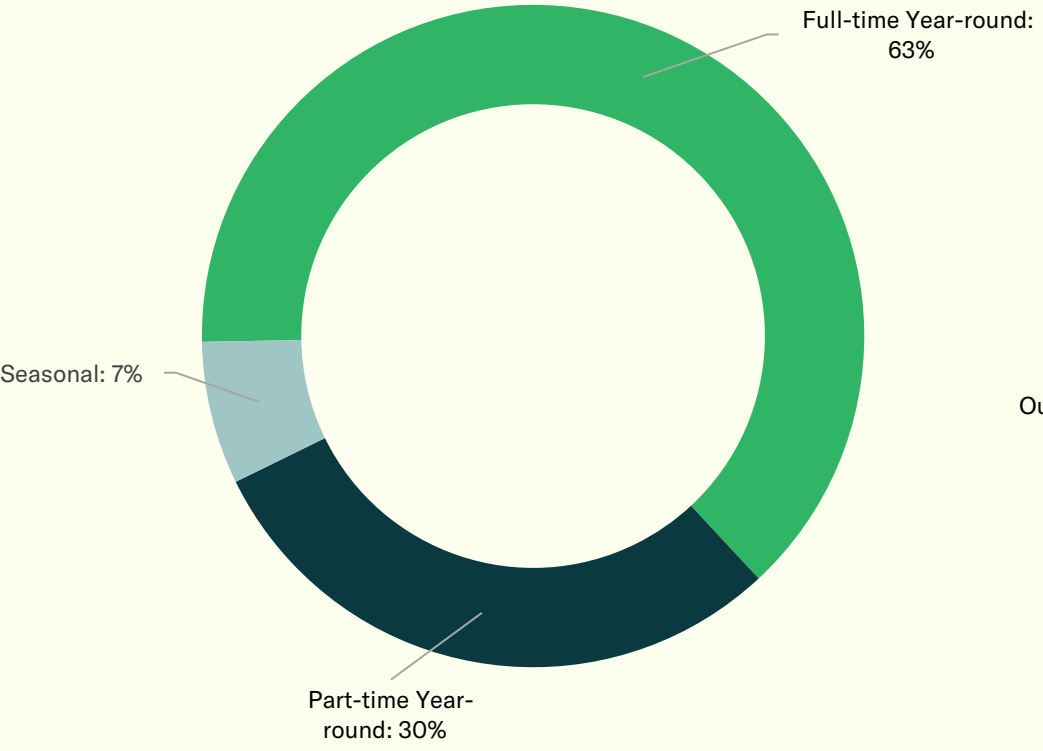


Question: Which of the following best describes your business?

Base: Oregon Coast residents who own a business that serves the tourism industry. 216 completed surveys.

Oregon Coast – Current Tourism Employees

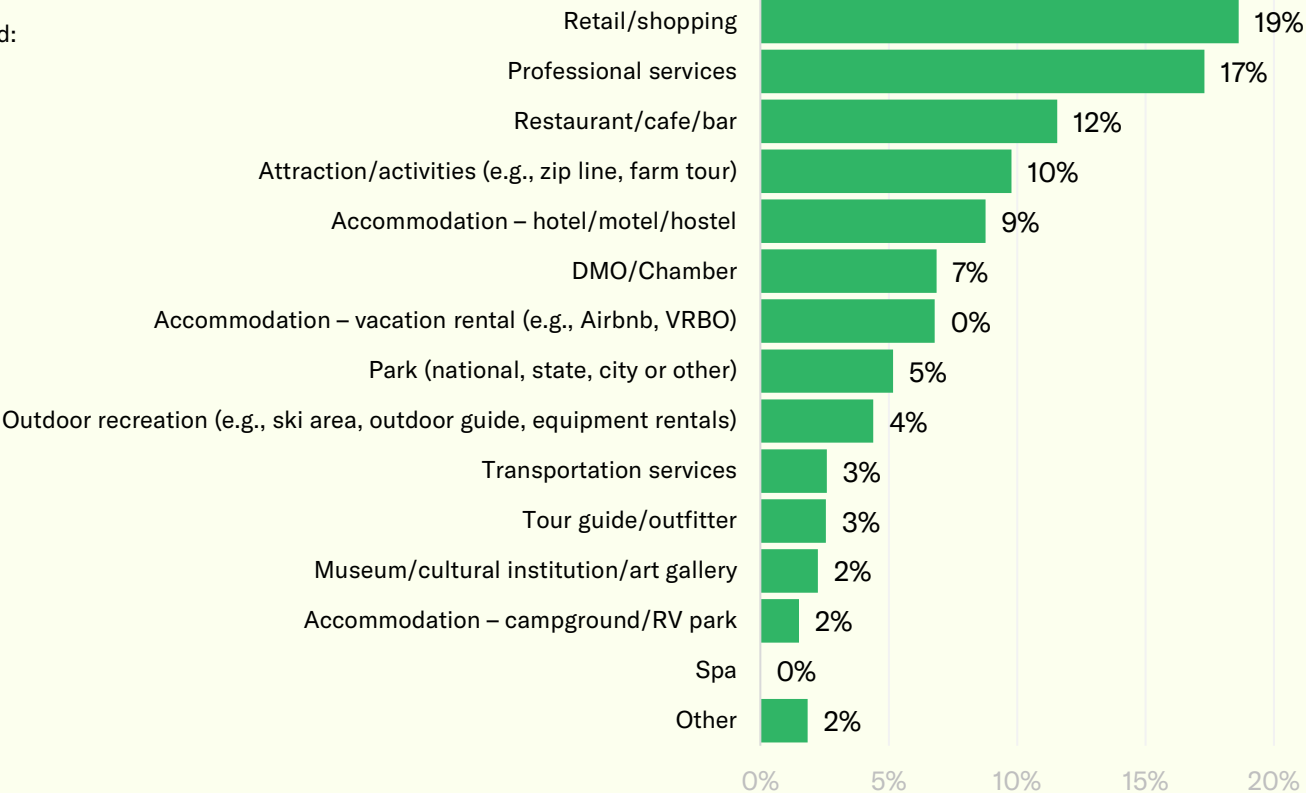
Current Employees: Employment Type



Question: Are you currently employed...?

Base: Oregon Coast current tourism business employees. 250 completed surveys.

Place of Employment

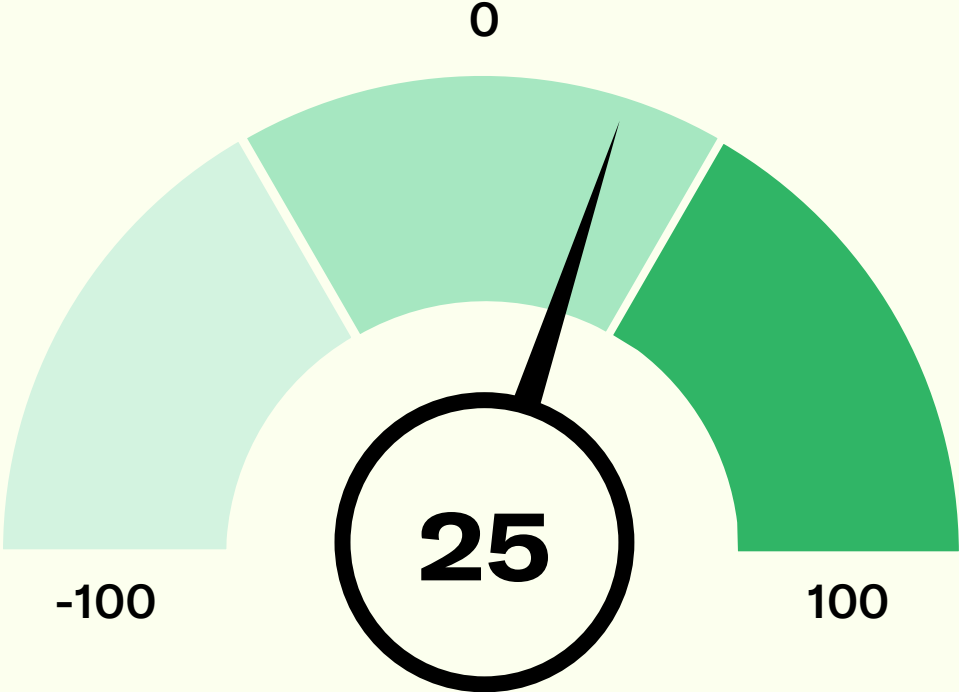


Question: Which of the following best describes your current place of employment?

Base: Oregon Coast current tourism business employees. 250 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.

Oregon Coast – Likelihood to Recommend Local Community as a Tourism Destination



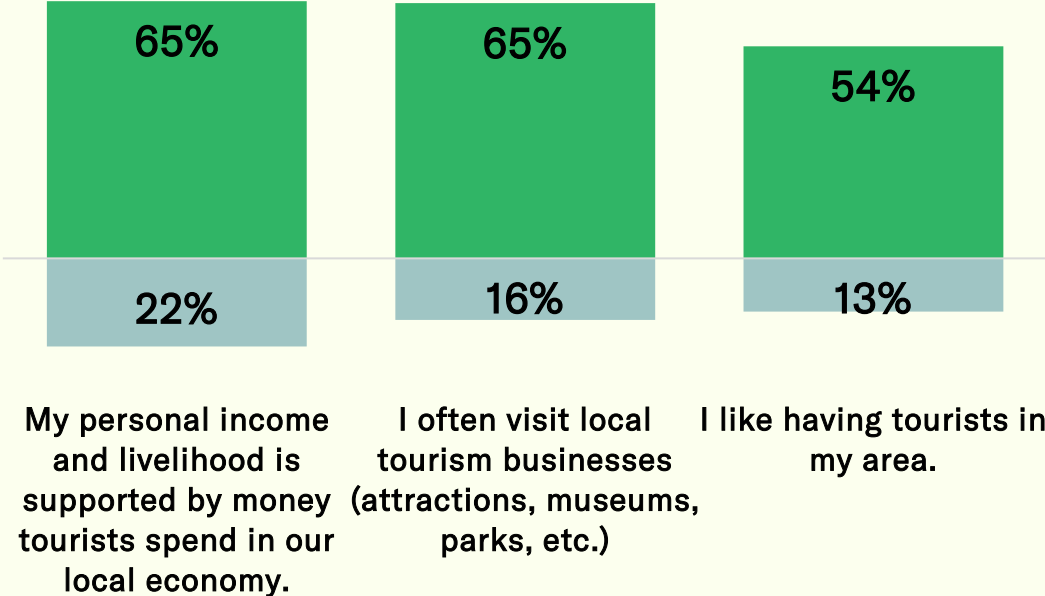
Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?

Base: Oregon Coast tourism workforce. 466 completed surveys.

Oregon Coast – Workforce's Perceptions of Local Tourism Personal Impacts

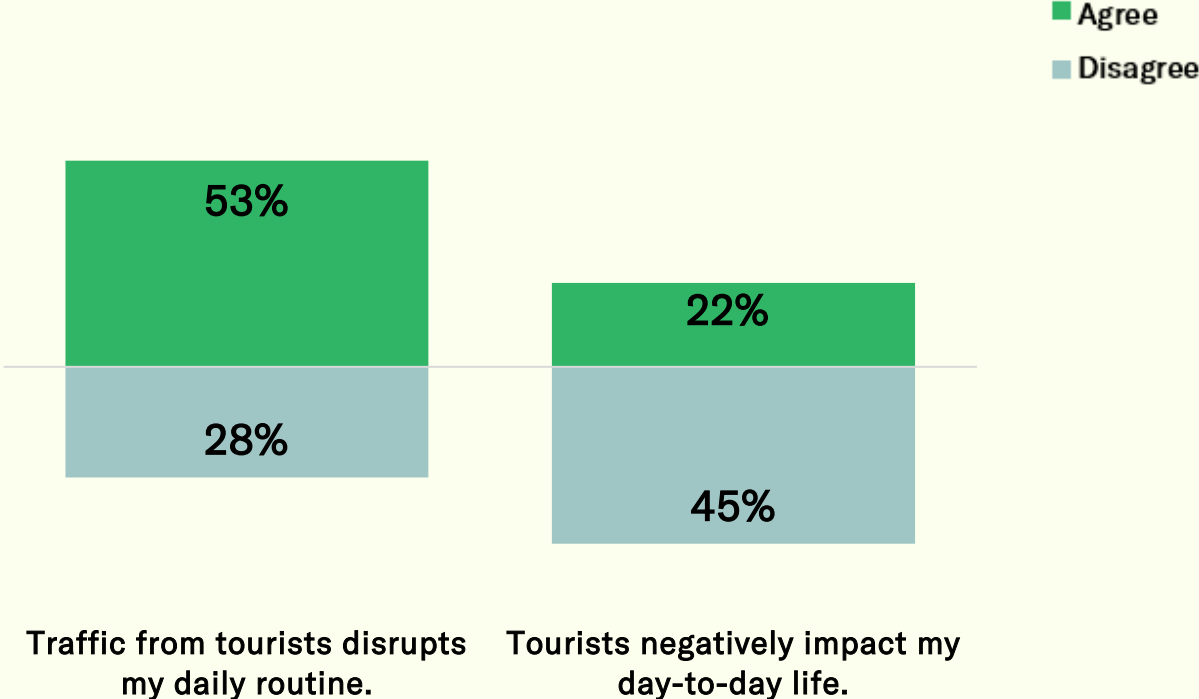
Workforce's Perceptions of Positive Local Tourism Personal Impacts

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



Workforce's Perceptions of Negative Local Tourism Personal Impacts

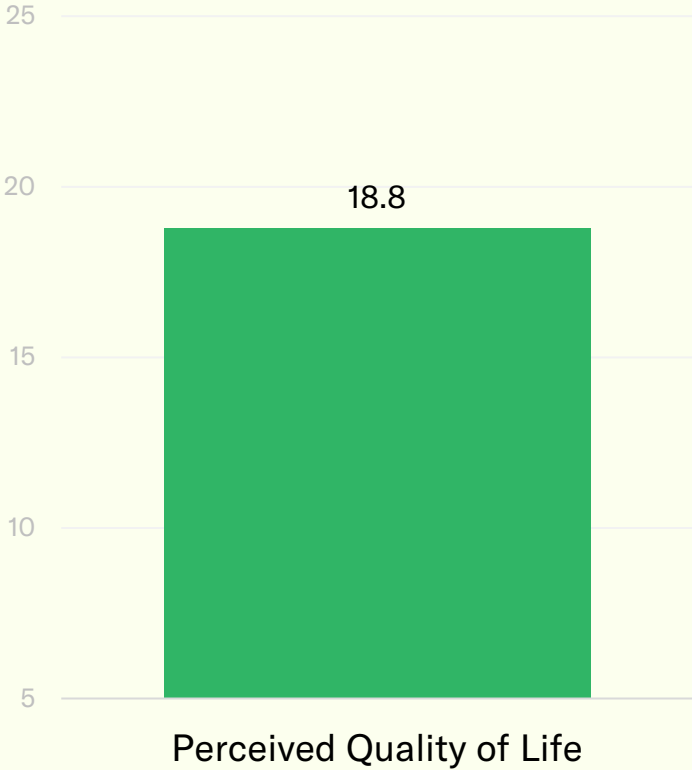
(% “Agree” or “Strongly Agree” vs. % “Disagree” or “Strongly Disagree”)



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 Coast tourism workforce. 466 completed surveys.

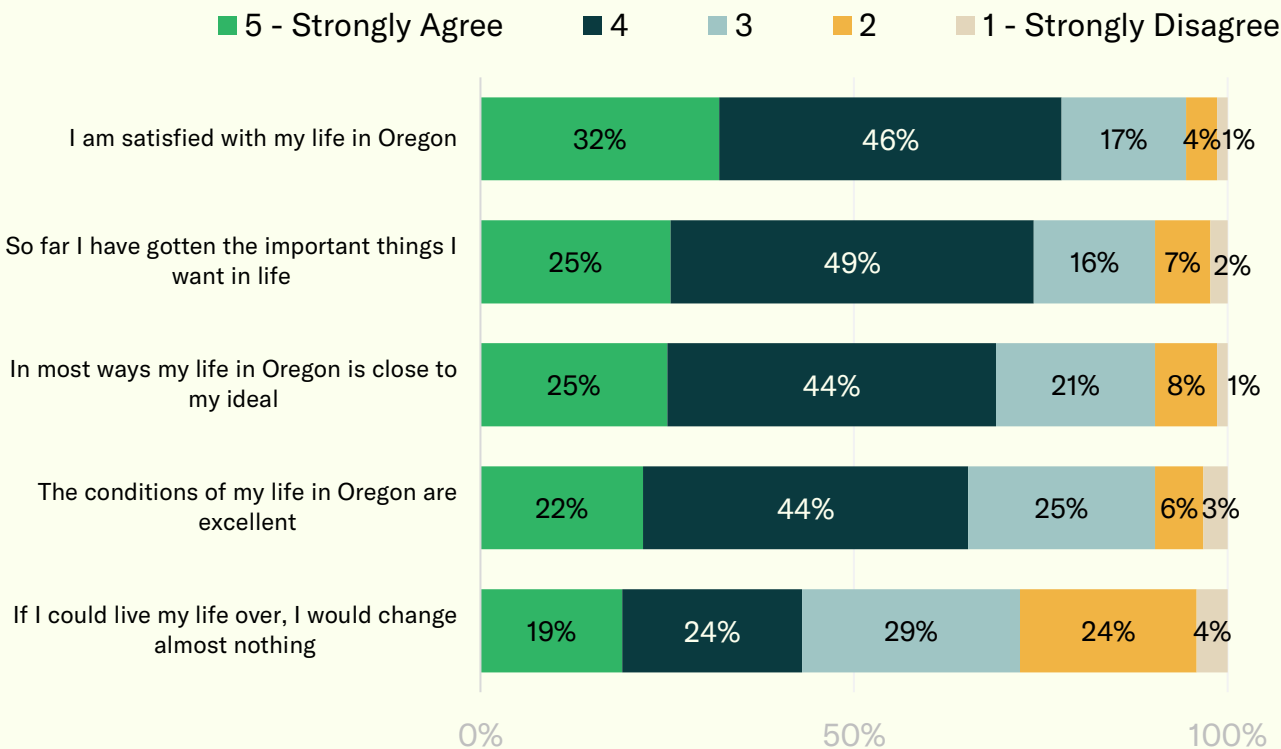
Oregon Coast –Tourism Business Owners’ Perceived Quality of Life

Tourism Business Owners’ 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



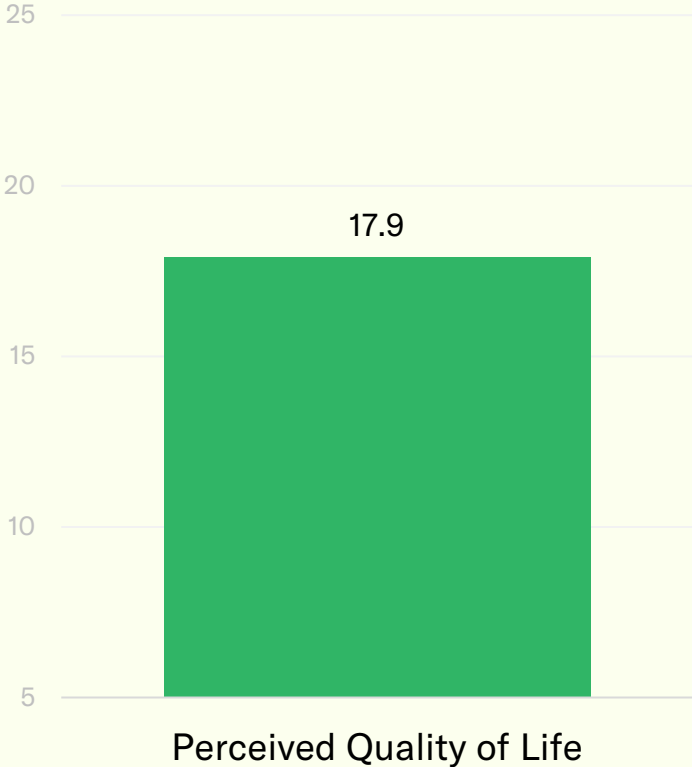
Note: Percentages may not sum to 100% due to rounding.

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

Base: Oregon Coast residents who own a business that serves the tourism industry. 216 completed surveys.

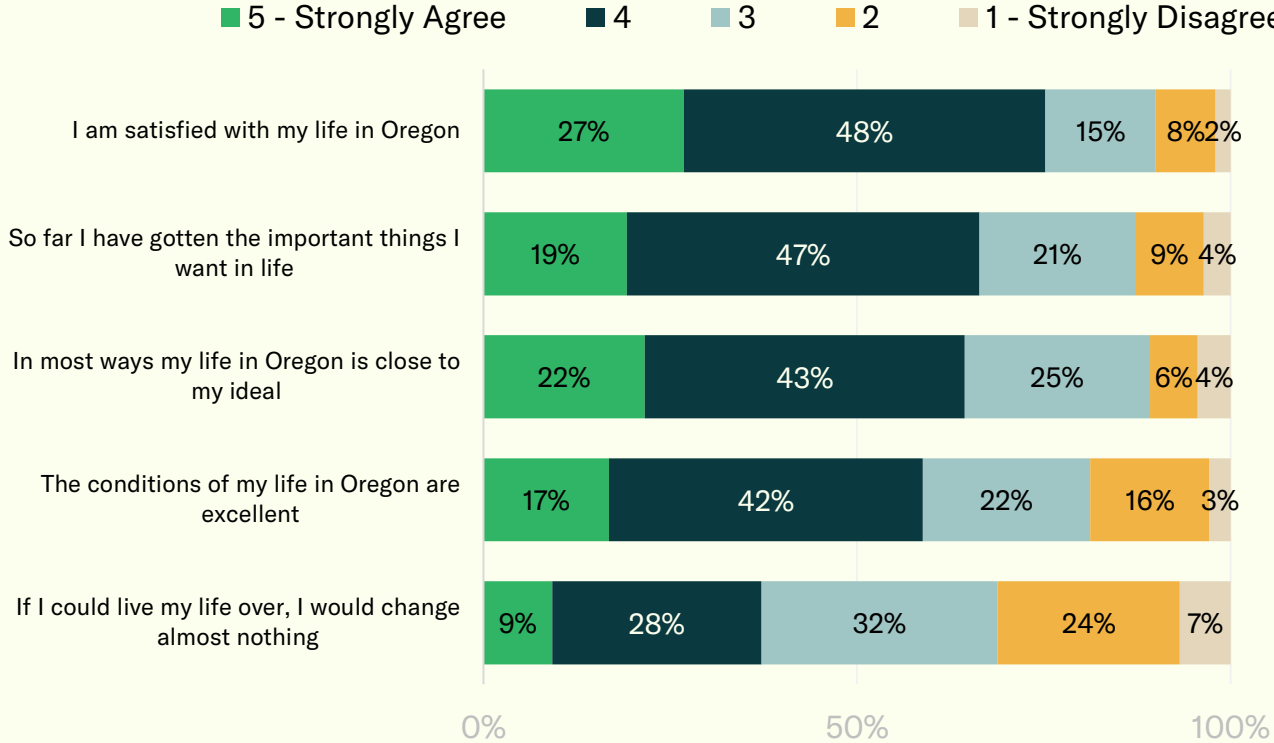
Oregon Coast – Current Tourism Workers’ Perceived Quality of Life

Current Tourism Workers’ 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.

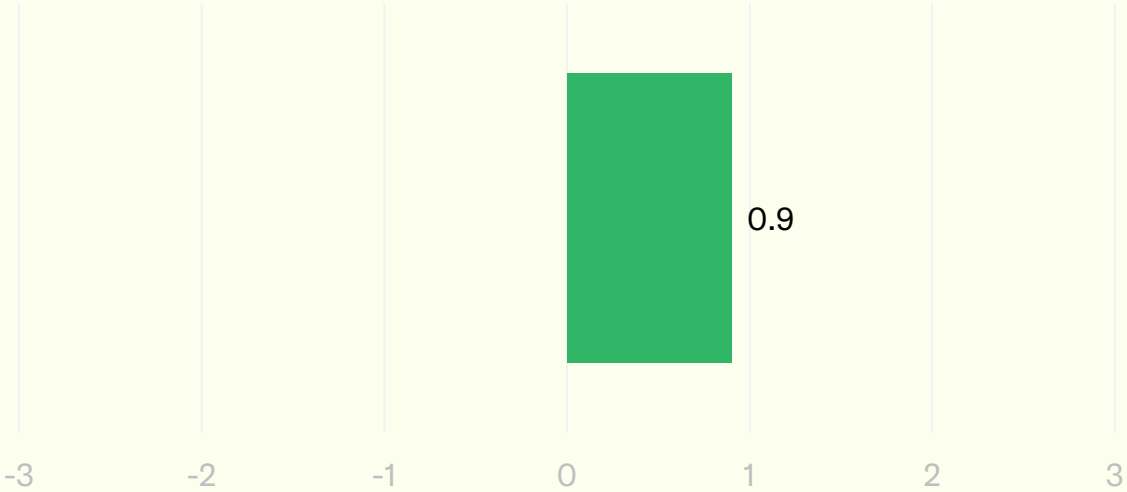
Question: Please rate your level of agreement with the following statements.

Base: Oregon Coast current tourism workers. 250 completed surveys.

Oregon Coast – Overall Support for Tourism

Overall Support for Tourism Mean Score*

Oregon Coast Tourism Workforce’s Overall Support for Tourism



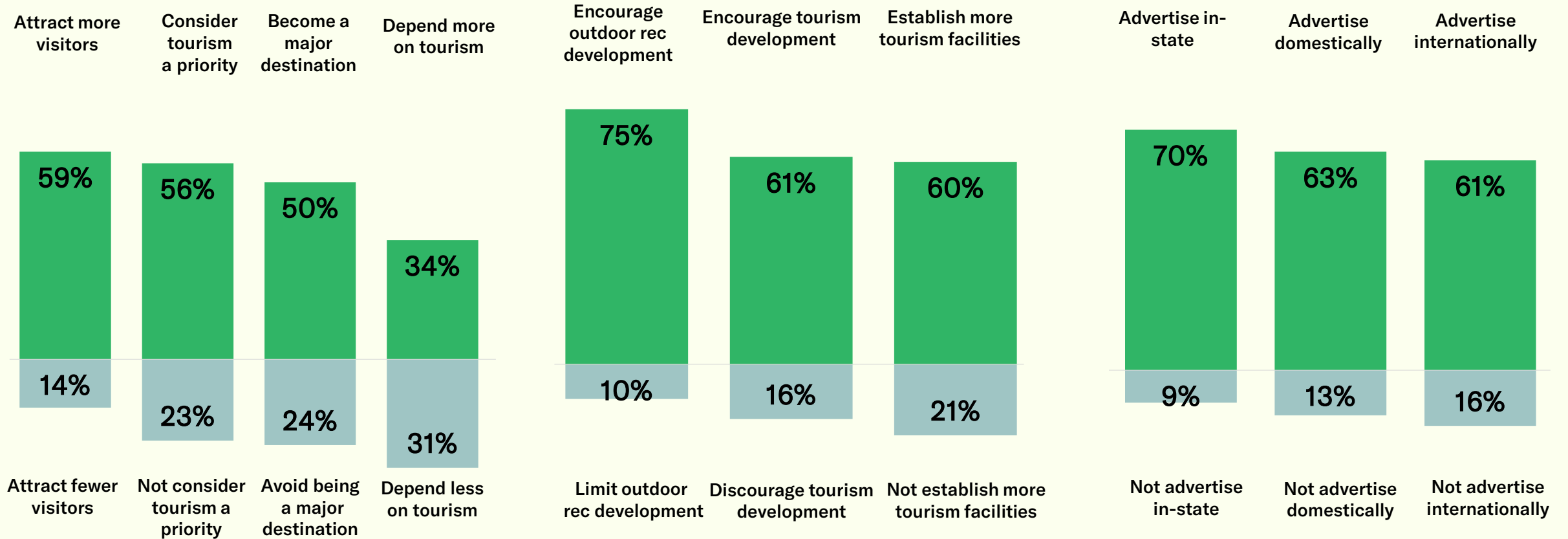
* Calculated as the mean scores for statements included in the index, with a minimum possible mean score of -3 and a maximum possible mean score of 3. See page 30 for detailed scores for each included statement.

Oregon Coast – Support for Tourism Statements

“Oregon should...”

(On a -3- to 3-point scale)

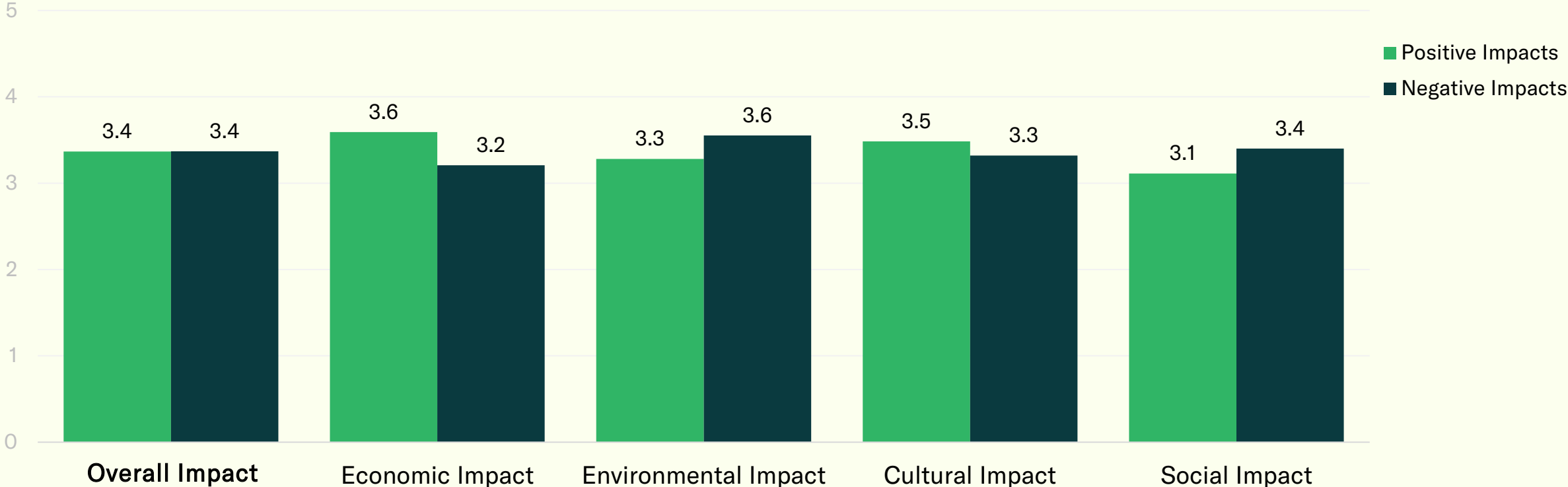
■ Positive Score (>0)
■ Negative Score (<0)



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 Coast tourism workforce. 466 completed surveys.

Oregon Coast – Index of Workforce's Perceptions of Tourism Impacts

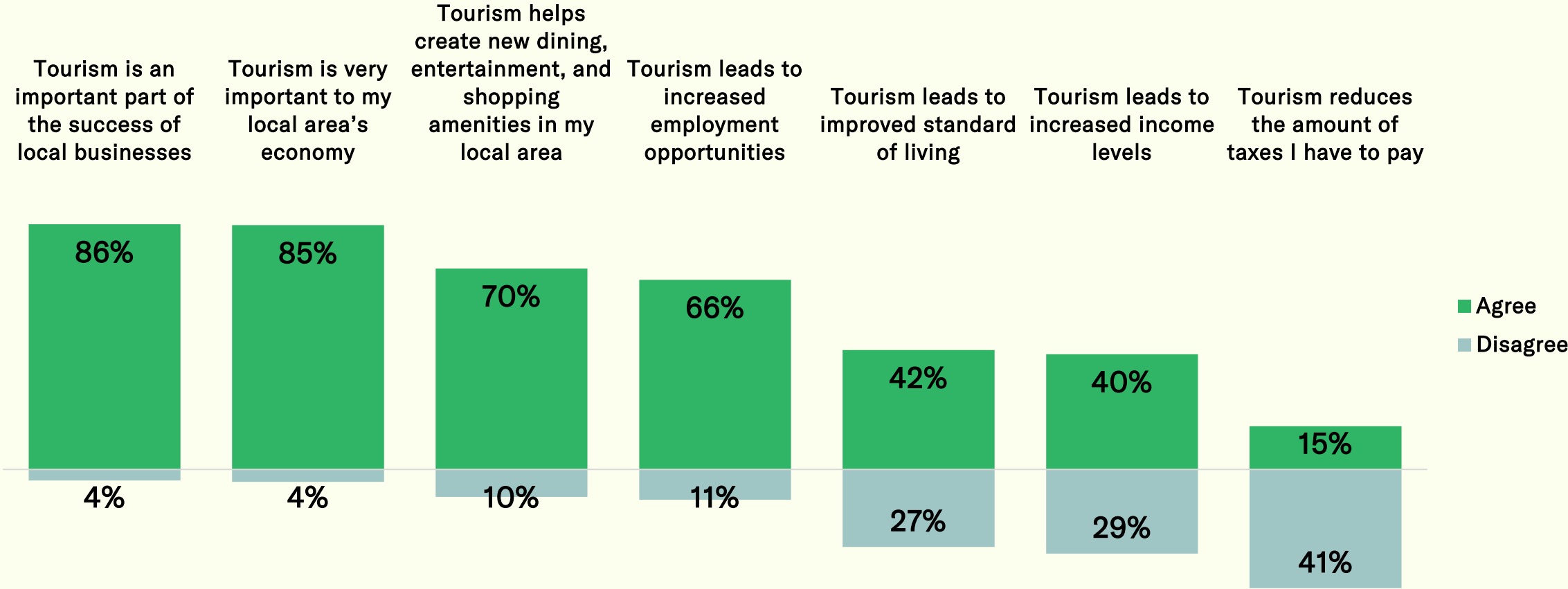


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Oregon Coast tourism workforce. 466 completed surveys.

Oregon Coast – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Positive Economic Impacts

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



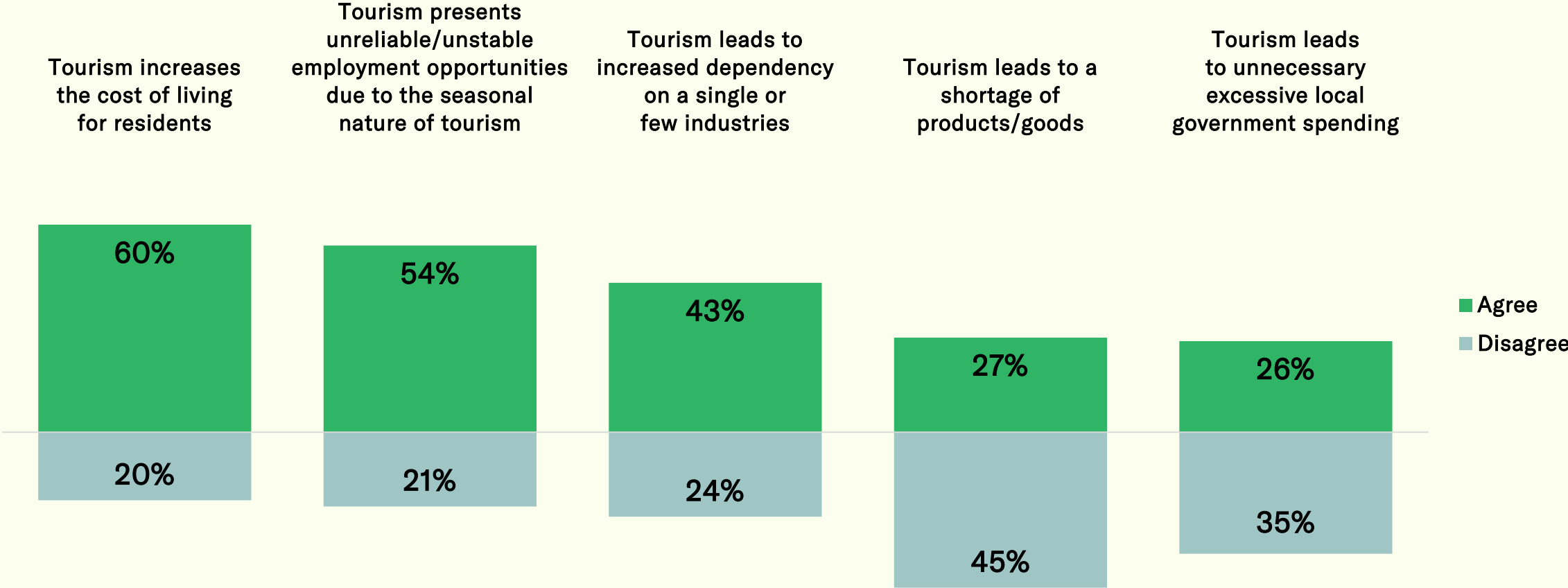
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Oregon Coast tourism workforce. 466 completed surveys.

Oregon Coast – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Negative Economic Impacts

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

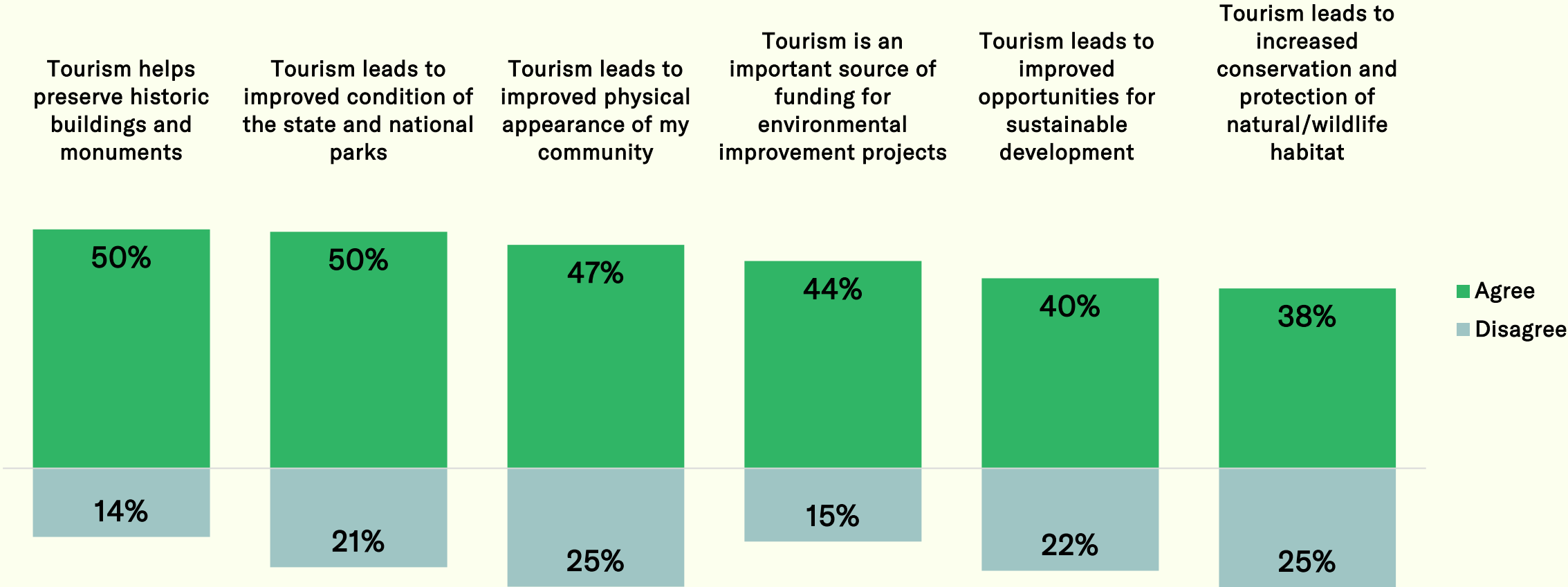


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Oregon Coast tourism workforce. 466 completed surveys.

Oregon Coast – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Positive Environmental Impacts

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

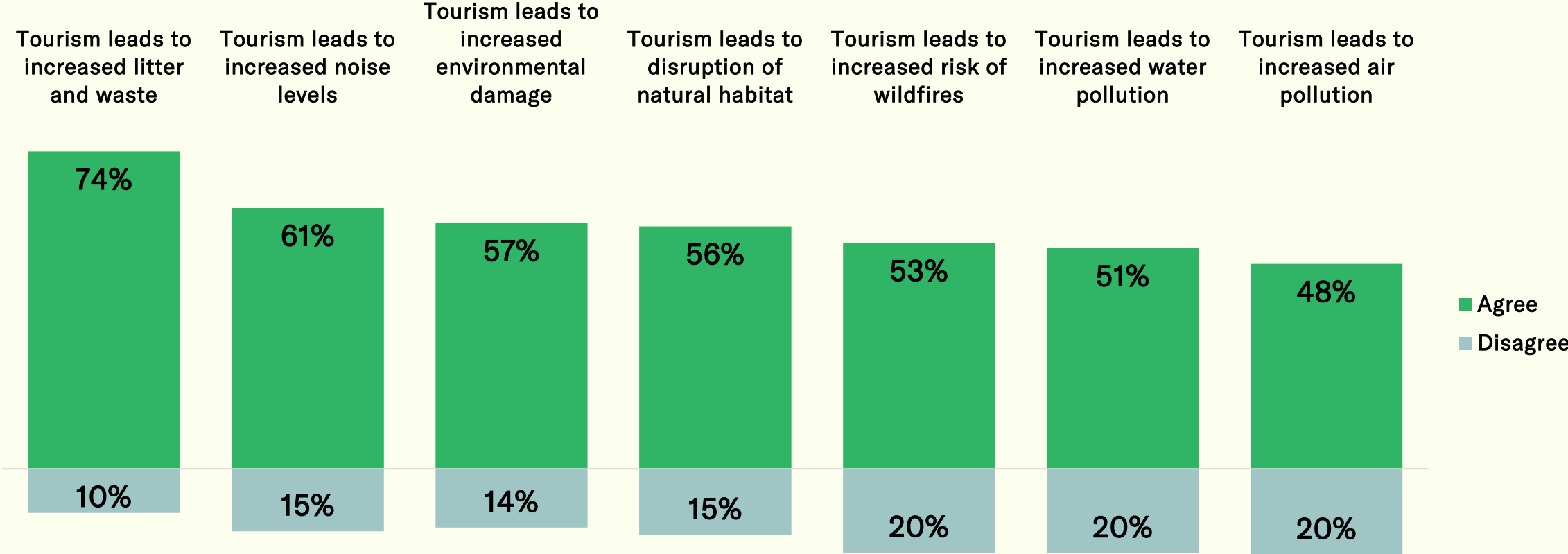


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Oregon Coast tourism workforce. 466 completed surveys.

Oregon Coast – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Negative Environmental Impacts

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

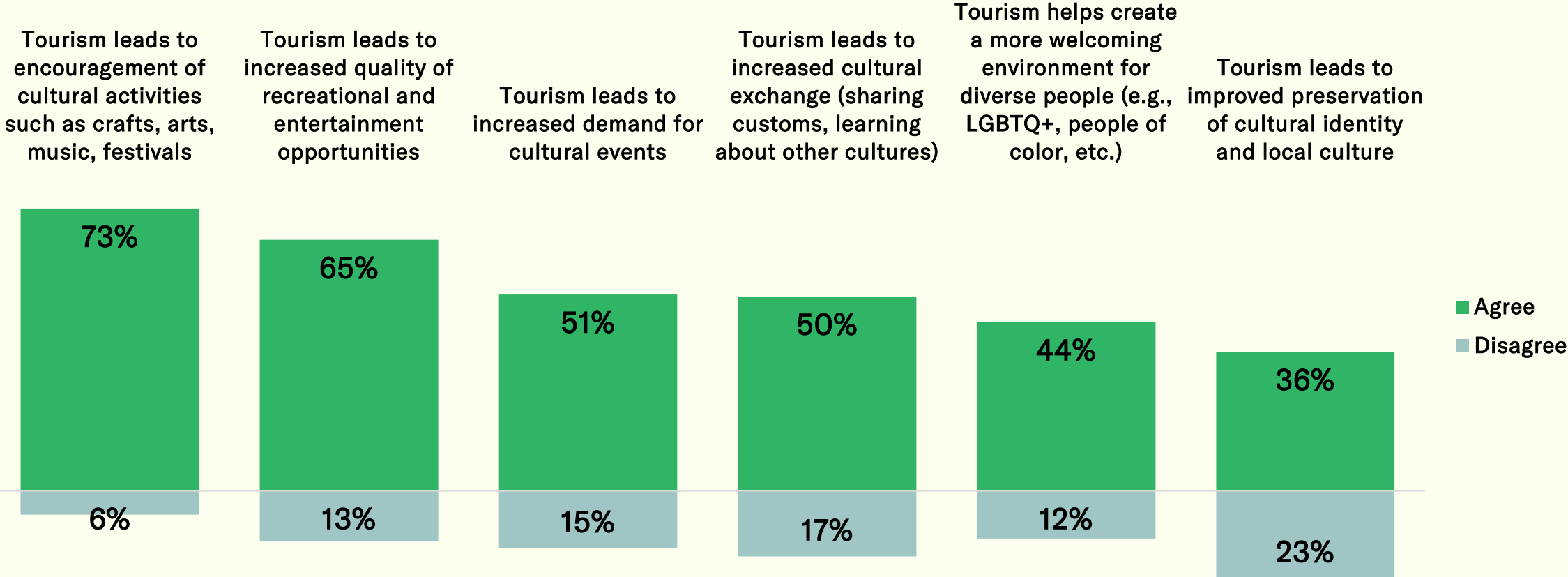


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Oregon Coast tourism workforce. 466 completed surveys.

Oregon Coast – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Positive Cultural Impacts

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



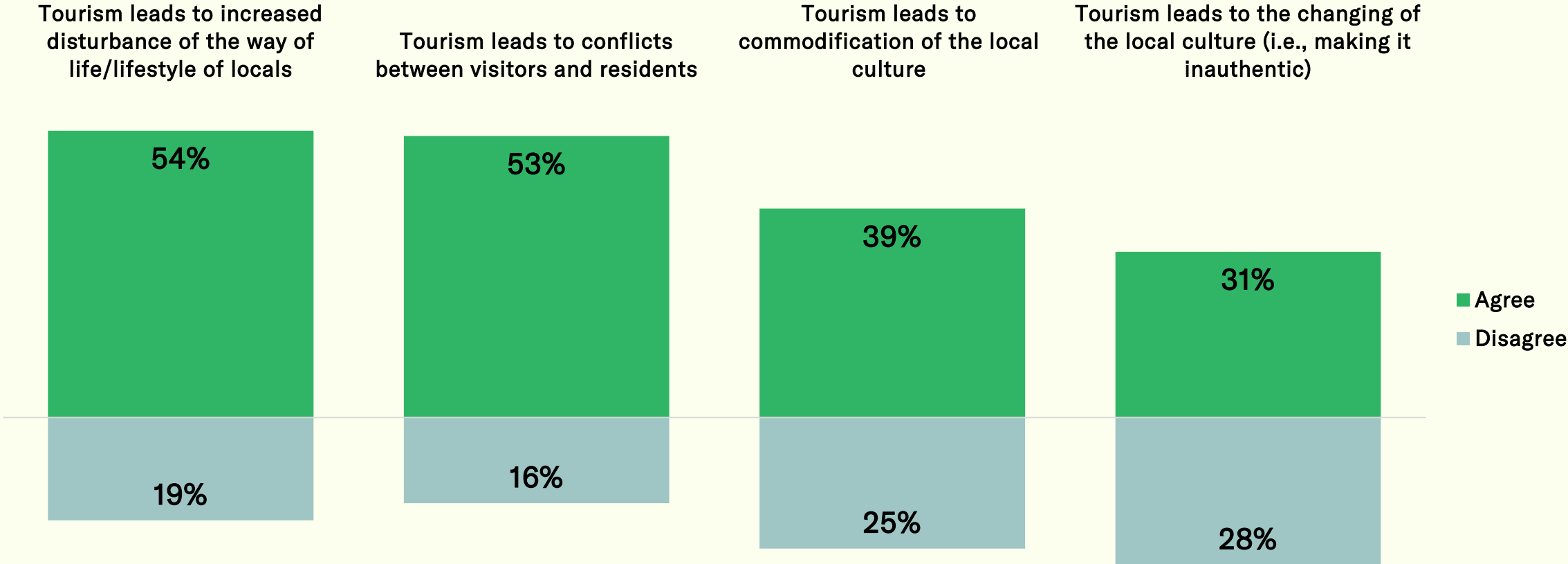
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Oregon Coast tourism workforce. 466 completed surveys.

Oregon Coast – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Negative Cultural Impacts

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

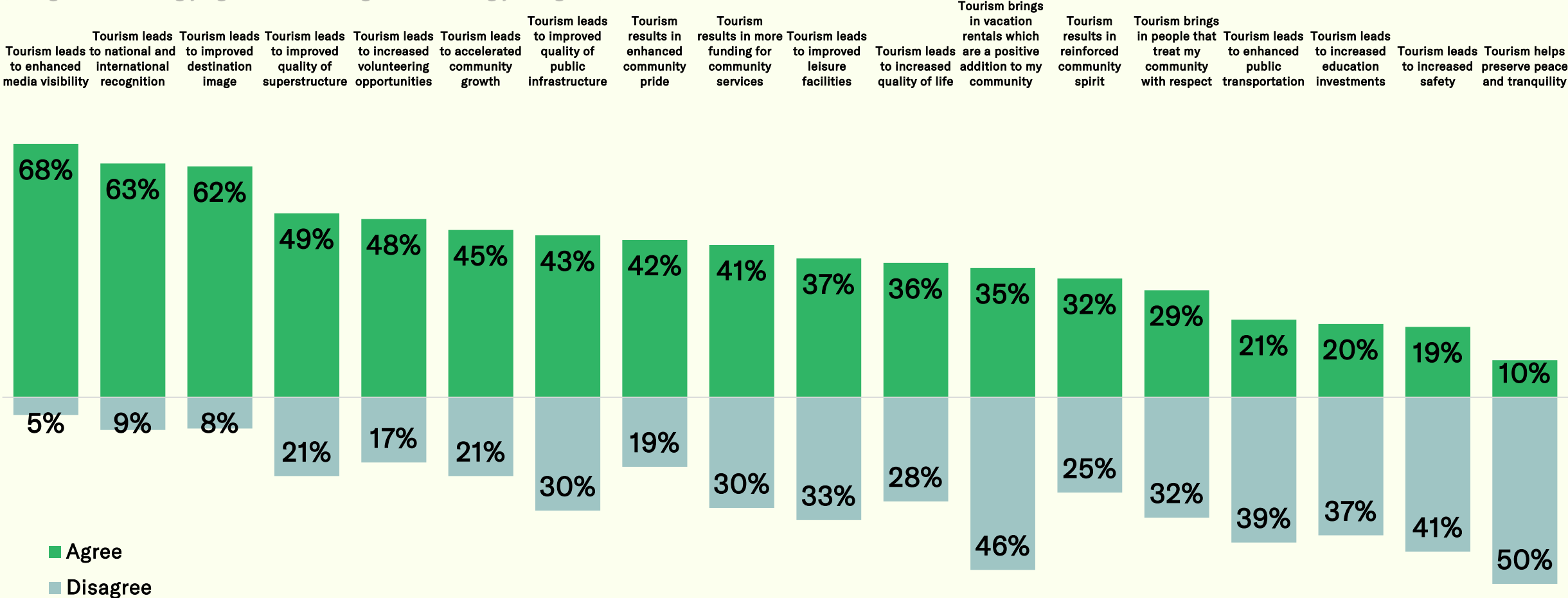


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Oregon Coast tourism workforce. 466 completed surveys.

Oregon Coast – Social Impact Index Statements

Workforce's Perceptions of Tourism's Positive Social Impacts

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

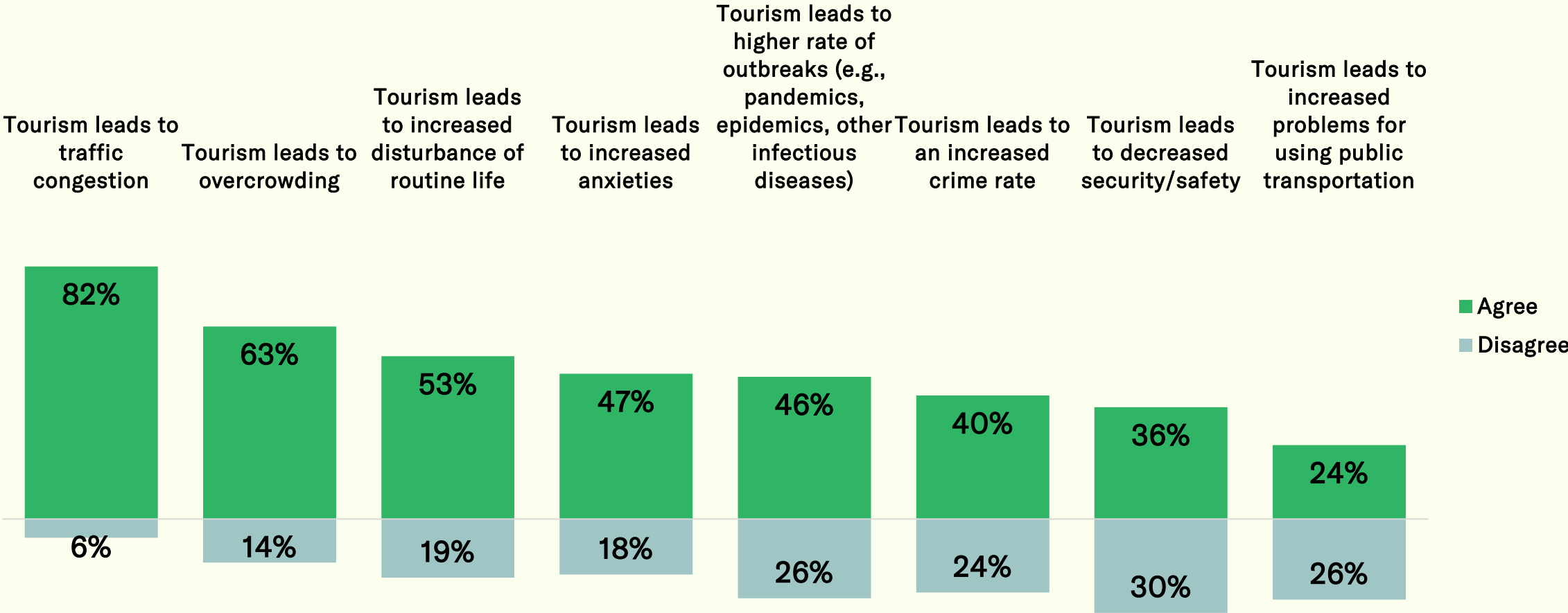


Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Oregon Coast tourism workforce. 466 completed surveys.

Oregon Coast – Social Impact Index Statements

Workforce's 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 tourism workforce. 466 completed surveys.

Southern Oregon

The following slides present findings specific to Southern Oregon residents, including demographics, likelihood to recommend their community as a tourism destination, index scores for tourism's impacts, and support for tourism in Oregon.

Southern Oregon Tourism Workforce Demographic Snapshot

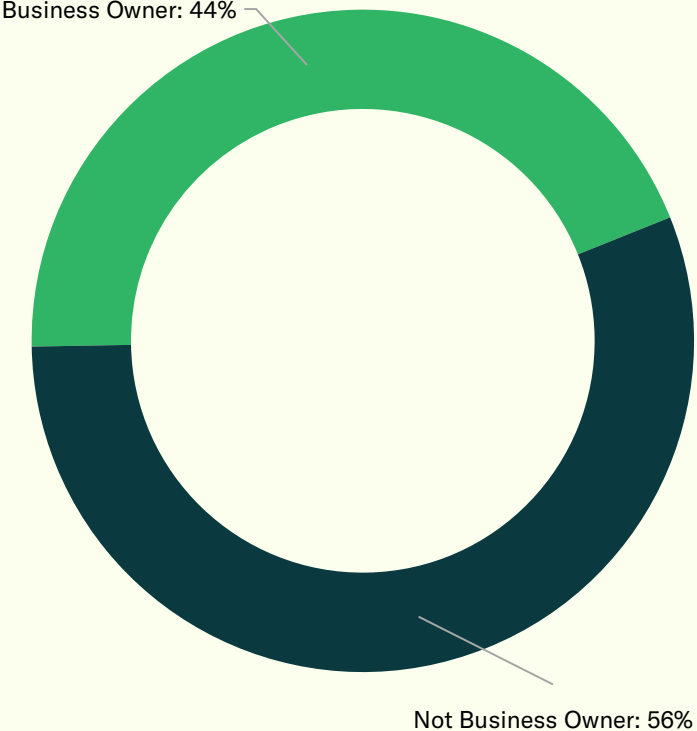
Total residents surveyed:	197
Average age:	44 years old
Average household income:	\$82,761
College graduate:	45%
Married/domestic partnership:	64%
Have children in household:	39%
Gender*	
• Female:	46%
• Male:	52%
• Non-binary/Other:	1%
Ethnicity*	
• White/Caucasian:	85%
• Hispanic/Latino:	10%
• Native American, Alaskan Native:	5%
• African American/Black:	5%
• Asian, Native Hawaiian, or Pacific Islander:	2%
• Other:	2%
LGBTQ+:	20%
Accessibility needs in household:	15%

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



Southern Oregon – Tourism-Industry Business Owners

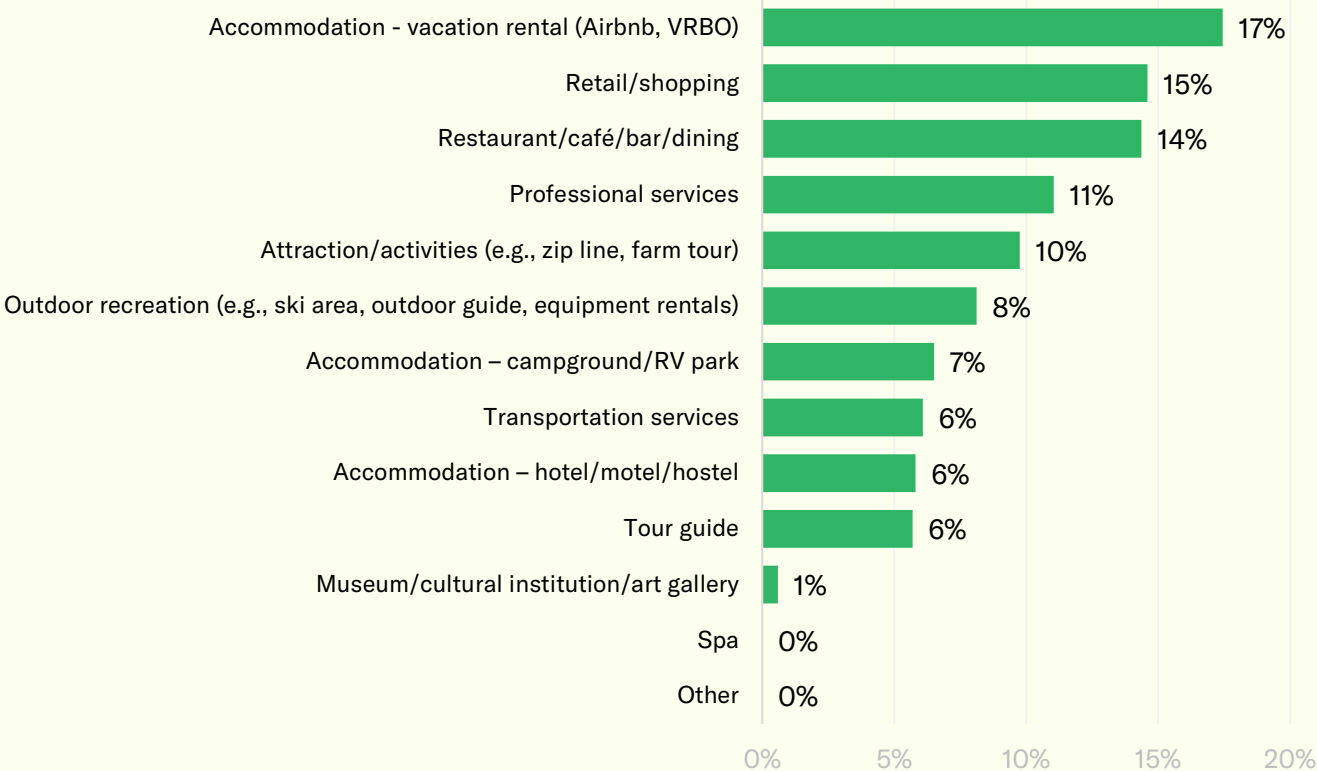
Share of Tourism Workforce who are Business Owners



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

Base: Southern Oregon tourism workforce. 197 completed surveys.

Type of Business Owned

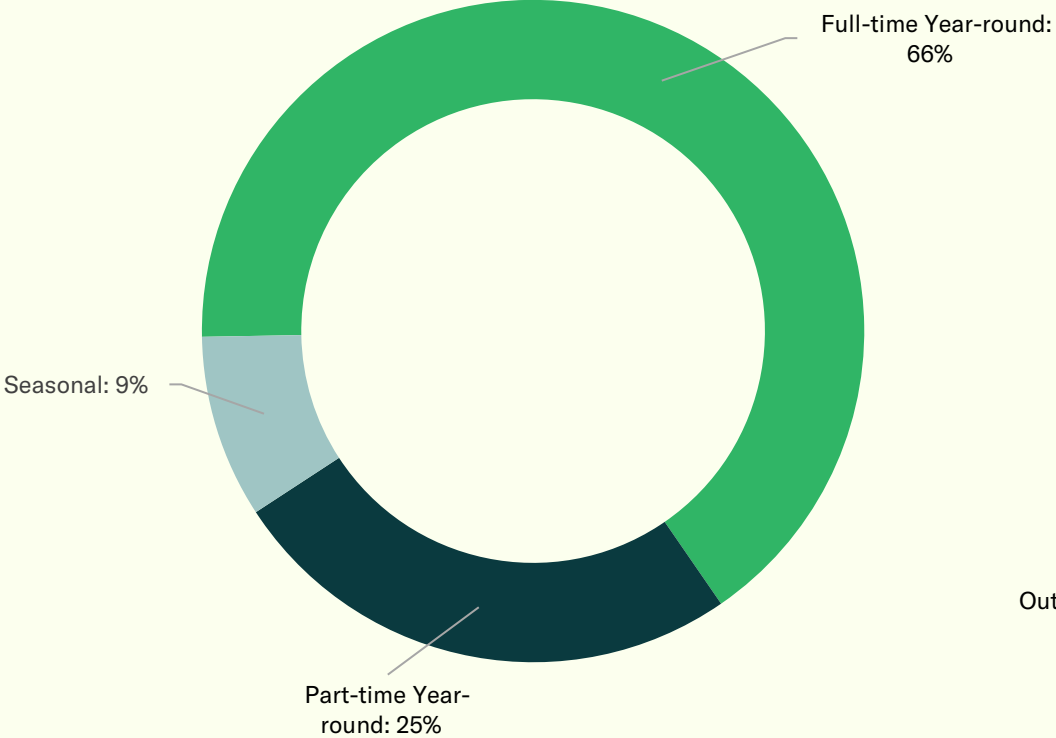


Question: Which of the following best describes your business?

Base: Southern Oregon residents who own a business that serves the tourism industry. 89 completed surveys.

Southern Oregon – Current Tourism Employees

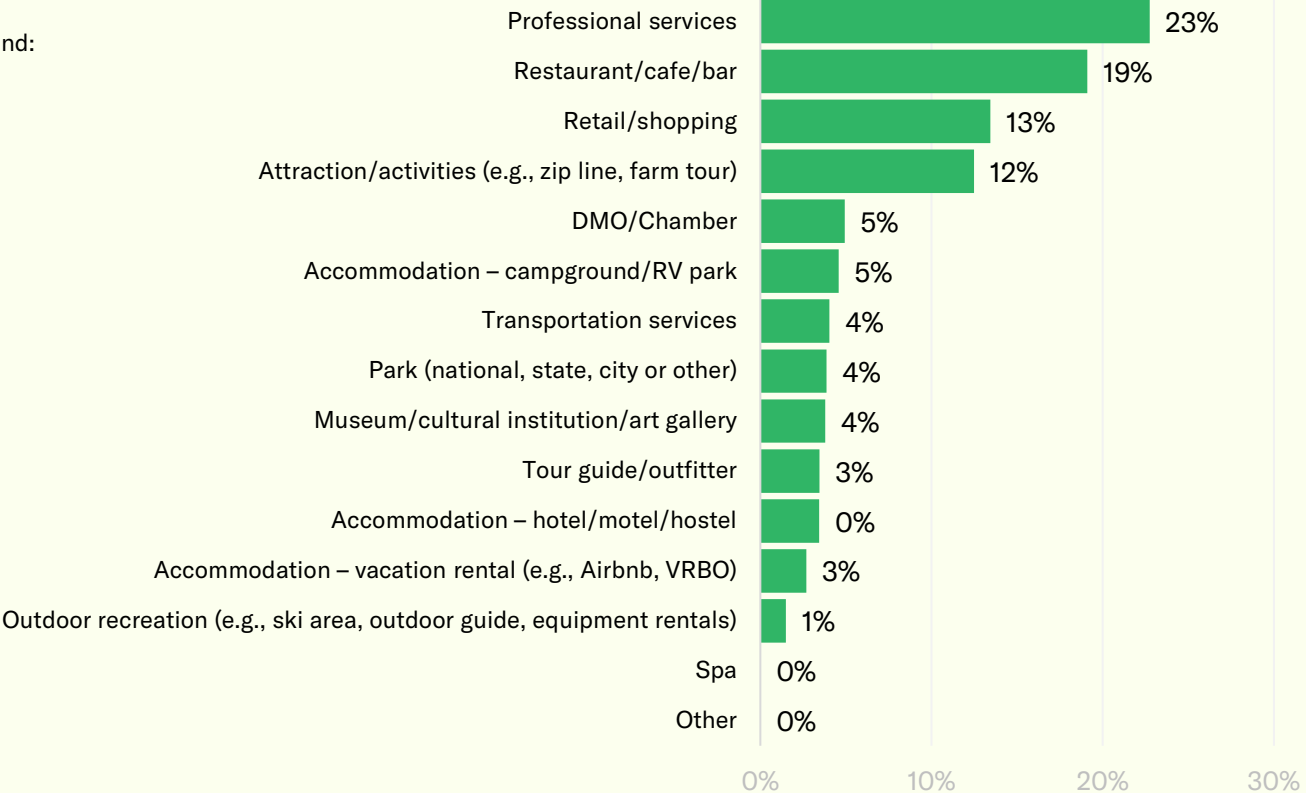
Current Employees: Employment Type



Question: Are you currently employed...?

Base: Southern Oregon current tourism business employees. 108 completed surveys.

Place of Employment

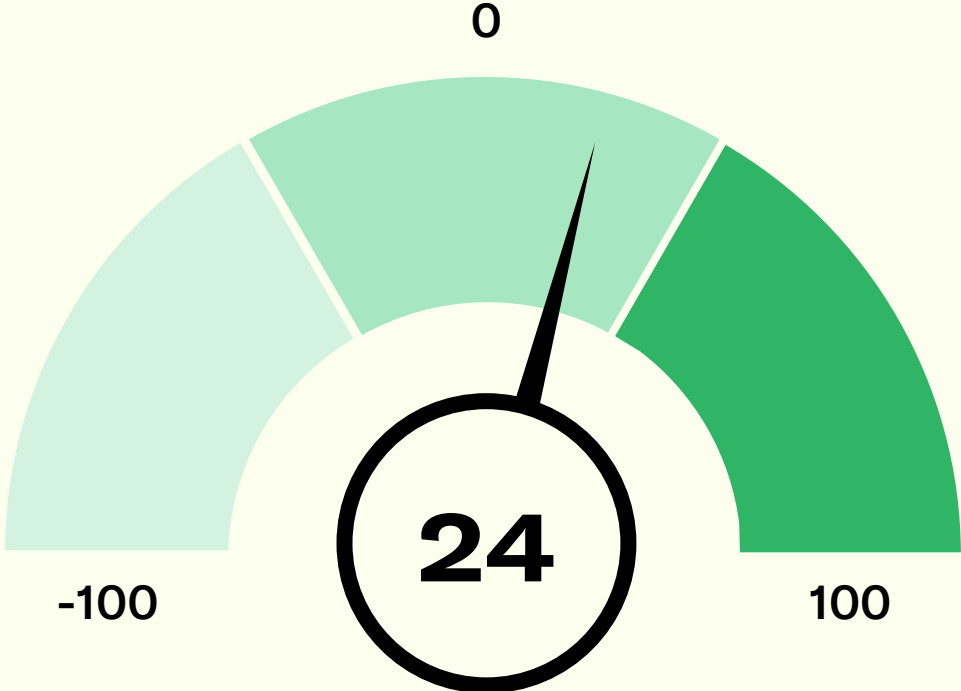


Question: Which of the following best describes your current place of employment?

Base: Southern Oregon current tourism business employees. 108 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.

Southern Oregon – Likelihood to Recommend Local Community as a Tourism Destination

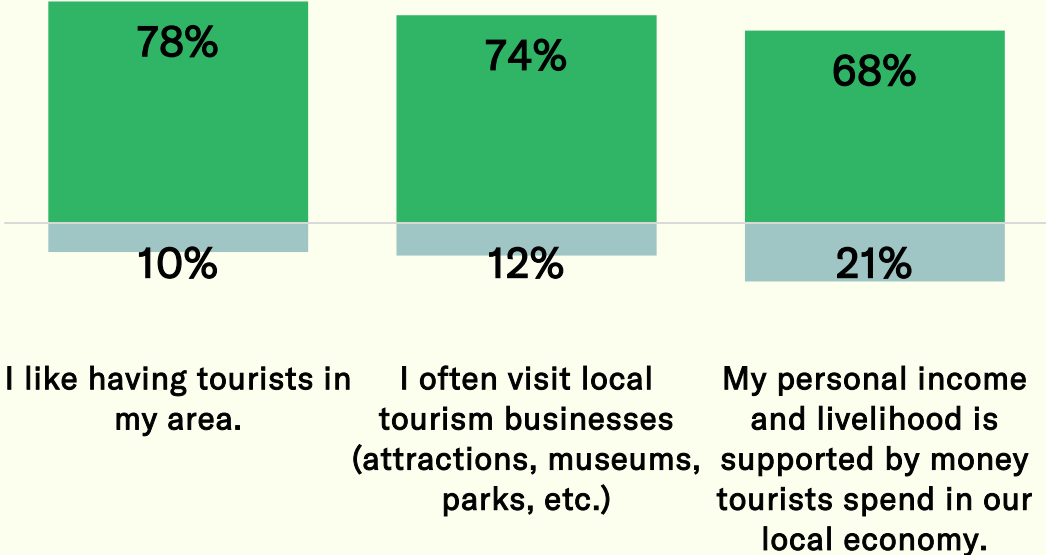


Question: How likely are you to recommend your community as a tourist destination to family, friends, or colleagues?
Base: Southern Oregon tourism workforce. 197 completed surveys.

Southern Oregon – Workforce's Perceptions of Local Tourism Personal Impacts

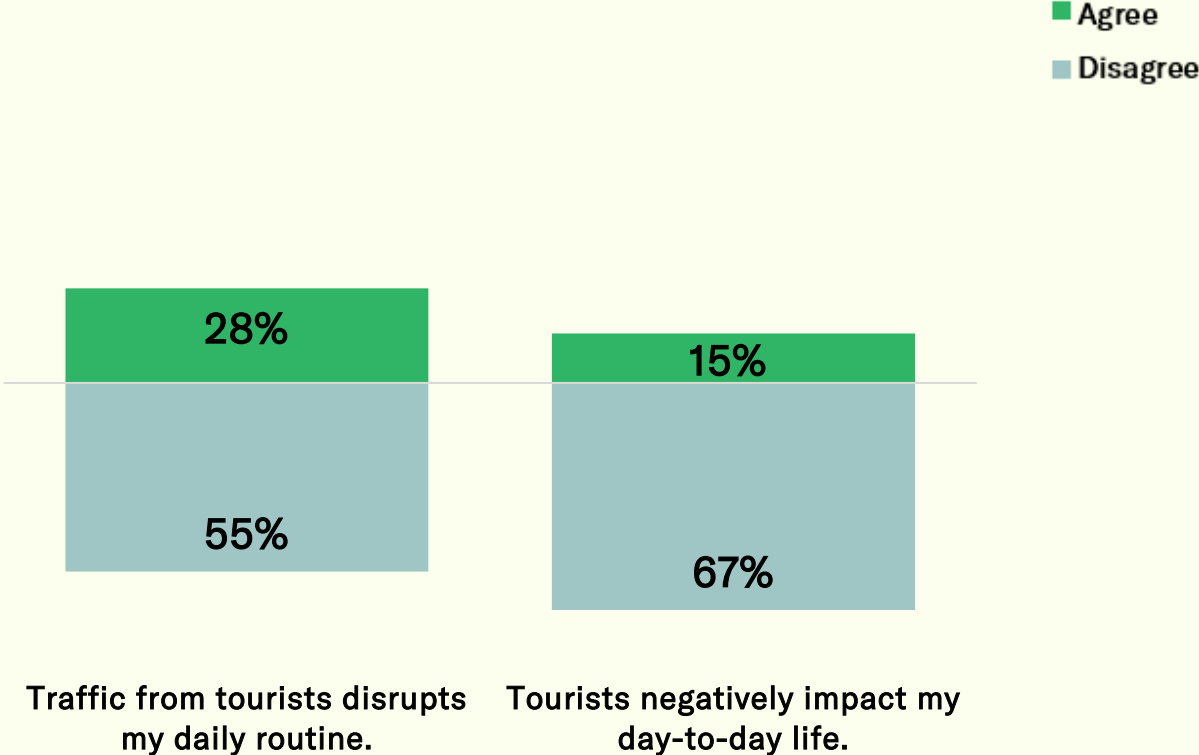
Workforce's Perceptions of Positive Local Tourism Personal Impacts

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



Workforce's Perceptions of Negative Local Tourism Personal Impacts

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

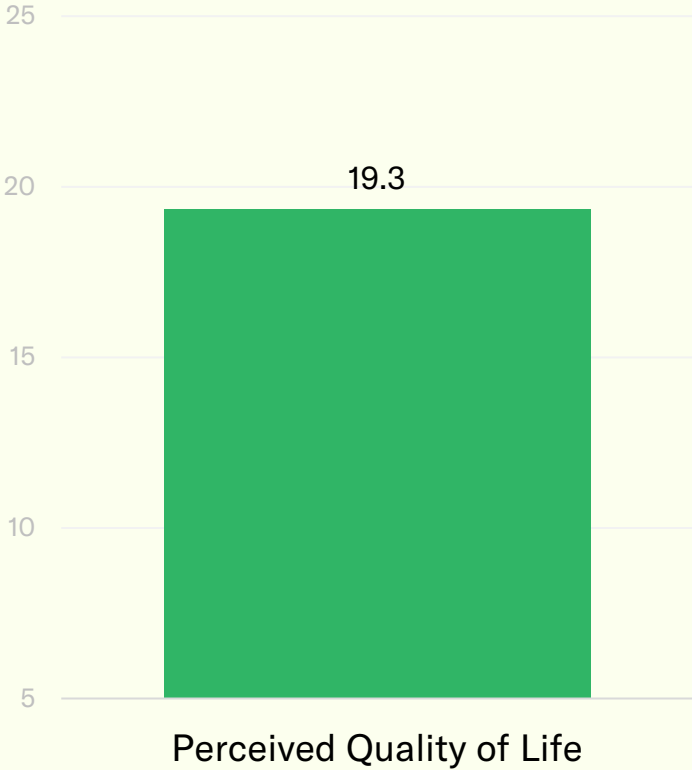


Question: Thinking about tourism in your local area and its impact on you personally, please rate how much you agree with the following statements.

Base: Southern Oregon tourism workforce. 197 completed surveys.

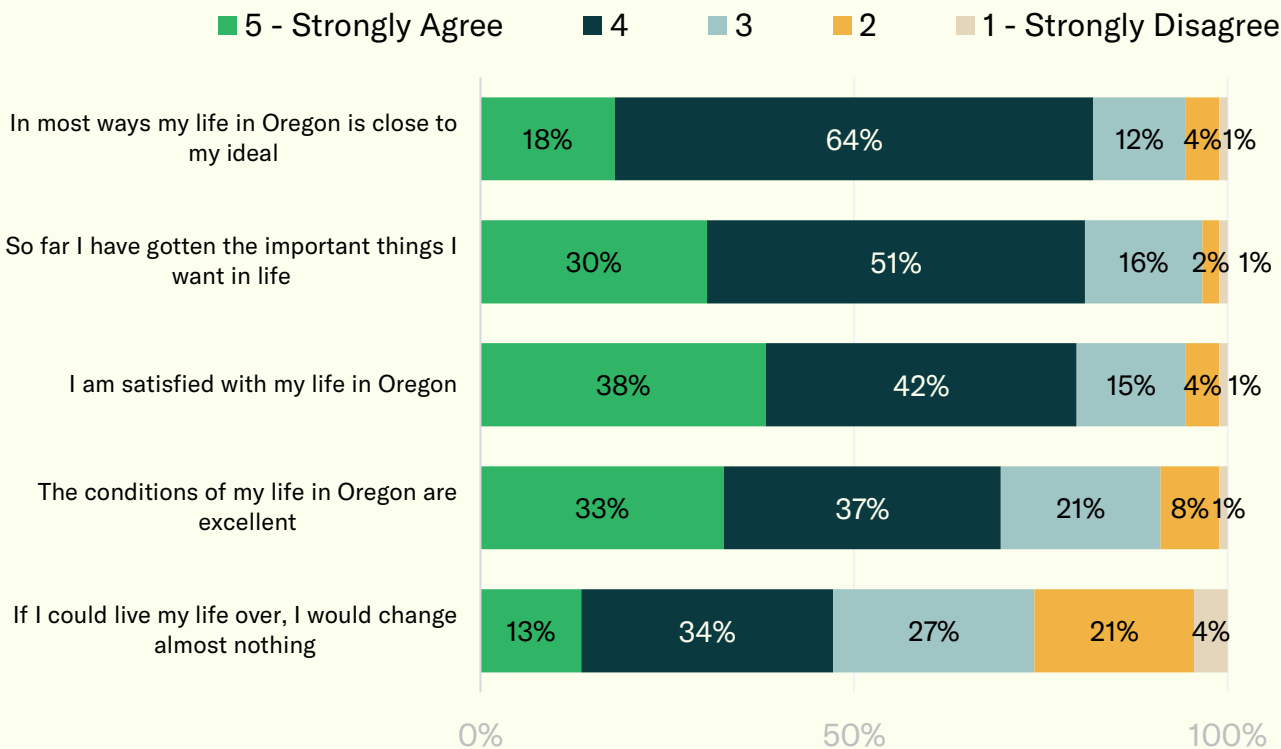
Southern Oregon –Tourism Business Owners’ Perceived Quality of Life

Tourism Business Owners’ 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



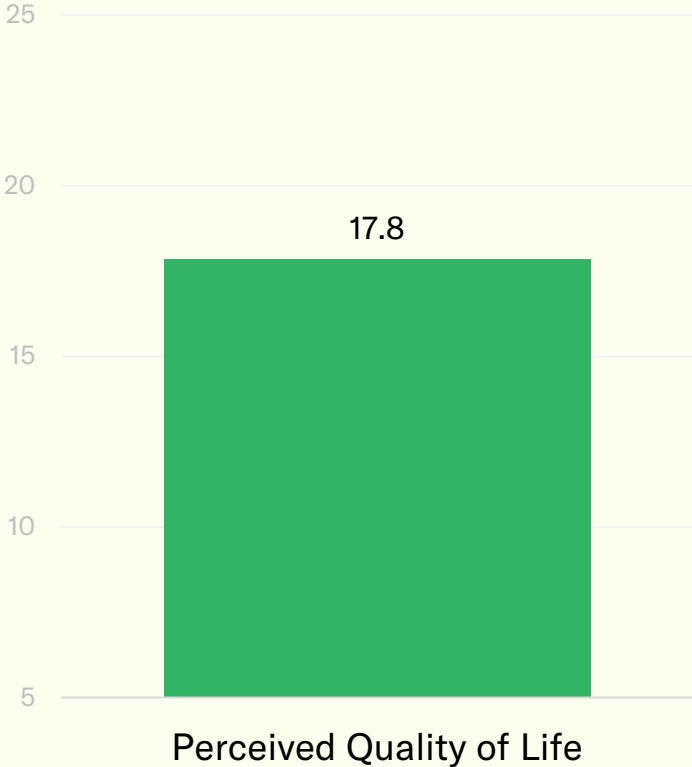
Note: Percentages may not sum to 100% due to rounding.

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

Base: Southern Oregon residents who own a business that serves the tourism industry. 89 completed surveys.

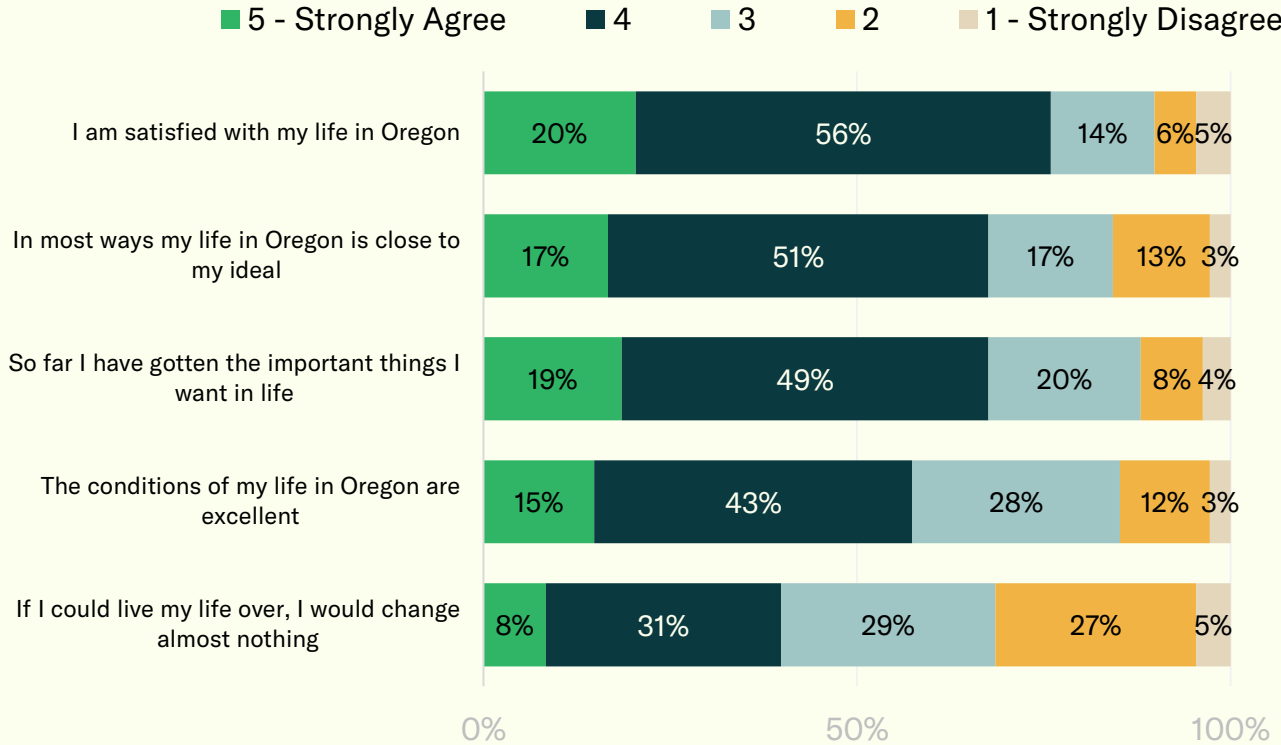
Southern Oregon – Current Tourism Workers’ Perceived Quality of Life

Current Tourism Workers’ 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.

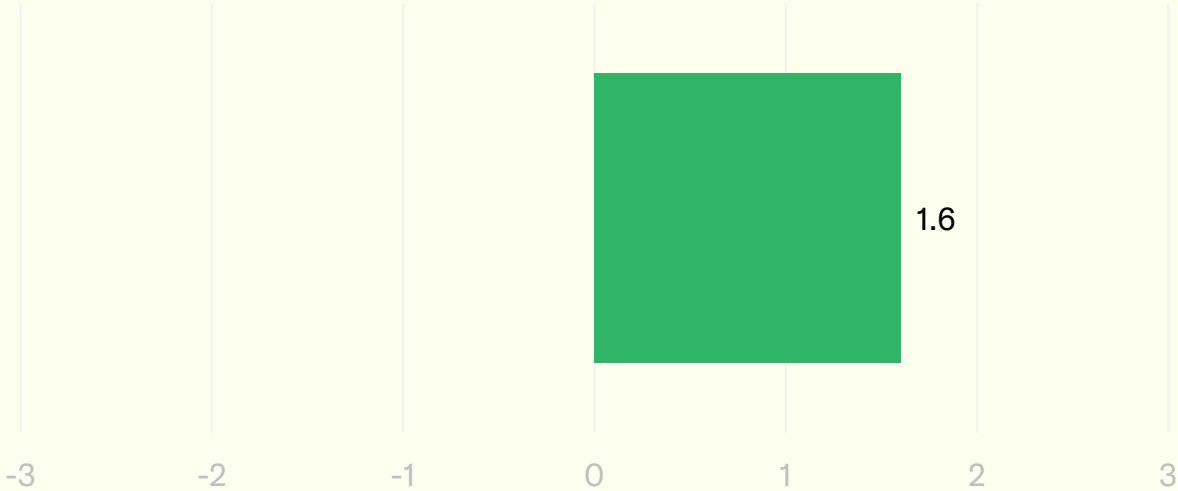
Question: Please rate your level of agreement with the following statements.

Base: Southern Oregon current tourism workers. 108 completed surveys.

Southern Oregon – Overall Support for Tourism

Overall Support for Tourism Mean Score*

Southern Oregon Tourism Workforce’s Overall Support for Tourism



* 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.

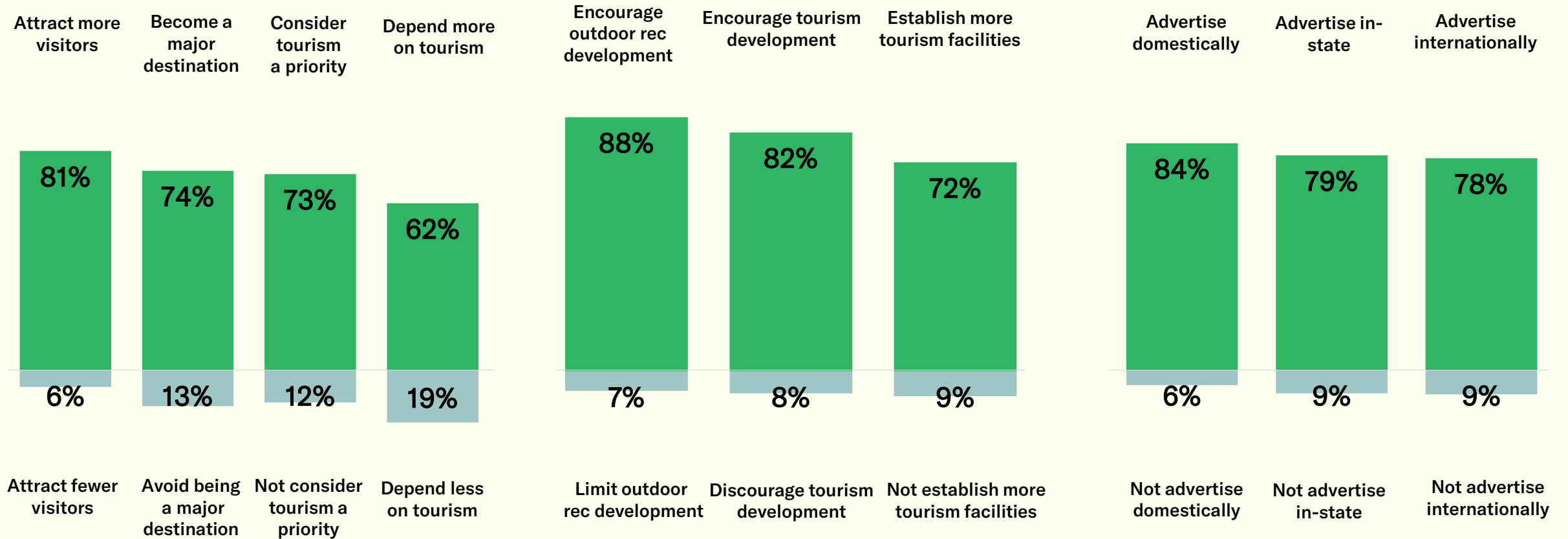
Southern Oregon – Support for Tourism Statements

“Oregon should...”

(On a -3- to 3-point scale)

■ Positive Score (>0)

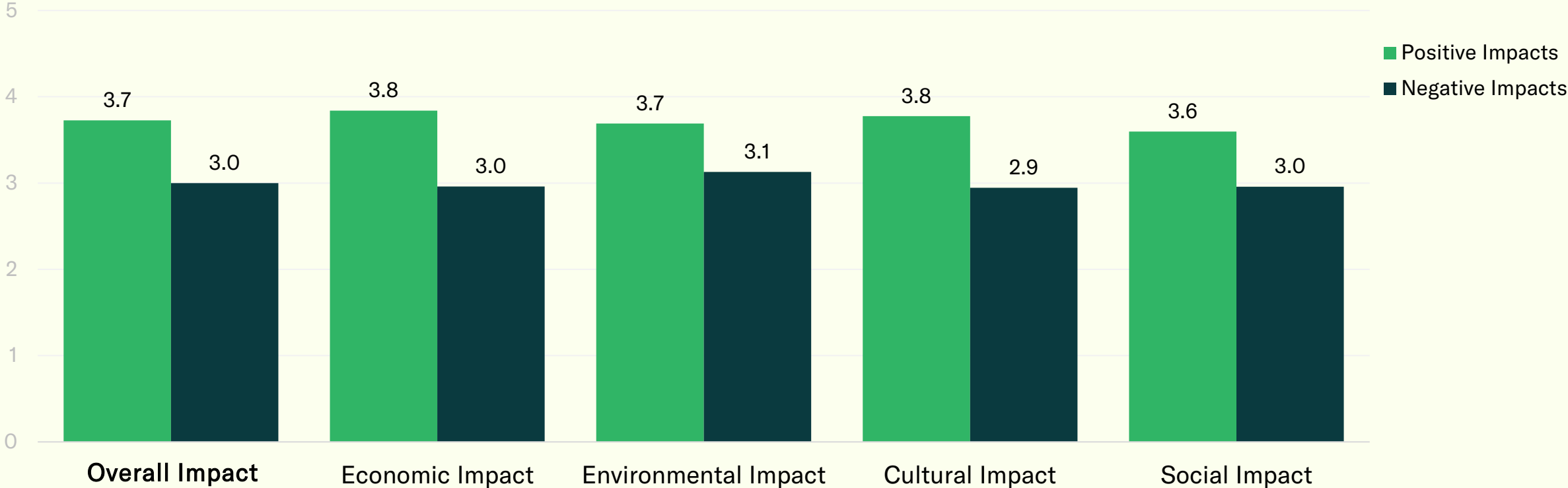
■ Negative Score (<0)



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: Southern Oregon tourism workforce. 197 completed surveys.

Southern Oregon – Index of Workforce's Perceptions of Tourism Impacts

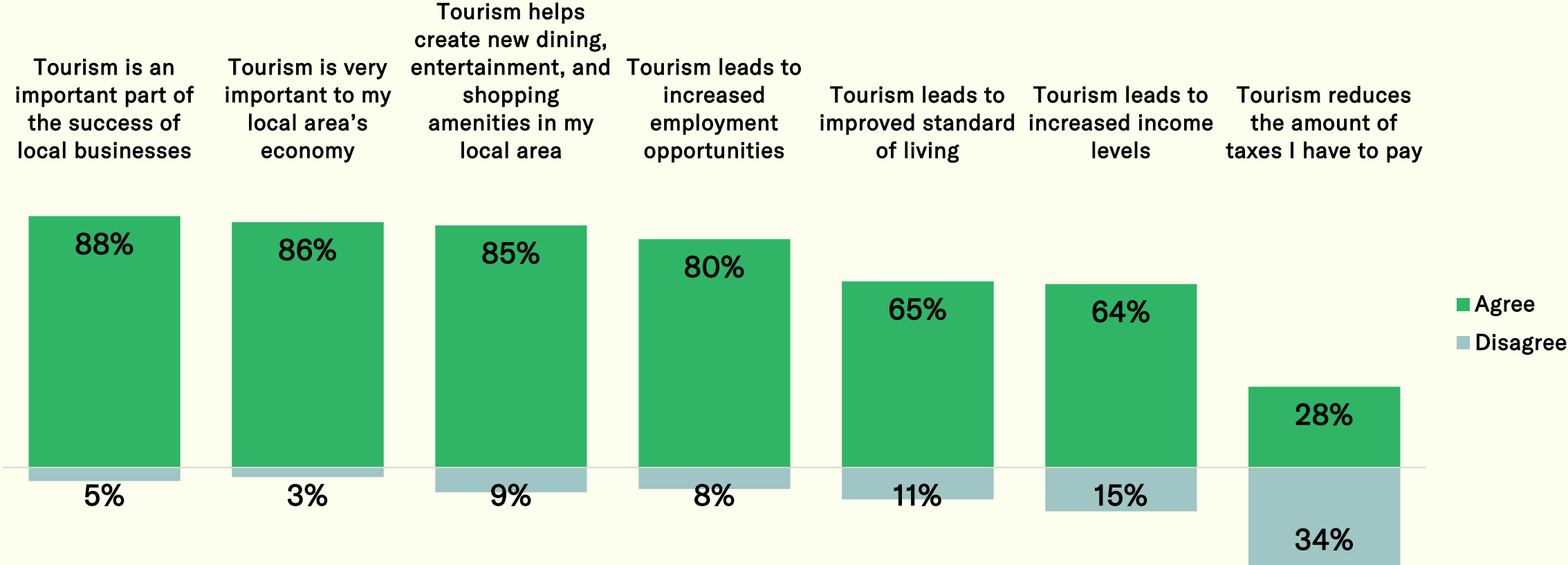


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Southern Oregon tourism workforce. 197 completed surveys.

Southern Oregon – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Positive Economic Impacts

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



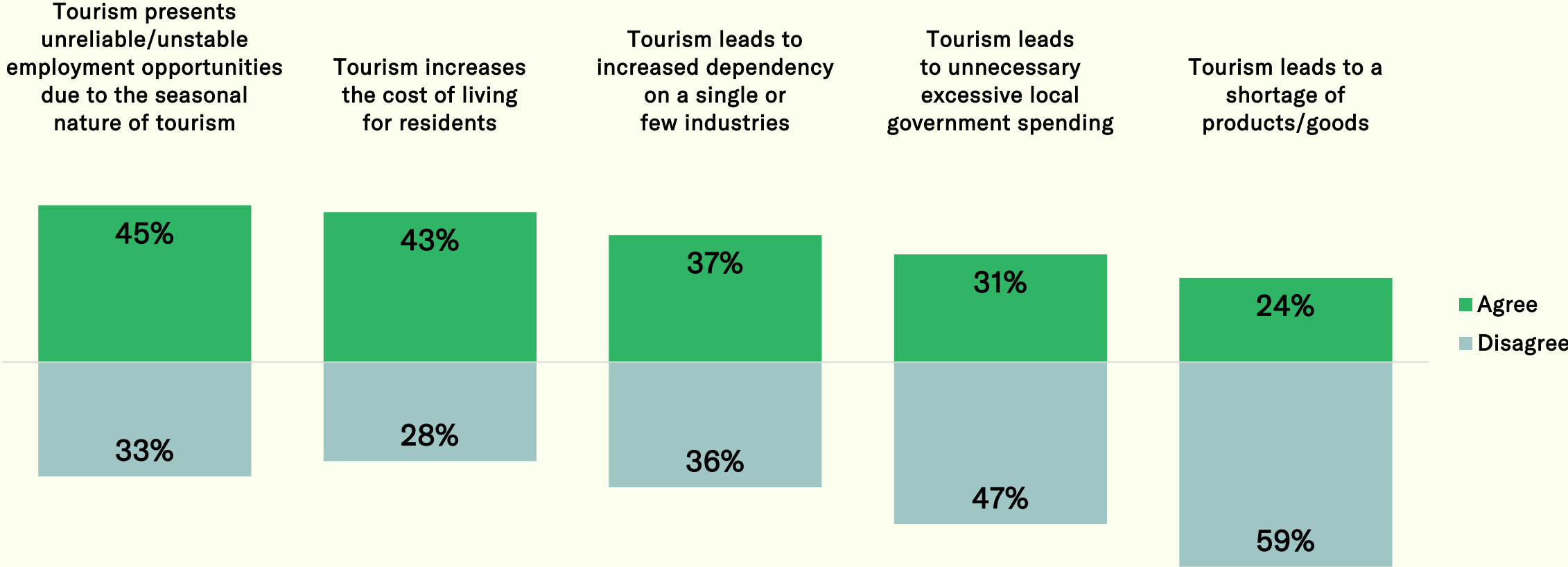
Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.

Base: Southern Oregon tourism workforce. 197 completed surveys.

Southern Oregon – Economic Impact Index Statements

Workforce's Perceptions of Tourism's Negative Economic Impacts

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

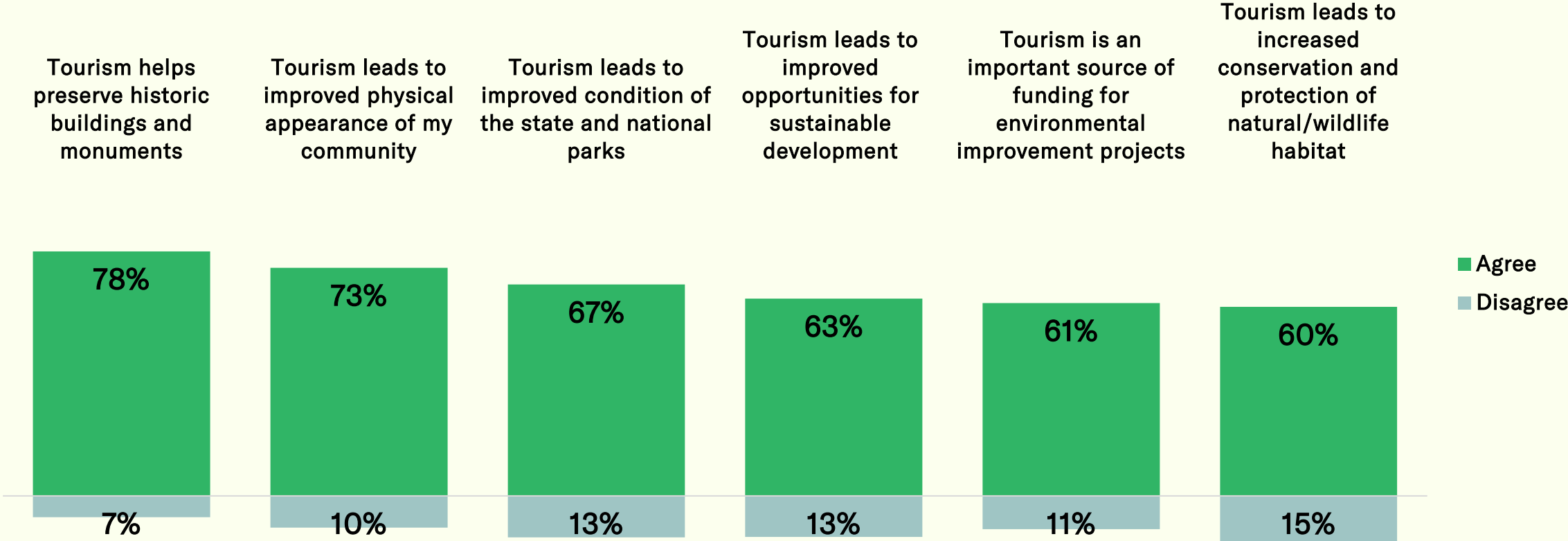


Question: Thinking about Oregon's tourism industry and its impact on Oregon's economy, please rate how much you agree or disagree with the following statements.
Base: Southern Oregon tourism workforce. 197 completed surveys.

Southern Oregon – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Positive Environmental Impacts

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

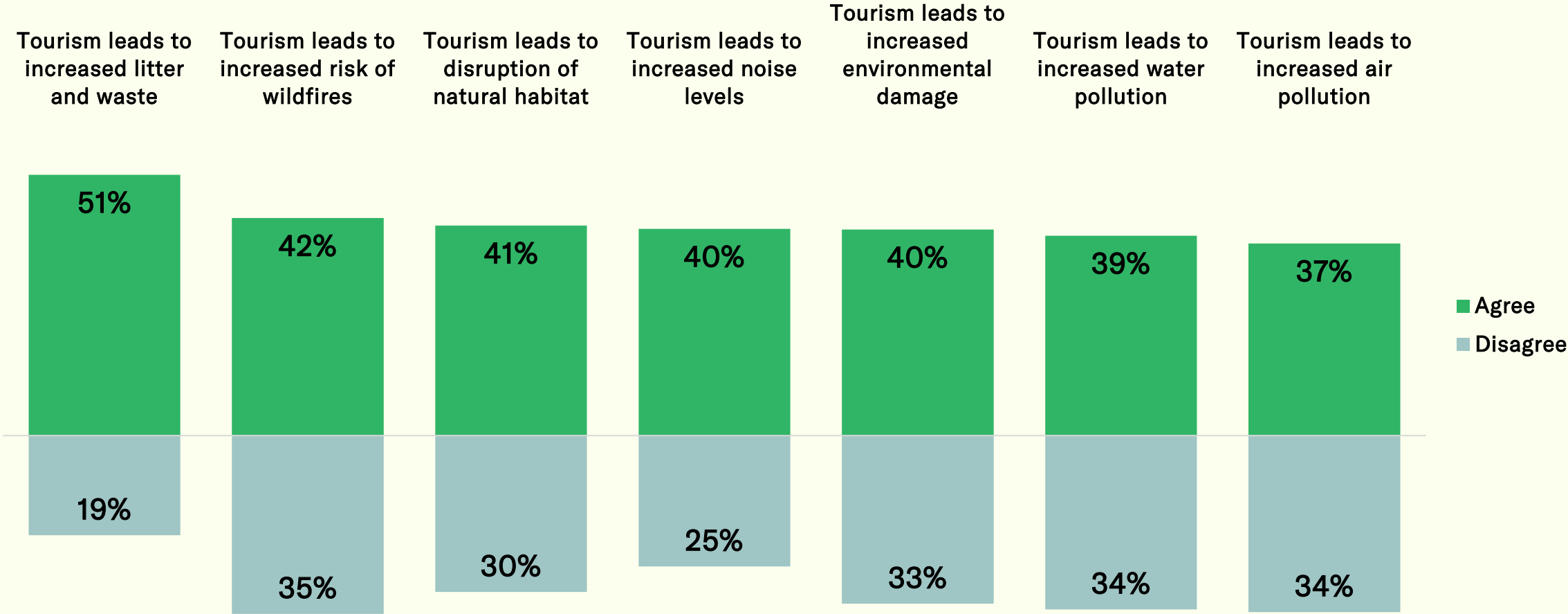


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Southern Oregon tourism workforce. 197 completed surveys.

Southern Oregon – Environmental Impact Index Statements

Workforce's Perceptions of Tourism's Negative Environmental Impacts

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

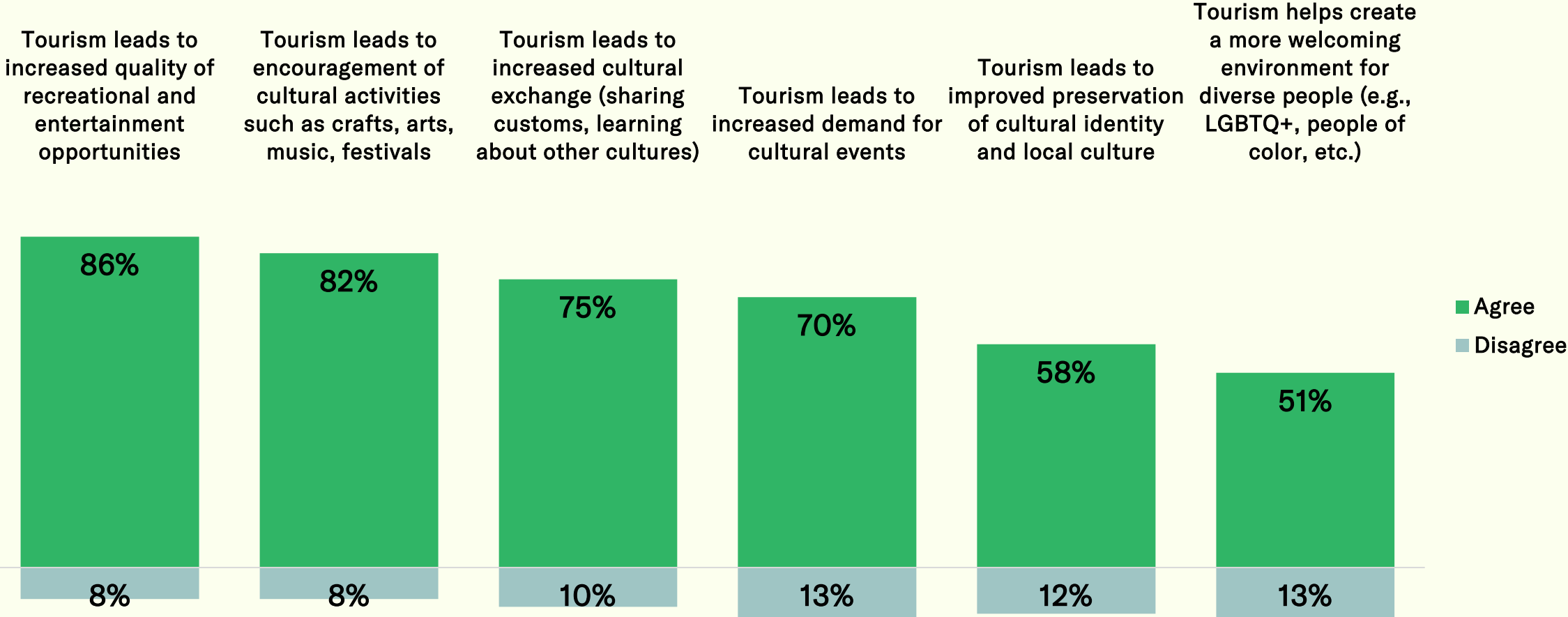


Question: Thinking about Oregon's tourism industry and its impact on Oregon's environment, please rate how much you agree or disagree with the following statements.
Base: Southern Oregon tourism workforce. 197 completed surveys.

Southern Oregon – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Positive Cultural Impacts

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



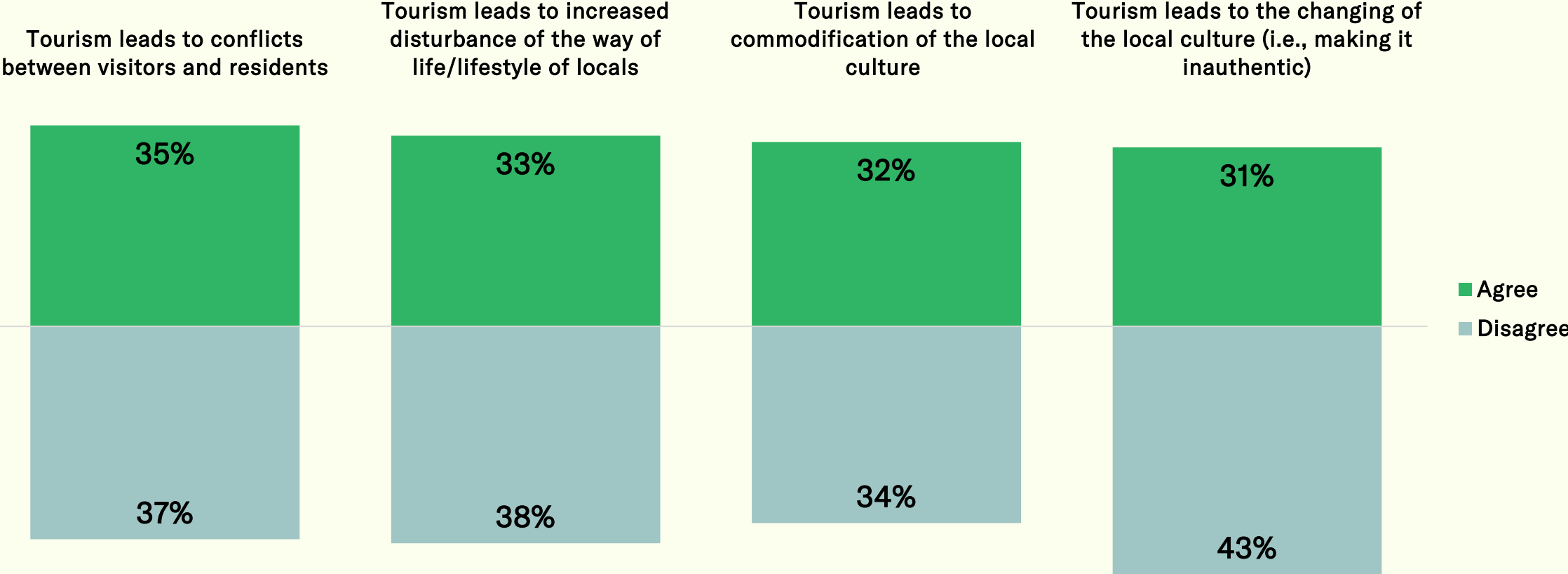
Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.

Base: Southern Oregon tourism workforce. 197 completed surveys.

Southern Oregon – Cultural Impact Index Statements

Workforce's Perceptions of Tourism's Negative Cultural Impacts

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

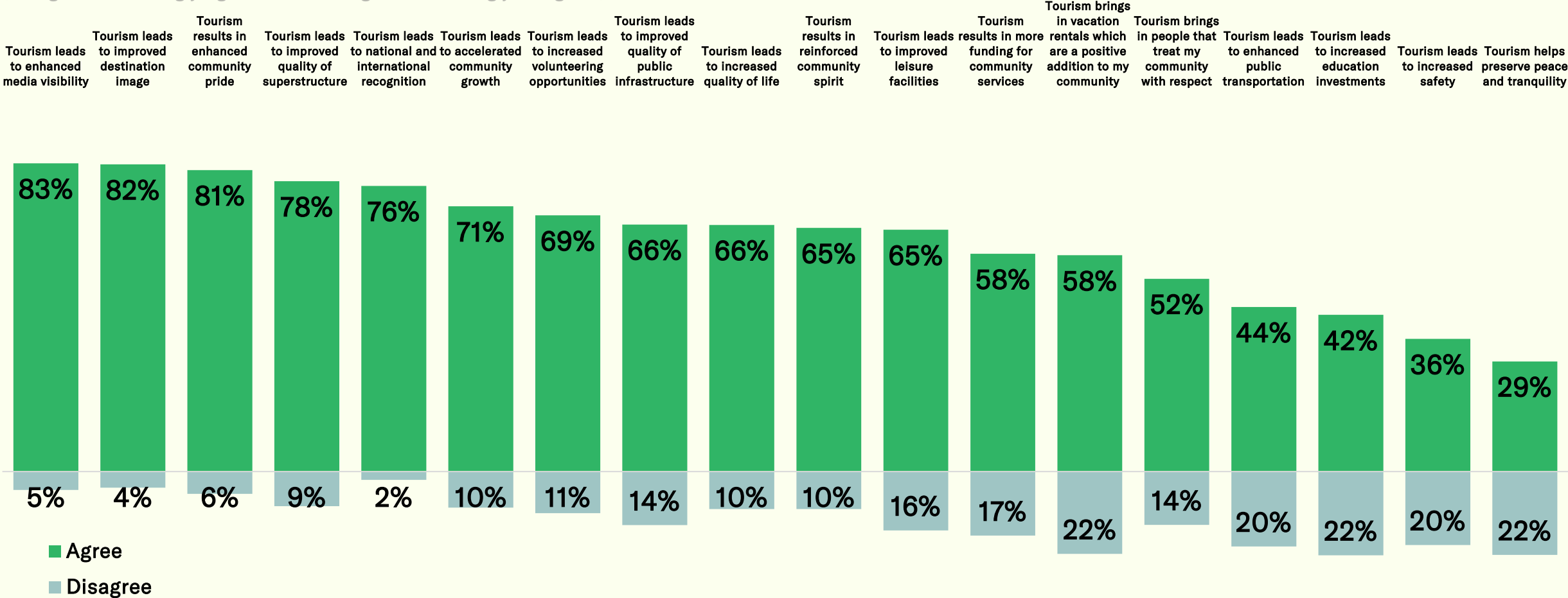


Question: Thinking about Oregon's tourism industry and its impact on Oregon's culture, please rate how much you agree or disagree with the following statements.
Base: Southern Oregon tourism workforce. 197 completed surveys.

Southern Oregon – Social Impact Index Statements

Workforce's Perceptions of Tourism's Positive Social Impacts

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

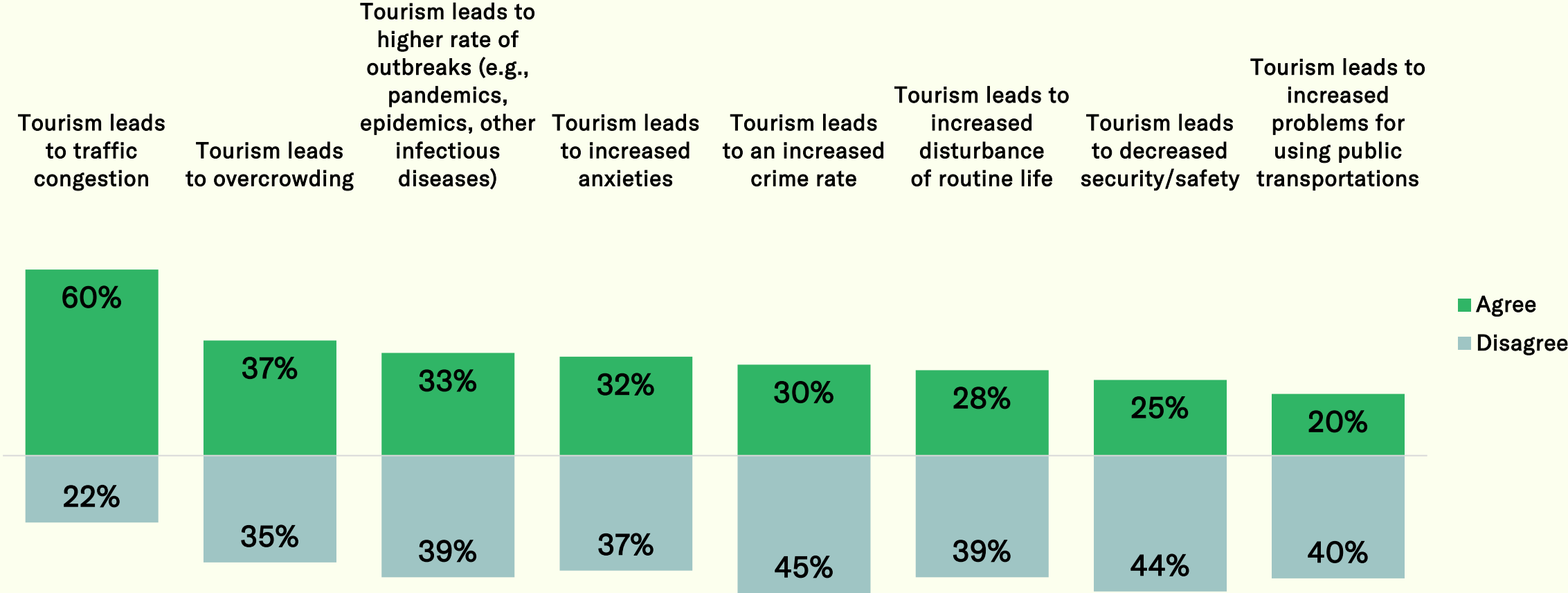


Question: Thinking about Oregon's tourism industry and its impact on Oregon's communities, please rate how much you agree or disagree with the following statements.
 Base: Southern Oregon tourism workforce. 197 completed surveys.

Southern Oregon – Social Impact Index Statements

Workforce's 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 tourism workforce. 197 completed surveys.

Future Partners