



2024 OREGON TOURISM INDUSTRY PARTNER SURVEY

SUMMARY OF RESULTS | CENTRAL OREGON

March 2025



OVERVIEW

This report summarizes findings from a 2024 survey of tourism industry partners in Oregon. The survey sought feedback from partners to provide guidance and perspective on priorities for future investments from regional destination management organizations. This report summarizes findings from respondents in Central Oregon, with additional statewide results provided for context.

OBJECTIVES

The 2024 Oregon Tourism Industry Survey was designed on behalf of the Oregon Tourism Commission, dba Travel Oregon, and the state's seven official regional destination management organizations (RDMOs) to elicit feedback from individuals and organizations linked to the tourism industry.

As Travel Oregon embarks on its 10-year strategic vision for tourism in the state, the results of the survey will help inform strategic direction for Travel Oregon and its regional partners to fulfill the strategic vision. The survey will also assist funding and programmatic decisions in marketing, grants, tourism-related infrastructure, visitor management, and more.

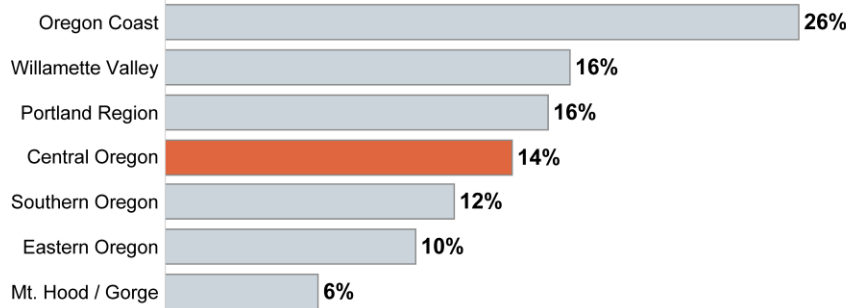
The survey built on a framework of past partner surveys conducted in 2018, 2020, and 2023. The survey was developed collaboratively by Travel Oregon, the seven RDMOs, and RRC Associates.

DATA COLLECTION

This study consisted of a digital survey that was fielded to Oregon tourism industry employees from September 12–October 14, 2024. The 2024 study is the fifth edition of the Industry Partner Survey, formerly known as the Stakeholder Survey. This year, the survey distribution methods included the Travel Oregon Industry Newsletter, partner and staff outreach, industry conferences, and social media.

The survey resulted in a total of 192 valid responses from Central Oregon (up from 79 responses in 2023) and more than 1,300 responses statewide. Sample sizes for individual questions vary. Results presented in this report are segmented by the region in which the respondent indicated that they live or work, and figures show results from Central Oregon compared to the statewide survey results.

Number of Respondents



192
Central Oregon
Responses

1,363
Overall Responses

Source: RRC

LIMITATIONS

The survey results should be viewed as an aggregation of relevant and thoughtful feedback from partners. The applicability of findings to real-life circumstances may depend on whether the feedback is from a broad enough (or representative) swath of partners and whether individual RDMOs believe they have engaged with enough partners to have a good gauge of the partners' priorities. An assessment of the industries represented, and the statewide response numbers, suggest a diverse and sufficient sample was collected from all regions, adding confidence to the applicability of results. Because the survey was not conducted from a random sample, statistical tests have not been performed on the data.

ADDITIONAL RESOURCES

In addition to this report, results from the survey are accessible via an interactive online dashboard that enables further exploration of the data. Users of the online dashboard can segment questions by key variables to gain additional insight into segments of the Oregon tourism partner population that were not addressed in this report.

The survey also resulted in an extensive number of open-ended responses. All open-ended responses may be accessed in the online dashboard.

Access the online dashboard by going to: bit.ly/2024TOPartnersurvey

TABLE OF CONTENTS

Overview	1
Objectives	1
Data Collection.....	1
Limitations.....	2
Additional Resources.....	2
Key Findings	4
Tourism Strategies	4
Destination Development.....	4
Planning Priorities	4
Advocacy	4
Visitation and Seasonality	4
Strengths and Challenges.....	5
Resources and Programs.....	5
Respondent Profile	6
Tourism Strategies	12
Areas of Focus	19
Representation of and Communication with Underserved Communities.....	29
Industry Engagement and Communications.....	35
Central Oregon Questions.....	36
Open-Ended Responses.....	39

KEY FINDINGS

TOURISM STRATEGIES

DESTINATION DEVELOPMENT

- **Satisfaction Levels:** 65% of Central Oregon respondents are satisfied with the direction of tourism development, slightly higher than the statewide average of 62%.
- **Focus Areas:** Key focus areas for improving the resident and visitor experience include land management and stewardship (34%), public infrastructure (32%), and creating a welcoming environment for BIPOC and LGBTQIA2S+ communities (24%).
- **Perceived Strengths:** Respondents highlight outdoor recreation opportunities (83%), food and beverage (42%), and entertainment (27%) as the region's strongest tourism assets.

PLANNING PRIORITIES

- **Top 3 Priorities for the Next 2–5 Years:**
 1. Sustainability and climate action (44%)
 2. Grant and funding opportunities (34%)
 3. Visitor management solutions (29%)
- **Shift from 2023:** Marketing and promotion, which was a top priority in 2023 (45%), has dropped to 26% this year, showing a shift toward infrastructure and sustainability.

ADVOCACY

- **Collaboration and Engagement:** Central Oregon respondents feel confident collaborating with diverse groups to support tourism (4.6 out of 5).
- **Legislative Engagement:** Engagement with policymakers is low (3.1 out of 5), suggesting a need for stronger advocacy efforts.
- **Tourism Perception:** Respondents see the value tourism brings to their community (4.7 out of 5), however see room for improvement in access to data and information to better understand this value.

VISITATION AND SEASONALITY

- **Overcrowding in Summer:** 67% of Central Oregon respondents say summer visitation feels very crowded, much higher than the statewide response.
- **Winter Visitation Concerns:** 20% of respondents feel winter is overcrowded—higher than the statewide average.
- **Potential for Redistributing Visitors:** Visitor dispersal strategies could help balance tourism demand throughout the year.

STRENGTHS AND CHALLENGES

- **Housing and Workforce Challenges:**
 - 80% cite a lack of affordable housing as a high-risk challenge compared to 74% statewide, a challenge regionally and statewide that has continued to rise in risk.
 - 76% report workforce housing shortages compared to 67% statewide. Similar to affordable housing, this issue has continued to rise in risk regionally and statewide.
 - 86% identify wildfires as a major threat—nearly double the statewide average (46%).
- **Workforce Recruitment Issues:**
 - 56% struggle with seasonal employment and 54% report inconsistent work hours as key barriers.

RESOURCES AND PROGRAMS

- **Most Needed Resources:**
 - Grant and funding opportunities (79%)—higher than the state average (72%).
 - Advocacy support for tourism-related policies (53%).
 - Training and tools for marketing and communication (52%).
- **Lowest Priority Resources:**
 - Transitioning to online sales (9%) and compliance with government regulations (16%) are less pressing concerns.

Central Oregon's tourism industry faces overcrowding, workforce housing shortages, and wildfire risks, yet its strengths in outdoor recreation, infrastructure, and sustainability planning provide a strong foundation for growth. Addressing funding, visitor management, and advocacy support will be essential for long-term success.

RESPONDENT PROFILE

The survey received broad participation by the tourism industry sector. Statewide, destination marketing and/or management accounted for 15% of total respondents, followed by lodging (14%) and food and beverage (10%). The top represented organizations remain similar to 2023.

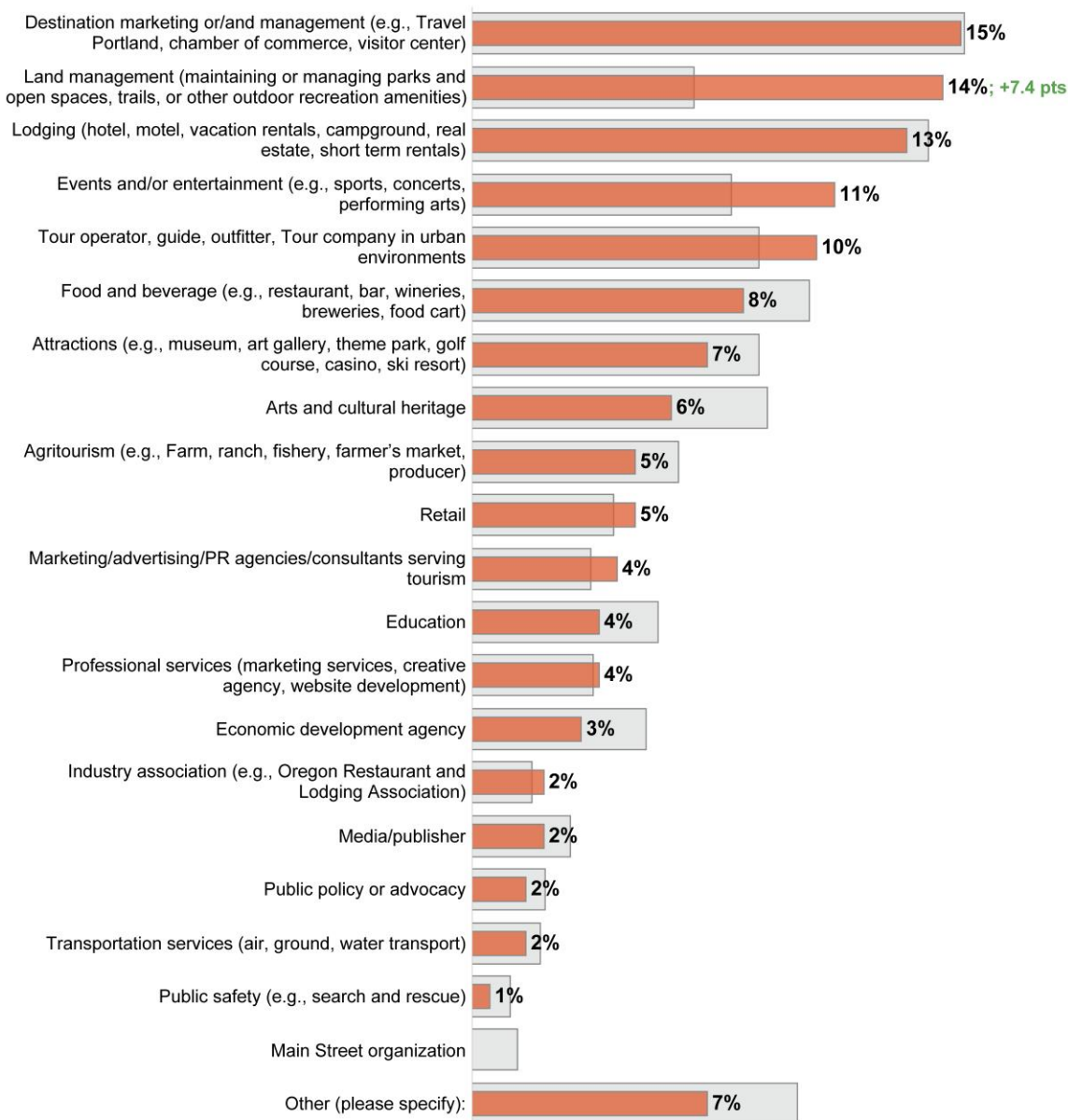
Like respondents statewide, respondents from Central Oregon were most often employed in destination marketing and/or management followed by lodging. Respondents from Central Oregon were more likely to work in land management than, tour operation or events/entertainment than statewide respondents.

Respondents were asked which entity type best describes their business or organization. In Central Oregon, the top two response options were private or for-profit entities/organizations (45%) and non-profit entities/organizations (38%). Respondents are more likely to work in land management, tour operation, or events/entertainment than statewide respondents. Compared to 2023, a larger share of respondents from this region were in land management (5% in 2023) and a smaller share in lodging (21% in 2023).

Industry Sector

Central Oregon
Statewide

Q: In what sector of the tourism industry do you primarily work?



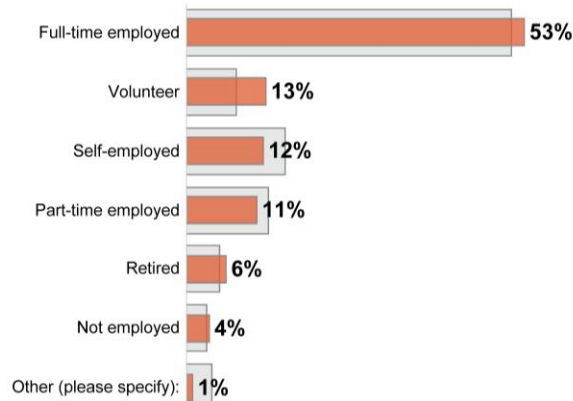
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

The top employment statuses for the region were full-time employed (53%), self-employed (12%), and volunteer (13%). Compared to the statewide responses, the Central Oregon region had a higher proportion of volunteers. Those who responded in the "other" category for entity type highlighted real estate, retired, tour guide, vacation rentals, and Visit Bend Board in some of the open-ended comments.

Entity Type & Employment Status

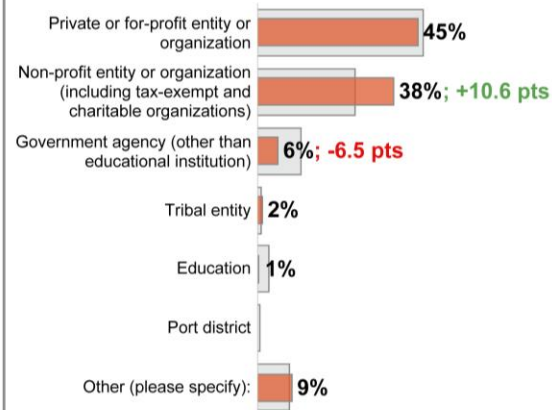
Q: Which of the following best describes your current employment status in the tourism industry?



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Q: Which entity type best describes your business/organization?

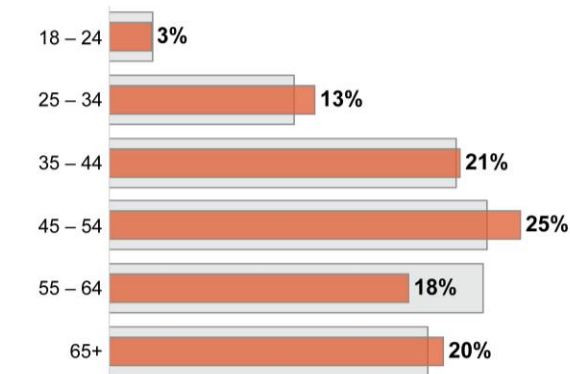


In Central Oregon, more respondents fell in the 25-54 age range than statewide respondents while less were in the 55-64 age range. In the statewide results, the largest share of respondents were in the 45-64 range. The share of respondents from Central Oregon aged 65 and older was also slightly higher compared to the statewide results.

Central Oregon respondents were slightly less likely to identify as female (60%) and more likely to identify as male (36%).

Age & Gender

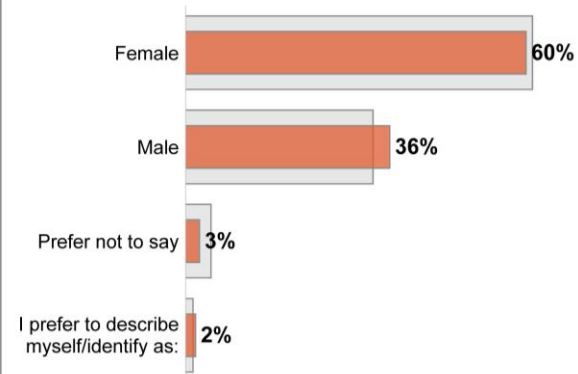
Q: What is your age?



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Q: What is your identified gender?

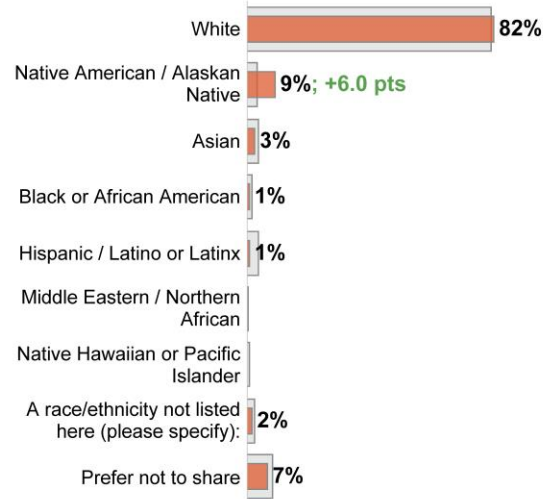


For race and ethnicity, 82% of Central Oregon respondents identify as white. A greater share of Central Oregon respondents identify as Native American/Alaskan Native (9%) compared to 4% statewide.

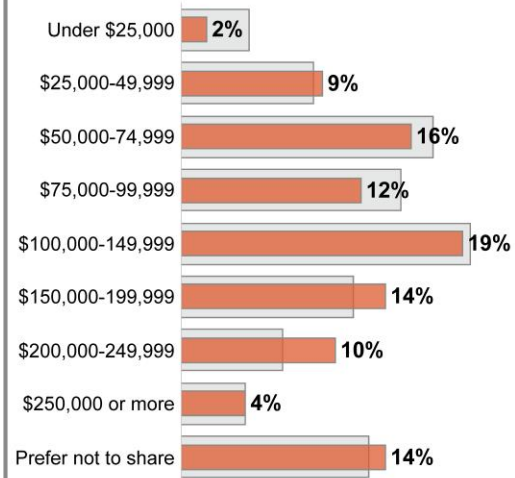
Fifty-seven percent of survey respondents statewide indicated that they had annual household incomes of \$75,000 or more. Compared to the statewide results, the Central Oregon region had a higher percentage of respondents in the \$200,000-249,999 range.

Race & Household Income

Q: Which of the following best describes you?



Q: Which of these categories best describes the total gross annual income of your household (before taxes)?



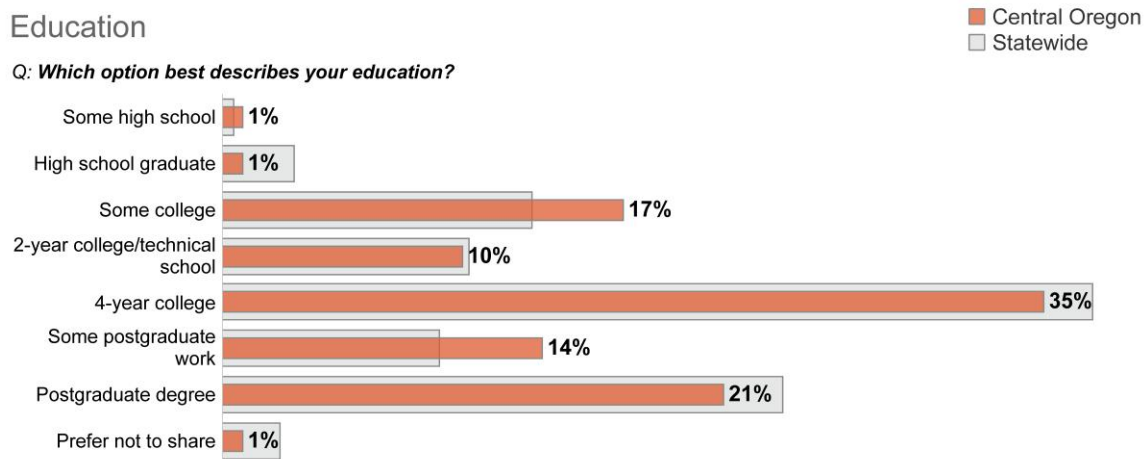
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Central Oregon respondents were only somewhat different compared to the sample in terms of level of education achieved. A larger percentage of Central Oregon respondents completed some postgraduate work (14%) and some college (17%) compared to the statewide results (9% and 13%, respectively).

Education

Q: *Which option best describes your education?*



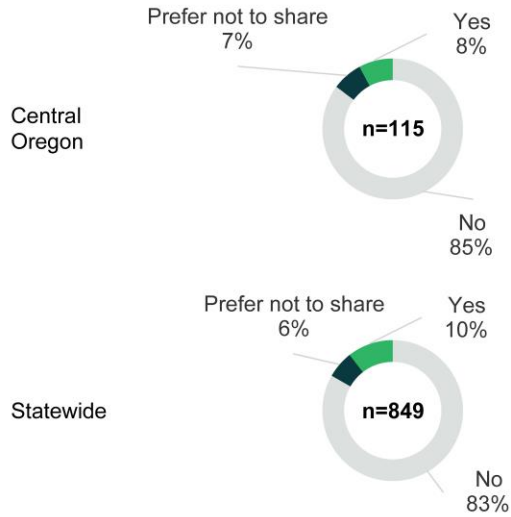
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

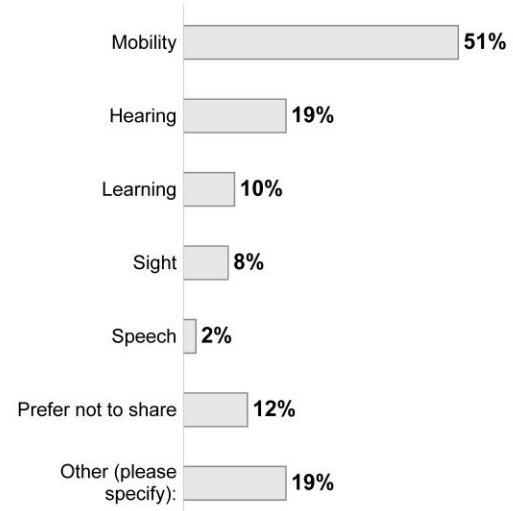
Eight percent of Central Oregon respondents reported having a disability, compared to 10% of respondents statewide. Other disabilities listed include mental health (including anxiety/depression, ADHD, and PTSD), autoimmune disease, and neurodivergence.

Presence of Disabilities

Q: *Do you have a disability?*



Q: *Which of the following best describes these disabilities?*



*Only displaying statewide sample due to insufficient sample size within regions.

Source: RRC

TOURISM STRATEGIES

As Travel Oregon continues their work on the 10-year strategic vision for tourism adopted in June 2022, these survey findings will play a crucial role in shaping strategic priorities for Travel Oregon and its regional partners. These insights will be a vital source of information in guiding Travel Oregon and RDMOs in funding and program decisions across key areas including marketing, grants, tourism-related infrastructure, and visitor management, ensuring alignment with the broader vision for sustainable tourism development in the state.

Respondents were asked to characterize their satisfaction with the general direction of tourism development in Oregon.

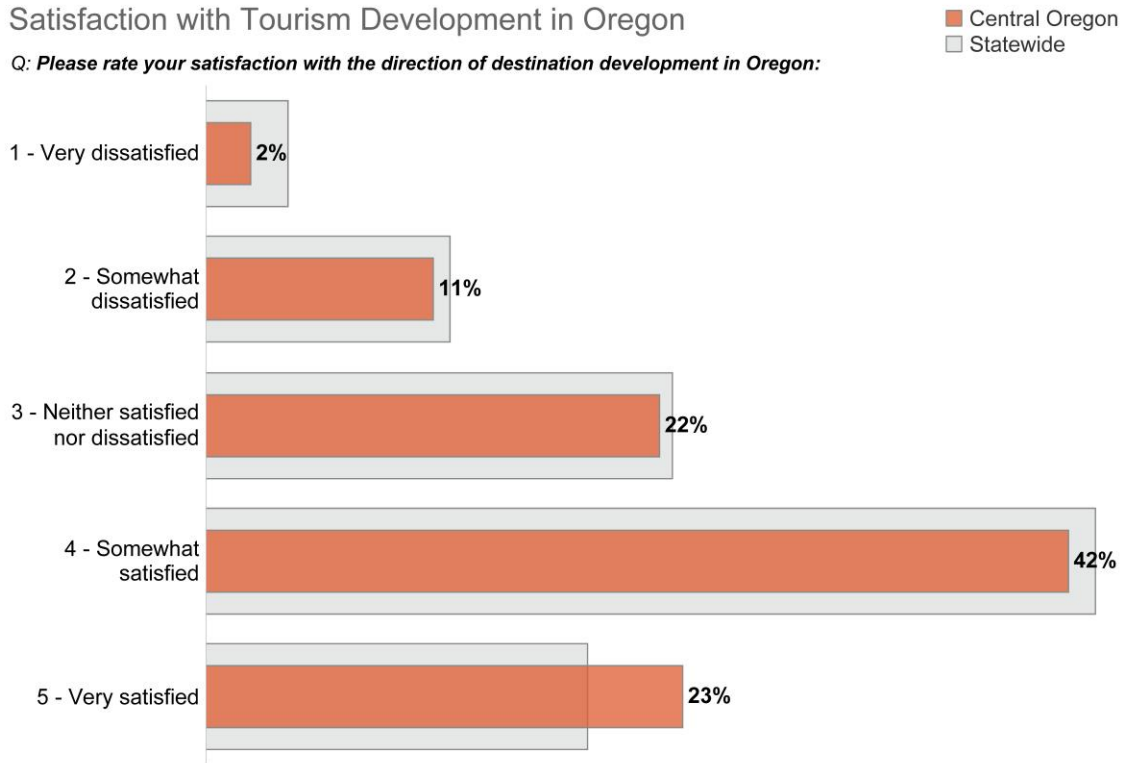
The following definition was provided to survey respondents:

"Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets."

Statewide, 62% of respondents were satisfied with the direction of tourism development in Oregon (selected 4 or 5 on a five-point scale), while 16% were unsatisfied (selected 1 or 2). Twenty-three percent were neutral (selected 3, neither unsatisfied nor satisfied). In Central Oregon, 65% were satisfied, 13% were unsatisfied, and 22% were neither unsatisfied nor satisfied. The average among respondents in Central Oregon was higher (3.7) than the average among respondents statewide (3.6). Overall, statewide satisfaction has increased since 2023 but remained at an average of 3.7 for Central Oregon.

Satisfaction with Tourism Development in Oregon

Q: Please rate your satisfaction with the direction of destination development in Oregon:



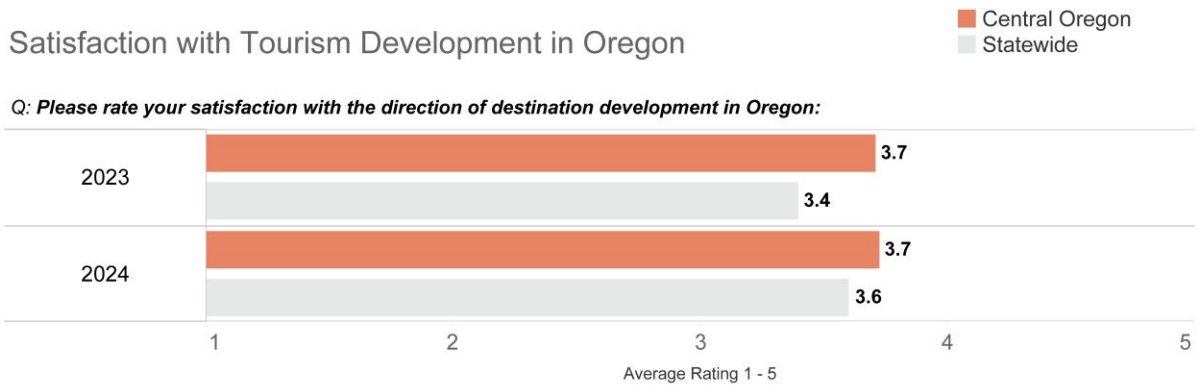
Note: "Destination Development" refers to overall tourism development in Oregon. The following definition was provided to survey respondents: "Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets."

Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Satisfaction with Tourism Development in Oregon

Q: Please rate your satisfaction with the direction of destination development in Oregon:



Note: "Destination Development" refers to overall tourism development in Oregon. The following definition was provided to survey respondents: "Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing and celebrating local assets."

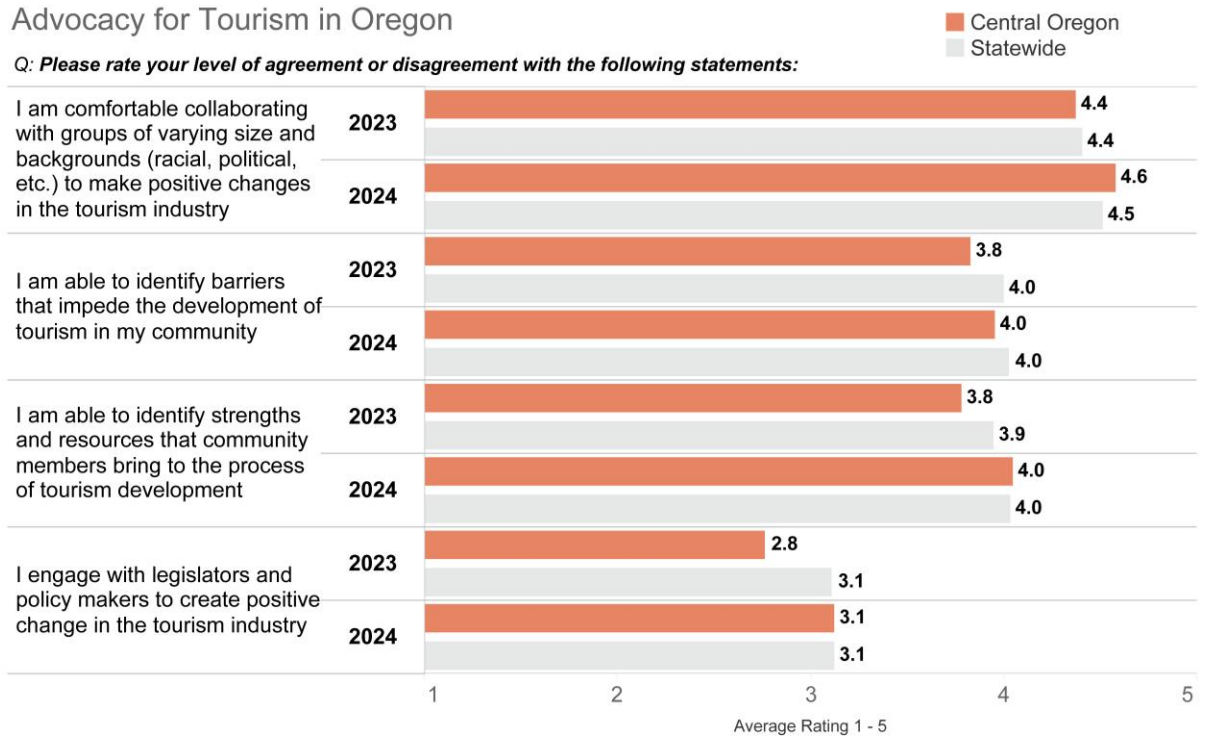
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Respondents were asked to rate their agreement with four statements that measured their advocacy for tourism. The statement with the greatest support among the statewide sample and respondents in Central Oregon was, "I am comfortable collaborating with groups of varying size and backgrounds (racial, political, etc.) to make positive changes in the tourism industry," with an average rating of 4.5 on a five-point scale (statewide) and 4.6 among respondents in Central Oregon. Respondents, both statewide and in Central Oregon, agreed least with the statement, "I engage with legislators and policy makers to create positive change in the tourism industry," with an average rating of 3.1 for both groups.

Advocacy for Tourism in Oregon

Q: Please rate your level of agreement or disagreement with the following statements:

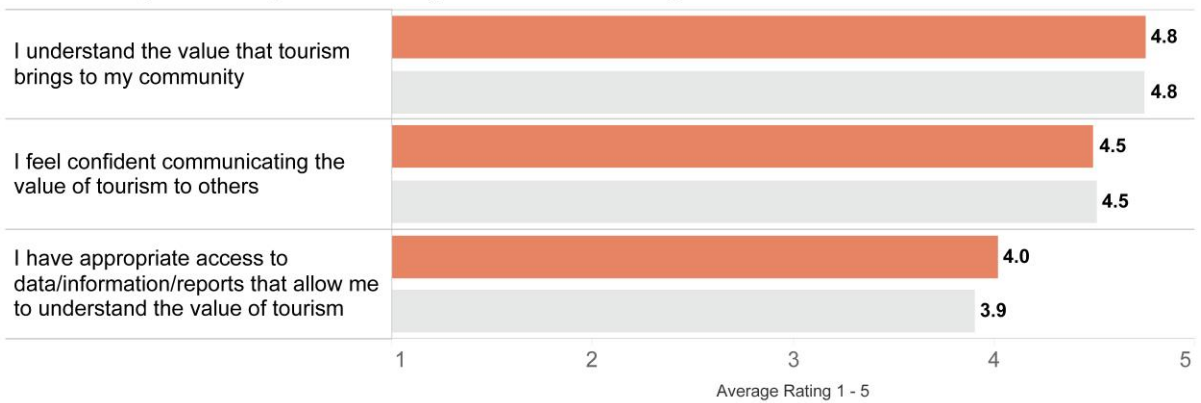


Source: RRC

Respondents were also asked to rate their level of agreement with three statements that measured perceived value of tourism. Average rating of the value of tourism differed only slightly between the statewide sample and Central Oregon. Both rated all three statements highly, with "I have appropriate access to data/information/reports that allow me to understand the value of tourism" the lowest rated at 3.9 statewide and at 4.0 for Central Oregon. The highest rated statement reflects an understanding that tourism benefits Oregon as a whole, at a 4.8 on a five-point scale: "I understand the value that tourism brings to my community" was rated equally high in both samples.

Value of Tourism in Oregon

Q: Please rate your level of agreement or disagreement with the following statements:



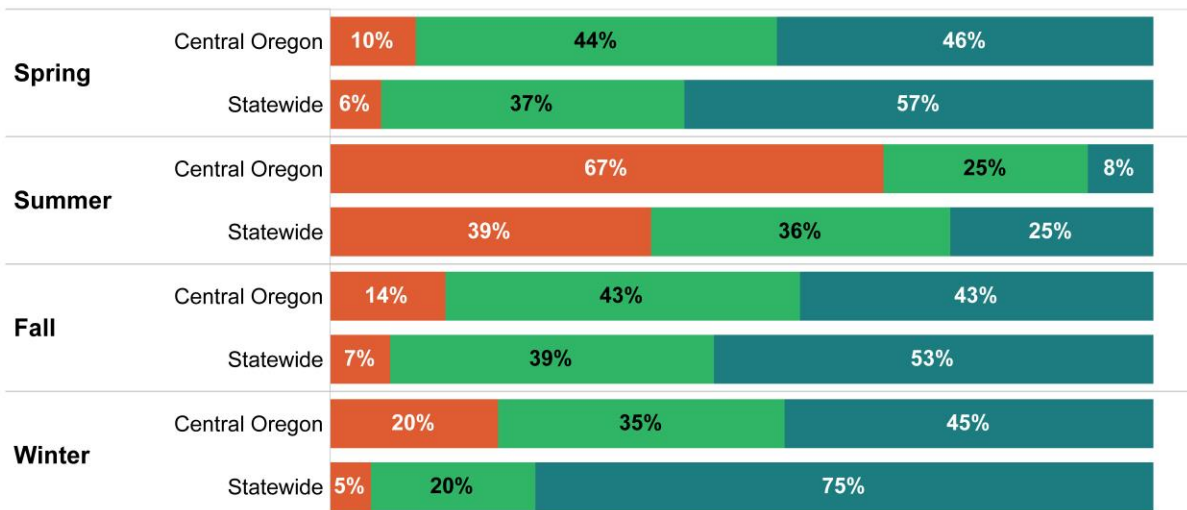
Source: RRC

Respondents were asked to characterize the number of visitors their community receives during each of the four seasons. Statewide, 6% of respondents said there were too many visitors in the spring, followed by 39% in summer, 7% in fall, and 5% in winter. Compared to the statewide sample, a higher proportion of respondents in Central Oregon indicated that there are too many visitors in the summer (67%) and too many visitors in the winter (20%). Across all seasons, respondents in Central Oregon were less likely to say that they could use more visitation. Compared to 2023 results, Central Oregon respondents were more likely to indicate that their community was "very crowded" in all seasons with summer jumping from 42% saying very crowded in 2023 to 67% in 2024.

Visitation Levels by Season

■ We could use more visitation
■ Just the right amount
■ Very crowded

Q: During each season, please select how you would describe the level of visitation in your community as it relates to tourism:

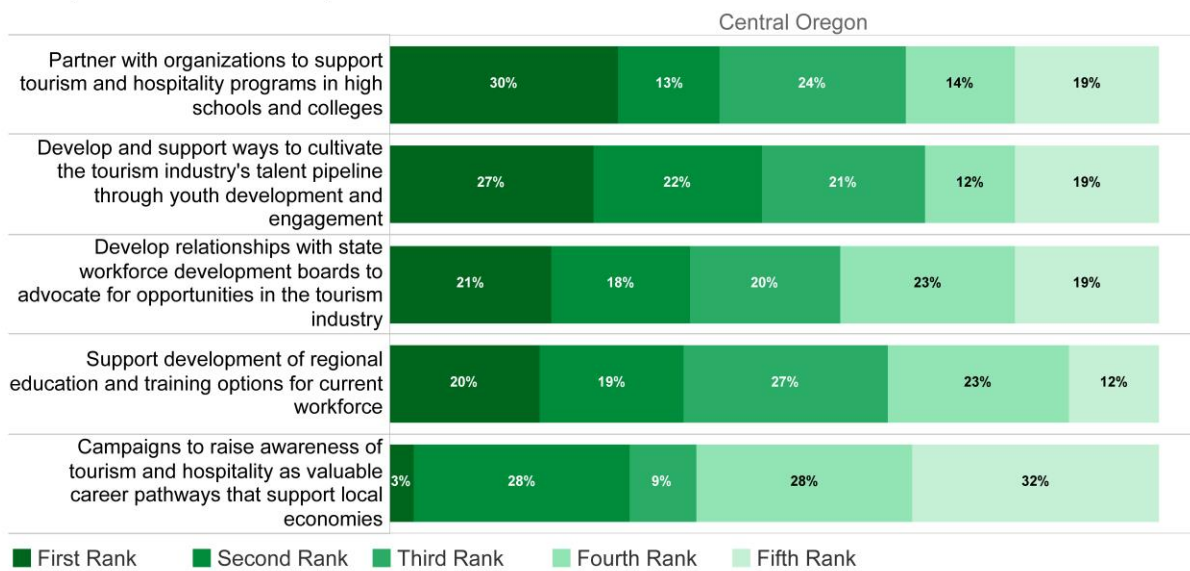


Source: RRC

Respondents were asked to rank, from highest to lowest priority, various educational and career opportunities designed to help develop, attract, and retain industry workforce. Central Oregon respondents placed "Partner with organizations to support tourism and hospitality programs in high schools and colleges" as their top priority, with 30% ranking it first among the five options. The next top-ranked priority for Central Oregon was "Develop and support ways to cultivate the tourism industry's talent pipeline through youth development and engagement" at 27%.

Educational and Career Opportunities (Regional)

Q: Please rank (from highest priority to lowest priority) the following educational and career opportunities designed to help develop, attract and retain industry workforce.



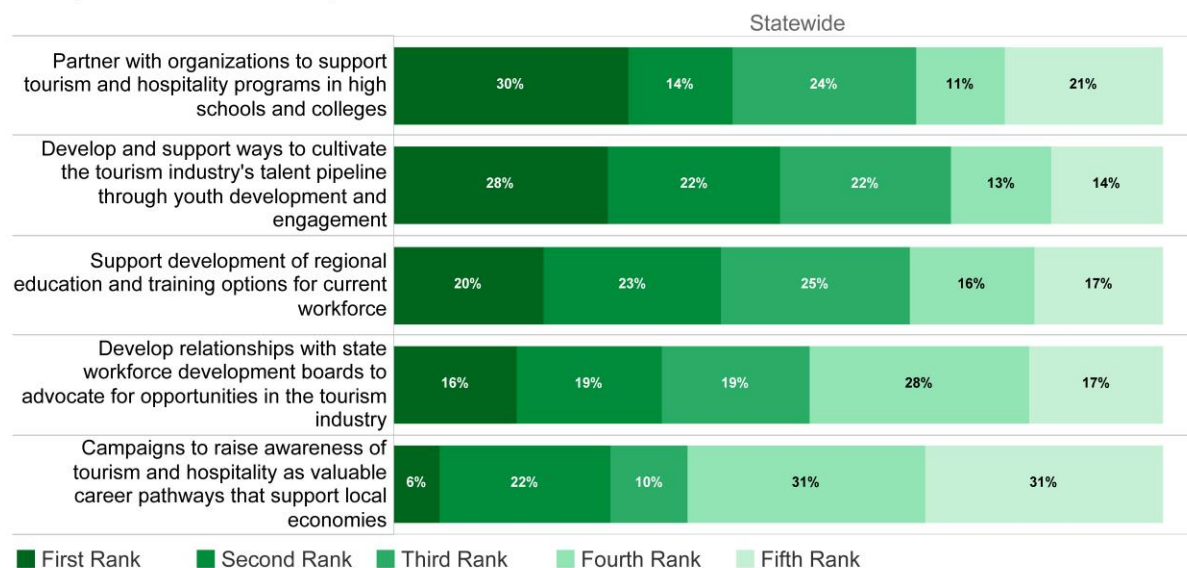
Note: Responses sorted in descending order by "First Rank".

Source: RRC

The statewide sample ranked "Partner with organizations to support tourism and hospitality programs in high schools and colleges" and "Develop and support ways to cultivate the tourism industry's talent pipeline through youth development and engagement" as their first-ranked priorities at 30% and 28%, respectively.

Educational and Career Opportunities (Statewide)

Q: Please rank (from highest priority to lowest priority) the following educational and career opportunities designed to help develop, attract and retain industry workforce.



Note: Responses sorted in descending order by "First Rank".

Source: RRC

AREAS OF FOCUS

The top areas that the statewide sample said their community needs to focus on to improve the resident and visitor experience were public infrastructure (37%), destination marketing and promotion (21%), downtown development (21%), and outdoor recreation opportunities (19%). In comparison, Central Oregon respondents identified a different set of priorities. Central Oregon identified land management/stewardship (34%); public infrastructure (32%); being a welcoming destination for Black, Indigenous, people of color, LGBTQIA2S+ community (24%); and transportation services (20%); and transportation services (20%).

Areas of Focus

Central Oregon
Statewide

Q: Please identify three areas that your community needs to focus on to improve the resident and visitor experience. (Select up to three)



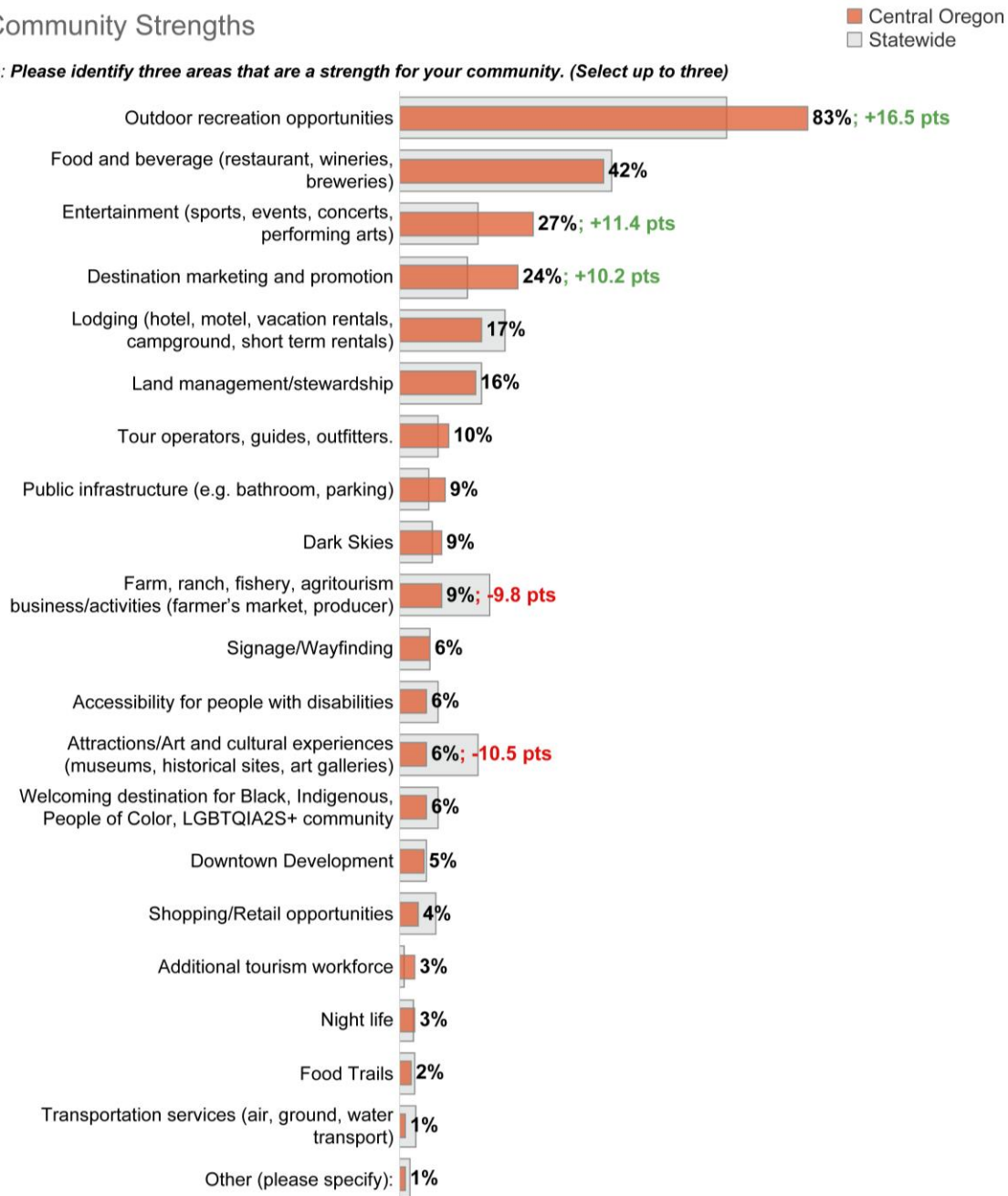
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Using the same set of answer options to those immediately above, the following figure portrays areas that respondents felt are strengths in their community. The top three areas that respondents from Central Oregon consider as strengths in their community are outdoor recreation opportunities (83%), food and beverage (42%), and entertainment, (27%). In comparison to the statewide responses, respondents in the Central Oregon region were more likely to identify outdoor recreation opportunities, events and/or entertainment and destination marketing and promotion as strengths and were less likely to identify attractions/art and cultural experiences and agritourism as strengths.

Community Strengths

Q: Please identify three areas that are a strength for your community. (Select up to three)



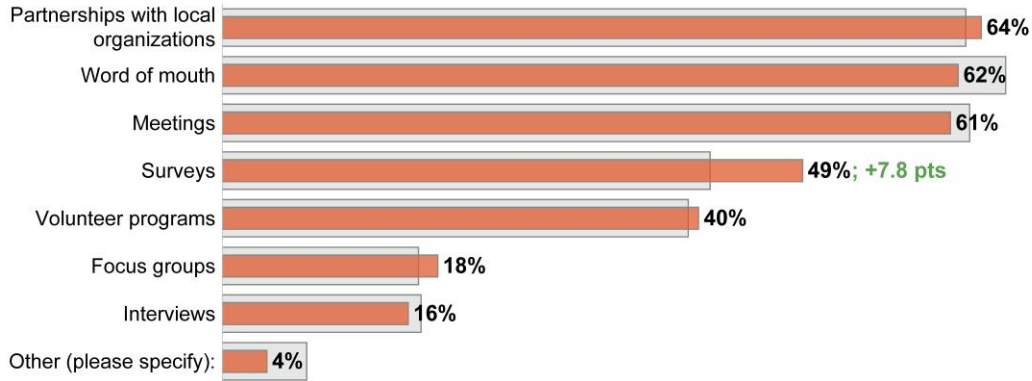
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

When communicating and engaging with the local community, Central Oregon is largely consistent with the statewide sample, partnering with local organizations (64%), using word of mouth (62%), and meetings (61%) to reach out to the community. In comparison to the statewide responses, respondents in the Central Oregon region were more likely to use surveys when engaging the local community.

Local Community Engagement

Q: *What methods have you used to engage with your local communities in the past 12 months?*



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

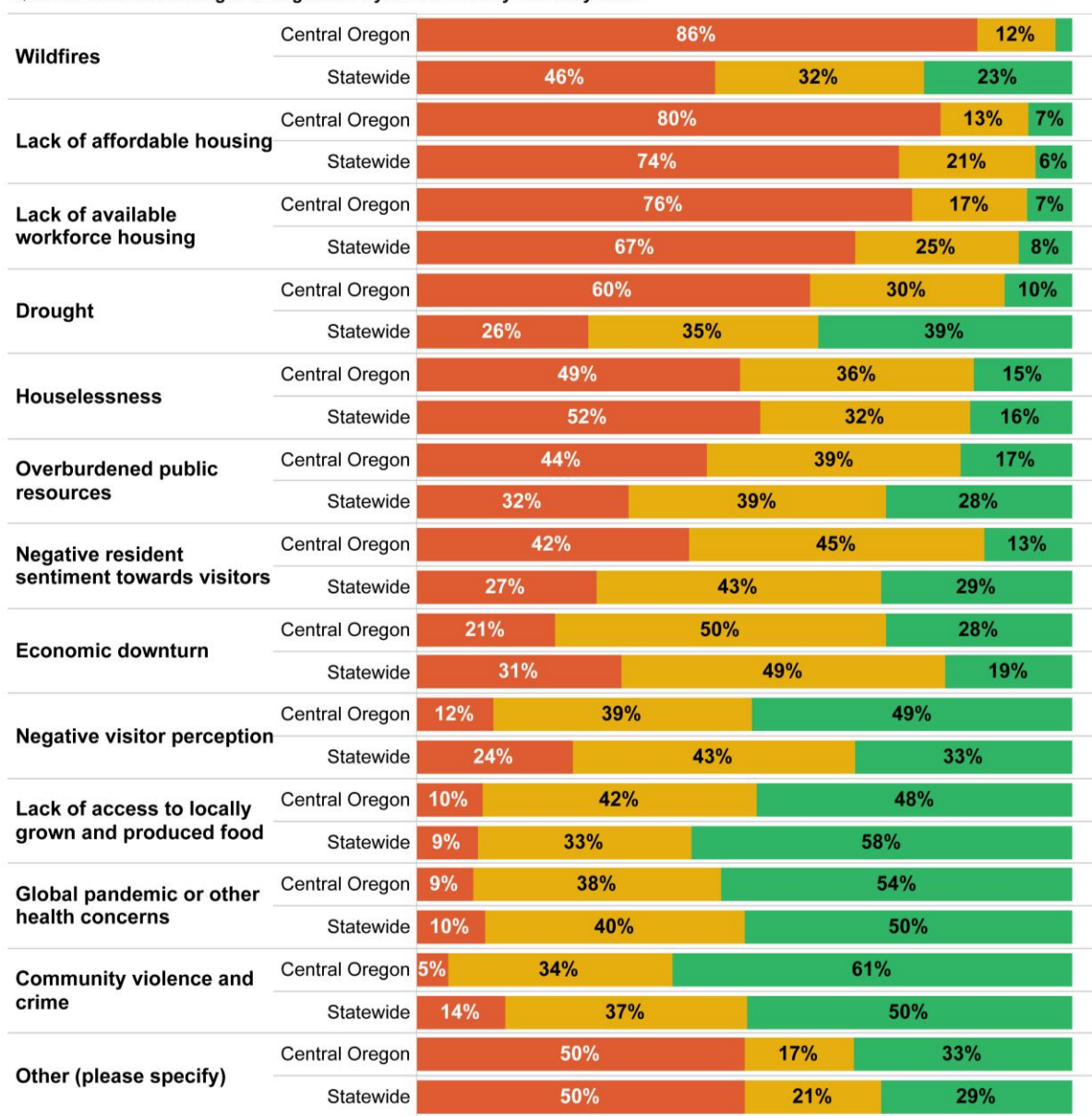
Source: RRC

The survey asked respondents to rate the challenges the community currently faces, and the level of risk associated with each challenge. The top three challenges statewide were identified by respondents as a lack of affordable housing (74%; "high risk"), a lack available workforce housing (67%), and houselessness (52%). Much of the response from Central Oregon identified similar challenges. While lack of available workforce housing (76%) and lack of affordable housing (80%) were in line with statewide results, nearly twice as many respondents in the Central Oregon sample cited wildfires (86%) as a high-risk challenge compared to only 46% in the statewide sample.

Risks to Tourism in Your Community

Q: Which of the following challenges does your community currently face?

Response
■ Low risk
■ Medium risk
■ High risk



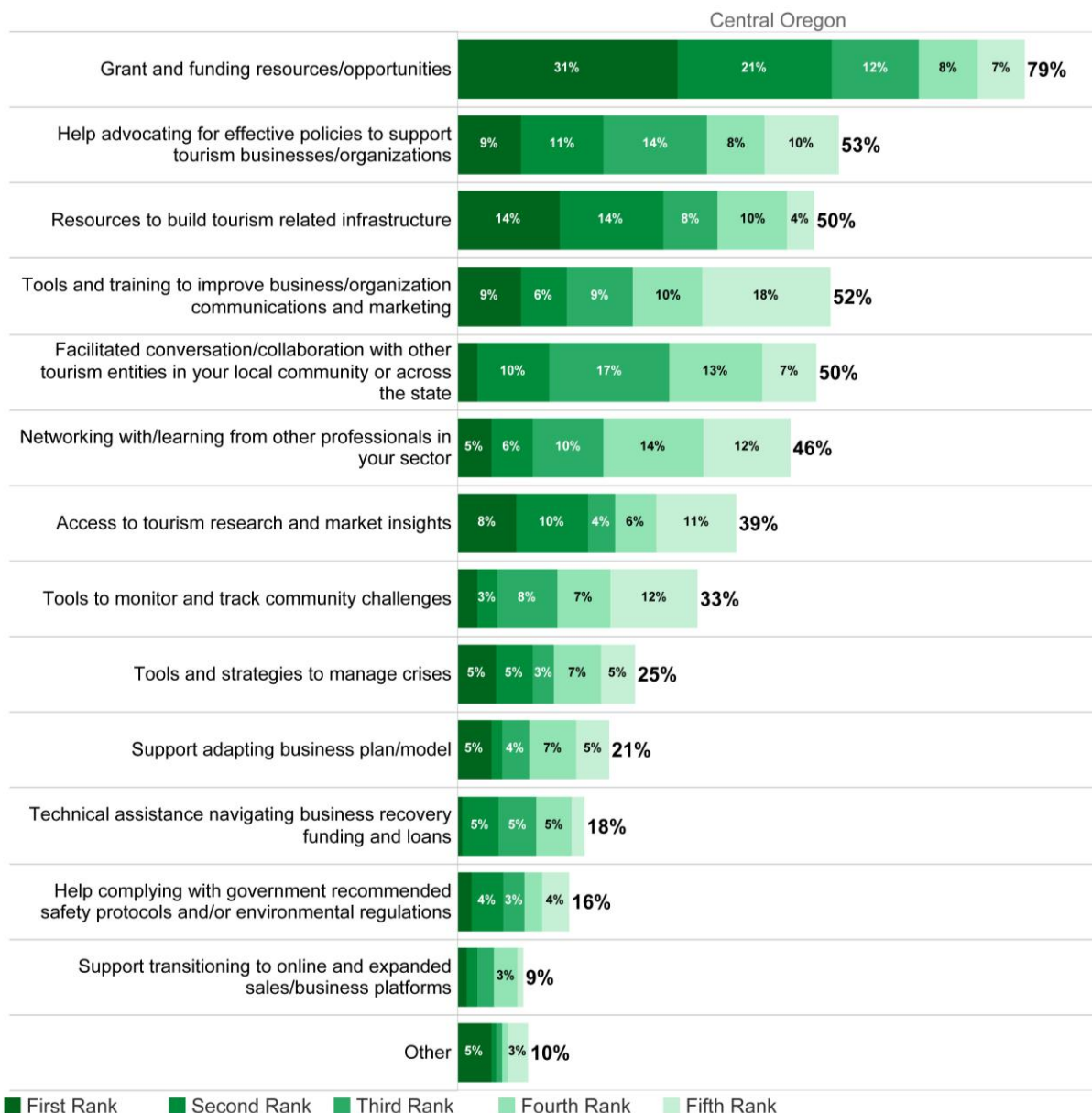
Note: Categories sorted in descending order by the percent of regional respondents selecting "High risk".

Source: RRC

The highest rated strategy statewide and in Central Oregon was grant and funding resources/opportunities (72% and 79%, respectively, identified this among their top five resources or programs). Help advocating for effective policies to support tourism business/organization (53%) and tools and training to improve business/organization communications and marketing (52%) were among the next highest rated for Central Oregon. The resources or programs that were identified as the lowest priority for Central Oregon were support transitioning to online and expanded sales/business platforms (9%) and help complying with government-recommended safety protocols and/or environmental regulations (16%).

Resources & Programs (Regional)

Q: Which of the following resources or programs would best assist your business/organization or community in the face of the challenges identified above?



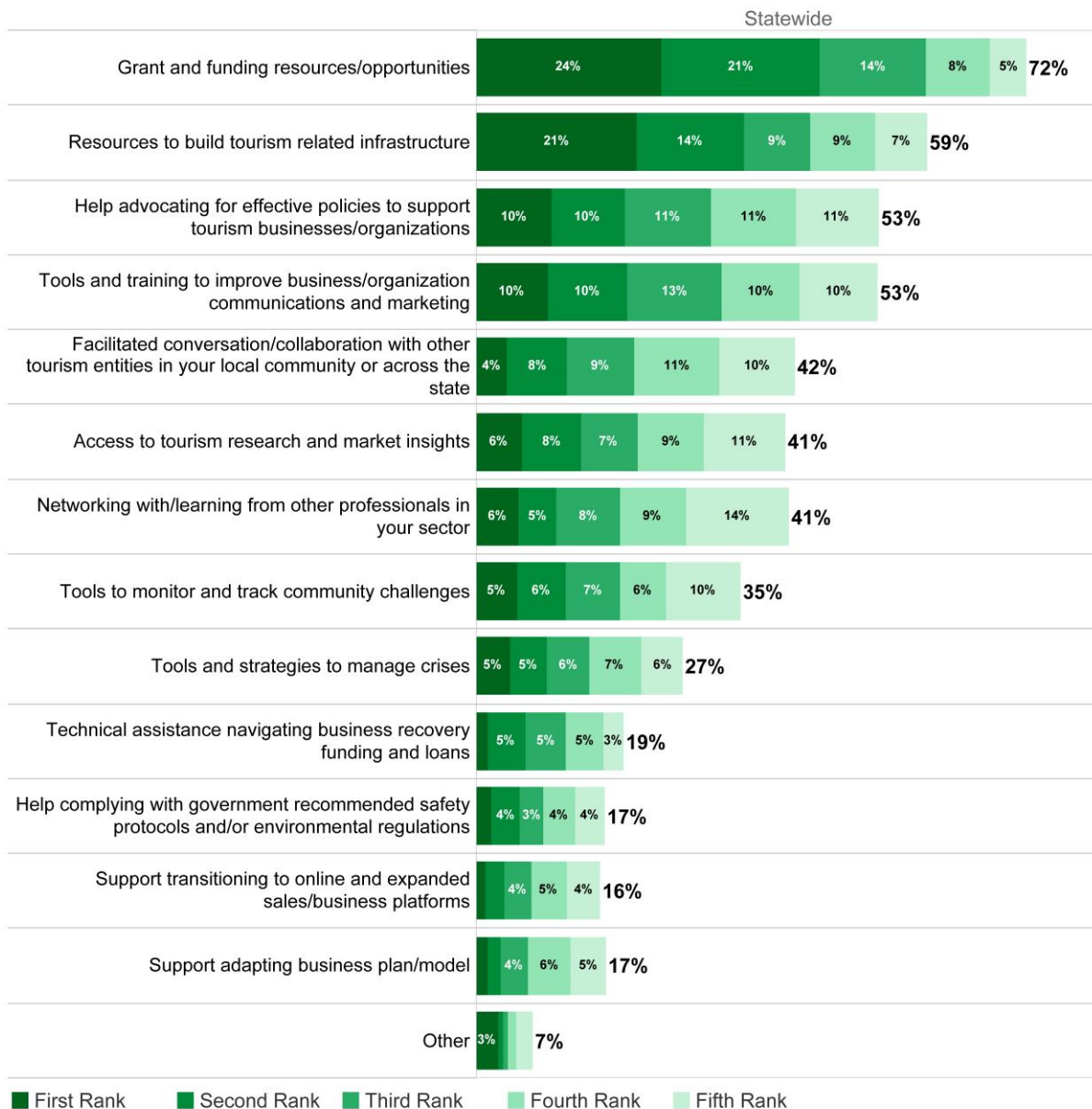
Note: Responses were recorded for the top five resources or programs respondents identified, with the sum of these five choices noted on the far right.

Source: RRC

Across the statewide sample, grant and funding resources/opportunities was the highest rated, with 72% of respondents identifying this among their top five resources or programs. Following were resources to build tourism-related infrastructure (59%), help advocating for effective policies to support tourism businesses/organizations (53%), and tools and training to improve business/organizations' communications and marketing (53%).

Resources & Programs (Statewide)

Q: Which of the following resources or programs would best assist your business/organization or community in the face of the challenges identified above?



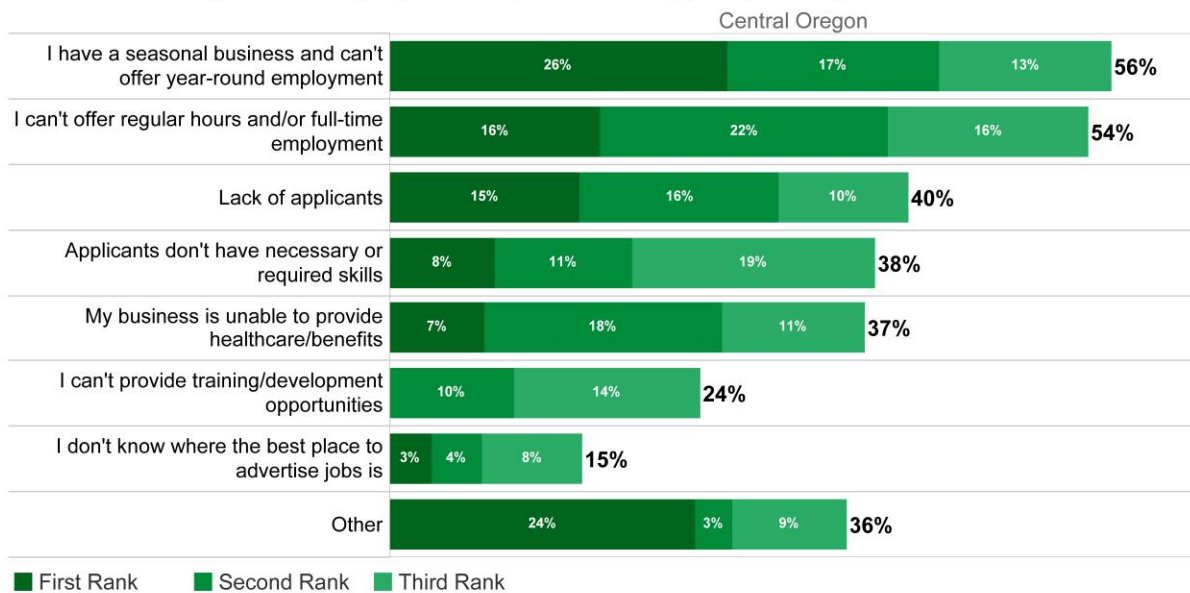
Note: Responses were recorded for the top five resources or programs respondents identified, with the sum of these five choices noted on the far right.

Source: RRC

Respondents were asked to identify the three greatest challenges they faced in attracting and/or retaining tourism workforce in the area. More than half of Central Oregon respondents ranked "I have a seasonal business and can't offer year-round employment" (56%) and "I can't offer regular hours and/or full-time employment" (54%) among their top three challenges in the area. The lowest rated challenge by Central Oregon was "I don't know where the best place to advertise jobs is" at 15%. Examples of challenges related to workforce housing mentioned in the "other" category primarily include affordable/lack of housing and lack of ability to pay competitive salaries.

Tourism Workforce Challenges (Regional)

Q: *What are the three greatest challenges you currently face in attracting (and/or) retaining tourism workforce?*



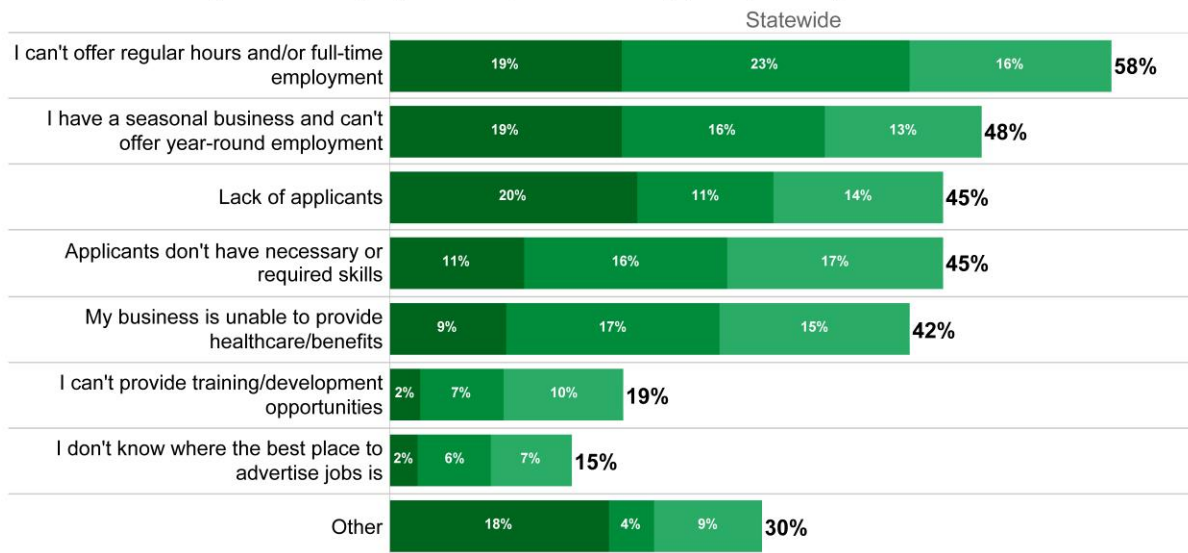
Note: Responses were recorded for the top three challenges respondents identified, with the sum of these three choices noted on the far right.

Source: RRC

The statewide sample was similar to regional findings, with the greatest share of respondents ranking "I can't offer regular hours and/or full-time employment" (58%) and "I have a seasonal business and can't offer year-round employment" (48%) among their greatest challenges. Similarly, "I don't know where the best place to advertise jobs is" (15%) was seen as relatively minimal in terms of tourism workforce challenges.

Tourism Workforce Challenges (Statewide)

Q: What are the three greatest challenges you currently face in attracting (and/or) retaining tourism workforce?



■ First Rank ■ Second Rank ■ Third Rank

Note: Responses were recorded for the top three challenges respondents identified, with the sum of these three choices noted on the far right.

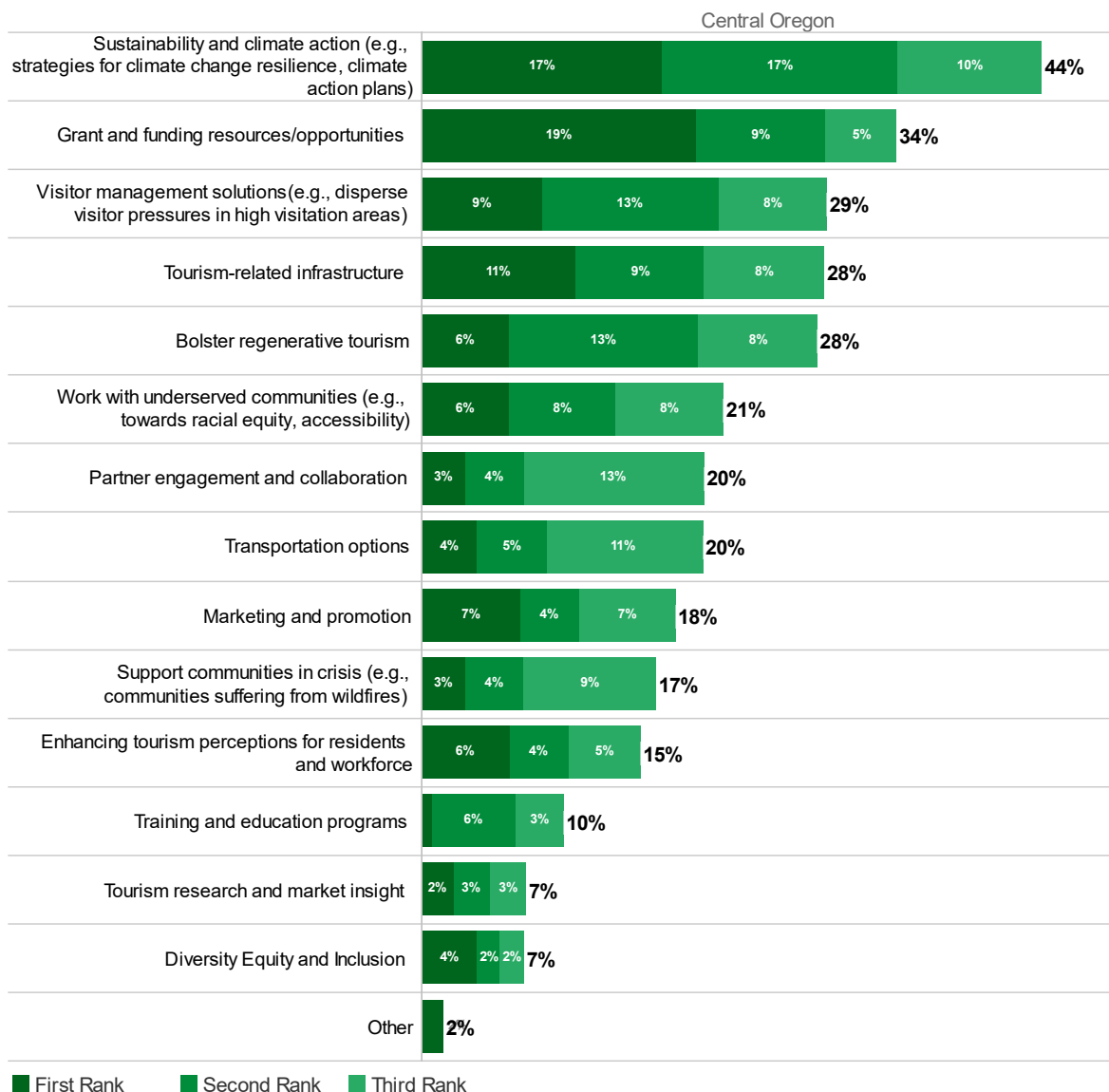
Source: RRC

As in prior iterations of the Oregon Tourism Industry Partner Survey, respondents were asked to identify the three areas that should be emphasized for tourism planning over the next 2-5 years.

Central Oregon respondents identified sustainability and climate action as the top priority, with 44% of respondents identifying it among their top three priorities. Grant and funding resources/opportunities was the second most identified priority (34%), followed by visitor management solutions (29%). Compared to 2023, marketing and promotion fell from 42% to 18%, the most drastic change. Tourism-related infrastructure also dropped from 53% to 35% in 2024, but remains a top priority.

Long-Term Tourism Planning (Regional)

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years. (Rank top three priorities within this list)



Note: Responses were recorded for the top three plans respondents identified, with the sum of these three choices noted on the far right.

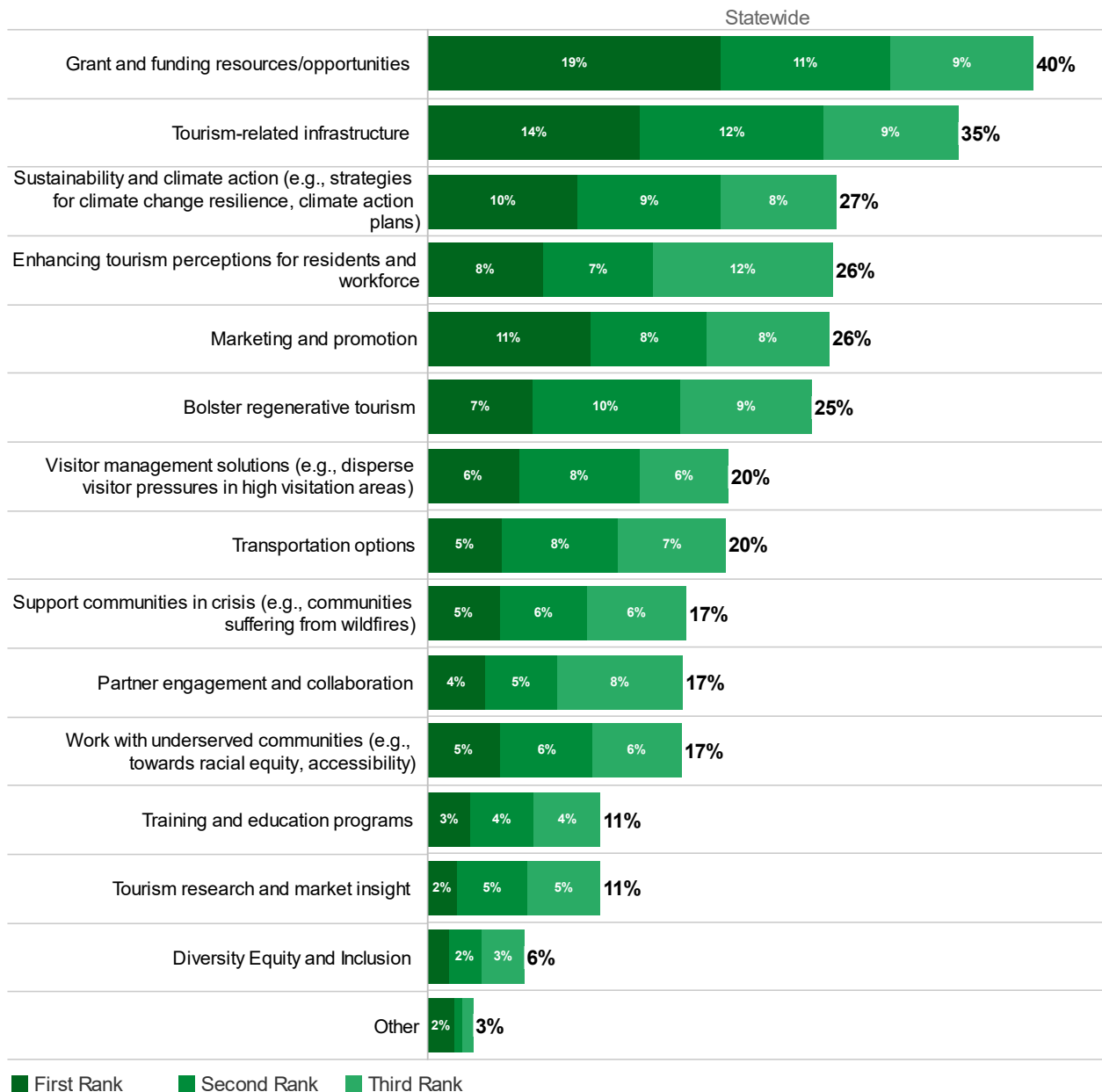
Source: RRC

The top priorities identified in the statewide sample were grant and funding resources/opportunities (40%), tourism-related infrastructure (35%), and sustainability and climate action (27%).

Relative to 2023, many of the same areas of focus were among the top priorities for respondents, with the exception of marketing and promotion, which was cited as a priority for 45% of the respondents in 2023 (down to 26% this year).

Long-Term Tourism Planning (Statewide)

Q: Please identify the three areas that you believe should be emphasized for longer-term tourism planning over the next 2 - 5 years. (Rank top three priorities within this list)



Note: Responses were recorded for the top three plans respondents identified, with the sum of these three choices noted on the far right.

Source: RRC

REPRESENTATION OF AND COMMUNICATION WITH UNDERSERVED COMMUNITIES

Historically and currently underserved and under-resourced communities, including Oregonians who identify as:

- Native American, members of Oregon's nine federally recognized tribes, American Indian, Alaska Natives
- Black, African, African American
- Latina, Latino, Latinx, Hispanic
- Asian
- Pacific Islander (including Compact of Free Association Citizens)
- Immigrants, Refugees, Asylum-Seekers, Deferred Status Holders, Temporary Protected Status
- Undocumented, Deferred Action for Childhood Arrivals (DACA), "Dreamers", Non-Immigrant Visa Holders
- Linguistically diverse, English language learners (ELL)
- Economically Disadvantaged
- People with disabilities
- LGBTQIA2S+
- Farmworkers, Migrant Seasonal Workers

Definition provided by State of Oregon

(https://www.oregon.gov/das/Docs/DEI_Action_Plan_2021.pdf)

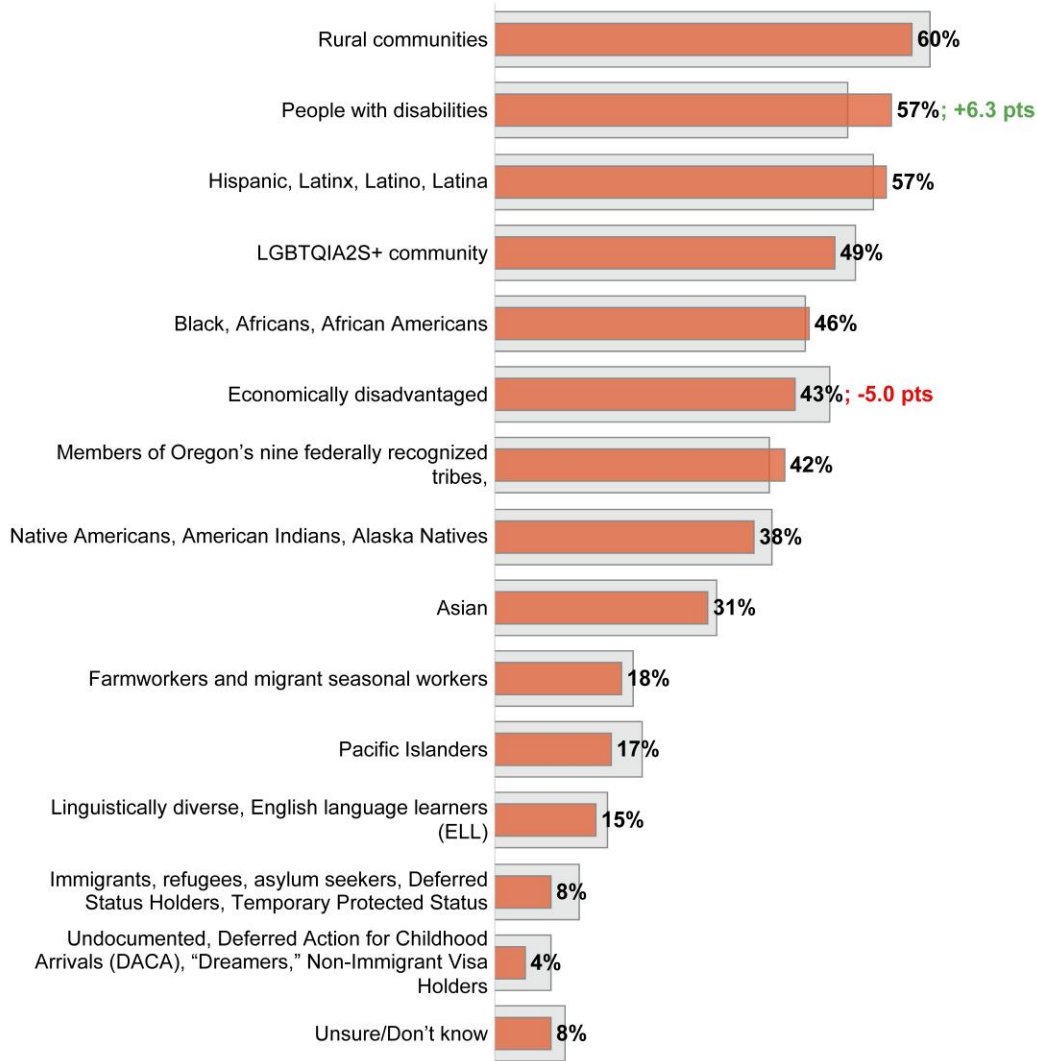
Of those underserved and under-resourced communities, Central Oregon respondents self-reported having the most engagement with rural communities (60%); people with disabilities (57%); Hispanic, Latinx, Latino, Latina (57%); LGBTQIA2S+ (49%); and Black, African, African American (46%).

Conversely, the lowest self-reported underserved and under-resourced communities were undocumented, Deferred Action for Childhood Arrivals (DACA), "Dreamers," non-immigrant visa holders (4%); immigrants, refugees, asylum-seekers, deferred status holders, temporary protected status (8%); and linguistically diverse, English language learners (ELL) (15%).

Engaging with Underserved Communities

Central Oregon
Statewide

Q: Which of the following underserved communities have you engaged with in the past two years?



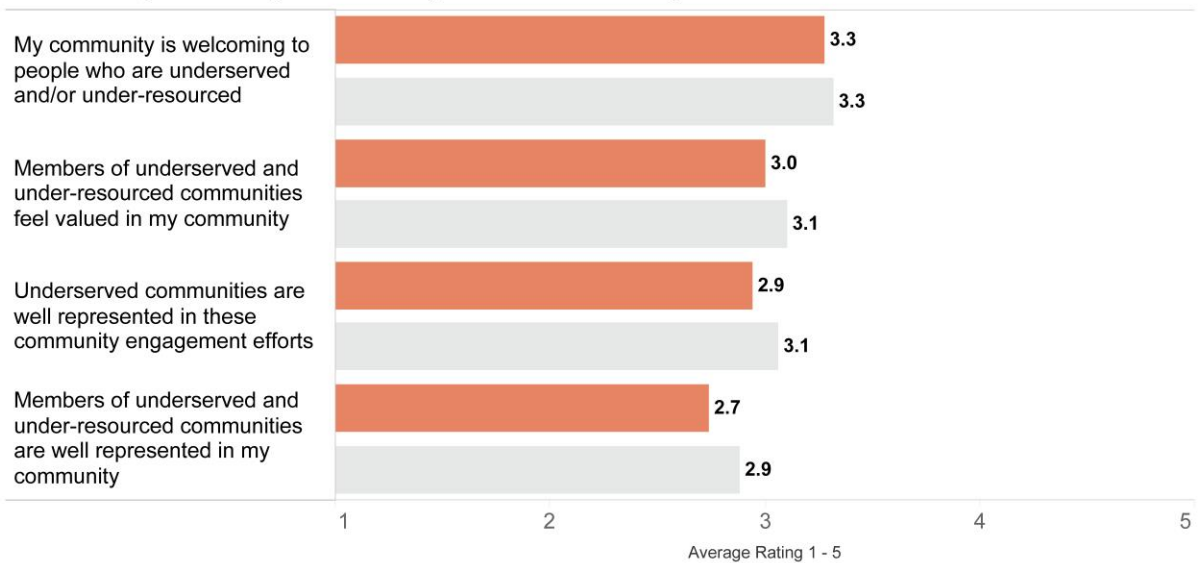
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

Respondents were asked to rate their agreement with four statements that measured their representation of underserved communities in the area. There was little shift observed in the average ratings between Central Oregon and the statewide sample. The highest rated statement for both samples was "My community is welcoming to people who are underserved and/or under-resourced," at 3.3 on a five-point scale. The lowest rated for both samples was the statement "Members of underserved and under-resourced communities are well represented in my community," at an average rating of 2.7 and 2.9 for Central Oregon and the statewide sample, respectively.

Representation of Underserved Communities

Q: Please rate your level of agreement or disagreement with the following statements:

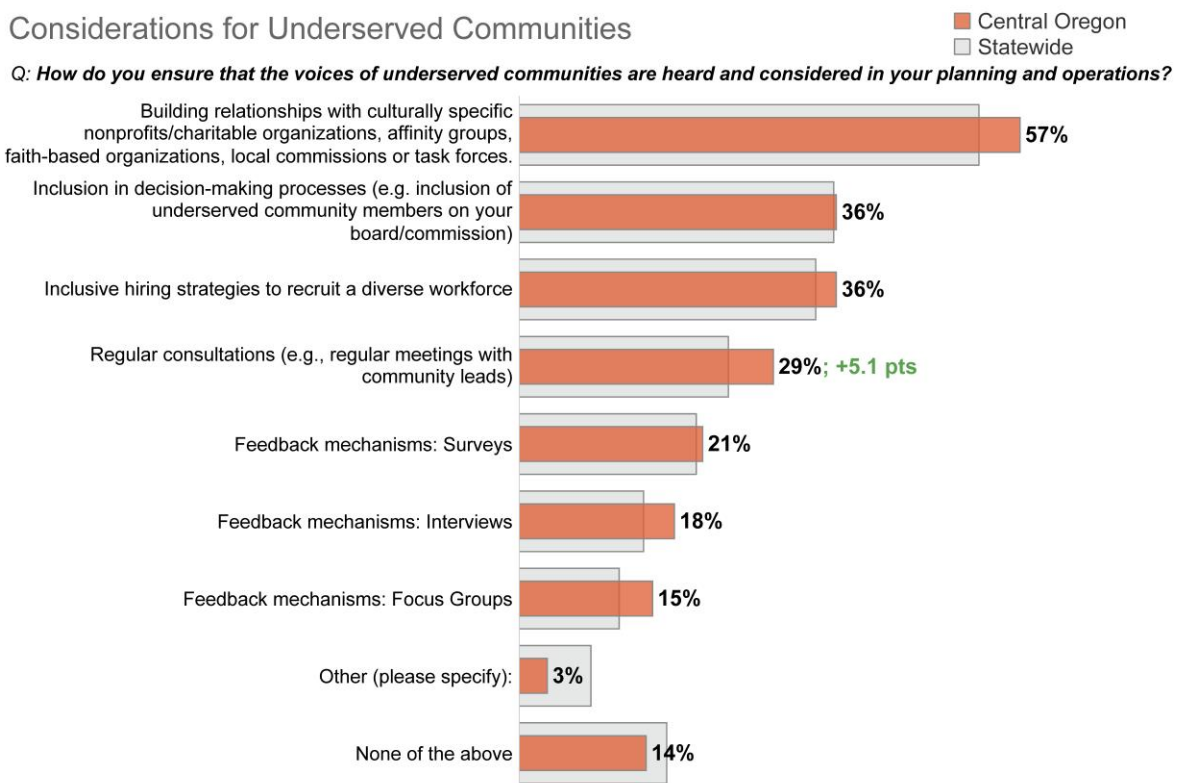


Source: RRC

When asked what considerations respondents make to ensure that the voices of underserved and under-resourced communities are heard, more than half of Central Oregon respondents cited building relationships with culturally specific nonprofits/charitable organizations, affinity groups, faith-based organizations, local commissions or task forces (57%). Just over one-third of Central Oregon respondents also included these communities in the decision-making process (36%) and used inclusive hiring strategies to recruit a diverse workforce (36%).

Responses from Central Oregon were largely in line with the statewide sample apart from using regular consultations, where Central Oregon rated higher than the statewide sample.

Considerations for Underserved Communities



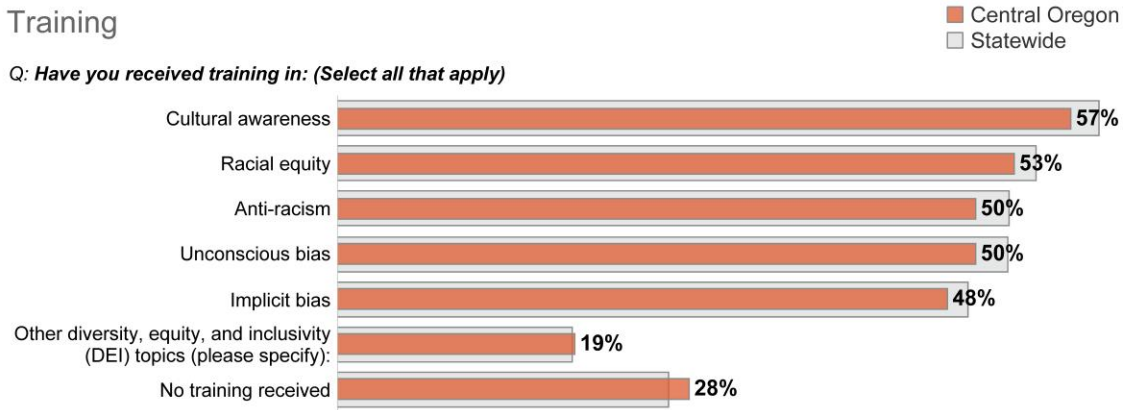
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

A majority of Central Oregon respondents reported having training in cultural awareness (57%), racial equity (53%), anti-racism (50%), and unconscious bias (50%), with most of these trainings provided by their current employer.

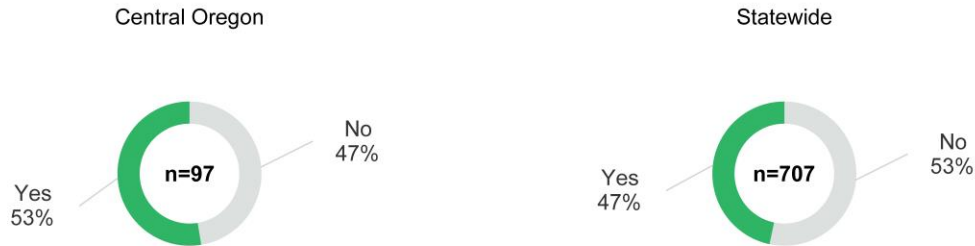
Training

Q: Have you received training in: (Select all that apply)



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Q: Was this training provided by your current employer?

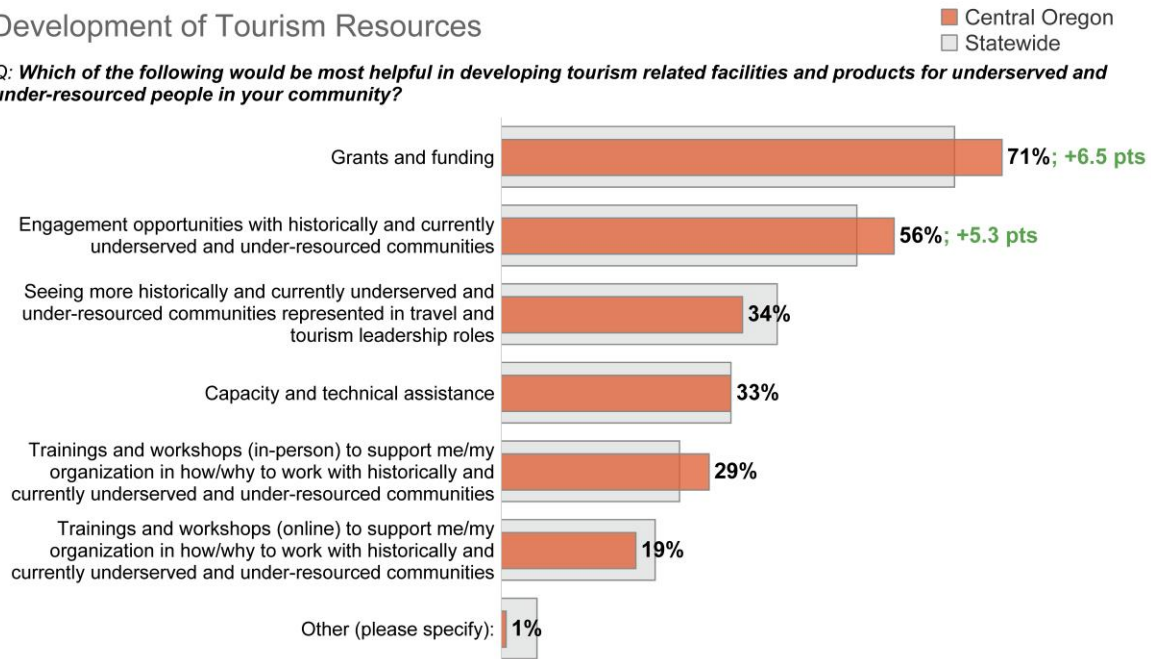


Source: RRC

When asked what type of resources would be most helpful in developing tourism-related facilities and products for underserved and under-resourced people, Central Oregon respondents cited grants and funding (71%) and engagement opportunities with historically and currently underserved and under-resourced communities (56%). Notably, shares of both response options were elevated for Central Oregon compared to the statewide sample.

Development of Tourism Resources

Q: Which of the following would be most helpful in developing tourism related facilities and products for underserved and under-resourced people in your community?



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

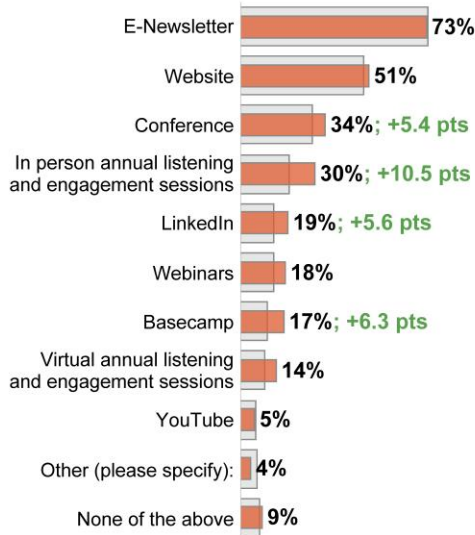
Source: RRC

INDUSTRY ENGAGEMENT AND COMMUNICATIONS

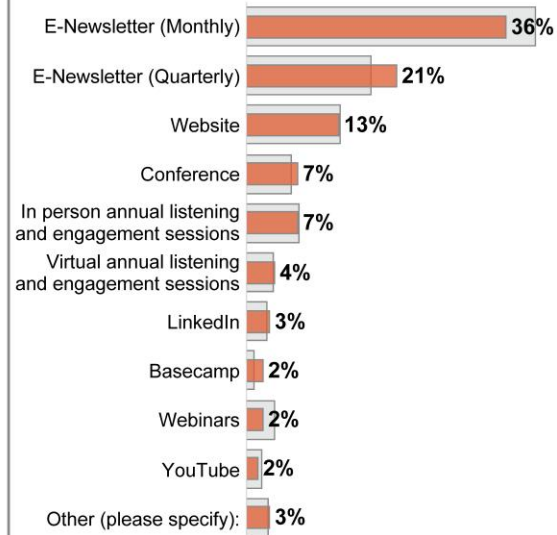
Seventy-three percent of Central Oregon respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter, followed by their website (51%). By a large margin, e-newsletters (monthly or quarterly) are considered the best way for respondents to receive information.

Tourism Communication Methods

Q: How do you currently receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization (RDMO)?



Q: What is the best way for you to receive tourism industry-related information from Travel Oregon and your Regional Destination Management Organization (RDMO)?



Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

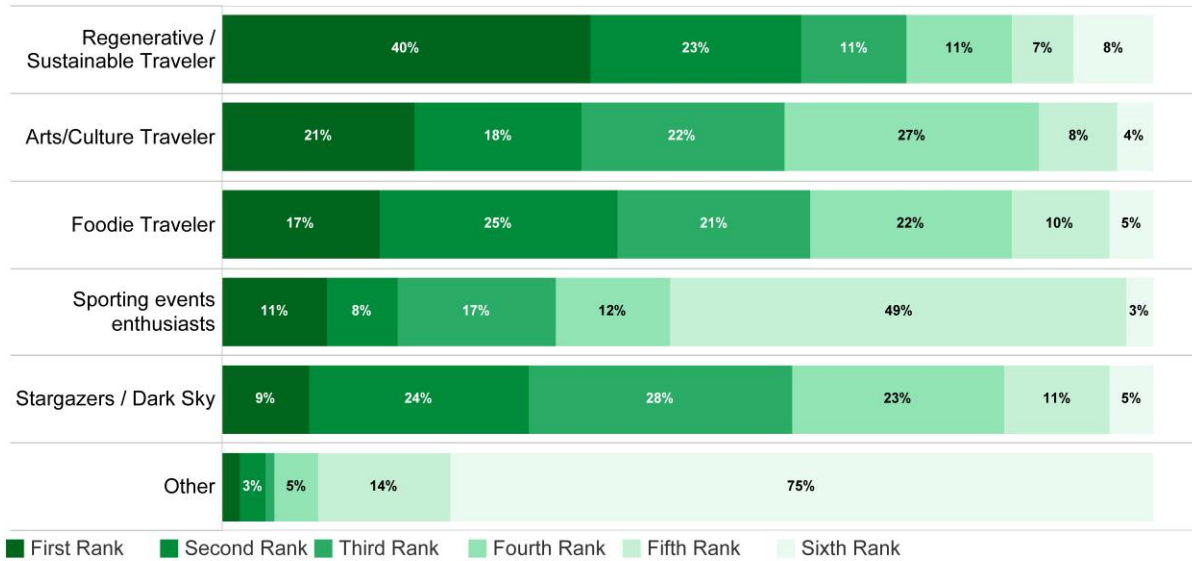
Source: RRC

CENTRAL OREGON QUESTIONS

Each Regional Destination Management Organization (RDMO) had the opportunity to ask a series of custom questions of specific interest to their partners. The findings from these custom questions are presented below. Responses to regional questions that were open-ended are presented in the Open-Ended Response appendix.

Central Oregon - Visitor Type Preferences

Q: The regional DMO, Visit Central Oregon, is committed to attracting new visitors to the region. Please rank these niche travelers in order of who your business would be most interested in attracting to Central Oregon, to least.



Note: Responses sorted in descending order by "First Rank".

Source: RRC

Central Oregon - Regenerative Tourism

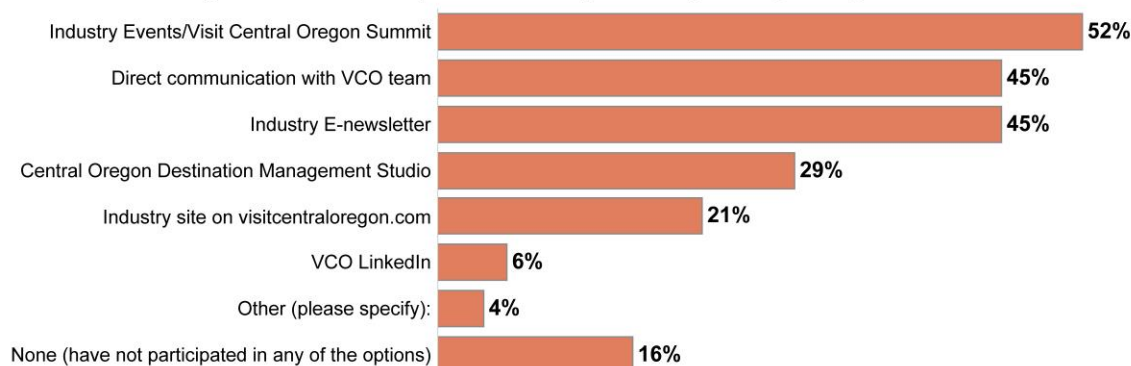
Q: Please rate your level of agreement or disagreement with the following statements (Consider regenerative travel as leaving something better than you found it):

Rating Category	Avg.	n=	1 - Strongly disagree	2 - Somewhat disagree	3 - Neither agree nor disagree	4 - Somewhat agree	5 - Strongly agree
My business is interested in learning more about Leave No Trace/sustainable tourism practices	4.0	106	3%	8%	23%	23%	44%
My business is interested in learning more about how to promote through a Diversity, Equity, Inclusion and Belonging (DEIB) lens	3.8	105	4%	6%	34%	22%	34%
Regenerative Tourism is important to my business	4.1	112	5%	5%	14%	20%	55%

Source: RRC

Central Oregon - Industry Networking Methods

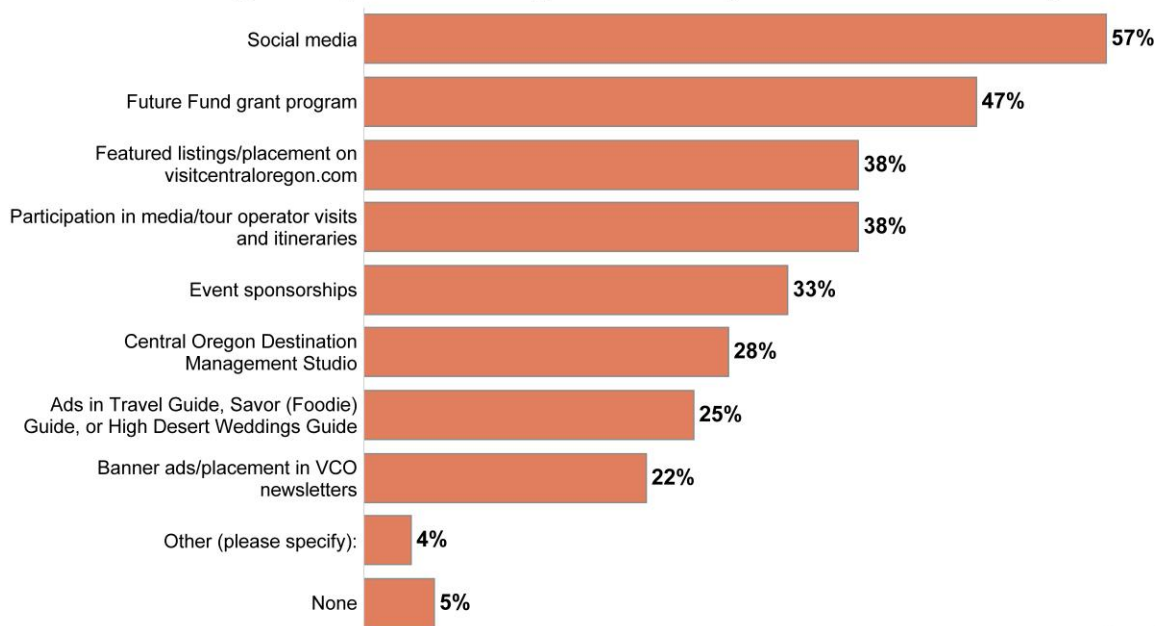
Q: Which of the following has been the most impactful for industry networking and for gathering information?



Source: RRC

Central Oregon - Partnership and Collaborative Interests

Q: Which of the following partnership and collaborative opportunities interest you the most with Visit Central Oregon?



Source: RRC

Central Oregon - Tourism Organization Engagement

Q: Please indicate your level of engagement with each of the following tourism organizations:

Rating Category	Avg.	n=	1 - Not aware of them	2 - Aware but not engaged	3 - Engaged	4 - Very engaged
Your Regional DMO - Visit Central Oregon	2.9	109	6%	28%	36%	31%
Your local Destination Management Organization (DMO) - Visit Bend, Explore Sisters, Explore Prineville	2.8	110	5%	38%	26%	30%
Travel Oregon	2.7	111	2%	46%	36%	16%
Your local business Chamber of Commerce	2.6	110	3%	53%	24%	21%
Other (please specify):	2.8	14	14%	21%	36%	29%

Source: RRC

Central Oregon - Satisfaction with Visit Central Oregon

Q: Please rate your level of agreement or disagreement with the following statements:

Rating Category	Avg.	n=	1 - Strongly disagree	2 - Somewhat disagree	3 - Neither agree nor disagree	4 - Somewhat agree	5 - Strongly agree
Overall, I am engaged with Visit Central Oregon	3.9	111	4%	7%	19%	32%	38%
Overall, I am satisfied with my level of engagement with Visit Central Oregon	3.9	110	2%	11%	24%	23%	41%
Overall, I am satisfied with the strategies of Visit Central Oregon	3.7	108	5%	10%	25%	27%	33%
Overall, I am satisfied with the direction of tourism in Central Oregon	3.7	110	7%	14%	17%	28%	34%

Source: RRC

OPEN-ENDED RESPONSES

The survey resulted in an extensive number of open-ended responses. In addition to open-ended questions asked of all respondents, each region was given the opportunity to ask customized questions to respondents from their region. Responses to the following Central Oregon questions follow:

- *The regional DMO, Visit Central Oregon, is committed to attracting new visitors to the region. Please rank these niche travelers in order of who your business would be most interested in attracting to Central Oregon, to least. If you selected "Other" above, please describe the other niche traveler that you ranked.*
- *Which of the following has been the most impactful for industry networking and for gathering information? Other (please specify)*
- *Which of the following partnership and collaborative opportunities interest you the most with Visit Central Oregon? Other (please specify)*
- *Please indicate your level of engagement with each of the following tourism organizations: Other (please specify)*

Note that responses are presented in the respondents' own words with no editing, spelling, or punctuation changes. The opinions expressed are the respondents' own and do not reflect the opinions of Travel Oregon. All other open-ended responses are viewable in a spreadsheet format or in an online dashboard format with accompanying word clouds and bar charts.

The regional DMO, Visit Central Oregon, is committed to attracting new visitors to the region. Please rank these niche travelers in order of who your business would be most interested in attracting to Central Oregon, to least. If you selected "Other" above, please describe the other niche traveler that you ranked.

Adaptive Adventure Travel

Adventure motorcycle traveler and overland vehicle traveler

Animal lovers

Backcountry and trail riders are being forced out of trails due to unlawful use of bikes and motorized vehicle.....and hunters using motorized vehicles.

Disc golfer

Equestrian

Equestrian activities- trail riding, horse camping, shows/competitions, equine expositions.

Equestrian trail riders.

Families looking for outdoor adventures opportunities

Families, veterans & Retired travelers

Goid

Group/Corporate

International Travelers

Meetings & events- group

N/A

Other- group travel

Outdoor adventurer.

Outdoor enthusiast -fish, hike, bike, snow

Outdoor enthusiasts

outdoor recreation

outdoor recreation enthusiast

Outdoor Recreation Enthusiasts

People in Bend LOVE to get involved and help

Simply a separation that travelers in those other segments are not currently our target demographic nor do we have programs to interest them

Spa

Travelers attracted to Wellness destinations, specifically related to experiencing natural Hot Springs soaking

Travelers with pets

We don't need more travelers. The region is ruined. There is no respect for permanent residents. I don't even go to town anymore except when I have to because of having to fight the entitled crowds. I don't go to art fairs, concerts etc for same reason. Thanks a lot.

Winter recreationist other than downhill skiing (e.g. x-c skiing, snowshoeing)

Which of the following has been the most impactful for industry networking and for gathering information? Other (please specify)

Collaboration through Deschutes Trails Coalition

Explore Lincoln City

Horse clubs

I am part of the RDMO.

Which of the following partnership and collaborative opportunities interest you the most with Visit Central Oregon? Other (please specify)

FAM tours

Group incentives

n/a

Please indicate your level of engagement with each of the following tourism organizations: Other (please specify)

American Indian Native Alaska Tourism Association

Emergency response

Horse clubs preserving trails.

I work with the RDMO.

Land Managers, Trails Coalitions, EDCO/SLED/COAST; Cities/Counties

right in the middle for all of the above! Aware but only slightly engaged,

Visit Central Oregon