2024 OREGON TOURISM INDUSTRY PARTNER SURVEY

SUMMARY OF RESULTS | PORTLAND

March 2025

TRAVEL OREGON

PORTLAND REGION

RRC

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 Portland, 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.

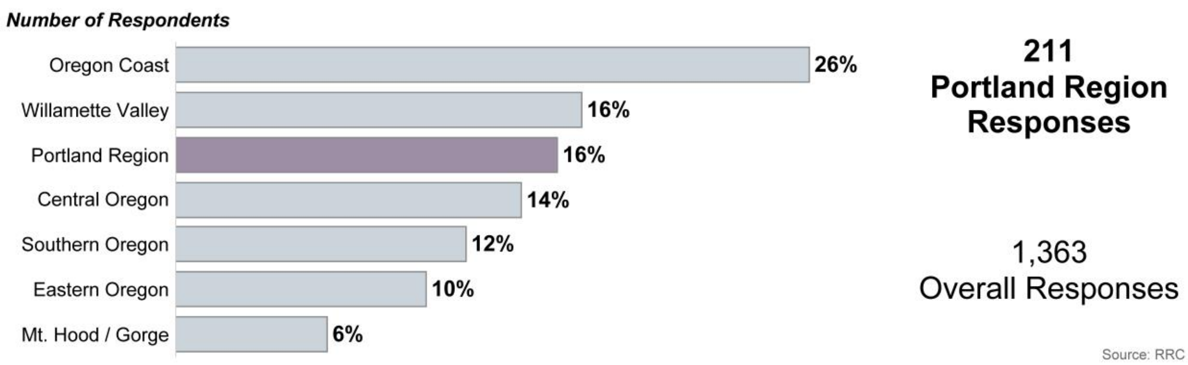
As Travel Oregon embarks on its 10-year strategic vision for tourism in the state, the results of the survey will help inform strategic direction for Travel Oregon and its regional partners to fulfill the strategic vision. The survey will also assist funding and programmatic decisions in marketing, grants, 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 211 valid responses from Portland (up from 115 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 Portland compared to the statewide survey results.



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

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KEY FINDINGS

TOURISM STRATEGIES

DESTINATION DEVELOPMENT

- Satisfaction Levels: 65% of Portland 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 downtown development (44%), public infrastructure (43%), and destination marketing and promotion (27%).
- Perceived Strengths: Respondents highlight food and beverage (68%), outdoor recreation opportunities (43%), and entertainment (25%) as the region's strongest tourism assets.

PLANNING PRIORITIES

- Top 3 Priorities for the Next 2–5 Years:
    1. Grant and funding opportunities (38%)
    2. Marketing and promotion (32%)
    3. Tourism-related infrastructure (31%)
- Trends from 2023: Although the same top three priorities were identified in 2023, marketing and promotion dropped from 55% in 2023 to 32% in 2024.

ADVOCACY

- Collaboration and Engagement: Portland respondents feel confident collaborating with diverse groups to support tourism (4.5 out of 5).
- Legislative Engagement: Engagement with policymakers is low (3.0 out of 5), suggesting a need for stronger advocacy efforts.
- Tourism Perception: Respondents see the value tourism brings to their community (4.8 out of 5), however see room for improvement in access to data and information to better understand this value.

VISITATION AND SEASONALITY

- Need for More Visitation: Higher proportion of respondents in the Portland Region indicated a need for more visitors across all seasons compared to statewide averages.
- Summer Crowding: 26% of Portland respondents in 2024 described their community as "very crowded" in summer which represents a significant increase from 12% in 2023.
- Potential for Redistributing Visitors: Visitor dispersal strategies could help balance tourism demand throughout the year for the region.

STRENGTHS AND CHALLENGES

- Houselessness and Visitor Perception Challenges:
  - 72% cite houselessness as a high-risk challenge compared to 53% statewide, a challenge that has been cited as more high-risk than previously in 2023, at both the regional and statewide level (62% and 42%, respectively).
  - 63% identify negative visitor perception as a major threat—more than double the statewide average (24%).
- Workforce Recruitment Issues:
  - 64% report inconsistent work hours, inability to provide healthcare/benefits (45%), and lack of qualified applicants (45%) as key barriers.

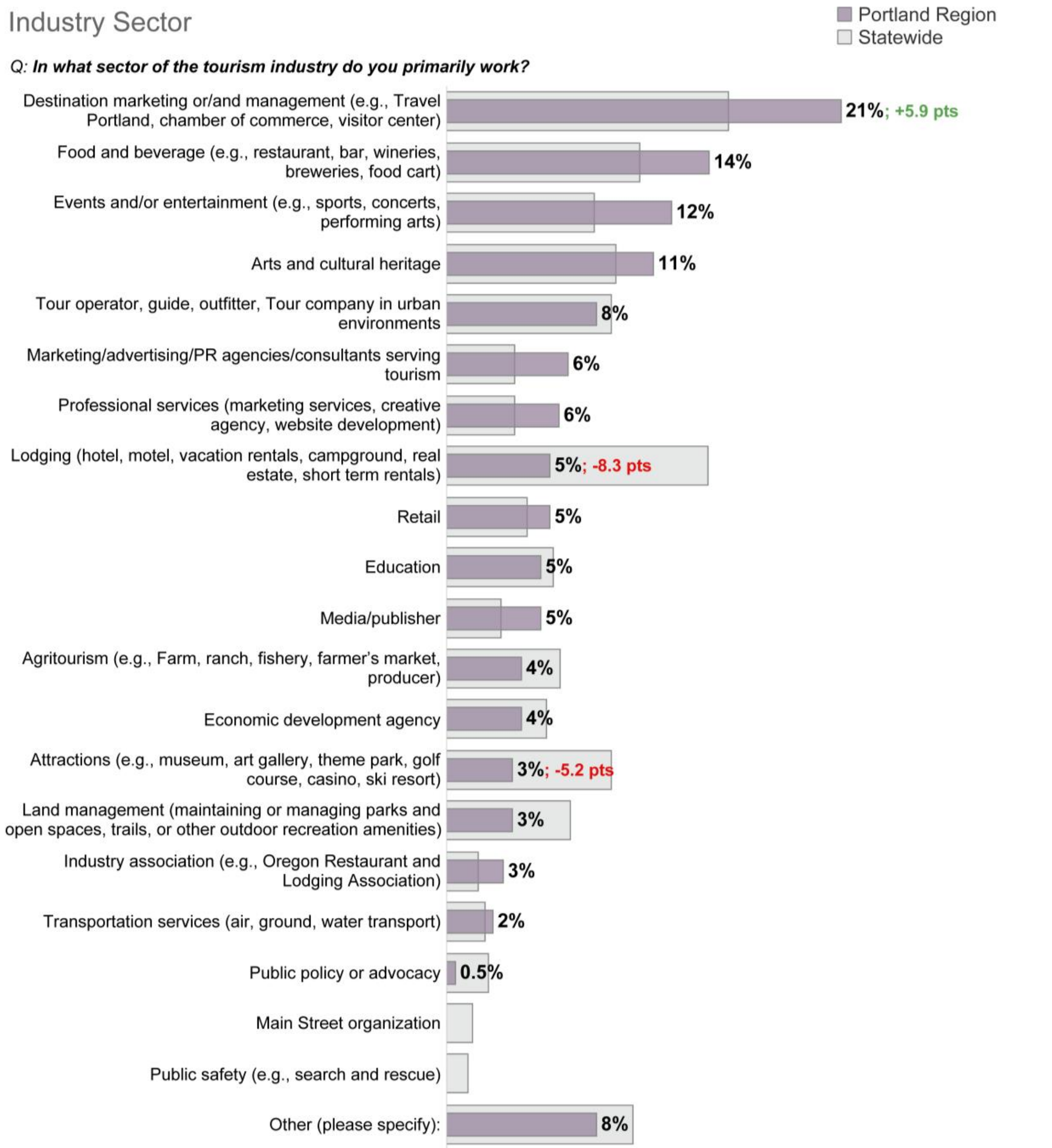
RESOURCES AND PROGRAMS

- Most Needed Resources:
  - Grant and funding opportunities (69%)—slightly lower than the state average (72%).
  - Advocacy support for tourism-related policies (61%).
  - Resources to build tourism-related infrastructure (50%).
- Lowest Priority Resources:
  - Transitioning to online sales (15%) and compliance with government regulations (14%) are less pressing concerns.

Portland respondents show strong satisfaction with tourism development (65%) and prioritize grant and funding opportunities, marketing and promotion, and tourism-related infrastructure for the next 2–5 years. While the region's strengths include food and beverage, outdoor recreation, and entertainment, challenges such as houselessness (72%) and negative visitor perceptions (63%) highlight the need for advocacy support, improved legislative engagement, and strategies to balance seasonal visitation.

RESPONDENT PROFILE

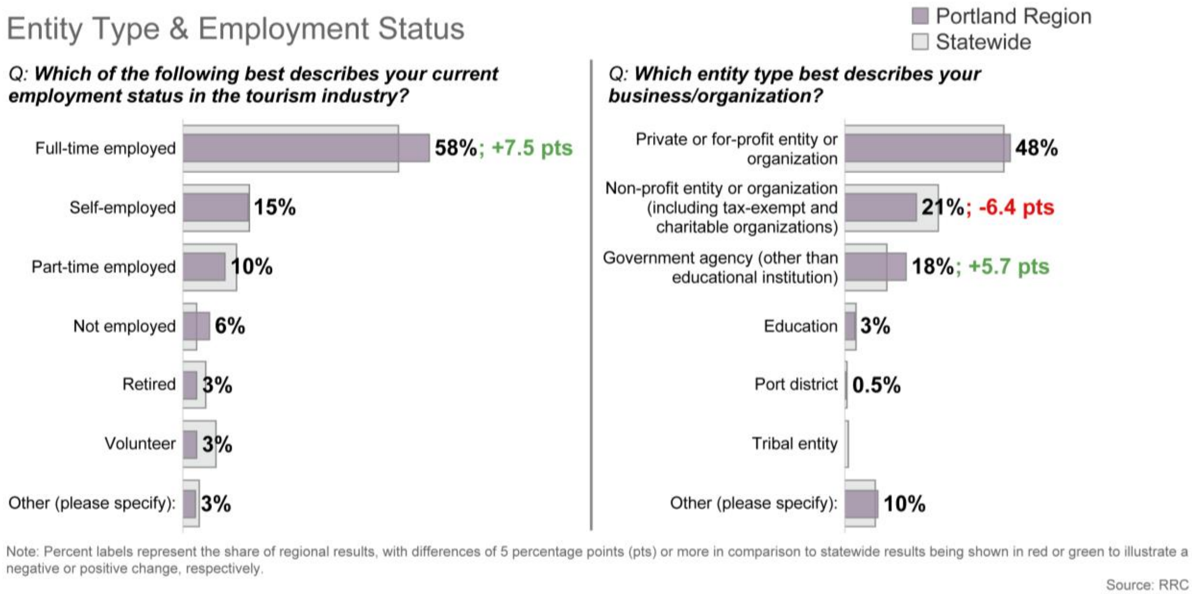
The survey received broad participation by the tourism industry sector. Statewide, destination marketing and/or management accounted for 15% of total respondents, followed by lodging (14%) and food and beverage (10%), similar to 2023. Like respondents statewide, respondents from Portland were most often employed in destination marketing and/or management followed by food and beverage. Respondents from Portland were more likely to work in destination marking and/or management and less likely to work in lodging or attractions than statewide results. Lodging dropped from 16% in 2023 to 5% in 2024, a large change.



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.

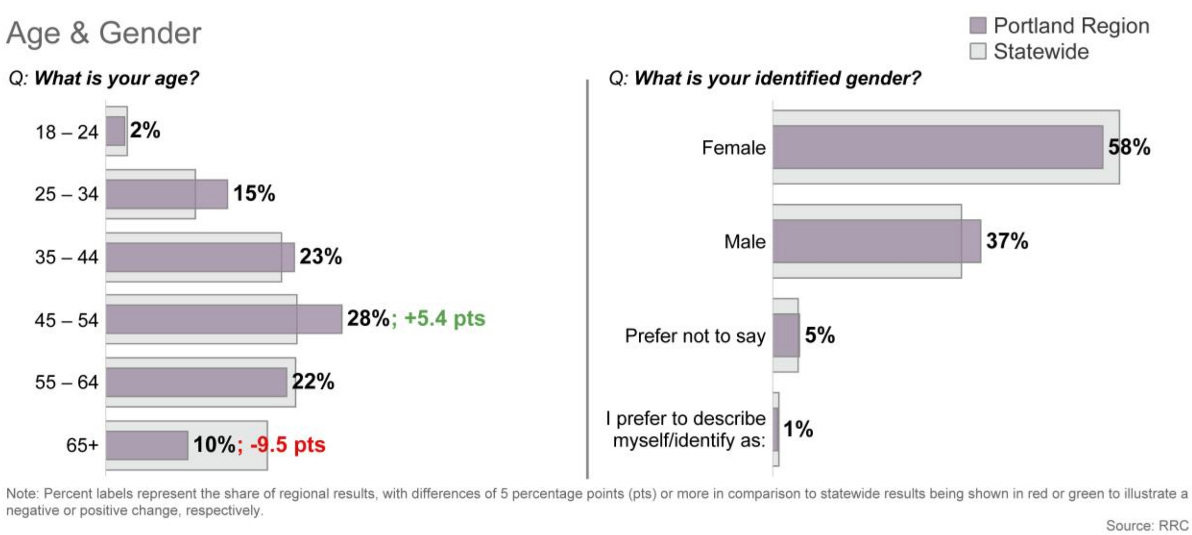
Source: RRC

The top employment statuses for the region were full-time employed (58%), self-employed (15%), and part-time employed (10%). Compared to the statewide responses, the Portland region had a higher proportion of full-time employees. Those who responded in the "other" category for entity type highlighted retired or semi-retired, seasonally employed, and business some of the open-ended comments. Portland Region respondents are comprised of fewer who work in non-profit entities or organizations and a greater share of those who work with government agencies than the statewide sample.



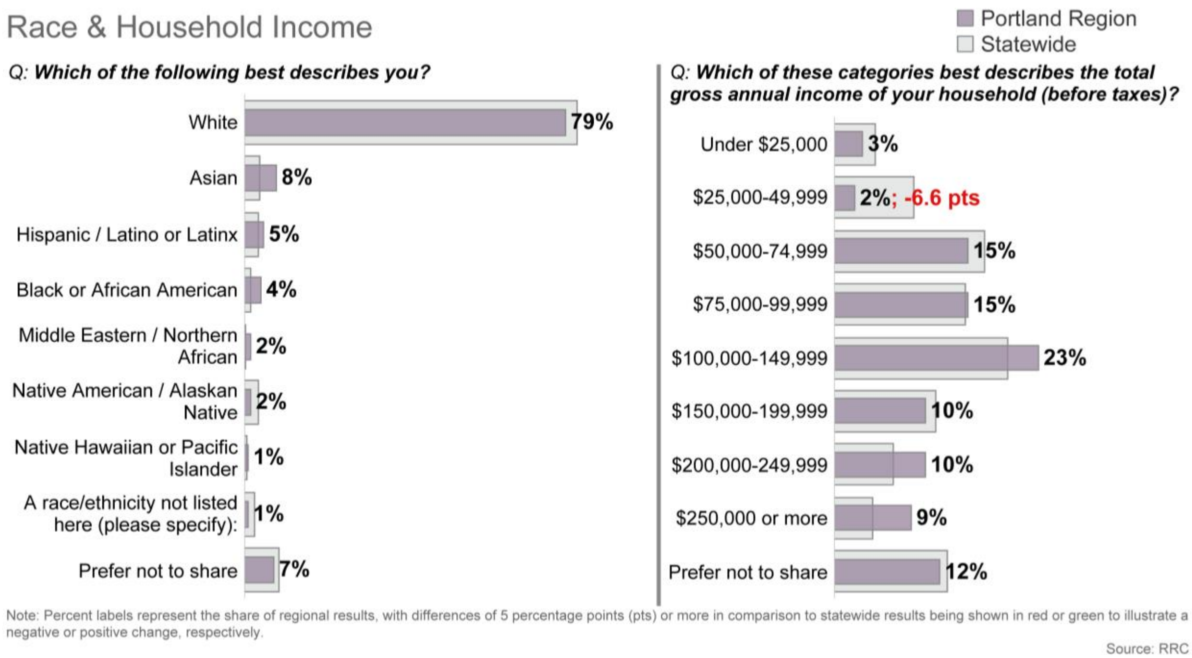
In Portland, more respondents fell in the 25-54 age range than statewide respondents while less were in the 65+ age range. In the statewide results, the largest share of respondents were in the 45-64 range.

Portland respondents were slightly less likely to identify as female (58%) and more likely to identify as male (37%).

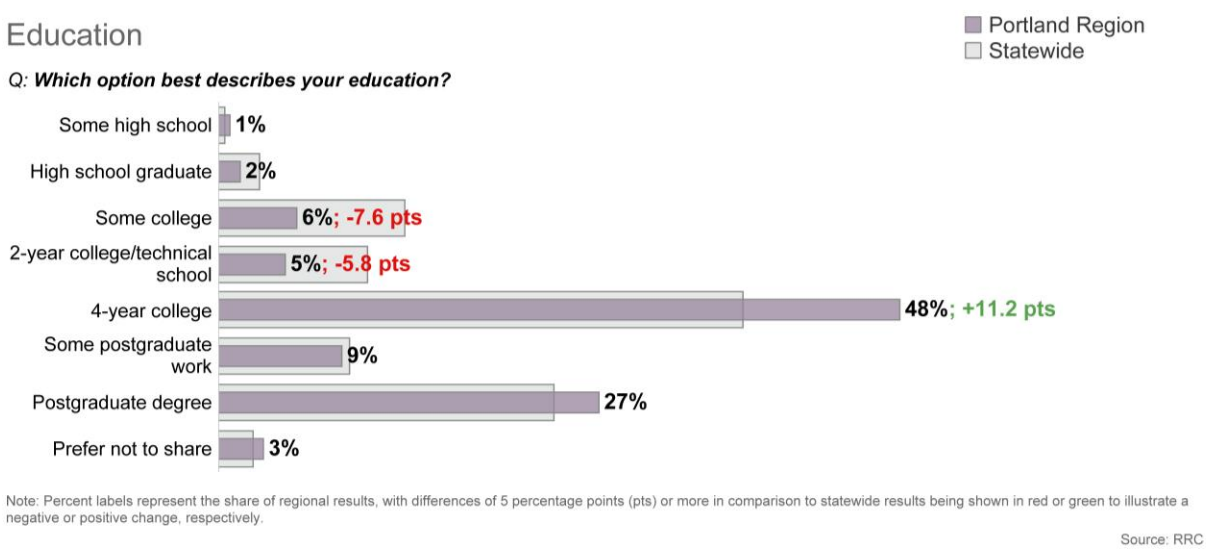


For race and ethnicity, 79% of Portland respondents identify as White, however, the overall racial profile of Portland Region respondents is slightly more diverse that the statewide sample.

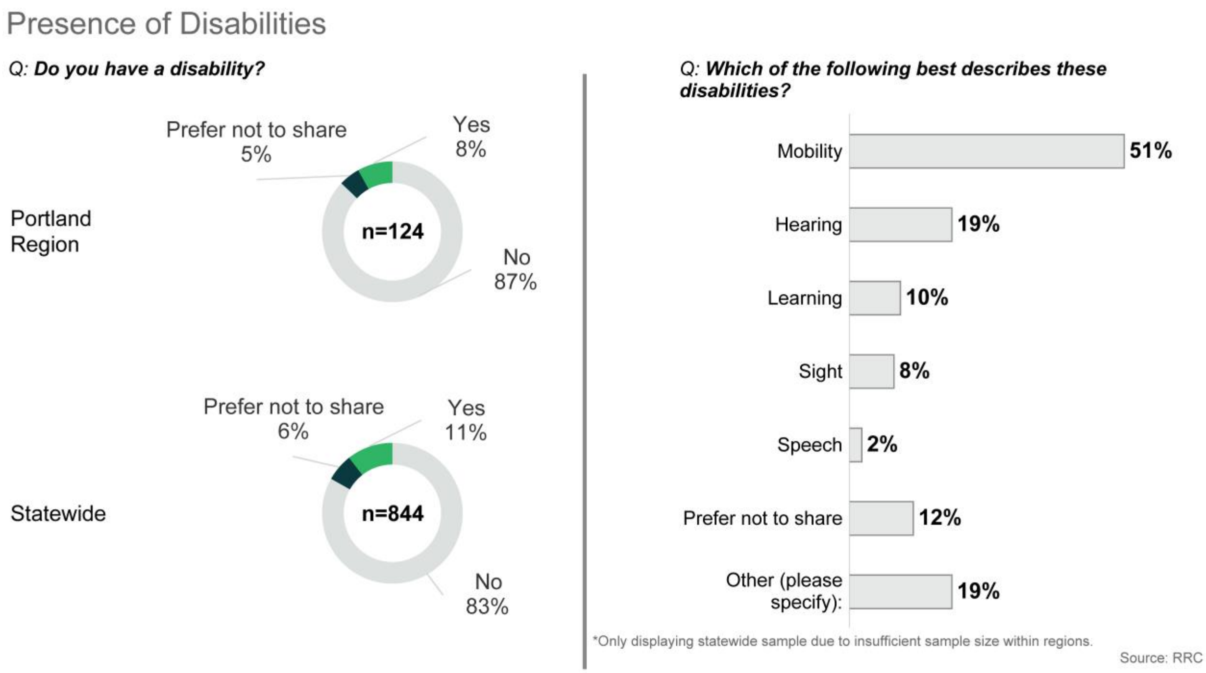
Sixy-seven percent of survey respondents statewide indicated that they had annual household incomes of $75,000 or more. Compared to the statewide results, the Portland region had a higher percentage of respondents in the $200,000 or more range.



A greater proportion of Portland Region respondents have completed a 4-year college or postgraduate degree than the statewide sample. Fewer Portland Region respondents cited having completed some college or 2-year college/technical school than the statewide sample.



Eight percent of Portland respondents reported having a disability, compared to 11% of respondents statewide. Other disabilities listed include mental health (including anxiety/depression, ADHD, and PTSD), autoimmune disease, and neurodivergence.



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.

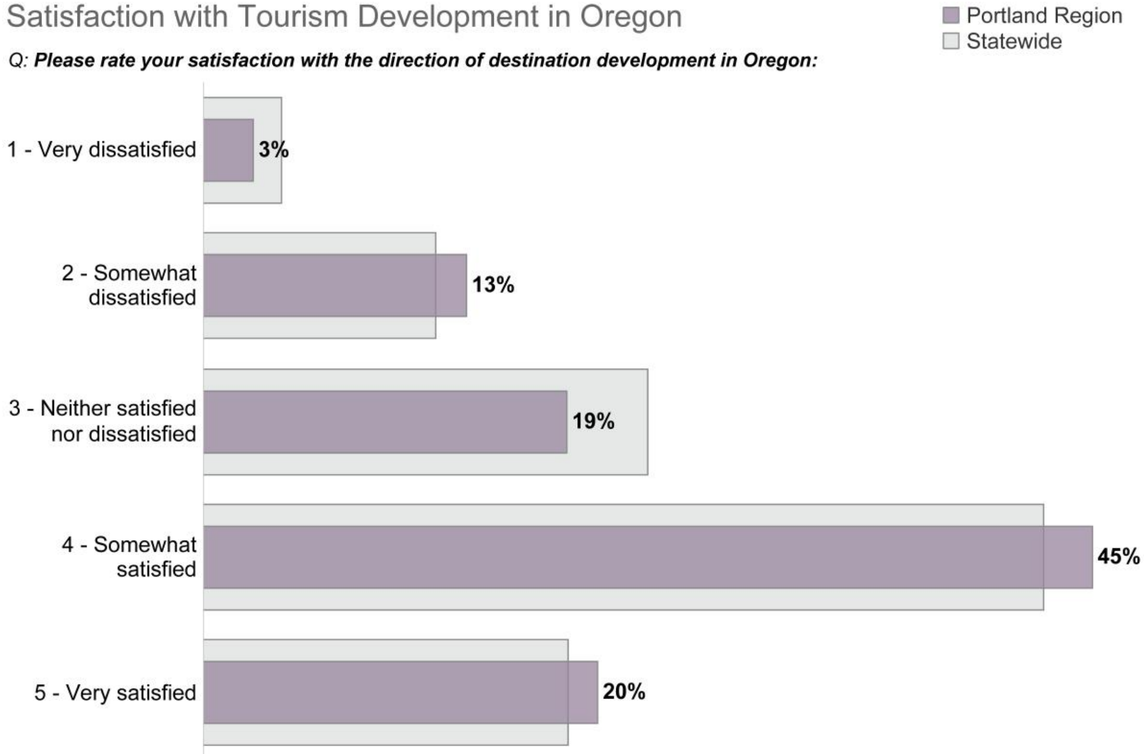
The following definition was provided to survey respondents:

"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 Portland, 65% were satisfied, 16% were unsatisfied, and 19% were neither unsatisfied nor satisfied. The average among respondents in Portland was higher (3.7) than the average among respondents statewide (3.6). Overall, both statewide and Portland Region's satisfaction have increased since 2023.

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."
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Source: RRC

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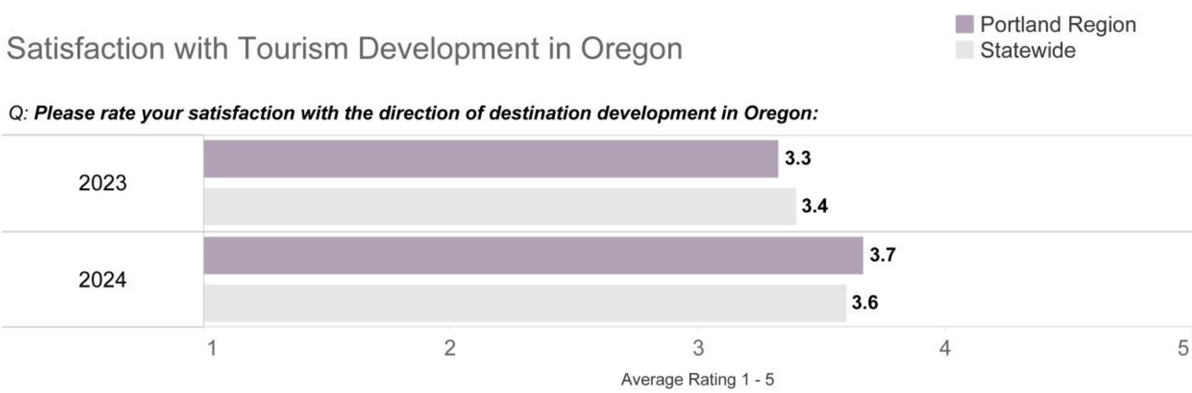

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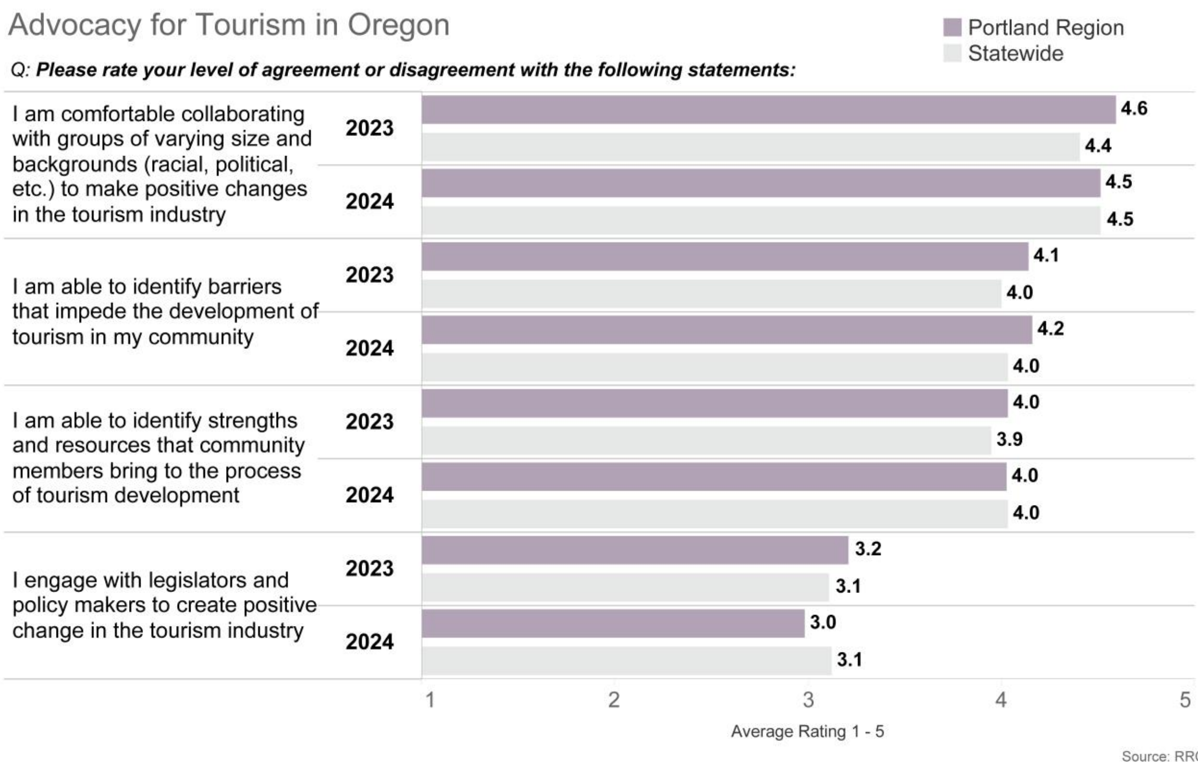
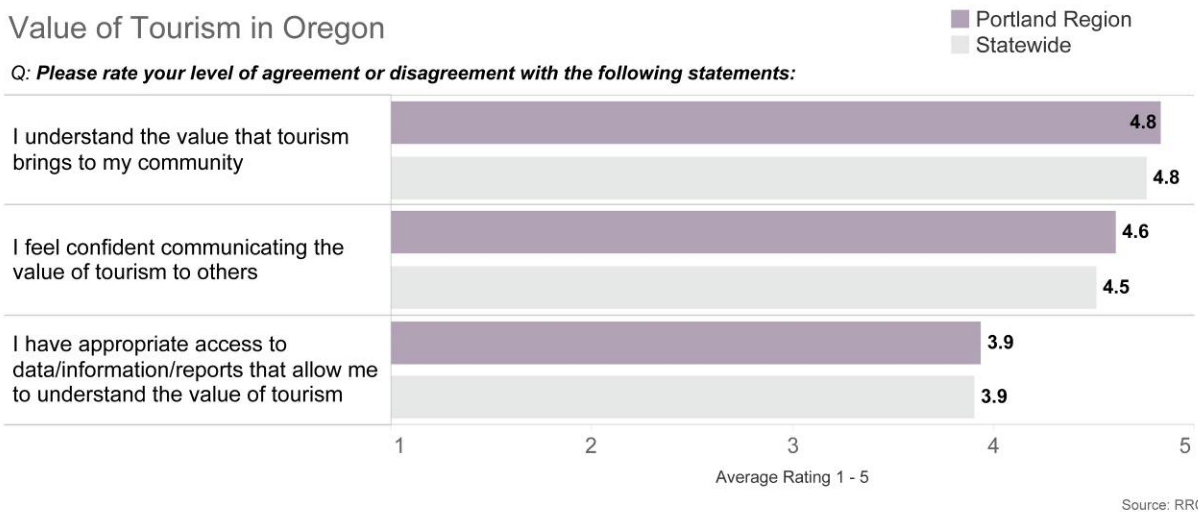
Note: Percent labels represent the share of regional results, with differences of 5 percentage points (pts) or more in comparison to statewide results being shown in red or green to illustrate a negative or positive change, respectively.

Source: RRC

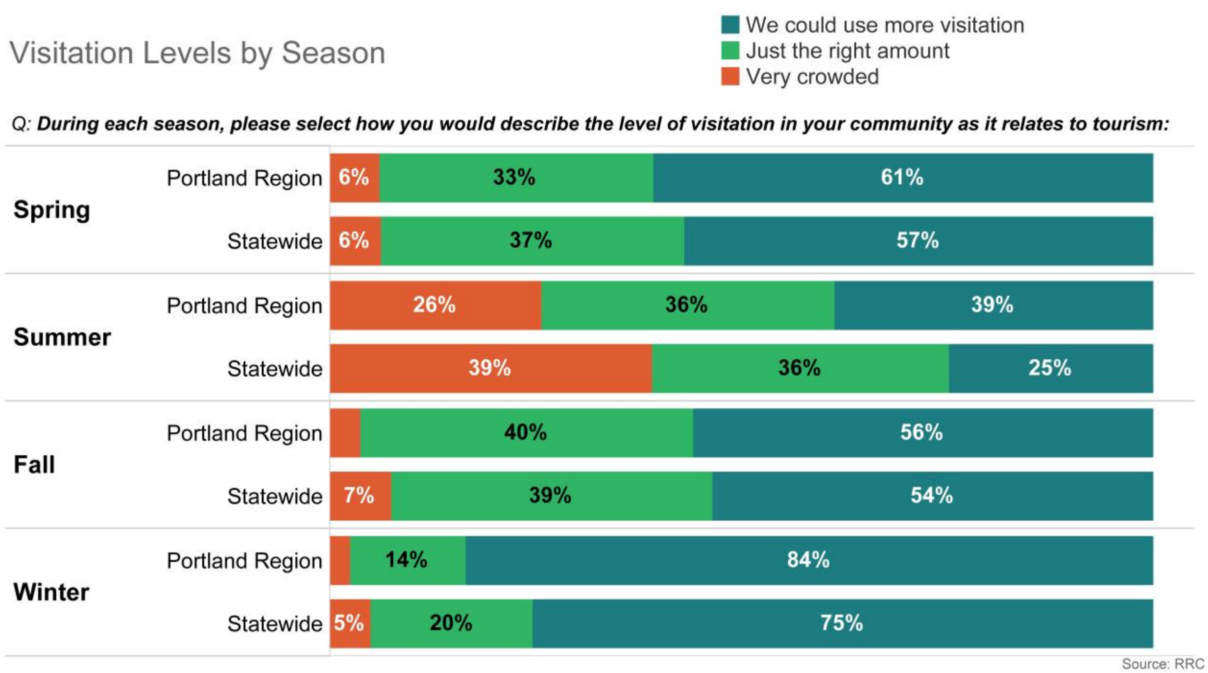
Respondents were asked to rate their agreement with four statements that measured their advocacy for tourism. The statement with the greatest support among the statewide sample and respondents in Portland was, "I am comfortable collaborating with groups of varying size and backgrounds (racial, political, etc.) to make positive changes in the tourism industry," with an average rating of 4.5 on a five-point scale for both samples. Respondents, both statewide and in Portland, 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 statewide and 3.0 for the Portland Region.



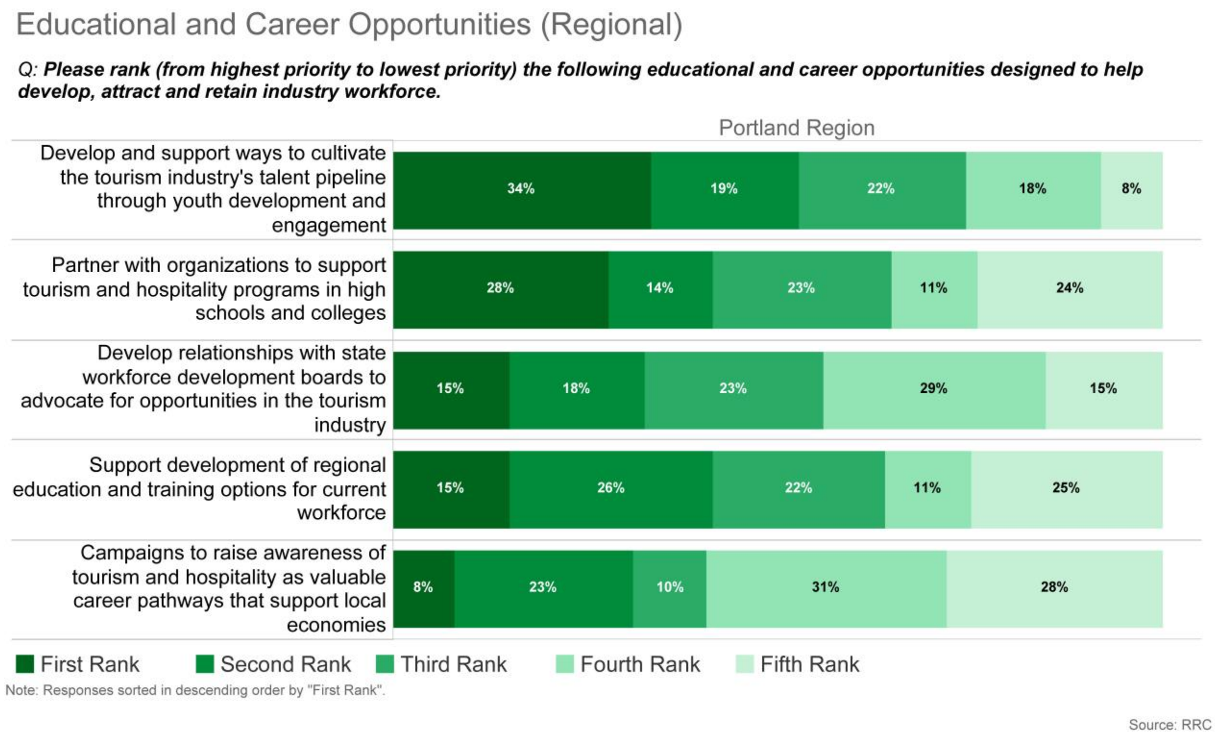
Respondents were also asked to rate their level of agreement with three statements that measured perceived value of tourism. Average rating of the value of tourism differed only slightly between the statewide sample and Portland. Both rated all three statements highly, with “I have appropriate access to data/information/reports that allow me to understand the value of tourism” the lowest rated at 3.9 for both samples. 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.



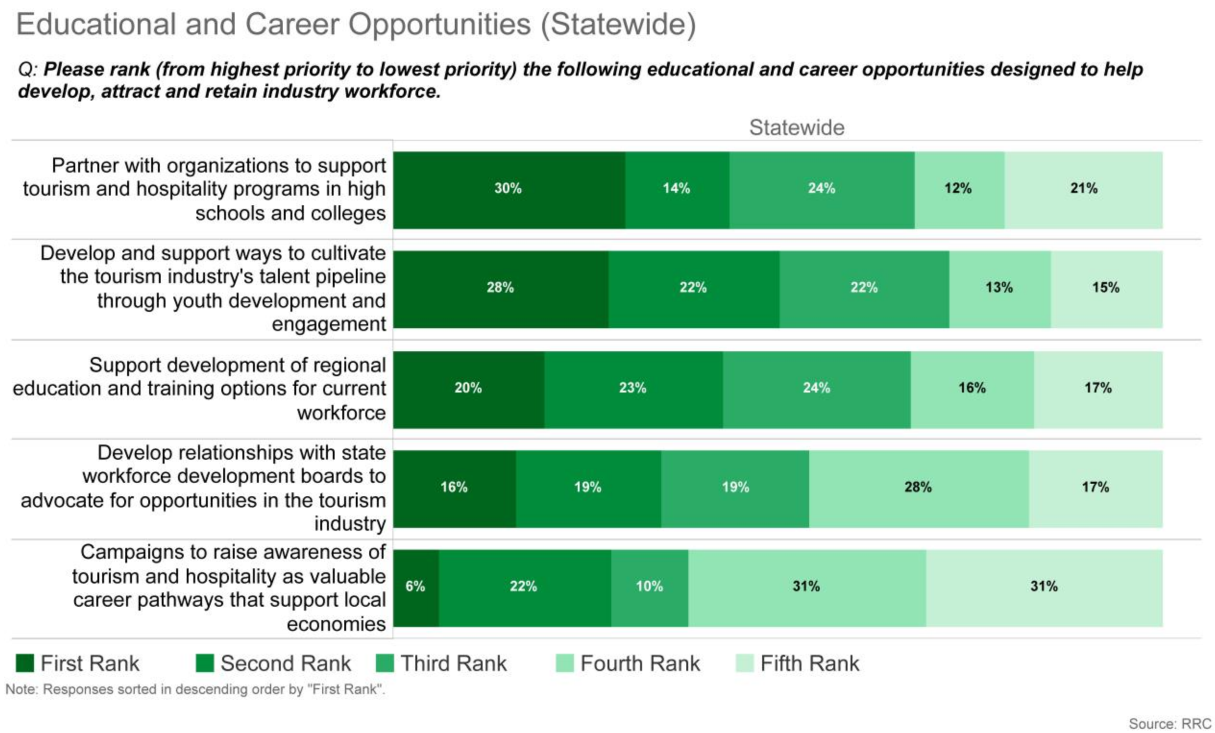
Respondents were asked to characterize the number of visitors their community receives during each of the four seasons. Statewide, 6% of respondents said there were too many visitors in the spring, followed by 39% in summer, 7% in fall, and 5% in winter. Compared to the statewide sample, a higher proportion of respondents in the Portland Region indicated that they could use more visitation across all seasons. Compared to 2023 results, Portland respondents were more likely to indicate that their community was "very crowded" in summer jumping from 12% saying very crowded in 2023 to 26% in 2024. Additionally, no Portland Region respondents in 2023 indicated that it was "very crowded" in spring, compared to 6% this year.



Respondents were asked to rank, from highest to lowest priority, various educational and career opportunities designed to help develop, attract, and retain industry workforce. Portland respondents placed "Develop and support ways to cultivate the tourism industry's talent pipeline through youth development and engagement" as their top priority, with 34% ranking it first among the five options. The next top-ranked priority for Portland was "Partner with organizations to support tourism and hospitality programs in high schools and colleges" at 28%.

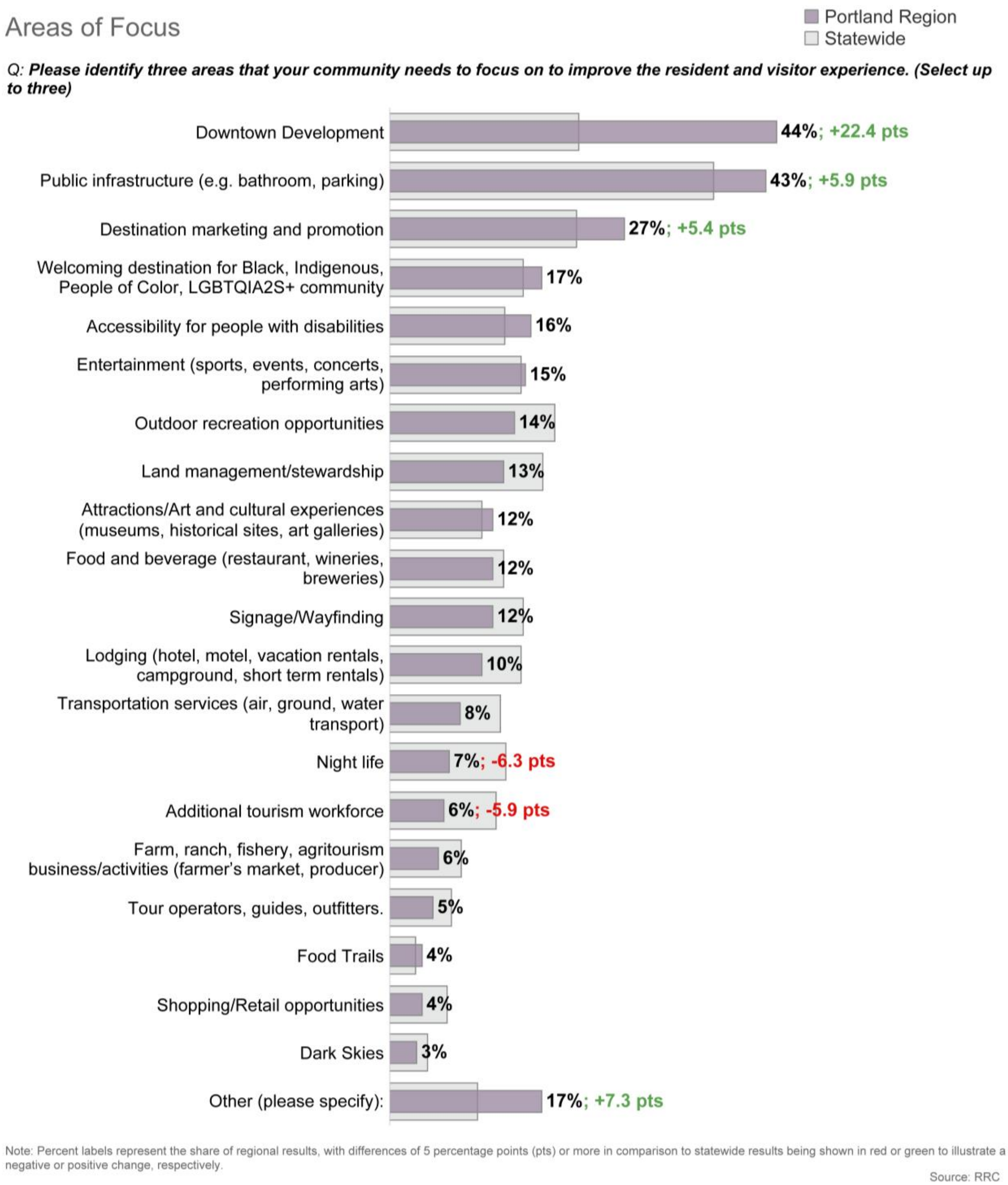


The statewide sample ranked "Partner with organizations to support tourism and hospitality programs in high schools and colleges" and "Develop and support ways to cultivate the tourism industry's talent pipeline through youth development and engagement" as their first-ranked priorities at 30% and 28%,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

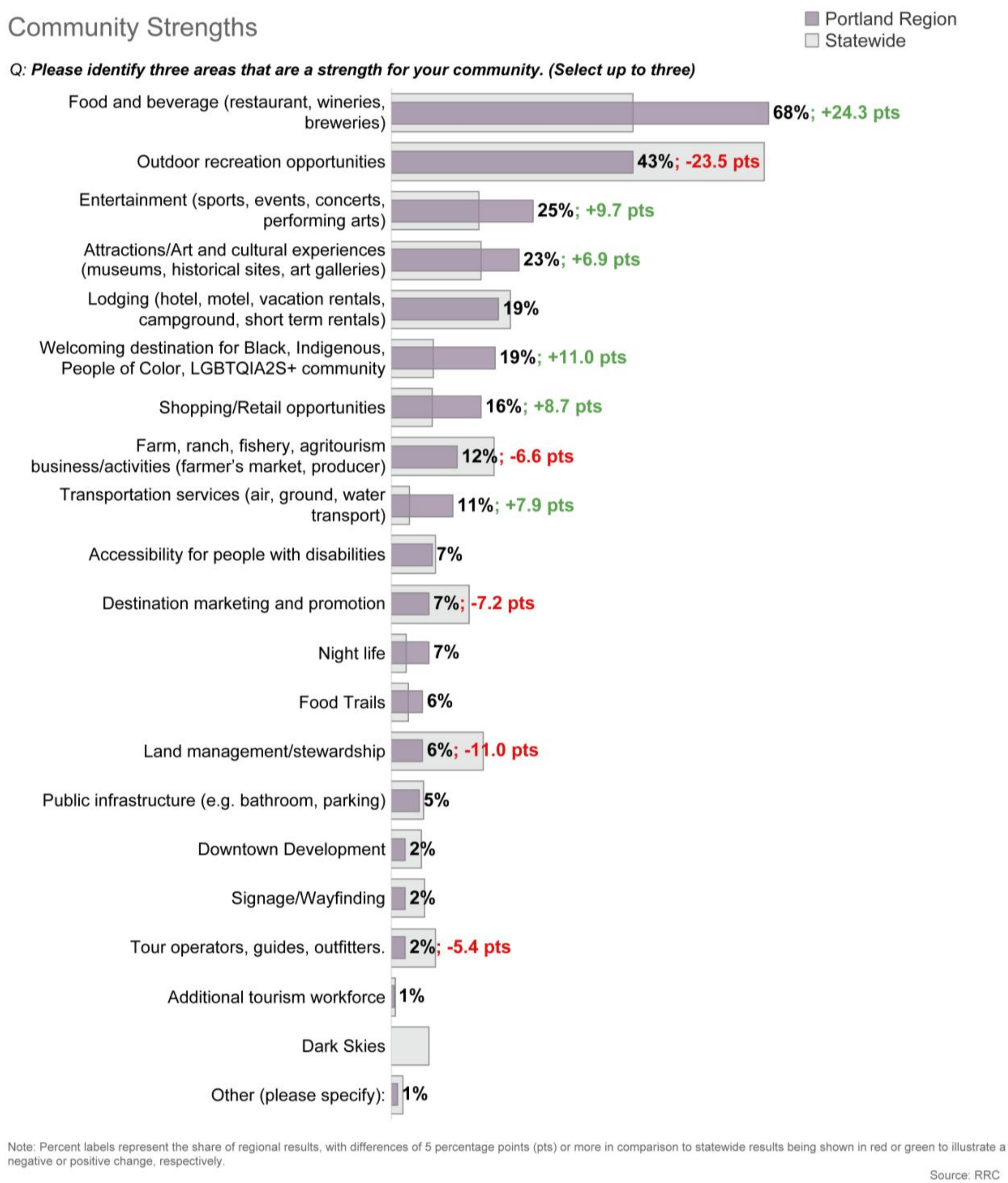


AREAS OF FOCUS

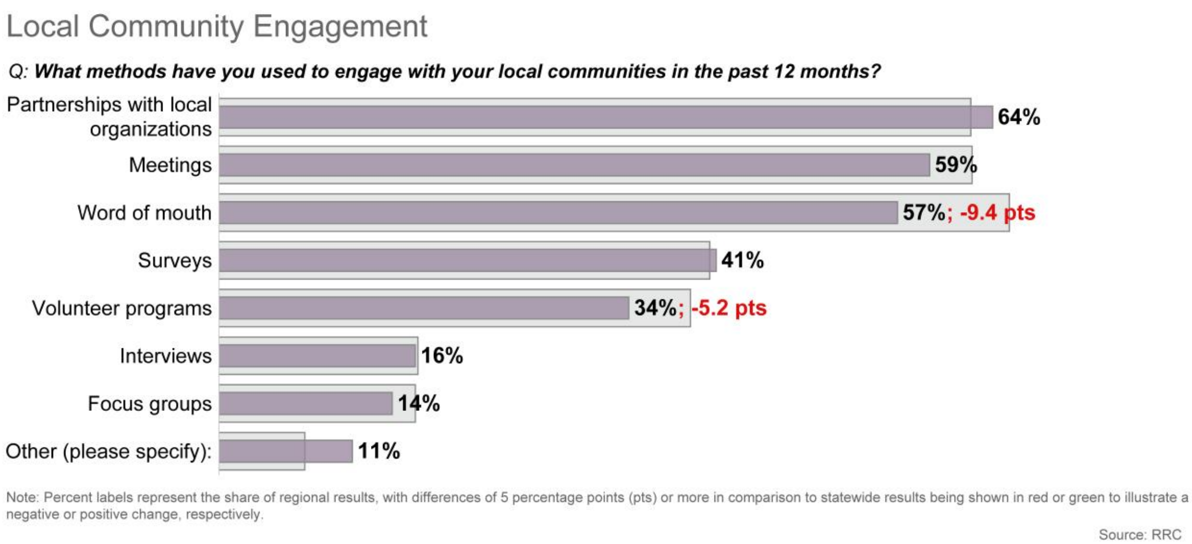
The top areas that the statewide sample said their community needs to focus on to improve the resident and visitor experience were public infrastructure (37%), destination marketing and promotion (21%), downtown development (21%), and outdoor recreation opportunities (19%). Portland respondents identified a similar set of priorities overall, but their top priority, which placed downtown development (44%) as an area of focus, was cited by more than twice the share of the statewide sample (20%).



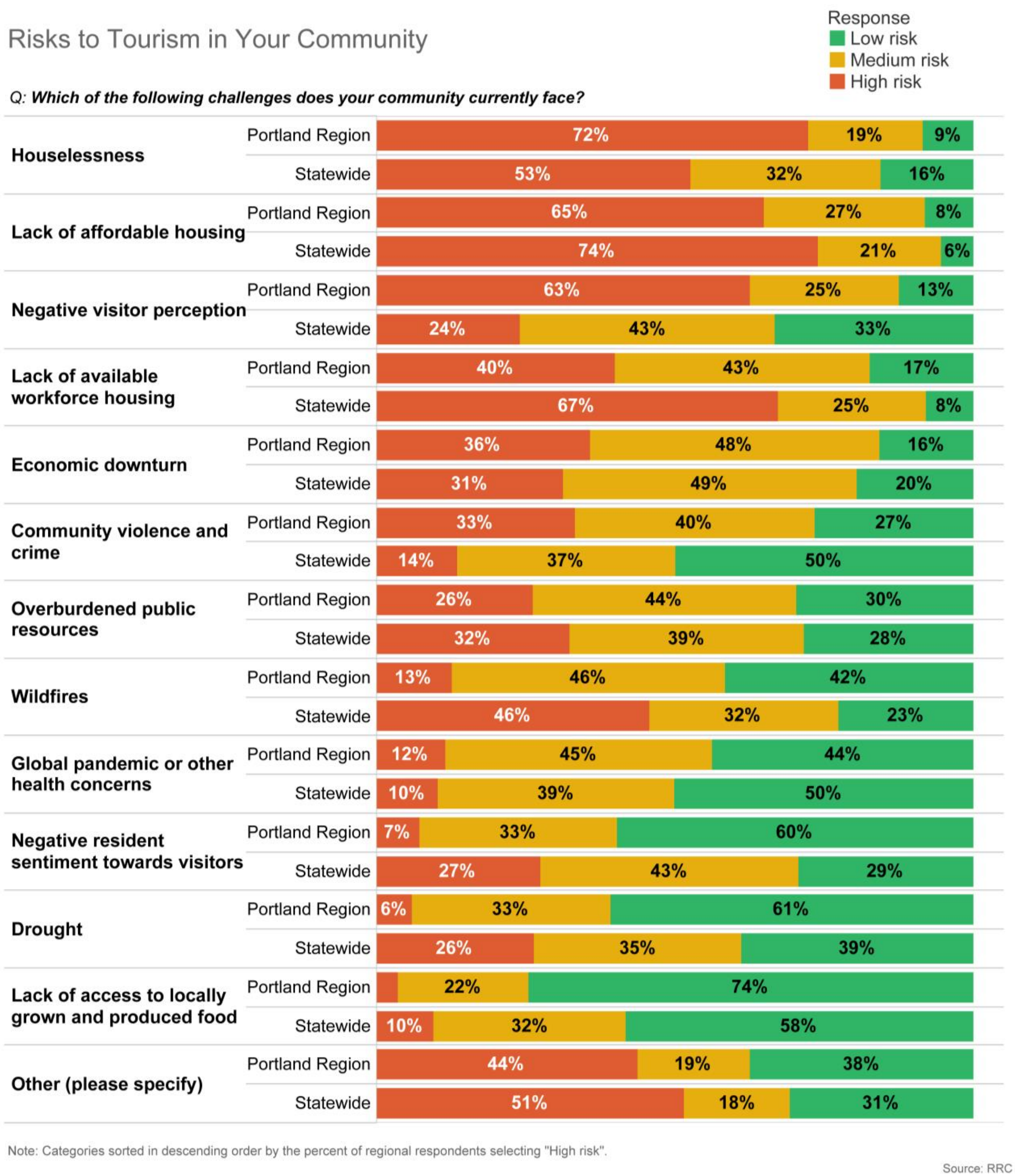
Using the same set of answer options to those immediately above, the following figure portrays areas that respondents felt are strengths in their community. The top three areas that respondents from Portland consider as strengths in their community are food and beverage (68%), outdoor recreation opportunities (43%), and entertainment, (25%). In comparison to the statewide responses, respondents in the Portland region were more likely to identify food and beverage and less likely to include outdoor recreation opportunities as strengths.



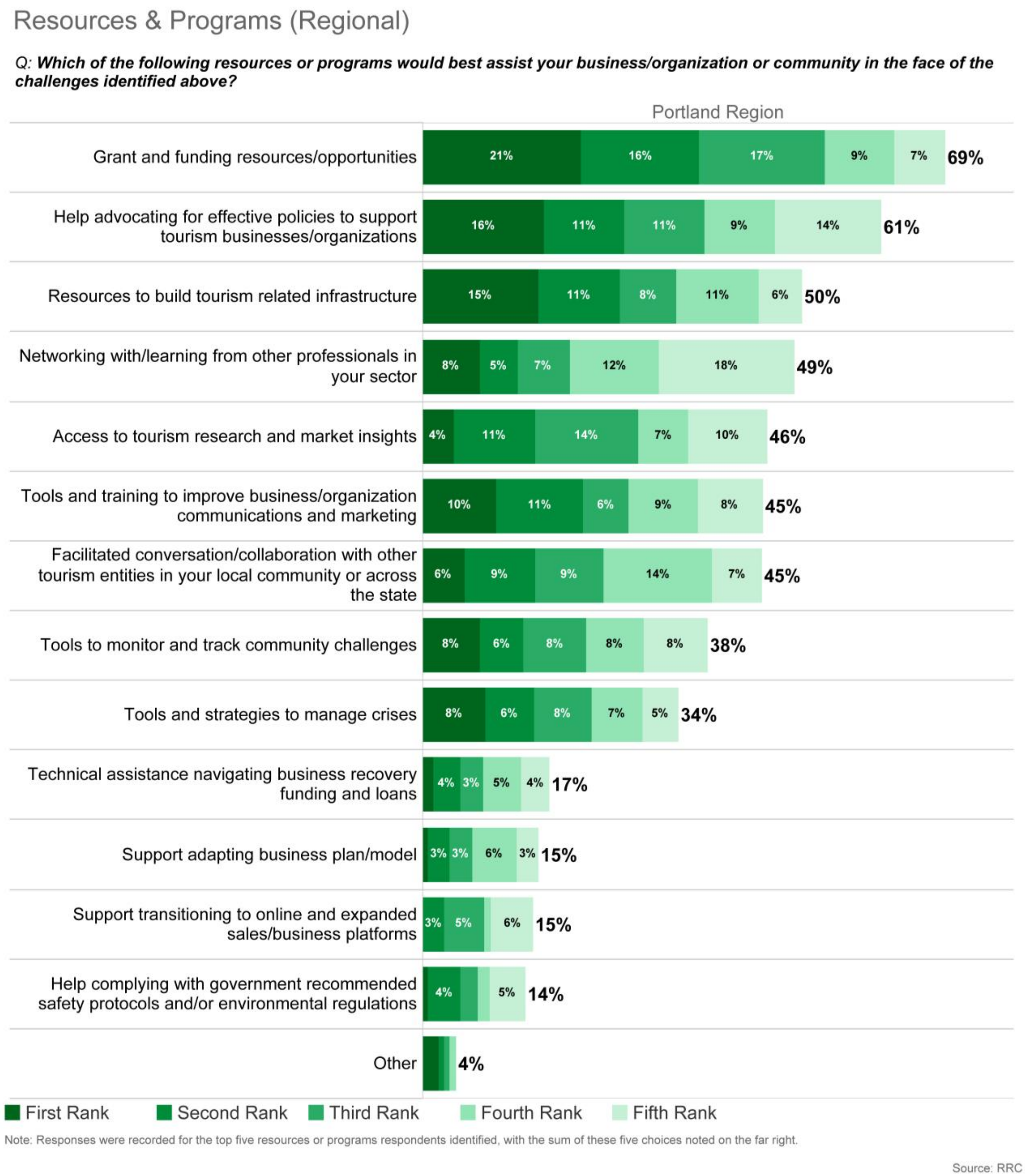
When communicating and engaging with the local community, Portland is largely consistent with the statewide sample, partnering with local organizations (64%), meetings (59%), and using word of mouth (57%) to reach out to the community. In comparison to the statewide responses, respondents in the Portland region were less likely to use volunteer programs and word of mouth when engaging the local community.



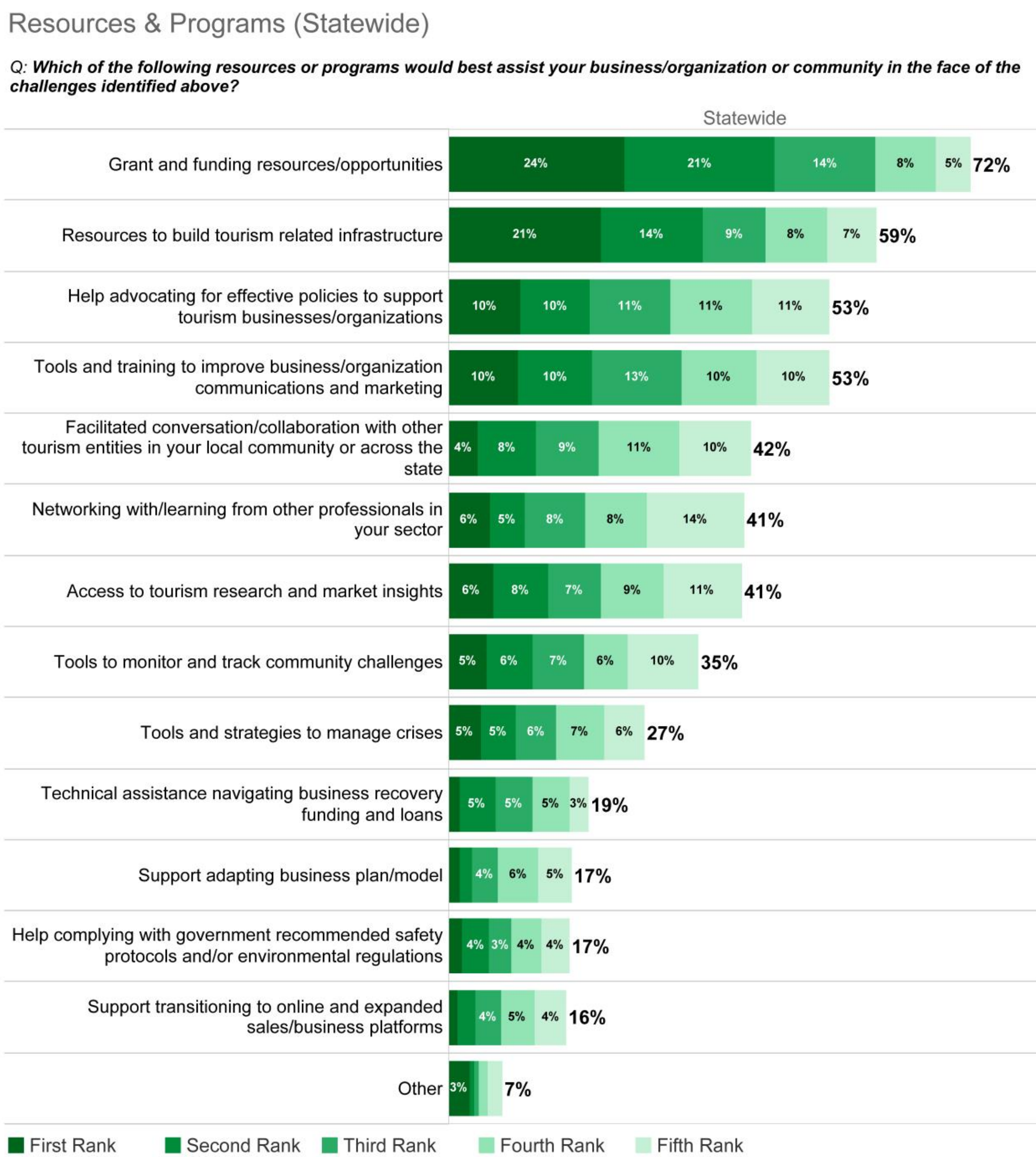
The survey asked respondents to rate the challenges the community currently faces, and the level of risk associated with each challenge. The top three challenges statewide were identified by respondents as a lack of affordable housing (74%; "high risk"), a lack available workforce housing (67%), and houselessness (53%). Compared to the statewide sample, the Portland Region feels that houselessness (72%) and negative visitor perception (63%) are of higher risk.



The highest rated strategy statewide and in Portland was grant and funding resources/opportunities (72% and 69%, respectively, identified this among their top five resources or programs). Help advocating for effective policies to support tourism business/organization (61%) and resources to build tourism related infrastructure (50%) were among the next highest rated for Portland. The resources or programs that were identified as the lowest priority for Portland were support transitioning to online and expanded sales/business platforms (15%) and help complying with government-recommended safety protocols and/or environmental regulations (14%).



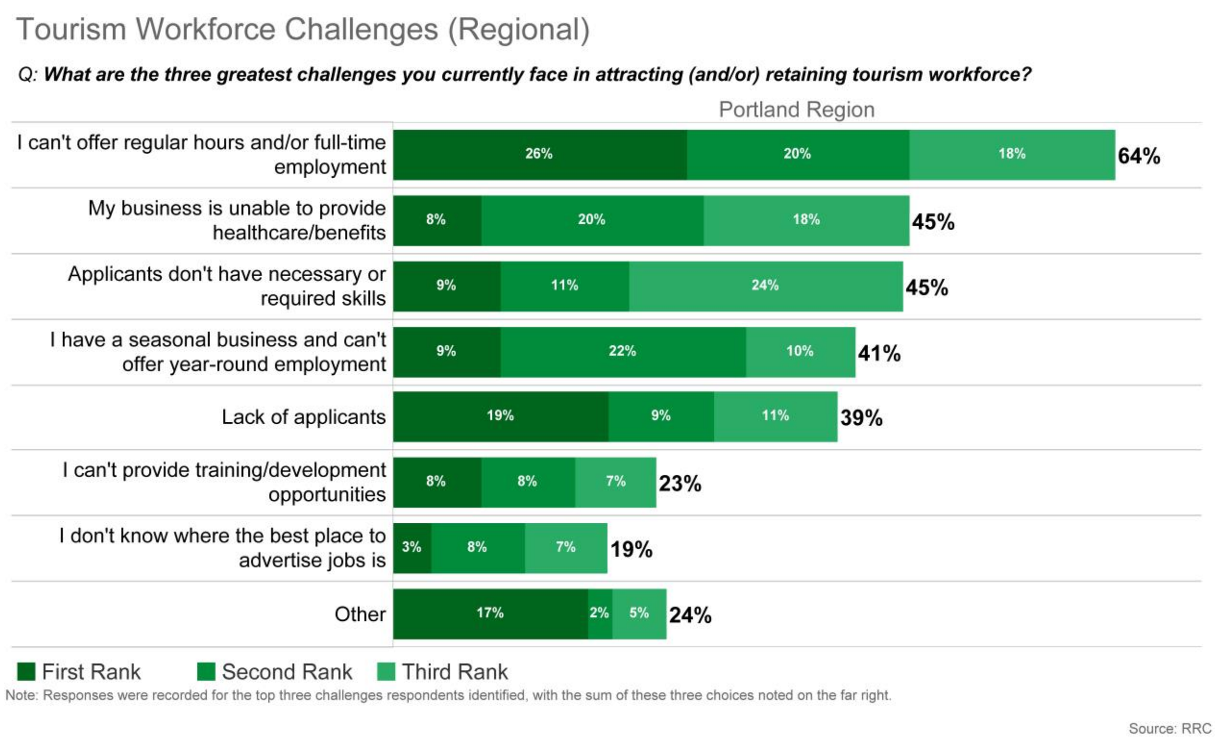
Across the statewide sample, grant and funding resources/opportunities was the highest rated, with 72% of respondents identifying this among their top five resources or programs. Following were resources to build tourism-related infrastructure (59%), help advocating for effective policies to support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



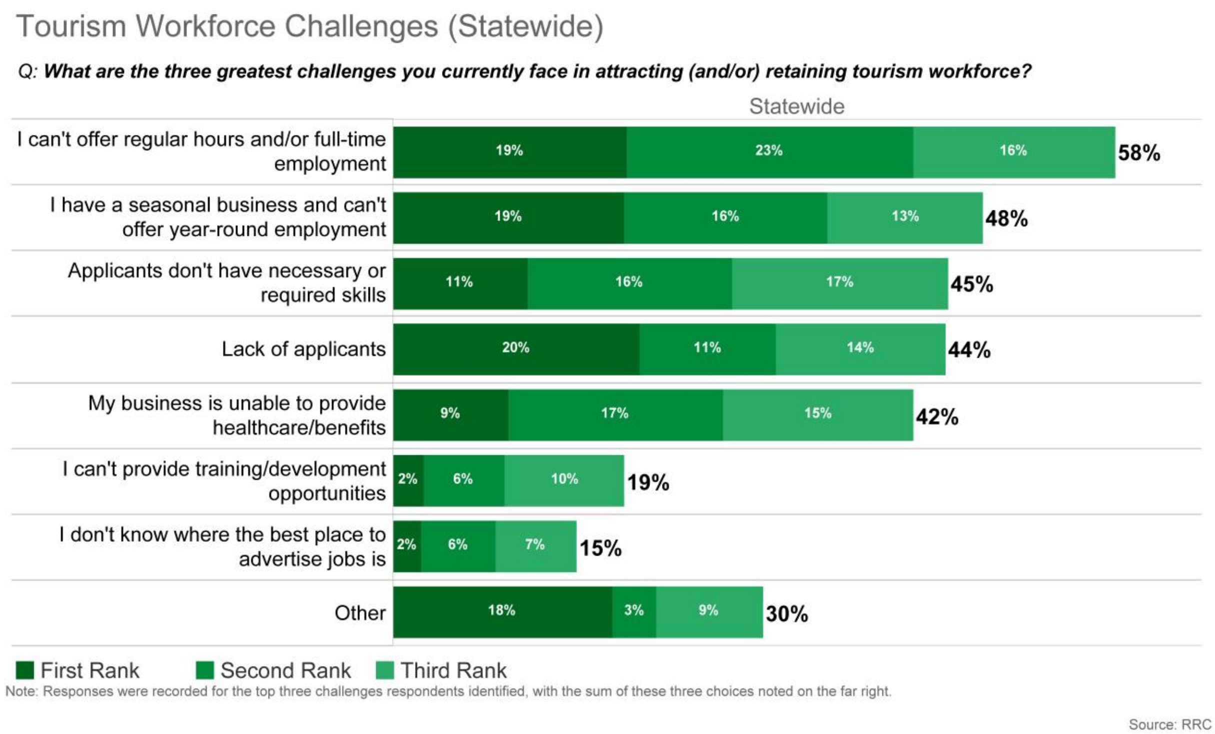
Note: Responses were recorded for the top five resources or programs respondents identified, with the sum of these five choices noted on the far right.

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 Portland respondents ranked "I can't offer regular hours and/or full-time employment" (64%) among their top three challenges in the area. The lowest rated challenge by Portland was "I don't know where the best place to advertise jobs is" at 19%. Examples of challenges related to workforce housing mentioned in the "other" category including attracting quality applicants, high labor costs, and affordable housing for the workforce.

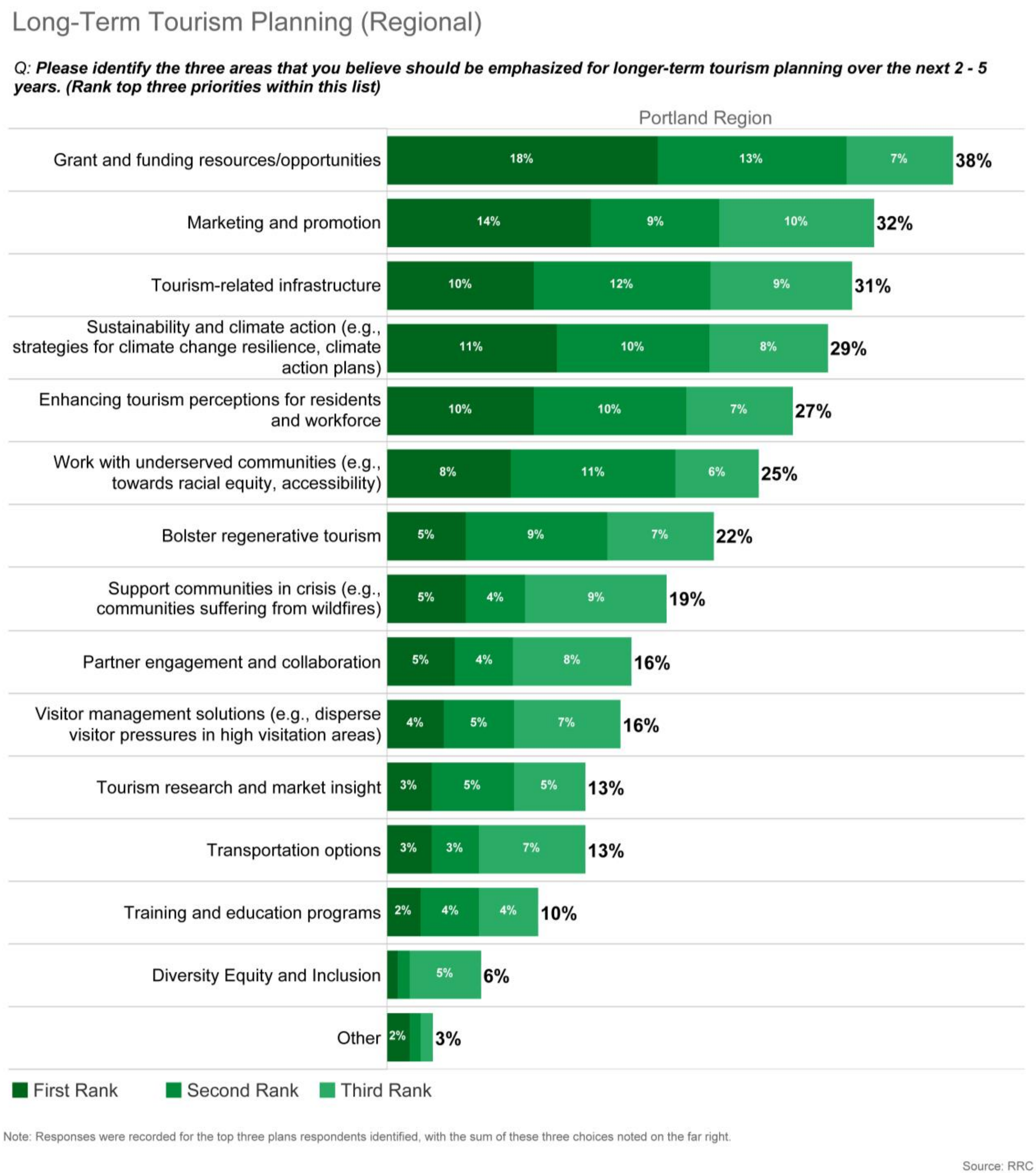


The statewide sample was similar to regional findings, with the greatest share of respondents ranking "I can't offer regular hours and/or full-time employment" (58%) and "I have a seasonal business and can't offer year-round employment" (48%) among their greatest challenges. Similarly, "I don't know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



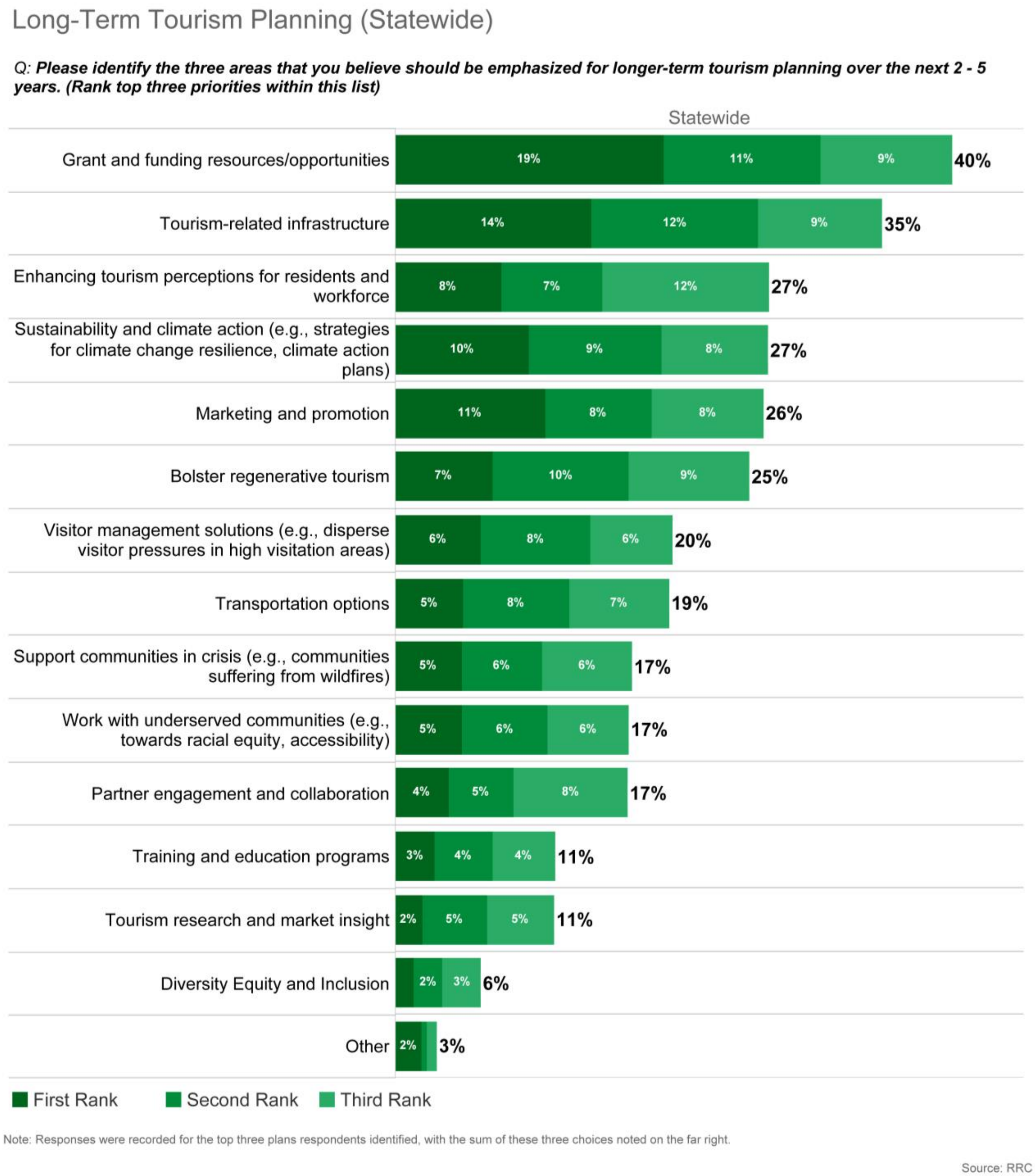
As in prior iterations of the Oregon Tourism Industry Partner Survey, respondents were asked to identify the three areas that should be emphasized for tourism planning over the next 2-5 years.

Portland respondents identified grant and funding opportunities as the top priority, with 38% of respondents identifying it among their top three priorities. Marketing and promotion was the second most identified priority (32%), followed by tourism-related infrastructure (31%). Compared to 2023, marketing and promotion fell from 55% to 32%, the largest shift.



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).



REPRESENTATION OF AND COMMUNICATION WITH UNDERSERVED COMMUNITIES

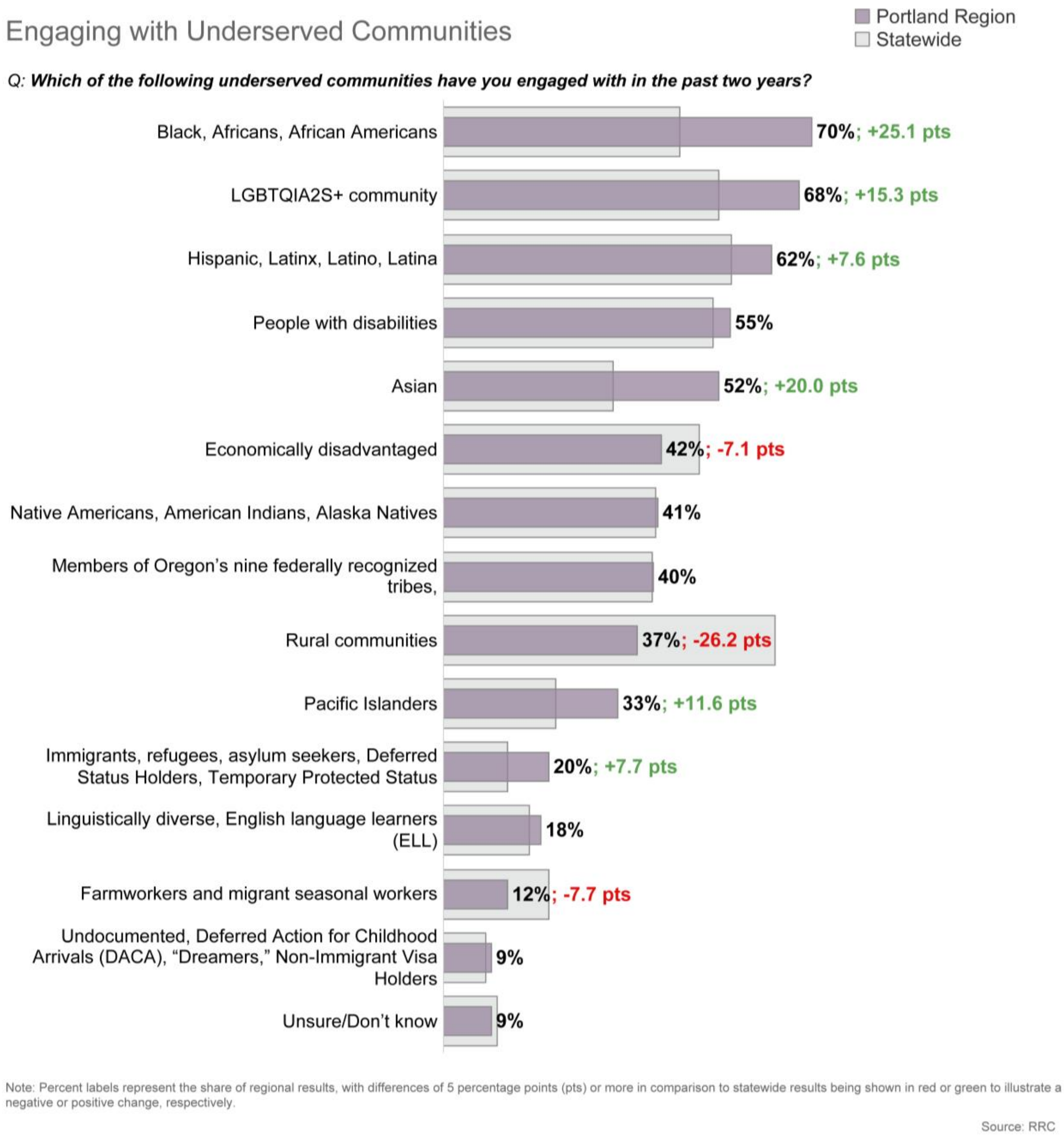
Historically and currently underserved and under-resourced communities, including Oregonians who identify as:

- 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

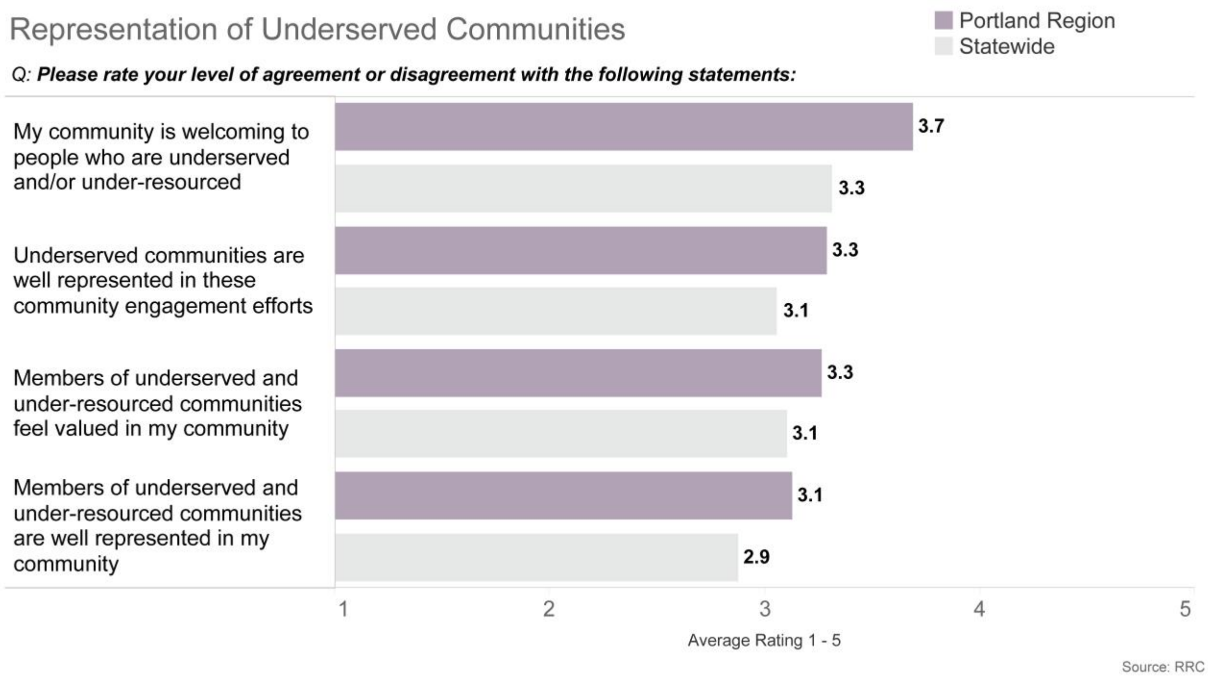
Definition provided by State of Oregon (https://www.oregon.gov/das/Docs/DEI_Action_Plan_2021.pdf)

Of those underserved and under-resourced communities, Portland respondents self-reported strong engagement with majority of the listed communities, particularly compared to statewide respondents. However, compared to the statewide sample, the communities in which the Portland Region interacts with less frequently are economically disadvantaged (42%), rural communities (37%), and farmers and migrant seasonal workers (12%).

The lowest level of engagement occurred with the Deferred Action for Childhood Arrivals (DACA), Dreamers, and non-immigrant visa holders community (9%).

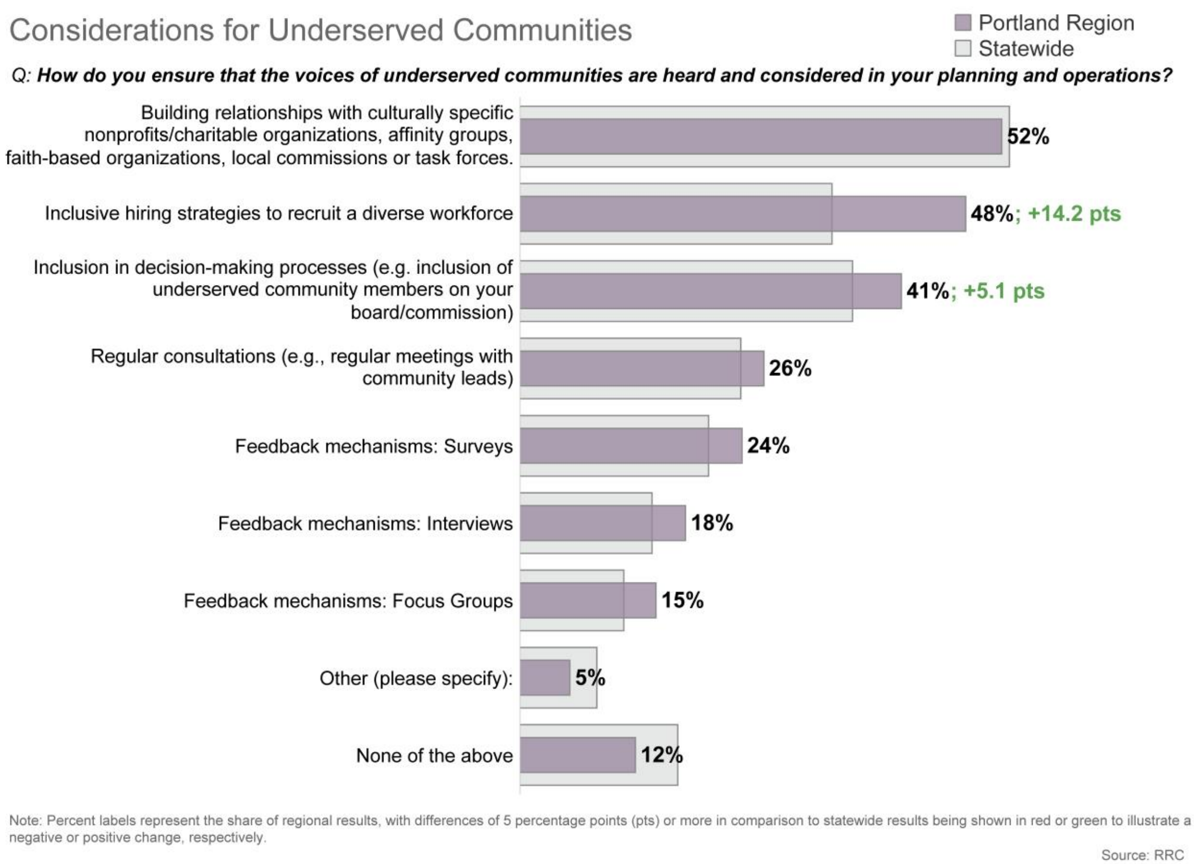


Respondents were asked to rate their agreement with four statements that measured their representation of underserved communities in the area. The highest rated statement for both samples was "My community is welcoming to people who are underserved and/or under-resourced," however Portland respondents had a slightly higher average (3.7) than the statewide average of 3.3. 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 3.1 and 2.9 for Portland and the statewide sample, respectively.

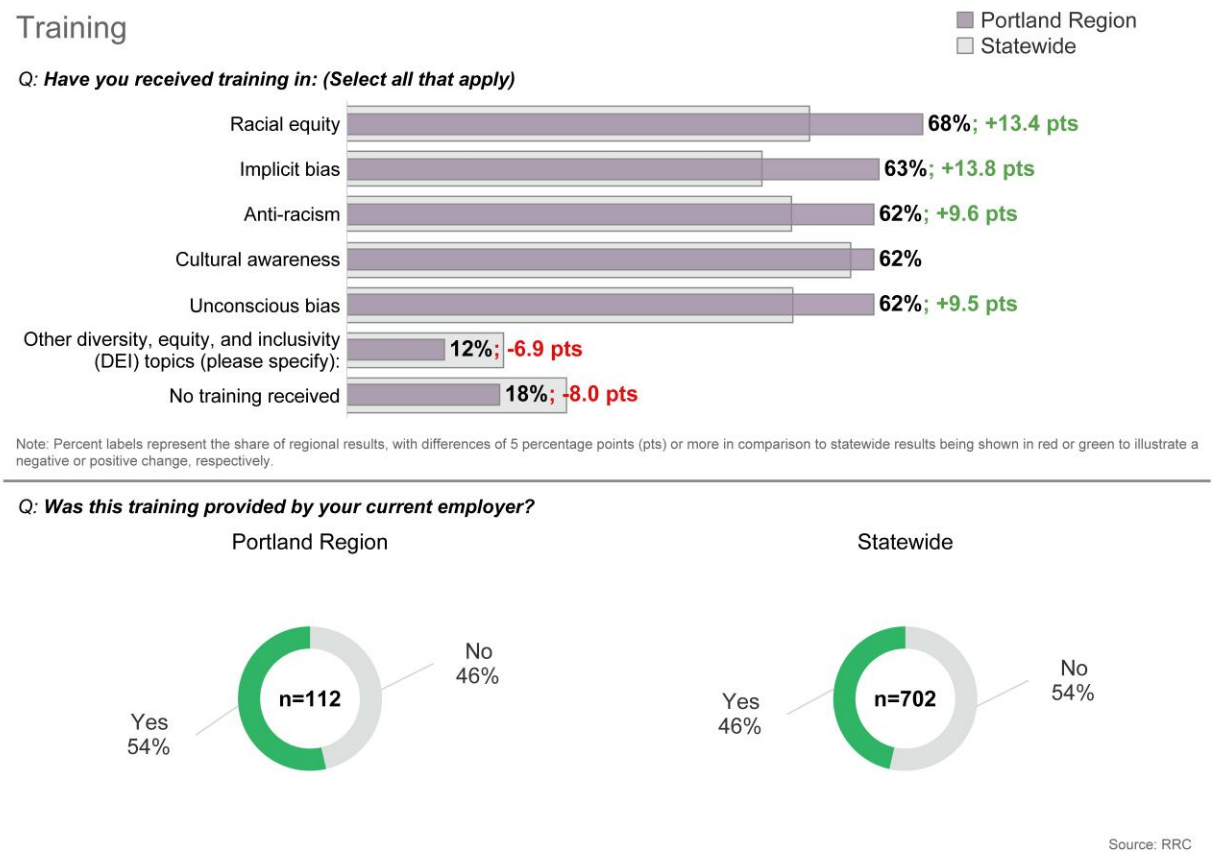


When asked what considerations respondents make to ensure that the voices of underserved and under-resourced communities are heard, more than half of Portland respondents cited building relationships with culturally specific nonprofits/charitable organizations, affinity groups, faith-based organizations, local commissions or task forces (52%). This is followed closely by hiring strategies to recruit a diverse workforce (48%) and inclusion in decision-making processes (41%).

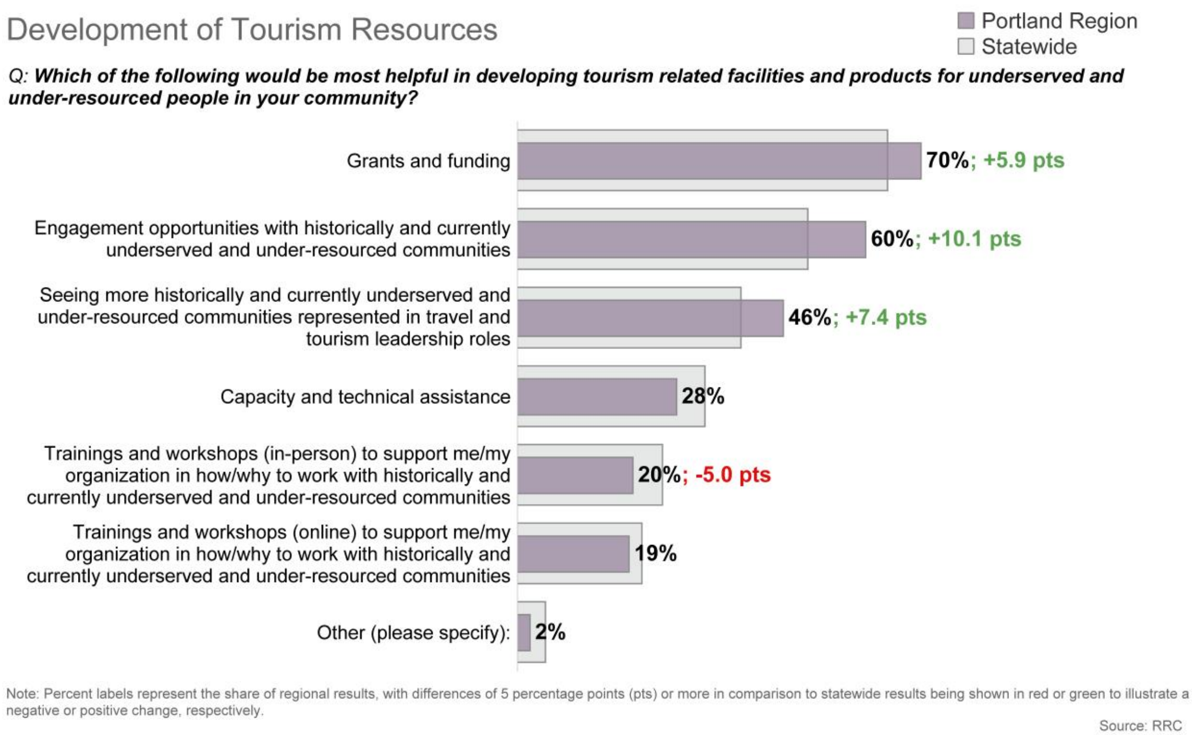
Overall, respondents from the Portland Region report using more of the listed strategies for including the voices of underserved communities in planning and operations more frequently than the statewide sample.



At least 62% of all Portland Region respondents have received training in all of the listed opportunities, with most of these trainings provided by their current employer. Compared to the statewide sample, the Portland Region participates in more diversity, equity, and inclusivity trainings overall.

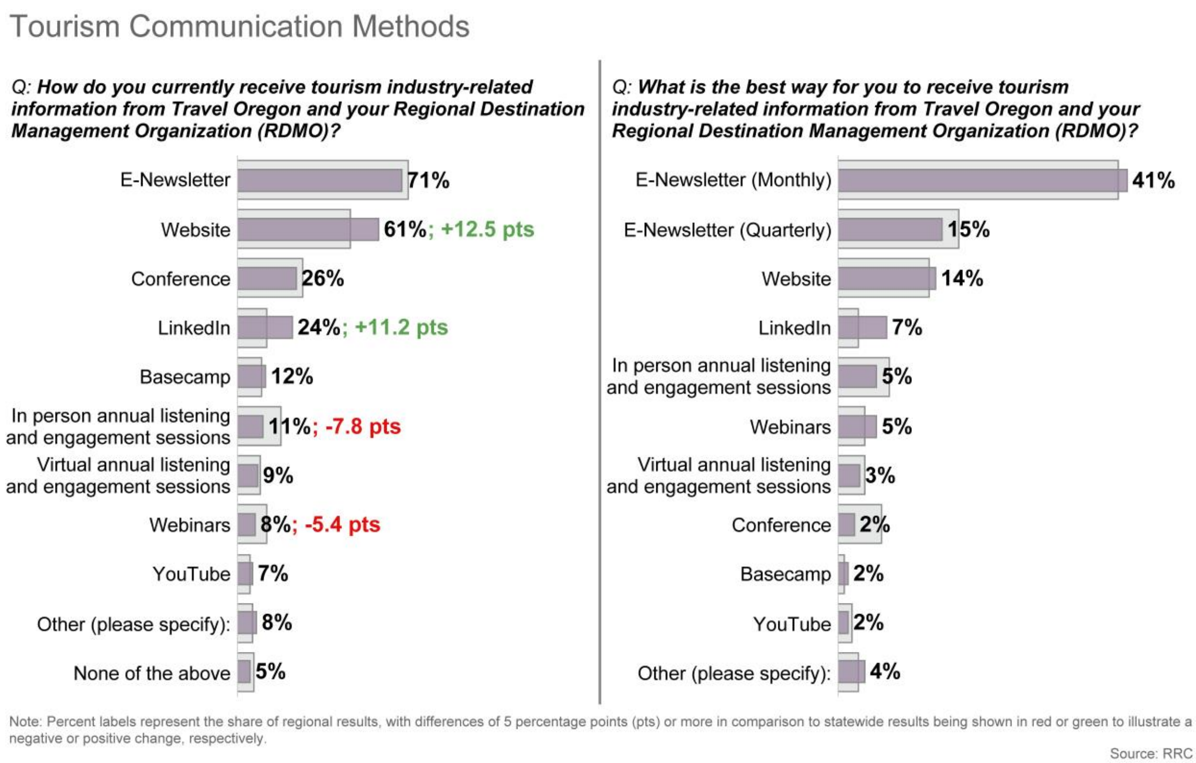


When asked what type of resources would be most helpful in developing tourism-related facilities and products for underserved and under-resourced people, Portland respondents cited grants and funding (70%) and engagement opportunities with historically and currently underserved and under-resourced communities (60%). Notably, shares of both response options were elevated for Portland compared to the statewide sample.



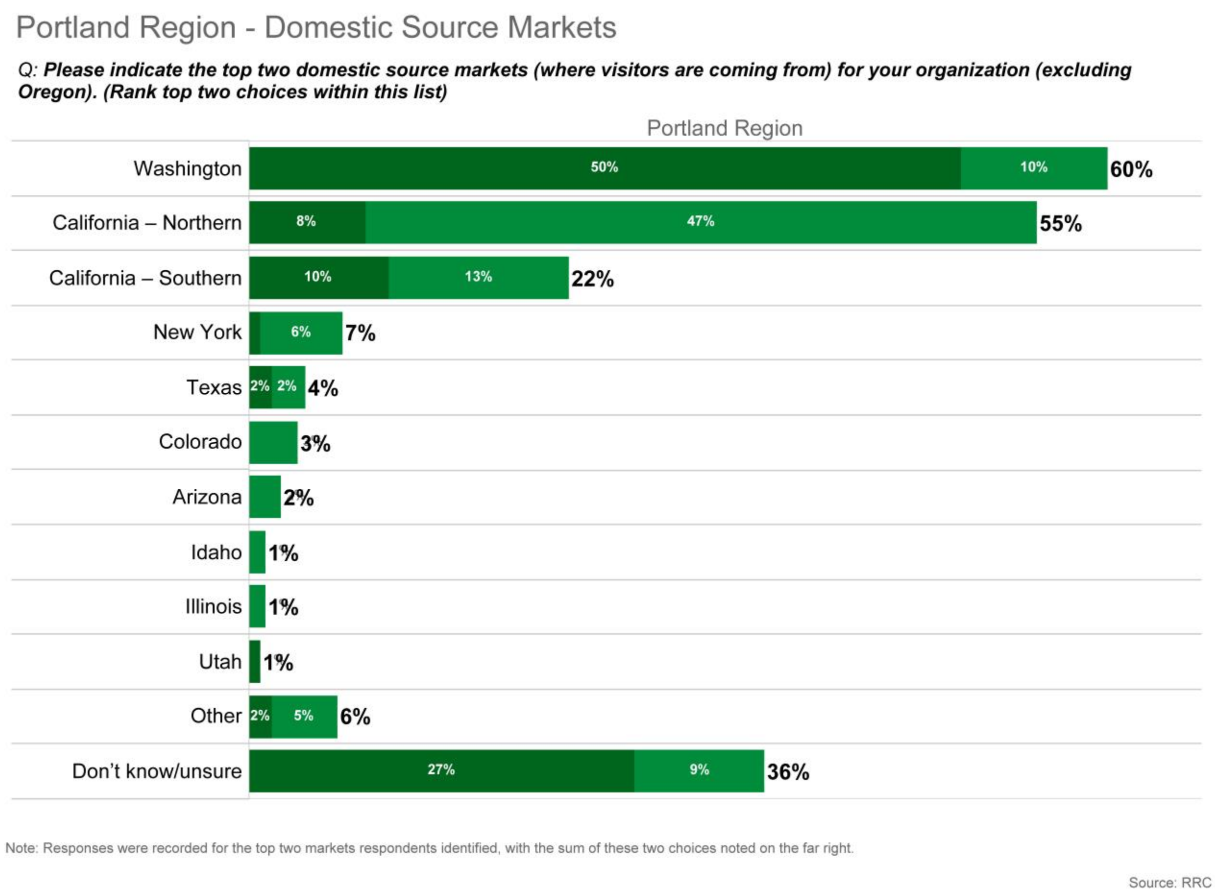
INDUSTRY ENGAGEMENT AND COMMUNICATIONS

Seventy-one percent of Portland respondents currently receive tourism industry-related information from Travel Oregon and RDMOs via e-newsletter, followed by their website (61%). By a large margin, e-newsletters (monthly or quarterly) are considered the best way for respondents to receive information.



PORTLAND 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.



Portland Region - Importance of Meetings, Conventions, and Sports Business

Q: ***We are interested in knowing more about the economic impact of meetings, conventions, and sports business in the Portland region. Please indicate the importance you would place on the meetings, conventions, and sports business in the following areas***

Rating Category	Avg.	n=	1 - Not at all important	2 - Somewhat important	3 - Moderately important	4 - Very important	5 - Extremely important
Meetings and conventions: economic importance to the tourism industry in the City of Portland	3.8	111	1%	14%	25%	25%	35%
Economic Importance to your organization of downtown Portland as an economic and tourism driver for the region	3.7	111	9%	10%	18%	24%	39%
Meetings and conventions: economic importance to the tourism industry in the Portland Region	3.7	112		18%	22%	29%	30%
Sports: economic importance to the tourism industry in the City of Portland	3.7	110	9%	8%	18%	35%	29%
Sports: economic importance to the tourism industry in the Portland Region	3.6	111	9%	12%	22%	26%	32%
Meetings and conventions: economic importance to your organization	3.3	114	13%	18%	23%	23%	24%
Sports: economic importance to your organization	2.8	114	32%	18%	11%	17%	21%

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 Portland questions follow:

- *Please indicate the top two domestic source markets (where visitors are coming from) for your organization (excluding Oregon). (Rank top two choices within this list). Please describe the other domestic source market you ranked:*

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.

Please indicate the top two domestic source markets (where visitors are coming from) for your organization (excluding Oregon). (Rank top two choices within this list). Please describe the other domestic source market you ranked:
Alaska
California, but not sure if 2nd biggest market is Northern or Southern.
CANADA
We are a tour operator and do not have one market where most visitors are coming from. It's spread somewhat evenly domestically, with a smaller percentage coming internationally.
We are more of a daytrip destination with most visitors coming from within Oregon.