

# 2024 Tourism Industry Partner Survey

TRAVEL



OREGON

02.13.25

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# INTRODUCTION

- The 2024 Oregon Tourism Industry Partner 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.
- In addition to this summary of statewide results, results for each region are reported under separate cover. Additionally, results may be accessed 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.



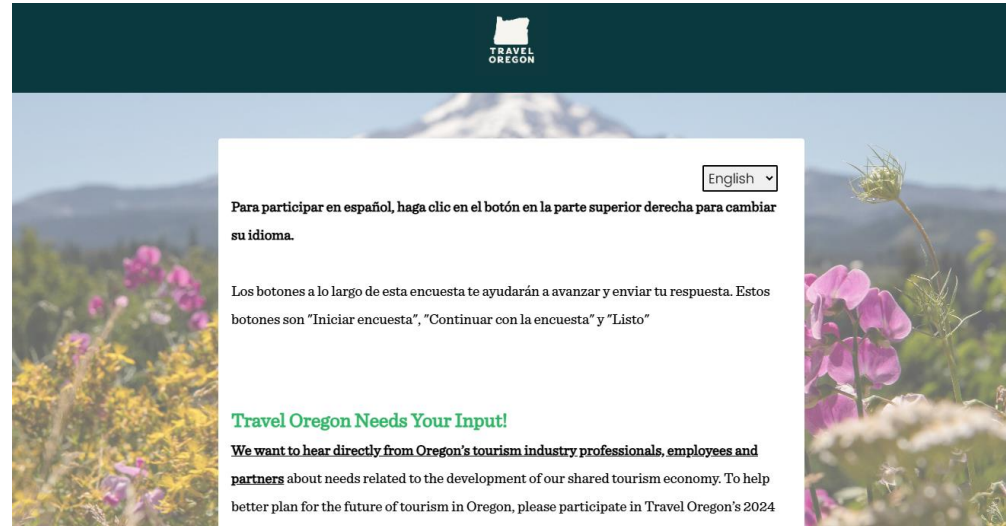
Photo Credit: Richard Hallman

# TABLE OF CONTENTS

- **SURVEY METHODOLOGY – 4**
- **KEY FINDINGS – 7**
- **TOURISM STRATEGIES – 14**
  - **Destination Development – 11**
  - **Planning Priorities – 16**
  - **Advocacy – 19**
  - **Visitation & Seasonality – 22**
- **STRENGTHS & CHALLENGES – 26**
- **RESOURCES & PROGRAMS – 38**
- **INDUSTRY ENGAGEMENT & COMMUNICATIONS – 53**
- **RESPONDENT PROFILE – 58**

# SURVEY METHODOLOGY

- 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 5<sup>th</sup> edition of the Industry Partner Survey, formerly known as the Stakeholder Survey. This year, the survey distribution methods were expanded and included the following:
  - Travel Oregon Industry Newsletter
  - Partner & Staff Outreach
  - Industry Conferences
  - Social Media
- Over 1,300 partners participated across the state.



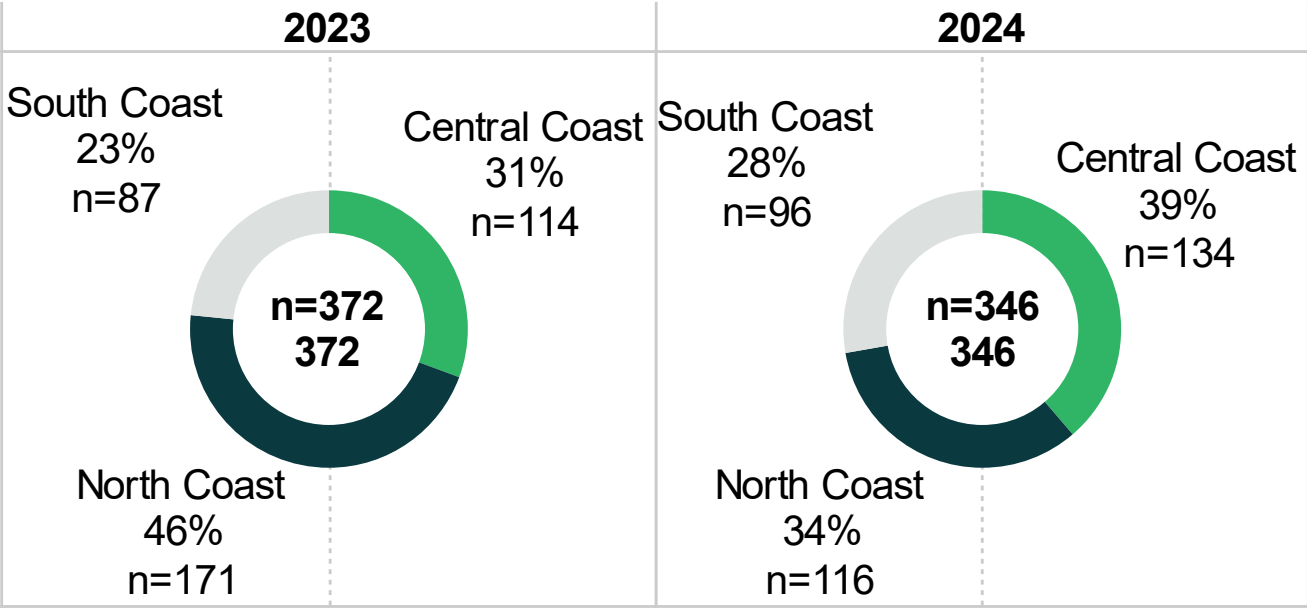
# RESPONSES BY REGION

- A total of 1,358 respondents participated in the Tourism Industry Partner Survey, up from 1,018 the year prior.  
**Your responses will help inform strategies and investments for the statewide tourism industry as well as your region. In which region do you primarily work, or in which region is your business/organization primarily located?**

	2023	2024
Oregon Coast	<div><div></div><div>37% n=375</div></div>	<div><div></div><div>26% n=350</div></div>
Willamette Valley	<div><div></div><div>16% n=166</div></div>	<div><div></div><div>16% n=224</div></div>
Portland Region	<div><div></div><div>11% n=115</div></div>	<div><div></div><div>16% n=211</div></div>
Central Oregon	<div><div></div><div>8% n=79</div></div>	<div><div></div><div>14% n=191</div></div>
Southern Oregon	<div><div></div><div>10% n=98</div></div>	<div><div></div><div>12% n=160</div></div>
Eastern Oregon	<div><div></div><div>10% n=105</div></div>	<div><div></div><div>10% n=138</div></div>
Mt. Hood / Gorge	<div><div></div><div>8% n=80</div></div>	<div><div></div><div>6% n=84</div></div>
n=	1,018	1,358

# RESPONSES BY OREGON COAST SUBREGION

In which Sub-Region of the Oregon Coast do you work or live?



Source: RRC



# KEY FINDINGS

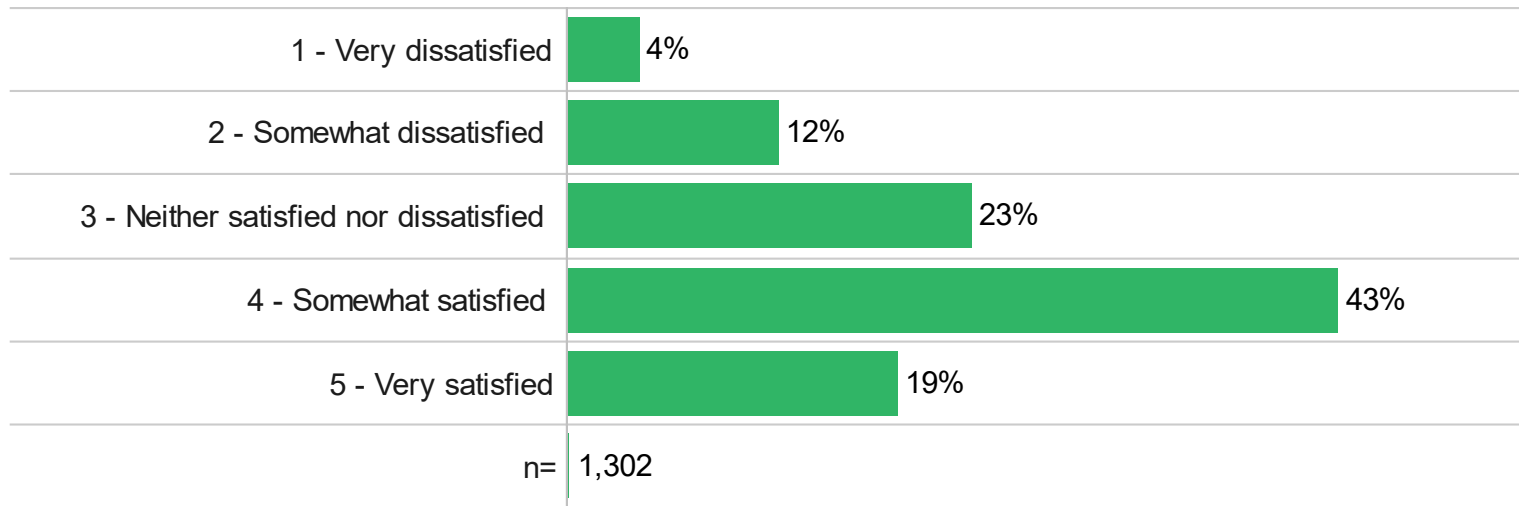


# KEY FINDINGS

## THE INDUSTRY CONTINUES TO SUPPORT THE DIRECTION OF TOURISM DEVELOPMENT IN OREGON

- Over 60% of respondents expressed satisfaction ("somewhat" or "very satisfied") with destination development efforts, indicating a generally positive perception of tourism efforts. This represents a 10% increase in satisfaction from 2023.

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



Source: RRC

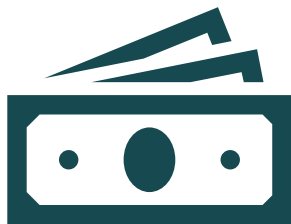


# KEY FINDINGS

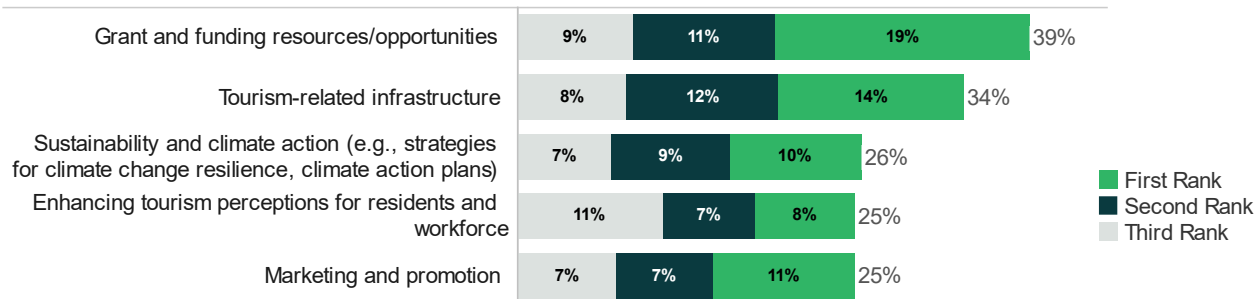
## TOURISM PRIORITIES AND FOCUS AREAS

Grants and tourism infrastructure top the list of priorities.

- Appearing as a theme throughout the results, grant/funding resources and opportunities (39%) along with tourism infrastructure (34%) were rated as the top planning priorities by partners.



**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)**



# KEY FINDINGS



## Seasonality

- Central Oregon, the Oregon Coast, and Mt. Hood/Gorge reported the highest levels of overcrowding during summer, while Southern Oregon and the Portland Region identified a need for more visitors. Working with regions who may need more support in drawing visitors while managing growth in already busy areas will still be important moving forward.



## Top Strengths

- Although dropping slightly from 2023 numbers, outdoor recreation and food and beverage continue to be perceived as the top strengths of the state. These two primary draws are commonly heard from visitors across the state, and partners recognize these strengths, too.



## Housing Challenges

- In 2024, lack of affordable housing (74% high risk) and workforce housing shortages (67% high risk) were the most critical challenges, up from 65% and 52% in 2023. Ongoing efforts to try and better leverage resources to improve housing infrastructure and retain workforce are in progress across the state.

# TOURISM STRATEGIES

## *Destination Development*



# SATISFACTION WITH DESTINATION DEVELOPMENT

- Overall, respondents have a fairly positive view of destination development, with 62% saying they were either "somewhat" or "very" satisfied, up 10 points from 2023.

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

	2023	2024
1 - Very dissatisfied	5%	4%
2 - Somewhat dissatisfied	14%	12%
3 - Neither satisfied nor dissatisfied	29%	23%
4 - Somewhat satisfied	39%	43%
5 - Very satisfied	13%	19%
n=	920	1,302

Source: RRC

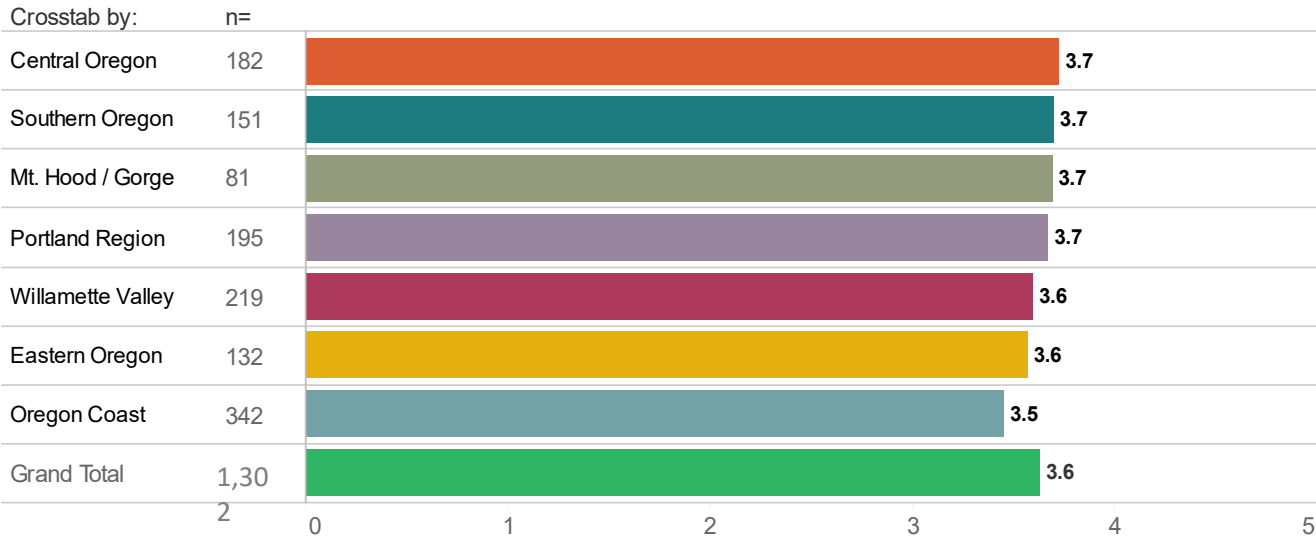
Note: "Destination Development" refers to overall tourism development in Oregon. The following definition was provided to survey respondents: "Destination Development refers to the development of robust destinations that offer authentic, world-class experiences for all travelers, while preserving, enhancing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

# SATISFACTION WITH DESTINATION DEVELOPMENT

## AVERAGE RATING BY REGION

- Regionally, little variation exists with the range of averages showing from 3.5-3.7, with the Oregon Coast rating the lowest.
- For Travel Oregon, this general sense of satisfaction is important for ensuring all partners feel included and supported.

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



Rating categories are sorted by 2024 average rating in descending order.  
Average rating shown on a 5-point scale.  
Source: RRC

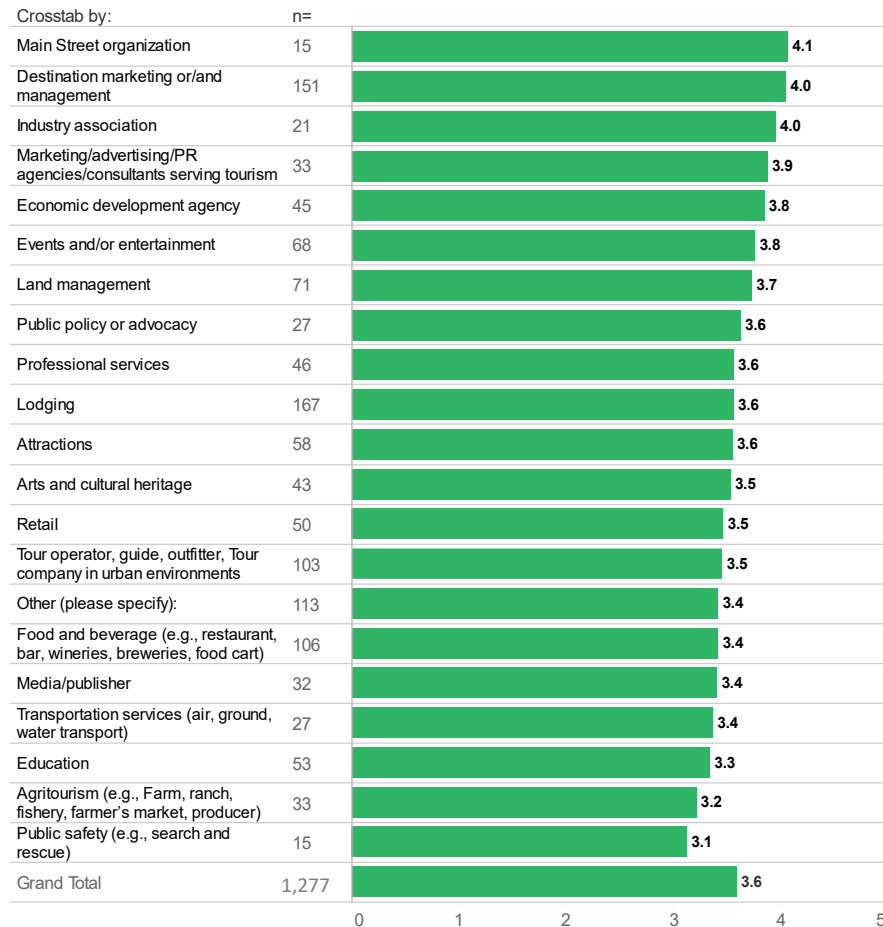


# SATISFACTION WITH DESTINATION DEVELOPMENT

## AVERAGE RATING BY SECTOR

- Satisfaction with the direction of destination development in Oregon shows moderate to high levels across nearly all sectors, with Main Street organizations, destination marketing/management groups, and industry associations reporting the highest ratings, while even the lower-rated groups, such as agritourism and public safety, still reflect moderate satisfaction.

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



Rating categories are sorted by 2024 average rating in descending order.

Average rating shown on a 5-point scale.

Source: RRC

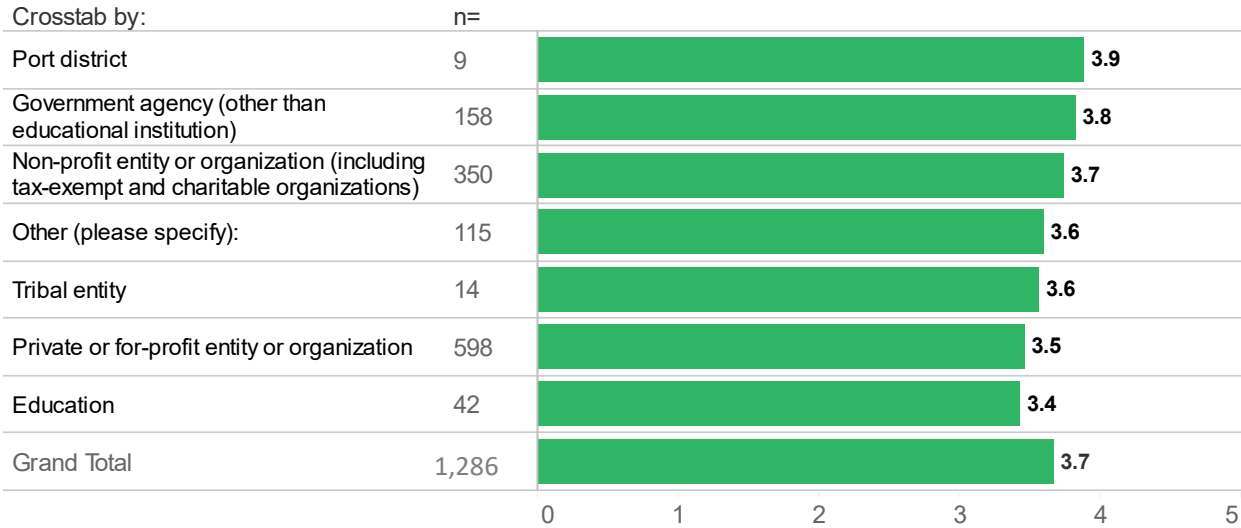
Note: Caution is advised when interpreting results based on sample size of less than 30. Averages are approximated to the first decimal.

# SATISFACTION WITH DESTINATION DEVELOPMENT

## AVERAGE RATING BY ENTITY

- When viewed by entity type, satisfaction with destination development in Oregon is moderate to high across all groups. Port districts and government agencies report the highest satisfaction, followed by nonprofits, tribal entities, and private organizations, with education showing slightly lower satisfaction.

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



Rating categories are sorted by 2024 average rating in descending order.  
Average rating shown on a 5-point scale.  
Source: RRC

Note: Caution is advised when interpreting results based on sample size of less than 30.

# TOURISM STRATEGIES

## *Planning Priorities*

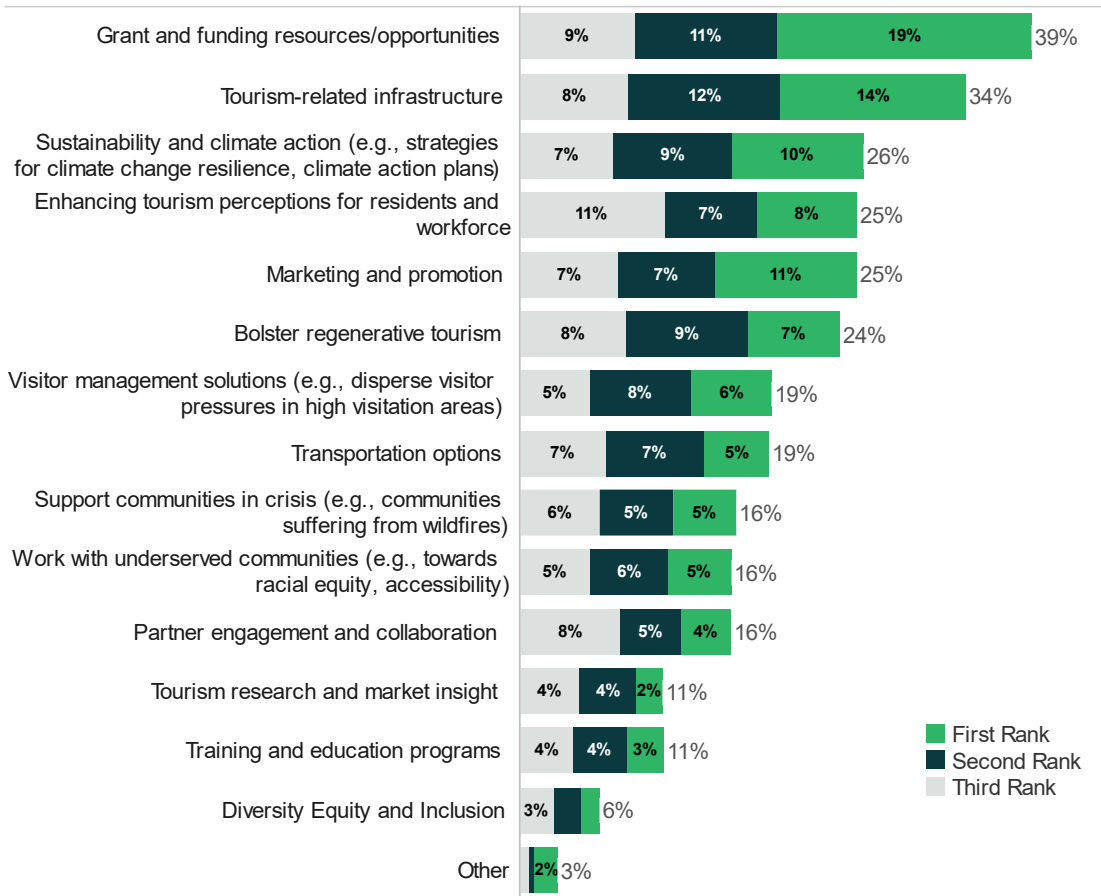




# TOP 3 TOURISM PLANNING PRIORITIES 2024 SAMPLE

- For future destination development, the industry would like to see the following areas prioritized: grant and funding opportunities (39%), tourism-related infrastructure (34%), and sustainability and climate action (26%). Focusing on these priorities, along with enhancing tourism perceptions and bolstering regenerative tourism, has the potential to increase satisfaction with destination development efforts.

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)



Source: RRC

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

# TOP 3 TOURISM PLANNING PRIORITIES BY YEAR OF SURVEY

- Marketing and promotion continue to decline significantly, dropping from 54% in 2020 to 45% in 2023 and to 25% in 2024.
- Priorities were more spread out in 2024, with the addition of new options gaining steam.

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 top three priorities respondents identified, with the sum of these three choices for each priority noted on the far right.



# TOURISM STRATEGIES

## *Advocacy*



# TOURISM ENGAGEMENT: ADVOCACY

- The industry could benefit from opportunities and guidance to engage effectively with legislators and policymakers, either directly or through partnerships with organizations. Empowering individuals to advocate for the tourism industry may improve perceptions of tourism and increase satisfaction with destination development efforts.

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	X - Don't know / Not sure
I am comfortable collaborating with groups of varying size and backgrounds (racial, political, etc.) to make positive changes in the tourism industry	4.6	1,187	2%	2%	8%	18%	66%	4%
I am able to identify barriers that impede the development of tourism in my community	4.1	1,200	2%	5%	13%	44%	33%	3%
I am able to identify strengths and resources that community members bring to the process of tourism development	4.1	1,182	2%	5%	14%	43%	33%	3%
I engage with legislators and policy makers to create positive change in the tourism industry	3.2	1,178	13%	17%	27%	23%	16%	4%

# TOURISM ENGAGEMENT: ADVOCACY

## BY YEAR OF SURVEY

- Overall results are similar between 2023 and 2024.
- While most respondents feel confident collaborating with diverse groups and identifying barriers and resources for tourism development, there is significantly less engagement with legislators and policymakers to create positive change, suggesting a key area for improvement in advocacy efforts within the tourism industry.

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

Rating Category	Crosstab by:	Avg.	n=	1 - Strongly disagree	2 - Somewhat disagree	3 - Neither agree nor disagree	4 - Somewhat agree	5 - Strongly agree
I am comfortable collaborating with groups of varying size and backgrounds (racial, political, etc.) to make positive changes in the tourism industry	2024	4.5	1,141	2%	2%	9%	19%	69%
	2023	4.4	869	1%	1%	6%	40%	52%
I am able to identify barriers that impede the development of tourism in my community	2024	4.0	1,161	2%	5%	13%	45%	34%
	2023	4.0	870	1%	4%	17%	52%	27%
I am able to identify strengths and resources that community members bring to the process of tourism development	2024	4.0	1,144	2%	5%	15%	44%	34%
	2023	3.9	869	1%	4%	17%	53%	24%
I engage with legislators and policy makers to create positive change in the tourism industry	2024	3.1	1,128	14%	17%	28%	24%	16%
	2023	3.1	863	9%	19%	36%	23%	13%

Source: RRC

# TOURISM STRATEGIES

## *Visitation and Seasonality*

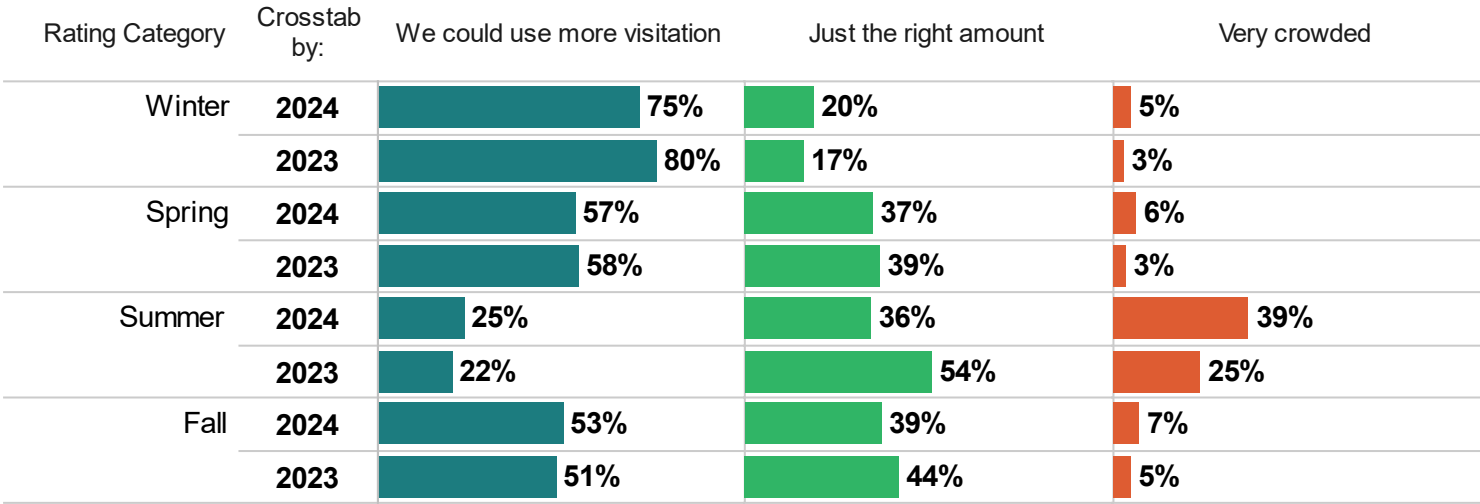


# LEVEL OF VISITATION BY SEASON

## BY YEAR OF SURVEY

- In 2024, there's a stronger sense of crowding in all seasons compared to 2023, particularly in summer, with those who rated the level of visitation as "very crowded" increased by 14 percentage points.

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



Source: RRC

Note: 2023 asked this question as "With respect to the number of visitors that your community receives each season, would you say there area:"
























# LEVEL OF VISITATION IN SUMMER

## BY REGION

- During the summer, Central Oregon stands out with 67% of respondents perceiving the area as very crowded, while Southern Oregon contrasts significantly, with only 16% sharing this sentiment, and nearly half (46%) indicating a need for more visitation. These differences highlight an opportunity to redirect visitors to less crowded regions, like Southern Oregon, to balance tourism demand and alleviate pressures in highly visited areas like Central Oregon.

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

Rating Category	Crosstab by:	n=	We could use more visitation	Just the right amount	Very crowded
Summer	Central Oregon	165	 8%	 25%	 67%
	Oregon Coast	320	 10%	 36%	 54%
	Mt. Hood / Gorge	72	 22%	 26%	 51%
	Willamette Valley	203	 30%	 43%	 27%
	Portland Region	164	 38%	 36%	 26%
	Eastern Oregon	126	 35%	 44%	 21%
	Southern Oregon	140	 46%	 38%	 16%





















Source: RRC

# LEVEL OF VISITATION IN WINTER

## BY REGION

- During winter, most regions report low levels of crowding, with the Oregon Coast, Portland Region, Southern Oregon, and Willamette Valley indicating a need for more visitation, while only Central Oregon shows a notable 20% perceiving winter visitation as very crowded.

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

Rating Category	Crosstab by:	n=	We could use more visitation	Just the right amount	Very crowded
Winter	Central Oregon	161	 45%	 35%	 20%
	Mt. Hood / Gorge	69	 67%	 20%	 13%
	Oregon Coast	319	 78%	 19%	 3%
	Portland Region	165	 83%	 15%	 2%
	Southern Oregon	138	 88%	 11%	 1%
	Willamette Valley	202	 82%	 17%	 0.5%
	Eastern Oregon	125	 74%	 26%	

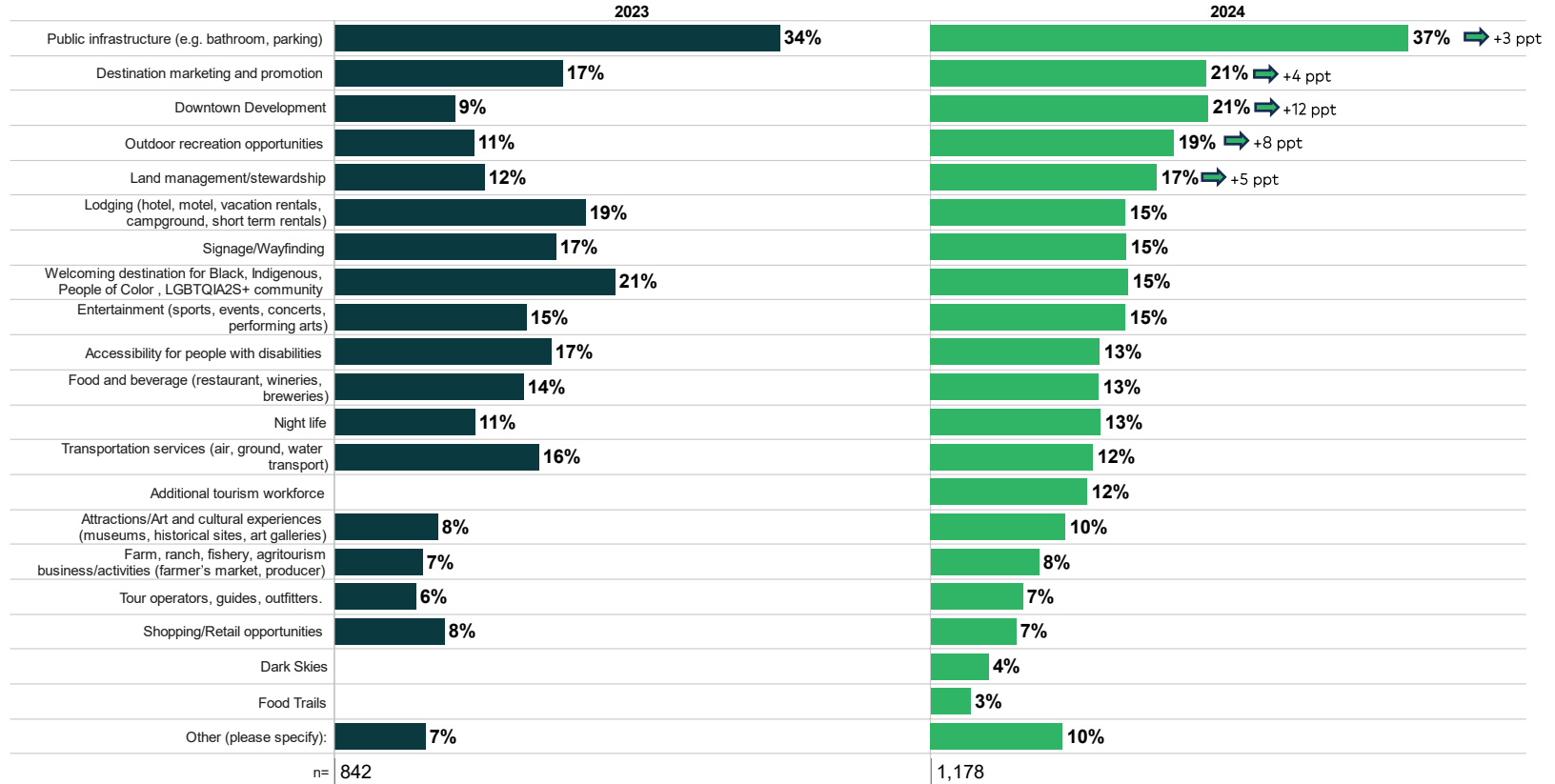
# STRENGTHS & CHALLENGES



# AREAS THAT NEED FOCUS

## BY YEAR OF SURVEY

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



Note: Instances where percentages are not shown in 2023 (i.e. Additional tourism workforce, dark skies, etc.) indicate a new answer option added in 2024.

Source: RRC

# AREAS THAT NEED FOCUS

## OPEN-ENDED RESPONSES

- Key Themes:

- **Affordable Housing:** A need for more affordable housing, workforce housing, and a generally negative sentiment toward short-term rentals perceived to be placing stress on the market.
- **Safety and Public Perception:** Concerns about safety, homelessness, public sanitation, and crime are frequently cited as barriers to attracting tourists.
- **Infrastructure:** A need for better infrastructure, including highways, public transportation, trail maintenance, and recreational facilities.



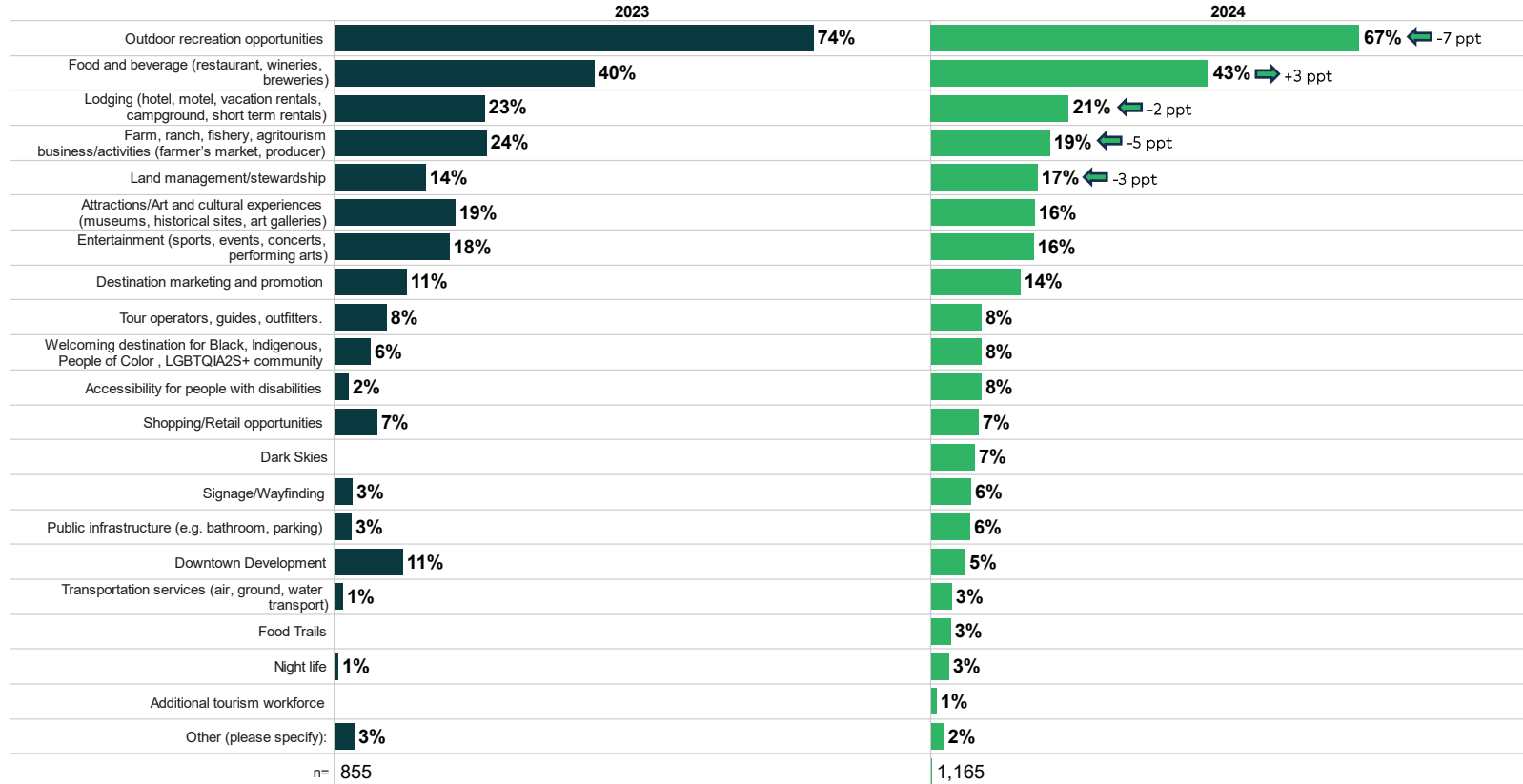
119 Comments | Words Used 3 or More Times Illustrated Above



# STRENGTHS

## BY YEAR OF SURVEY

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



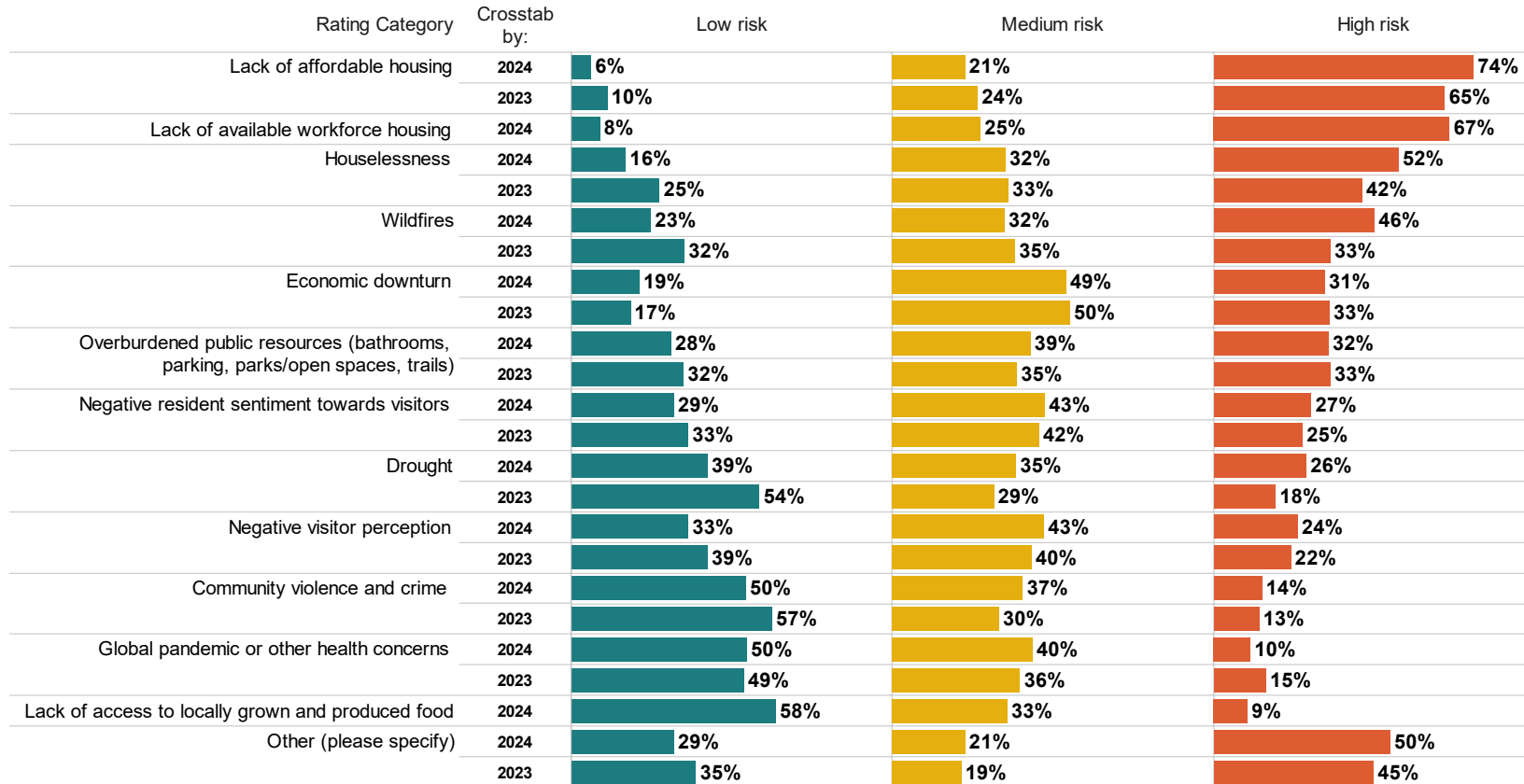
Source: RRC

Note: Instances where percentages are not shown in 2023 (i.e. Additional tourism workforce, dark skies, etc.) indicate a new answer option added in 2024.

# CHALLENGES

## BY YEAR OF SURVEY

Which of the following challenges does your community currently face?



# CHALLENGES

## BY YEAR OF SURVEY & REGION

- YEAR OF SURVEY:

- A common topic heard across the industry, not just in Oregon, is the lack of affordable and/or workforce housing. In 2024, 74% of respondents rated it as a high-risk issue, a 10% increase from the previous year.
- Houselessness and wildfires followed closely in perceived risk, while concern over drought grew, with the percentage of respondents rating it as high-risk rising from 18% in 2023 to 26% in 2024.

### REGION

- Across regions, lack of affordable housing was among the top two challenges each region cited as a high risk or medium risk.
- Challenges that were ranked as the highest risk for each of the regions were:
  - Wildfires – Central Oregon, Mt. Hood / Gorge, Southern Oregon
  - Lack of Available Workforce Housing – Eastern Oregon
  - Lack of Affordable Housing – Oregon Coast, Portland Region

# CHALLENGES

## BY REGION: LACK OF AFFORDABLE HOUSING

### Challenges by Region: Percent Responding "High Risk" or "Medium Risk" in Rank Order

Which of the following challenges does your community currently face?

Rank	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
1	1) Wildfires: 97%	1) Lack of available workforce housing: 97%	1) Wildfires: 95%	1) Lack of affordable housing: 97%	1) Lack of affordable housing: 92%	1) Wildfires: 96%	1) Lack of affordable housing: 93%
2	2) Lack of affordable housing: 93%	2) Lack of affordable housing: 94%	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 95%	2) Houselessness: 92%	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 90%
3	3) Lack of available workforce housing: 93%	3) Wildfires: 93%	3) Lack of available workforce housing: 90%	3) Houselessness: 89%	3) Negative visitor perception: 88%	3) Lack of available workforce housing: 92%	3) Houselessness: 84%
4	4) Drought: 90%	4) Drought: 88%	4) Negative resident sentiment towards visitors: 83%	4) Negative resident sentiment towards visitors: 87%	4) Economic downturn: 84%	4) Economic downturn: 88%	4) Economic downturn: 78%
5	5) Negative resident sentiment towards visitors: 87%	5) Economic downturn: 82%	5) Overburdened public resources: 83%	5) Overburdened public resources: 82%	5) Lack of available workforce housing: 83%	5) Houselessness: 87%	5) Wildfires: 76%
6	6) Houselessness: 85%	6) Negative resident sentiment towards visitors: 68%	6) Economic downturn: 76%	6) Economic downturn: 82%	6) Community violence and crime: 74%	6) Drought: 86%	6) Negative visitor perception: 70%
7	7) Overburdened public resources: 83%	7) Houselessness: 66%	7) Houselessness: 75%	7) Negative visitor perception: 62%	7) Overburdened public resources: 71%	7) Negative visitor perception: 72%	7) Overburdened public resources: 63%
8	8) Economic downturn: 72%	8) Negative visitor perception: 65%	8) Drought: 65%	8) Wildfires: 58%	8) Wildfires: 59%	8) Overburdened public resources: 60%	8) Negative resident sentiment towards visitors: 61%
9	9) Lack of access to locally grown and produced food: 52%	9) Lack of access to locally grown and produced food: 51%	9) Negative visitor perception: 60%	9) Lack of access to locally grown and produced food: 55%	9) Global pandemic or other health concerns: 56%	9) Community violence and crime: 59%	9) Drought: 58%
10	10) Negative visitor perception: 51%	10) Overburdened public resources: 50%	10) Lack of access to locally grown and produced food: 48%	10) Community violence and crime: 49%	10) Negative resident sentiment towards visitors: 41%	10) Negative resident sentiment towards visitors: 59%	10) Global pandemic or other health concerns: 52%
11	11) Global pandemic or other health concerns: 46%	11) Global pandemic or other health concerns: 49%	11) Global pandemic or other health concerns: 44%	11) Global pandemic or other health concerns: 49%	11) Drought: 40%	11) Global pandemic or other health concerns: 51%	11) Community violence and crime: 51%
12	12) Community violence and crime: 39%	12) Community violence and crime: 32%	12) Community violence and crime: 39%	12) Drought: 37%	12) Lack of access to locally grown and produced food: 26%	12) Lack of access to locally grown and produced food: 31%	12) Lack of access to locally grown and produced food: 25%

Pose Greater Risk ↑  
↓ Pose Less Risk

# CHALLENGES

## BY REGION: LACK OF AVAILABLE WORKFORCE HOUSING

### Challenges by Region: Percent Responding "High Risk" or "Medium Risk" in Rank Order

Which of the following challenges does your community currently face?

Rank	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
1	1) Wildfires: 97%	1) Lack of available workforce housing: 97%	1) Wildfires: 95%	1) Lack of affordable housing: 97%	1) Lack of affordable housing: 92%	1) Wildfires: 96%	1) Lack of affordable housing: 93%
2	2) Lack of affordable housing: 93%	2) Lack of affordable housing: 94%	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 95%	2) Houselessness: 92%	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 90%
3	3) Lack of available workforce housing: 93%	3) Wildfires: 93%	3) Lack of available workforce housing: 90%	3) Houselessness: 89%	3) Negative visitor perception: 88%	3) Lack of available workforce housing: 92%	3) Houselessness: 84%
4	4) Drought: 90%	4) Drought: 88%	4) Negative resident sentiment towards visitors: 83%	4) Negative resident sentiment towards visitors: 87%	4) Economic downturn: 84%	4) Economic downturn: 88%	4) Economic downturn: 78%
5	5) Negative resident sentiment towards visitors: 87%	5) Economic downturn: 82%	5) Overburdened public resources: 83%	5) Overburdened public resources: 82%	5) Lack of available workforce housing: 83%	5) Houselessness: 87%	5) Wildfires: 76%
6	6) Houselessness: 85%	6) Negative resident sentiment towards visitors: 68%	6) Economic downturn: 76%	6) Economic downturn: 82%	6) Community violence and crime: 74%	6) Drought: 86%	6) Negative visitor perception: 70%
7	7) Overburdened public resources: 83%	7) Houselessness: 66%	7) Houselessness: 75%	7) Negative visitor perception: 62%	7) Overburdened public resources: 71%	7) Negative visitor perception: 72%	7) Overburdened public resources: 63%
8	8) Economic downturn: 72%	8) Negative visitor perception: 65%	8) Drought: 65%	8) Wildfires: 58%	8) Wildfires: 59%	8) Overburdened public resources: 60%	8) Negative resident sentiment towards visitors: 61%
9	9) Lack of access to locally grown and produced food: 52%	9) Lack of access to locally grown and produced food: 51%	9) Negative visitor perception: 60%	9) Lack of access to locally grown and produced food: 55%	9) Global pandemic or other health concerns: 56%	9) Community violence and crime: 59%	9) Drought: 58%
10	10) Negative visitor perception: 51%	10) Overburdened public resources: 50%	10) Lack of access to locally grown and produced food: 48%	10) Community violence and crime: 49%	10) Negative resident sentiment towards visitors: 41%	10) Negative resident sentiment towards visitors: 59%	10) Global pandemic or other health concerns: 52%
11	11) Global pandemic or other health concerns: 46%	11) Global pandemic or other health concerns: 49%	11) Global pandemic or other health concerns: 44%	11) Global pandemic or other health concerns: 49%	11) Drought: 40%	11) Global pandemic or other health concerns: 51%	11) Community violence and crime: 51%
12	12) Community violence and crime: 39%	12) Community violence and crime: 32%	12) Community violence and crime: 39%	12) Drought: 37%	12) Lack of access to locally grown and produced food: 26%	12) Lack of access to locally grown and produced food: 31%	12) Lack of access to locally grown and produced food: 25%

Pose Greater Risk ↑  
↓ Pose Less Risk



# CHALLENGES

## BY REGION: HOUSELESSNESS

### Challenges by Region: Percent Responding "High Risk" or "Medium Risk" in Rank Order

Which of the following challenges does your community currently face?

Rank	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
1	1) Wildfires: 97%	1) Lack of available workforce housing: 97%	1) Wildfires: 95%	1) Lack of affordable housing: 97%	1) Lack of affordable housing: 92%	1) Wildfires: 96%	1) Lack of affordable housing: 93%
2	2) Lack of affordable housing: 93%	2) Lack of affordable housing: 94%	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 95%	2) Houselessness: 92%	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 90%
3	3) Lack of available workforce housing: 93%	3) Wildfires: 93%	3) Lack of available workforce housing: 90%	3) Houselessness: 89%	3) Negative visitor perception: 88%	3) Lack of available workforce housing: 92%	3) Houselessness: 84%
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5	5) Negative resident sentiment towards visitors: 87%	5) Economic downturn: 82%	5) Overburdened public resources: 83%	5) Overburdened public resources: 82%	5) Lack of available workforce housing: 83%	5) Houselessness: 87%	5) Wildfires: 76%
6	6) Houselessness: 85%	6) Negative resident sentiment towards visitors: 68%	6) Economic downturn: 76%	6) Economic downturn: 82%	6) Community violence and crime: 74%	6) Drought: 86%	6) Negative visitor perception: 70%
7	7) Overburdened public resources: 83%	7) Houselessness: 66%	7) Houselessness: 75%	7) Negative visitor perception: 62%	7) Overburdened public resources: 71%	7) Negative visitor perception: 72%	7) Overburdened public resources: 63%
8	8) Economic downturn: 72%	8) Negative visitor perception: 65%	8) Drought: 65%	8) Wildfires: 58%	8) Wildfires: 59%	8) Overburdened public resources: 60%	8) Negative resident sentiment towards visitors: 61%
9	9) Lack of access to locally grown and produced food: 52%	9) Lack of access to locally grown and produced food: 51%	9) Negative visitor perception: 60%	9) Lack of access to locally grown and produced food: 55%	9) Global pandemic or other health concerns: 56%	9) Community violence and crime: 59%	9) Drought: 58%
10	10) Negative visitor perception: 51%	10) Overburdened public resources: 50%	10) Lack of access to locally grown and produced food: 48%	10) Community violence and crime: 49%	10) Negative resident sentiment towards visitors: 41%	10) Negative resident sentiment towards visitors: 59%	10) Global pandemic or other health concerns: 52%
11	11) Global pandemic or other health concerns: 46%	11) Global pandemic or other health concerns: 49%	11) Global pandemic or other health concerns: 44%	11) Global pandemic or other health concerns: 49%	11) Drought: 40%	11) Global pandemic or other health concerns: 51%	11) Community violence and crime: 51%
12	12) Community violence and crime: 39%	12) Community violence and crime: 32%	12) Community violence and crime: 39%	12) Drought: 37%	12) Lack of access to locally grown and produced food: 26%	12) Lack of access to locally grown and produced food: 31%	12) Lack of access to locally grown and produced food: 25%

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# CHALLENGES

## BY REGION: WILDFIRES

### Challenges by Region: Percent Responding "High Risk" or "Medium Risk" in Rank Order

Which of the following challenges does your community currently face?

Rank	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
1	<b>1) Wildfires: 97%</b>	1) Lack of available workforce housing: 97%	<b>1) Wildfires: 95%</b>	1) Lack of affordable housing: 97%	1) Lack of affordable housing: 92%	<b>1) Wildfires: 96%</b>	1) Lack of affordable housing: 93%
2	2) Lack of affordable housing: 93%	2) Lack of affordable housing: 94%	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 95%	2) <b>Houselessness: 92%</b>	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 90%
3	3) Lack of available workforce housing: 93%	<b>3) Wildfires: 93%</b>	3) Lack of available workforce housing: 90%	3) <b>Houselessness: 89%</b>	3) <b>Negative visitor perception: 88%</b>	3) Lack of available workforce housing: 92%	3) <b>Houselessness: 84%</b>
4	4) <b>Drought: 90%</b>	4) <b>Drought: 88%</b>	4) <b>Negative resident sentiment towards visitors: 83%</b>	4) <b>Negative resident sentiment towards visitors: 87%</b>	4) <b>Economic downturn: 84%</b>	4) <b>Economic downturn: 88%</b>	4) <b>Economic downturn: 78%</b>
5	5) <b>Negative resident sentiment towards visitors: 87%</b>	5) <b>Economic downturn: 82%</b>	5) <b>Overburdened public resources: 83%</b>	5) <b>Overburdened public resources: 82%</b>	5) <b>Lack of available workforce housing: 83%</b>	5) <b>Houselessness: 87%</b>	<b>5) Wildfires: 76%</b>
6	6) <b>Houselessness: 85%</b>	6) <b>Negative resident sentiment towards visitors: 68%</b>	6) <b>Economic downturn: 76%</b>	6) <b>Economic downturn: 82%</b>	6) <b>Community violence and crime: 74%</b>	6) <b>Drought: 86%</b>	6) <b>Negative visitor perception: 70%</b>
7	7) <b>Overburdened public resources: 83%</b>	7) <b>Houselessness: 66%</b>	7) <b>Houselessness: 75%</b>	7) <b>Negative visitor perception: 62%</b>	7) <b>Overburdened public resources: 71%</b>	7) <b>Negative visitor perception: 72%</b>	7) <b>Overburdened public resources: 63%</b>
8	8) <b>Economic downturn: 72%</b>	8) <b>Negative visitor perception: 65%</b>	8) <b>Drought: 65%</b>	<b>8) Wildfires: 58%</b>	<b>8) Wildfires: 59%</b>	8) <b>Overburdened public resources: 60%</b>	8) <b>Negative resident sentiment towards visitors: 61%</b>
9	9) <b>Lack of access to locally grown and produced food: 52%</b>	9) <b>Lack of access to locally grown and produced food: 51%</b>	9) <b>Negative visitor perception: 60%</b>	9) <b>Lack of access to locally grown and produced food: 55%</b>	9) <b>Global pandemic or other health concerns: 56%</b>	9) <b>Community violence and crime: 59%</b>	9) <b>Drought: 58%</b>
10	10) <b>Negative visitor perception: 51%</b>	10) <b>Overburdened public resources: 50%</b>	10) <b>Lack of access to locally grown and produced food: 48%</b>	10) <b>Community violence and crime: 49%</b>	10) <b>Negative resident sentiment towards visitors: 41%</b>	10) <b>Negative resident sentiment towards visitors: 59%</b>	10) <b>Global pandemic or other health concerns: 52%</b>
11	11) <b>Global pandemic or other health concerns: 46%</b>	11) <b>Global pandemic or other health concerns: 49%</b>	11) <b>Global pandemic or other health concerns: 44%</b>	11) <b>Global pandemic or other health concerns: 49%</b>	11) <b>Drought: 40%</b>	11) <b>Global pandemic or other health concerns: 51%</b>	11) <b>Community violence and crime: 51%</b>
12	12) <b>Community violence and crime: 39%</b>	12) <b>Community violence and crime: 32%</b>	12) <b>Community violence and crime: 39%</b>	12) <b>Drought: 37%</b>	12) <b>Lack of access to locally grown and produced food: 26%</b>	12) <b>Lack of access to locally grown and produced food: 31%</b>	12) <b>Lack of access to locally grown and produced food: 25%</b>

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# CHALLENGES

## BY REGION: ECONOMIC DOWNTURN

### Challenges by Region: Percent Responding "High Risk" or "Medium Risk" in Rank Order

Which of the following challenges does your community currently face?

Rank	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
1	1) Wildfires: 97%	1) Lack of available workforce housing: 97%	1) Wildfires: 95%	1) Lack of affordable housing: 97%	1) Lack of affordable housing: 92%	1) Wildfires: 96%	1) Lack of affordable housing: 93%
2	2) Lack of affordable housing: 93%	2) Lack of affordable housing: 94%	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 95%	2) Houselessness: 92%	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 90%
3	3) Lack of available workforce housing: 93%	3) Wildfires: 93%	3) Lack of available workforce housing: 90%	3) Houselessness: 89%	3) Negative visitor perception: 88%	3) Lack of available workforce housing: 92%	3) Houselessness: 84%
4	4) Drought: 90%	4) Drought: 88%	4) Negative resident sentiment towards visitors: 83%	4) Negative resident sentiment towards visitors: 87%	4) Economic downturn: 84%	4) Economic downturn: 88%	4) Economic downturn: 78%
5	5) Negative resident sentiment towards visitors: 87%	5) Economic downturn: 82%	5) Overburdened public resources: 83%	5) Overburdened public resources: 82%	5) Lack of available workforce housing: 83%	5) Houselessness: 87%	5) Wildfires: 76%
6	6) Houselessness: 85%	6) Negative resident sentiment towards visitors: 68%	6) Economic downturn: 76%	6) Economic downturn: 82%	6) Community violence and crime: 74%	6) Drought: 86%	6) Negative visitor perception: 70%
7	7) Overburdened public resources: 83%	7) Houselessness: 66%	7) Houselessness: 75%	7) Negative visitor perception: 62%	7) Overburdened public resources: 71%	7) Negative visitor perception: 72%	7) Overburdened public resources: 63%
8	8) Economic downturn: 72%	8) Negative visitor perception: 65%	8) Drought: 65%	8) Wildfires: 58%	8) Wildfires: 59%	8) Overburdened public resources: 60%	8) Negative resident sentiment towards visitors: 61%
9	9) Lack of access to locally grown and produced food: 52%	9) Lack of access to locally grown and produced food: 51%	9) Negative visitor perception: 60%	9) Lack of access to locally grown and produced food: 55%	9) Global pandemic or other health concerns: 56%	9) Community violence and crime: 59%	9) Drought: 58%
10	10) Negative visitor perception: 51%	10) Overburdened public resources: 50%	10) Lack of access to locally grown and produced food: 48%	10) Community violence and crime: 49%	10) Negative resident sentiment towards visitors: 41%	10) Negative resident sentiment towards visitors: 59%	10) Global pandemic or other health concerns: 52%
11	11) Global pandemic or other health concerns: 46%	11) Global pandemic or other health concerns: 49%	11) Global pandemic or other health concerns: 44%	11) Global pandemic or other health concerns: 49%	11) Drought: 40%	11) Global pandemic or other health concerns: 51%	11) Community violence and crime: 51%
12	12) Community violence and crime: 39%	12) Community violence and crime: 32%	12) Community violence and crime: 39%	12) Drought: 37%	12) Lack of access to locally grown and produced food: 26%	12) Lack of access to locally grown and produced food: 31%	12) Lack of access to locally grown and produced food: 25%

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# CHALLENGES

## BY REGION: ALL CATEGORIES

### Challenges by Region: Percent Responding "High Risk" or "Medium Risk" in Rank Order

Which of the following challenges does your community currently face?

Rank	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
1	1) Wildfires: 97%	1) Lack of available workforce housing: 97%	1) Wildfires: 95%	1) Lack of affordable housing: 97%	1) Lack of affordable housing: 92%	1) Wildfires: 96%	1) Lack of affordable housing: 93%
2	2) Lack of affordable housing: 93%	2) Lack of affordable housing: 94%	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 95%	2) Houselessness: 92%	2) Lack of affordable housing: 95%	2) Lack of available workforce housing: 90%
3	3) Lack of available workforce housing: 93%	3) Wildfires: 93%	3) Lack of available workforce housing: 90%	3) Houselessness: 89%	3) Negative visitor perception: 88%	3) Lack of available workforce housing: 92%	3) Houselessness: 84%
4	4) Drought: 90%	4) Drought: 88%	4) Negative resident sentiment towards visitors: 83%	4) Negative resident sentiment towards visitors: 87%	4) Economic downturn: 84%	4) Economic downturn: 88%	4) Economic downturn: 78%
5	5) Negative resident sentiment towards visitors: 87%	5) Economic downturn: 82%	5) Overburdened public resources: 83%	5) Overburdened public resources: 82%	5) Lack of available workforce housing: 83%	5) Houselessness: 87%	5) Wildfires: 76%
6	6) Houselessness: 85%	6) Negative resident sentiment towards visitors: 68%	6) Economic downturn: 76%	6) Economic downturn: 82%	6) Community violence and crime: 74%	6) Drought: 86%	6) Negative visitor perception: 70%
7	7) Overburdened public resources: 83%	7) Houselessness: 66%	7) Houselessness: 75%	7) Negative visitor perception: 62%	7) Overburdened public resources: 71%	7) Negative visitor perception: 72%	7) Overburdened public resources: 63%
8	8) Economic downturn: 72%	8) Negative visitor perception: 65%	8) Drought: 65%	8) Wildfires: 58%	8) Wildfires: 59%	8) Overburdened public resources: 60%	8) Negative resident sentiment towards visitors: 61%
9	9) Lack of access to locally grown and produced food: 52%	9) Lack of access to locally grown and produced food: 51%	9) Negative visitor perception: 60%	9) Lack of access to locally grown and produced food: 55%	9) Global pandemic or other health concerns: 56%	9) Community violence and crime: 59%	9) Drought: 58%
10	10) Negative visitor perception: 51%	10) Overburdened public resources: 50%	10) Lack of access to locally grown and produced food: 48%	10) Community violence and crime: 49%	10) Negative resident sentiment towards visitors: 41%	10) Negative resident sentiment towards visitors: 59%	10) Global pandemic or other health concerns: 52%
11	11) Global pandemic or other health concerns: 46%	11) Global pandemic or other health concerns: 49%	11) Global pandemic or other health concerns: 44%	11) Global pandemic or other health concerns: 49%	11) Drought: 40%	11) Global pandemic or other health concerns: 51%	11) Community violence and crime: 51%
12	12) Community violence and crime: 39%	12) Community violence and crime: 32%	12) Community violence and crime: 39%	12) Drought: 37%	12) Lack of access to locally grown and produced food: 26%	12) Lack of access to locally grown and produced food: 31%	12) Lack of access to locally grown and produced food: 25%

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# RESOURCES & PROGRAMS





# TOP RESOURCES/PROGRAMS

Which of the following resources or programs would best assist your business/organization or community in the face of challenges previously specified?



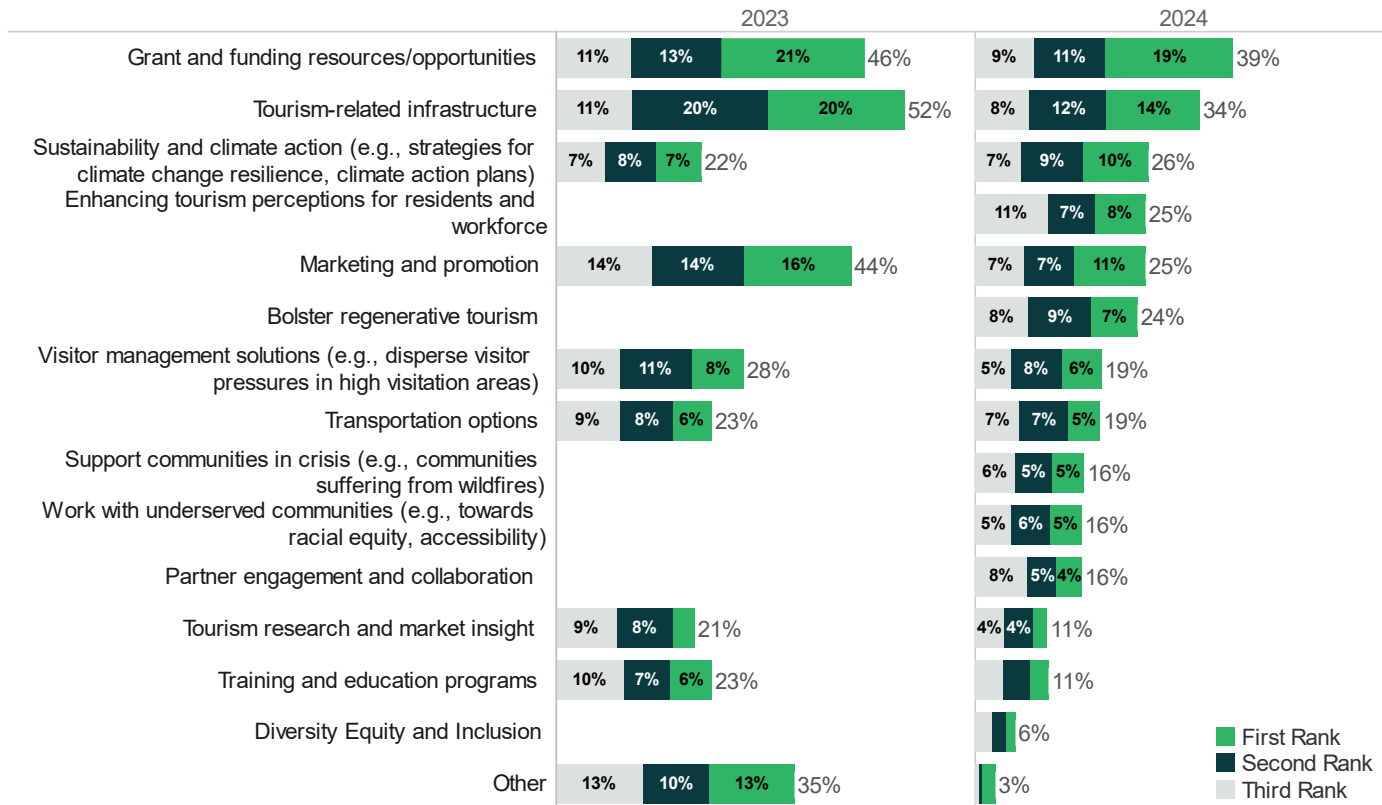
**Note:** Responses were recorded for top five resources respondents identified, with the sum of these five choices for each priority noted on the far right.

Source: RRC

# LONG-TERM PLANNING PRIORITIES

## BY YEAR OF SURVEY

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)



Source: RRC

**Note:** Instances where percentages are not shown in 2023 (i.e. bolster regenerative tourism, etc.) indicate a new answer option added in 2024.

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

# LONG-TERM PLANNING PRIORITIES

## BY REGION: GRANT AND FUNDING RESOURCES/OPPORTUNITIES

### Priorities by Region: Percent Responding "First Rank" in Rank Order

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)

Higher Priority ↑ Lower Priority ↓	Rank	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
		1) Grant and funding resources/opportunities: 19%	1) Grant and funding resources/opportunities: 22%	1) Tourism-related infrastructure: 18%	1) Grant and funding resources/opportunities: 19%	1) Grant and funding resources/opportunities: 18%	1) Grant and funding resources/opportunities: 26%	1) Grant and funding resources/opportunities: 16%
	2	2) Sustainability and climate action: 17%	2) Tourism-related infrastructure: 15%	2) Grant and funding resources/opportunities: 14%	2) Tourism-related infrastructure: 18%	2) Marketing and promotion: 13%	2) Marketing and promotion: 16%	2) Marketing and promotion: 13%
	3	3) Tourism-related infrastructure: 11%	3) Sustainability and climate action: 11%	3) Enhancing tourism perceptions for residents and workforce: 12%	3) Marketing and promotion: 9%	3) Sustainability and climate action: 12%	3) Tourism-related infrastructure: 14%	3) Tourism-related infrastructure: 10%
	4	4) Visitor management solutions: 9%	4) Marketing and promotion: 10%	4) Transportation options: 11%	4) Bolster regenerative tourism: 8%	4) Enhancing tourism perceptions for residents and workforce: 10%	4) Sustainability and climate action: 8%	4) Enhancing tourism perceptions for residents and workforce: 9%
	5	5) Marketing and promotion: 7%	5) Bolster regenerative tourism: 8%	5) Visitor management solutions: 11%	5) Visitor management solutions: 8%	5) Tourism-related infrastructure: 10%	5) Enhancing tourism perceptions for residents and workforce: 6%	5) Support communities in crisis: 9%
	6	6) Bolster regenerative tourism: 6%	6) Support communities in crisis: 6%	6) Marketing and promotion: 7%	6) Sustainability and climate action: 7%	6) Work with underserved communities: 8%	6) Bolster regenerative tourism: 5%	6) Bolster regenerative tourism: 7%
	7	7) Enhancing tourism perceptions for residents and workforce: 6%	7) Enhancing tourism perceptions for residents and workforce: 5%	7) Sustainability and climate action: 7%	7) Enhancing tourism perceptions for residents and workforce: 7%	7) Bolster regenerative tourism: 5%	7) Visitor management solutions: 5%	7) Partner engagement and collaboration: 7%
	8	8) Work with underserved communities: 6%	8) Visitor management solutions: 5%	8) Bolster regenerative tourism: 5%	8) Transportation options: 6%	8) Support communities in crisis: 5%	8) Work with underserved communities: 4%	8) Sustainability and climate action: 7%
	9	9) Diversity Equity and Inclusion: 4%	9) Work with underserved communities: 5%	9) Support communities in crisis: 5%	9) Other: 3%	9) Partner engagement and collaboration: 4%	9) Partner engagement and collaboration: 3%	9) Work with underserved communities: 6%
	10	10) Transportation options: 4%	10) Partner engagement and collaboration: 4%	10) Training and education programs: 4%	10) Support communities in crisis: 3%	10) Visitor management solutions: 4%	10) Support communities in crisis: 3%	10) Transportation options: 5%
	11	11) Partner engagement and collaboration: 3%	11) Training and education programs: 4%	11) Work with underserved communities: 4%	11) Training and education programs: 3%	11) Tourism research and market insight: 3%	11) Tourism research and market insight: 3%	11) Training and education programs: 4%
	12	12) Support communities in crisis: 3%	12) Transportation options: 4%	12) Partner engagement and collaboration: 2%	12) Partner engagement and collaboration: 3%	12) Transportation options: 3%	12) Transportation options: 3%	12) Other: 2%
	13	13) Tourism research and market insight: 2%	13) Diversity Equity and Inclusion: 1%	13) Tourism research and market insight: 2%	13) Work with underserved communities: 2%	13) Training and education programs: 2%	13) Training and education programs: 2%	13) Tourism research and market insight: 2%
	14	14) Other: 2%	14) Other: 1%		14) Diversity Equity and Inclusion: 2%	14) Other: 1%		14) Diversity Equity and Inclusion: 1%
	15	15) Training and education programs: 1%	15) Tourism research and market insight: 1%		15) Tourism research and market insight: 1%	15) Diversity Equity and Inclusion: 1%		15) Visitor management solutions: 1%

# LONG-TERM PLANNING PRIORITIES

## BY REGION: TOURISM-RELATED INFRASTRUCTURE

### Priorities by Region: Percent Responding "First Rank" in Rank Order

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)

Higher Priority ↑ Lower Priority ↓	Rank	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
		1) Grant and funding resources/opportunities: 19%	1) Grant and funding resources/opportunities: 22%	1) Tourism-related infrastructure: 18%	1) Grant and funding resources/opportunities: 19%	1) Grant and funding resources/opportunities: 18%	1) Grant and funding resources/opportunities: 26%	1) Grant and funding resources/opportunities: 16%
	2	2) Sustainability and climate action: 17%	2) Tourism-related infrastructure: 15%	2) Grant and funding resources/opportunities: 14%	2) Tourism-related infrastructure: 18%	2) Marketing and promotion: 13%	2) Marketing and promotion: 16%	2) Marketing and promotion: 13%
	3	3) Tourism-related infrastructure: 11%	3) Sustainability and climate action: 11%	3) Enhancing tourism perceptions for residents and workforce: 12%	3) Marketing and promotion: 9%	3) Sustainability and climate action: 12%	3) Tourism-related infrastructure: 14%	3) Tourism-related infrastructure: 10%
	4	4) Visitor management solutions: 9%	4) Marketing and promotion: 10%	4) Transportation options: 11%	4) Bolster regenerative tourism: 8%	4) Enhancing tourism perceptions for residents and workforce: 10%	4) Sustainability and climate action: 8%	4) Enhancing tourism perceptions for residents and workforce: 9%
	5	5) Marketing and promotion: 7%	5) Bolster regenerative tourism: 8%	5) Visitor management solutions: 11%	5) Visitor management solutions: 8%	5) Tourism-related infrastructure: 10%	5) Enhancing tourism perceptions for residents and workforce: 6%	5) Support communities in crisis: 9%
	6	6) Bolster regenerative tourism: 6%	6) Support communities in crisis: 6%	6) Marketing and promotion: 7%	6) Sustainability and climate action: 7%	6) Work with underserved communities: 8%	6) Bolster regenerative tourism: 5%	6) Bolster regenerative tourism: 7%
	7	7) Enhancing tourism perceptions for residents and workforce: 6%	7) Enhancing tourism perceptions for residents and workforce: 5%	7) Sustainability and climate action: 7%	7) Enhancing tourism perceptions for residents and workforce: 7%	7) Bolster regenerative tourism: 5%	7) Visitor management solutions: 5%	7) Partner engagement and collaboration: 7%
	8	8) Work with underserved communities: 6%	8) Visitor management solutions: 5%	8) Bolster regenerative tourism: 5%	8) Transportation options: 6%	8) Support communities in crisis: 5%	8) Work with underserved communities: 4%	8) Sustainability and climate action: 7%
	9	9) Diversity Equity and Inclusion: 4%	9) Work with underserved communities: 5%	9) Support communities in crisis: 5%	9) Other: 3%	9) Partner engagement and collaboration: 4%	9) Partner engagement and collaboration: 3%	9) Work with underserved communities: 6%
	10	10) Transportation options: 4%	10) Partner engagement and collaboration: 4%	10) Training and education programs: 4%	10) Support communities in crisis: 3%	10) Visitor management solutions: 4%	10) Support communities in crisis: 3%	10) Transportation options: 5%
	11	11) Partner engagement and collaboration: 3%	11) Training and education programs: 4%	11) Work with underserved communities: 4%	11) Training and education programs: 3%	11) Tourism research and market insight: 3%	11) Tourism research and market insight: 3%	11) Training and education programs: 4%
	12	12) Support communities in crisis: 3%	12) Transportation options: 4%	12) Partner engagement and collaboration: 2%	12) Partner engagement and collaboration: 3%	12) Transportation options: 3%	12) Transportation options: 3%	12) Other: 2%
	13	13) Tourism research and market insight: 2%	13) Diversity Equity and Inclusion: 1%	13) Tourism research and market insight: 2%	13) Work with underserved communities: 2%	13) Training and education programs: 2%	13) Training and education programs: 2%	13) Tourism research and market insight: 2%
	14	14) Other: 2%	14) Other: 1%		14) Diversity Equity and Inclusion: 2%	14) Other: 1%		14) Diversity Equity and Inclusion: 1%
	15	15) Training and education programs: 1%	15) Tourism research and market insight: 1%		15) Tourism research and market insight: 1%	15) Diversity Equity and Inclusion: 1%		15) Visitor management solutions: 1%

# LONG-TERM PLANNING PRIORITIES

## BY REGION: SUSTAINABILITY AND CLIMATE ACTION

### Priorities by Region: Percent Responding "First Rank" in Rank Order

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)

Higher Priority ↑ ↓ Lower Priority	Rank	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
		1) Grant and funding resources/opportunities: 19%	1) Grant and funding resources/opportunities: 22%	1) Tourism-related infrastructure: 18%	1) Grant and funding resources/opportunities: 19%	1) Grant and funding resources/opportunities: 18%	1) Grant and funding resources/opportunities: 26%	1) Grant and funding resources/opportunities: 16%
	2	<b>2) Sustainability and climate action: 17%</b>	2) Tourism-related infrastructure: 15%	2) Grant and funding resources/opportunities: 14%	2) Tourism-related infrastructure: 18%	2) Marketing and promotion: 13%	2) Marketing and promotion: 16%	2) Marketing and promotion: 13%
	3	3) Tourism-related infrastructure: 11%	<b>3) Sustainability and climate action: 11%</b>	3) Enhancing tourism perceptions for residents and workforce: 12%	3) Marketing and promotion: 9%	<b>3) Sustainability and climate action: 12%</b>	3) Tourism-related infrastructure: 14%	3) Tourism-related infrastructure: 10%
	4	4) Visitor management solutions: 9%	4) Marketing and promotion: 10%	4) Transportation options: 11%	4) Bolster regenerative tourism: 8%	4) Enhancing tourism perceptions for residents and workforce: 10%	<b>4) Sustainability and climate action: 8%</b>	4) Enhancing tourism perceptions for residents and workforce: 9%
	5	5) Marketing and promotion: 7%	5) Bolster regenerative tourism: 8%	5) Visitor management solutions: 11%	5) Visitor management solutions: 8%	5) Tourism-related infrastructure: 10%	5) Enhancing tourism perceptions for residents and workforce: 6%	5) Support communities in crisis: 9%
	6	6) Bolster regenerative tourism: 6%	6) Support communities in crisis: 6%	6) Marketing and promotion: 7%	<b>6) Sustainability and climate action: 7%</b>	6) Work with underserved communities: 8%	6) Bolster regenerative tourism: 5%	6) Bolster regenerative tourism: 7%
	7	7) Enhancing tourism perceptions for residents and workforce: 6%	7) Enhancing tourism perceptions for residents and workforce: 5%	<b>7) Sustainability and climate action: 7%</b>	7) Enhancing tourism perceptions for residents and workforce: 7%	7) Bolster regenerative tourism: 5%	7) Visitor management solutions: 5%	<b>7) Partner engagement and collaboration: 7%</b>
	8	8) Work with underserved communities: 6%	8) Visitor management solutions: 5%	8) Bolster regenerative tourism: 5%	8) Transportation options: 6%	8) Support communities in crisis: 5%	8) Work with underserved communities: 4%	<b>8) Sustainability and climate action: 7%</b>
	9	9) Diversity Equity and Inclusion: 4%	9) Work with underserved communities: 5%	9) Support communities in crisis: 5%	9) Other: 3%	9) Partner engagement and collaboration: 4%	9) Partner engagement and collaboration: 3%	9) Work with underserved communities: 6%
	10	10) Transportation options: 4%	<b>10) Partner engagement and collaboration: 4%</b>	10) Training and education programs: 4%	10) Support communities in crisis: 3%	10) Visitor management solutions: 4%	10) Support communities in crisis: 3%	10) Transportation options: 5%
	11	<b>11) Partner engagement and collaboration: 3%</b>	11) Training and education programs: 4%	11) Work with underserved communities: 4%	11) Training and education programs: 3%	11) Tourism research and market insight: 3%	11) Tourism research and market insight: 3%	11) Training and education programs: 4%
	12	12) Support communities in crisis: 3%	12) Transportation options: 4%	12) Partner engagement and collaboration: 2%	12) Partner engagement and collaboration: 3%	12) Transportation options: 3%	12) Transportation options: 3%	<b>12) Other: 2%</b>
	13	13) Tourism research and market insight: 2%	13) Diversity Equity and Inclusion: 1%	13) Tourism research and market insight: 2%	13) Work with underserved communities: 2%	13) Training and education programs: 2%	13) Training and education programs: 2%	13) Tourism research and market insight: 2%
	14	<b>14) Other: 2%</b>	<b>14) Other: 1%</b>		14) Diversity Equity and Inclusion: 2%	<b>14) Other: 1%</b>		14) Diversity Equity and Inclusion: 1%
	15	15) Training and education programs: 1%	15) Tourism research and market insight: 1%		15) Tourism research and market insight: 1%	15) Diversity Equity and Inclusion: 1%		15) Visitor management solutions: 1%



# LONG-TERM PLANNING PRIORITIES

## BY REGION: ALL CATEGORIES

### Priorities by Region: Percent Responding "First Rank" in Rank Order

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)

Higher Priority	Rank	Central Oregon	Eastern Oregon	Mt. Hood / Gorge	Oregon Coast	Portland Region	Southern Oregon	Willamette Valley
	1	1) Grant and funding resources/opportunities: 19%	1) Grant and funding resources/opportunities: 22%	1) Tourism-related infrastructure: 18%	1) Grant and funding resources/opportunities: 19%	1) Grant and funding resources/opportunities: 18%	1) Grant and funding resources/opportunities: 26%	1) Grant and funding resources/opportunities: 16%
	2	2) Sustainability and climate action: 17%	2) Tourism-related infrastructure: 15%	2) Grant and funding resources/opportunities: 14%	2) Tourism-related infrastructure: 18%	2) Marketing and promotion: 13%	2) Marketing and promotion: 16%	2) Marketing and promotion: 13%
	3	3) Tourism-related infrastructure: 11%	3) Sustainability and climate action: 11%	3) Enhancing tourism perceptions for residents and workforce: 12%	3) Marketing and promotion: 9%	3) Sustainability and climate action: 12%	3) Tourism-related infrastructure: 14%	3) Tourism-related infrastructure: 10%
	4	4) Visitor management solutions: 9%	4) Marketing and promotion: 10%	4) Transportation options: 11%	4) Bolster regenerative tourism: 8%	4) Enhancing tourism perceptions for residents and workforce: 10%	4) Sustainability and climate action: 8%	4) Enhancing tourism perceptions for residents and workforce: 9%
	5	5) Marketing and promotion: 7%	5) Bolster regenerative tourism: 8%	5) Visitor management solutions: 11%	5) Visitor management solutions: 8%	5) Tourism-related infrastructure: 10%	5) Enhancing tourism perceptions for residents and workforce: 6%	5) Support communities in crisis: 9%
	6	6) Bolster regenerative tourism: 6%	6) Support communities in crisis: 6%	6) Marketing and promotion: 7%	6) Sustainability and climate action: 7%	6) Work with underserved communities: 8%	6) Bolster regenerative tourism: 5%	6) Bolster regenerative tourism: 7%
	7	7) Enhancing tourism perceptions for residents and workforce: 6%	7) Enhancing tourism perceptions for residents and workforce: 5%	7) Sustainability and climate action: 7%	7) Enhancing tourism perceptions for residents and workforce: 7%	7) Bolster regenerative tourism: 5%	7) Visitor management solutions: 5%	7) Partner engagement and collaboration: 7%
	8	8) Work with underserved communities: 6%	8) Visitor management solutions: 5%	8) Bolster regenerative tourism: 5%	8) Transportation options: 6%	8) Support communities in crisis: 5%	8) Work with underserved communities: 4%	8) Sustainability and climate action: 7%
	9	9) Diversity Equity and Inclusion: 4%	9) Work with underserved communities: 5%	9) Support communities in crisis: 5%	9) Other: 3%	9) Partner engagement and collaboration: 4%	9) Partner engagement and collaboration: 3%	9) Work with underserved communities: 6%
	10	10) Transportation options: 4%	10) Partner engagement and collaboration: 4%	10) Training and education programs: 4%	10) Support communities in crisis: 3%	10) Visitor management solutions: 4%	10) Support communities in crisis: 3%	10) Transportation options: 5%
	11	11) Partner engagement and collaboration: 3%	11) Training and education programs: 4%	11) Work with underserved communities: 4%	11) Training and education programs: 3%	11) Tourism research and market insight: 3%	11) Tourism research and market insight: 3%	11) Training and education programs: 4%
	12	12) Support communities in crisis: 3%	12) Transportation options: 4%	12) Partner engagement and collaboration: 2%	12) Partner engagement and collaboration: 3%	12) Transportation options: 3%	12) Transportation options: 3%	12) Other: 2%
	13	13) Tourism research and market insight: 2%	13) Diversity Equity and Inclusion: 1%	13) Tourism research and market insight: 2%	13) Work with underserved communities: 2%	13) Training and education programs: 2%	13) Training and education programs: 2%	13) Tourism research and market insight: 2%
	14	14) Other: 2%	14) Other: 1%		14) Diversity Equity and Inclusion: 2%	14) Other: 1%		14) Diversity Equity and Inclusion: 1%
	15	15) Training and education programs: 1%	15) Tourism research and market insight: 1%		15) Tourism research and market insight: 1%	15) Diversity Equity and Inclusion: 1%		15) Visitor management solutions: 1%
Lower Priority								

# ENGAGEMENT AND COMMUNICATIONS WITH UNDERSERVED COMMUNITIES

- Travel Oregon emphasizes the importance of engaging with all types of communities across the state, especially those who may be underserved. The following results highlight the ways partners interact with communities in their area and various trainings and methods that support their efforts.



Rural communities, Hispanic/Latino/Latina/Latinx, and LGBTQIA2S+ communities were the most engaged by partners.

- These underserved communities see the most engagement by partners who were able to connect. On the least engaged end are undocumented and documented immigrants, asylum seekers, farm workers, and linguistically diverse communities.



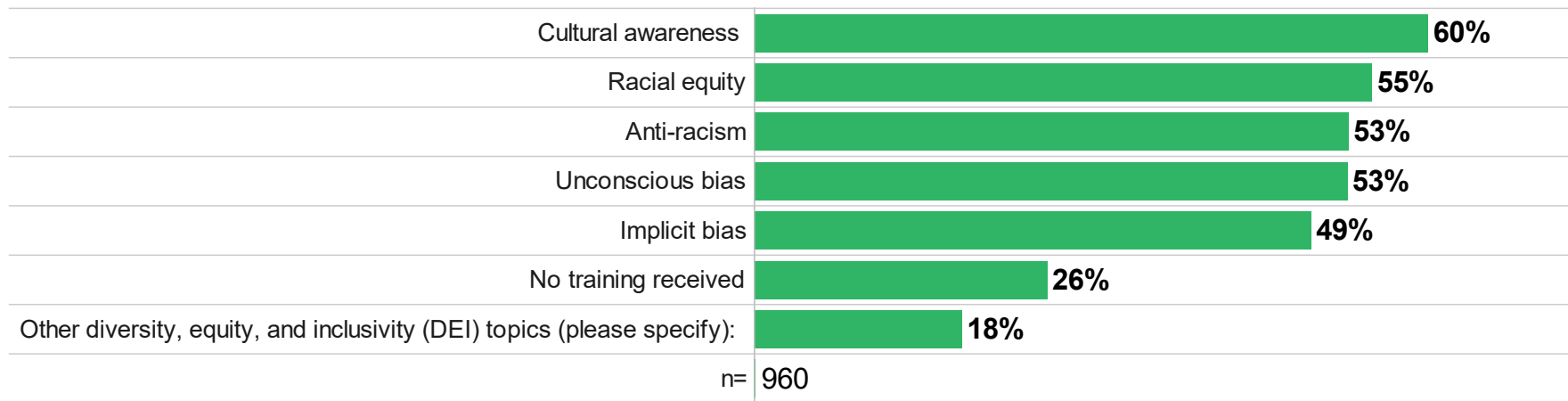
Communication gaps exist for underserved communities.

- 39% of respondents felt that underserved communities were not well represented in engagement efforts, suggesting a need for targeted outreach. Only 28% thought that they were engaging with these communities successfully.

# DEI TRAINING

- About three-quarters of respondents have received at least some degree of DEI training, with the most popular being cultural awareness.

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

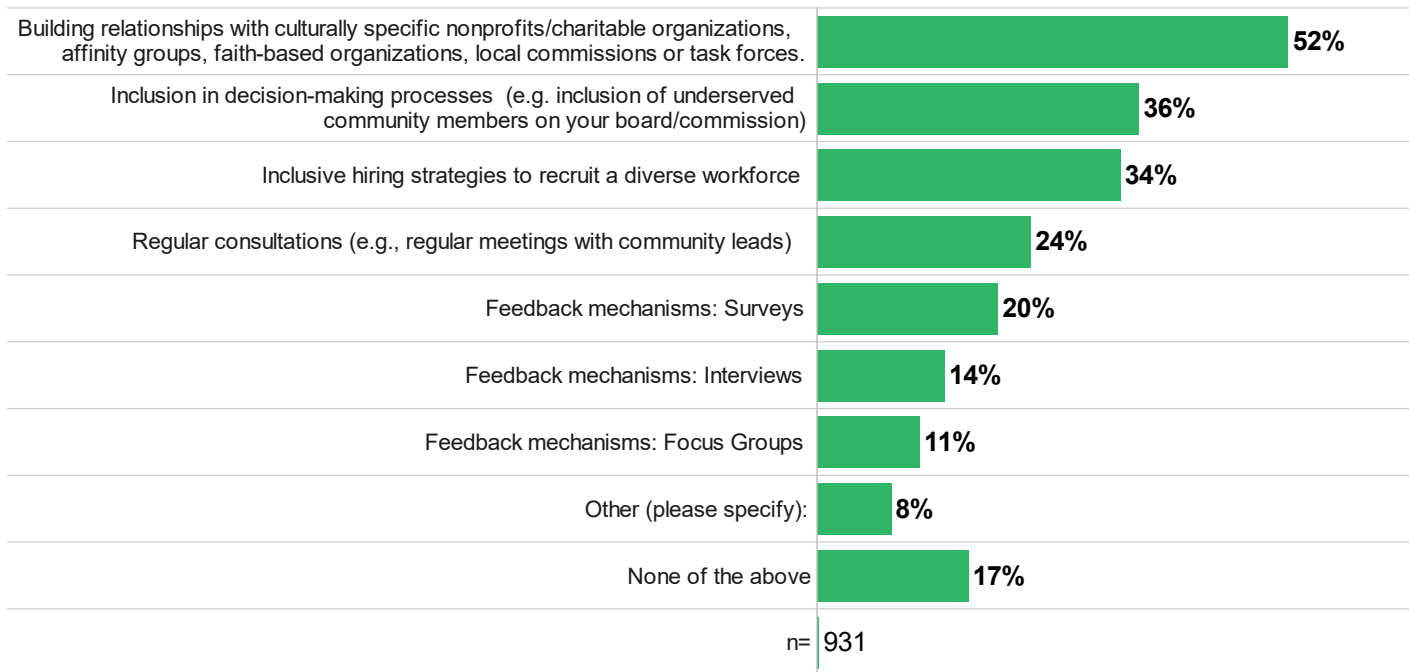


Source: RRC

# UNDERSERVED COMMUNITY ENGAGEMENT

- Building relationships with culturally specific nonprofits, charitable organizations, and affinity groups (52%) is the most common approach for ensuring underserved communities' voices are heard, emphasizing the value of partnerships in outreach and inclusion.
- Additionally, 17% report no efforts, indicating room for broader adoption of inclusive practices.

## How do you ensure that the voices of underserved communities are heard and considered in your planning and operations?

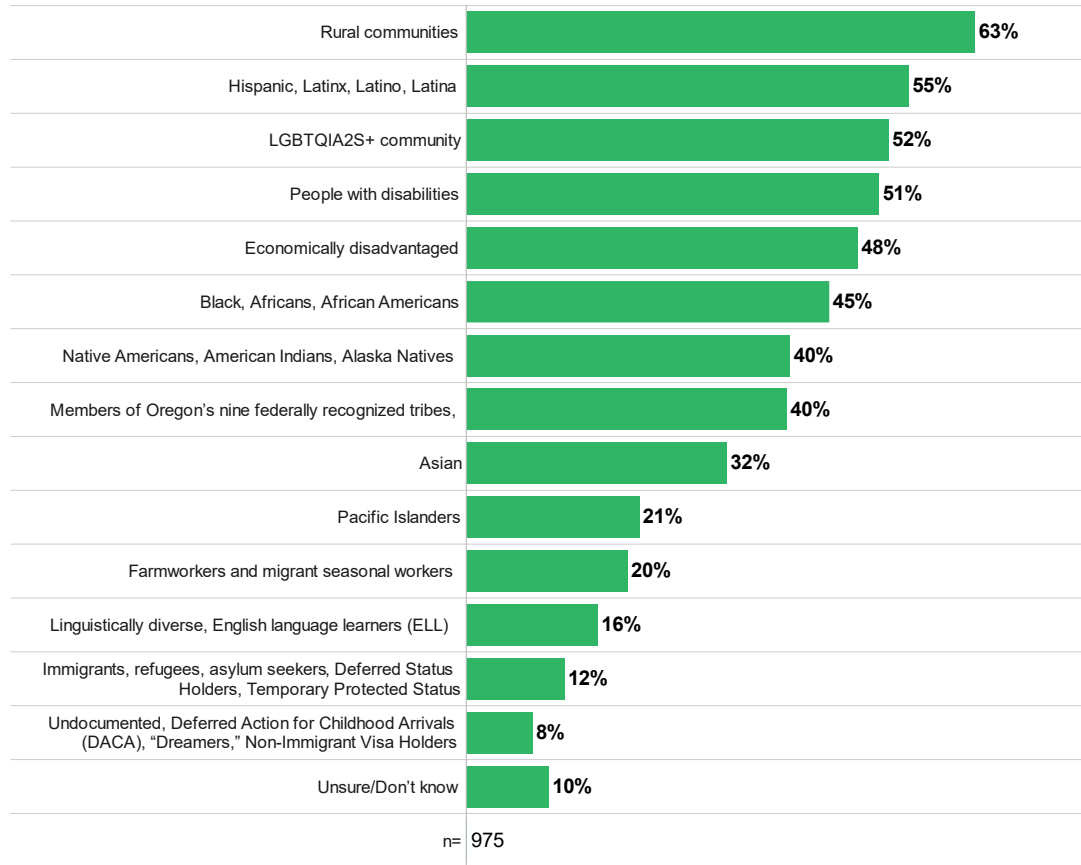


Source: RRC

# UNDERSERVED COMMUNITY ENGAGEMENT

- Over the past two years, rural communities have been the most engaged underserved group, followed by Hispanic/Latinx, LGBTQIA2S+, and people with disabilities, while engagement with groups such as undocumented individuals (8%) and immigrants/refugees has been comparatively lower.

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



Source: RRC



# AGREEMENT – UNDERSERVED COMMUNITIES

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

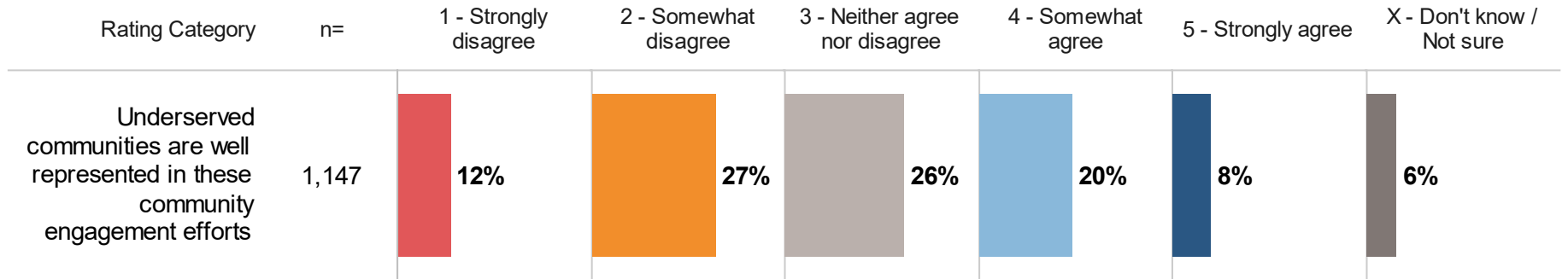
Rating Category	Avg.	n=	1 - Strongly disagree	2 - Somewhat disagree	3 - Neither agree nor disagree	4 - Somewhat agree	5 - Strongly agree	X - Don't know / Not sure
My community is welcoming to people who are underserved and/or under-resourced	3.3	952	7%	22%	24%	30%	13%	4%
Members of underserved and under-resourced communities feel valued in my community	3.1	949	10%	29%	25%	20%	6%	9%
Members of underserved and under-resourced communities are well represented in my community	2.9	963	17%	28%	22%	21%	8%	5%

- Overall, there are moderate levels of agreement (averages ranging from 2.9 to 3.3 out of 5) regarding support for underserved or under-resourced communities, indicating some room for improvement.

# UNDERSERVED COMMUNITIES REPRESENTATION

- Respondents are divided as to whether underserved communities are well represented in community engagement efforts, with 28% saying they agree and 39% responding that they disagree.

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

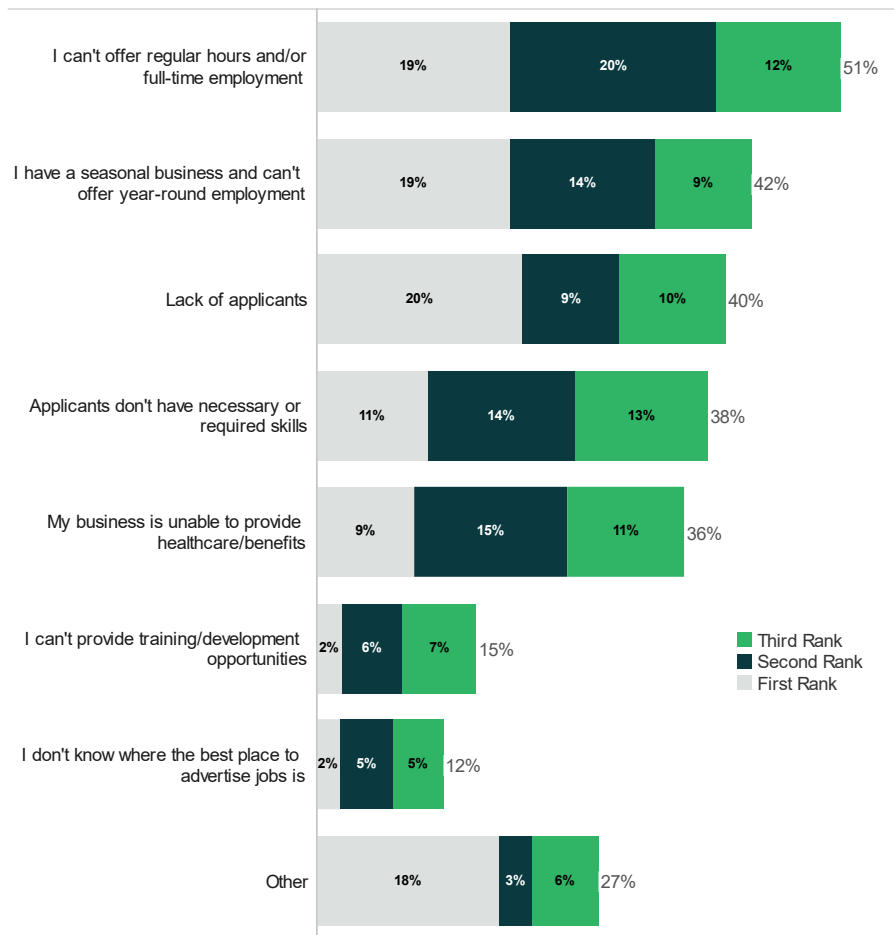


Source: RRC

# RETAINING WORKFORCE

- Inability to offer regular hours and/or full-time employment continues to be a challenge for many industry partners.
- Tourism's seasonality hampers many destinations with workforce, but efforts are ongoing to try and bolster shoulder-season visitation.

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



## OPEN-ENDED RESPONSES

- **Affordable Housing:** A lack of affordable housing for employees, particularly in tourism-dependent areas.
- **Cost of Living:** Concerns that employers often cannot offer wages that match the cost of living in their area.
- **Childcare Accessibility/Affordability:** Concerns over employees struggling to balance work and family .



245 Comments / Words Used 4 or More Times Illustrated Above



# INDUSTRY ENGAGEMENT AND COMMUNICATIONS



# ENGAGEMENT WITH TRAVEL OREGON

BY YEAR OF SURVEY

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

	2023	2024
E-Newsletter	78%	74%
Website	46%	49%
Conference	25%	28%
In person annual listening and engagement sessions		19%
LinkedIn	8%	13%
Webinars	14%	13%
Basecamp	14%	11%
Virtual annual listening and engagement sessions		10%
YouTube	3%	6%
None of the above		8%
Other (please specify):	16%	6%
n=	741	922

**Note:** Instances where percentages are not shown in 2023 (i.e. in-person annual listening and engagement sessions, etc.) indicate a new answer option added in 2024.



# ENGAGEMENT WITH TRAVEL OREGON

BY YEAR OF SURVEY

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

	2023	2024
E-Newsletter (Monthly)		40%
E-Newsletter (Quarterly)*	67%	17%
Website	12%	13%
In person annual listening and engagement sessions		7%
Conference	5%	6%
Webinars	5%	4%
Virtual annual listening and engagement sessions		4%
LinkedIn	2%	3%
YouTube	1%	2%
Basecamp	2%	1%
Other (please specify):	6%	3%
n=	747	912


































































\*2023 response shares represent all respondents that selected “E-Newsletter”  
Source: RRC

**Note:** Instances where percentages are not shown in 2023 (i.e. in-person annual listening and engagement sessions, etc.) indicate a new answer option added in 2024.

# ENGAGEMENT WITH TRAVEL OREGON

## BY AGE

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

	18 – 24	25 – 34	35 – 44	45 – 54	55 – 64	65+
E-Newsletter	 62%	 66%	 82%	 73%	 80%	 65%
Website	 62%	 50%	 47%	 54%	 44%	 47%
Conference	 27%	 32%	 33%	 27%	 29%	 21%
In person annual listening and engagement sessions	 8%	 24%	 17%	 17%	 20%	 23%
LinkedIn	 27%	 25%	 13%	 12%	 10%	 8%
Webinars	 19%	 18%	 16%	 11%	 14%	 8%
Basecamp	 19%	 23%	 12%	 9%	 8%	 5%
Virtual annual listening and engagement sessions	 8%	 14%	 10%	 8%	 9%	 10%
YouTube	 8%	 8%	 6%	 5%	 7%	 4%
None of the above	 8%	 4%	 8%	 6%	 8%	 11%
Other (please specify):		 3%	 6%	 7%	 6%	 9%
n=	26	115	191	223	209	158

Source: RRC

**Note:** Caution is advised when interpreting results based on sample size of less than 30.

# ENGAGEMENT WITH TRAVEL OREGON

BY AGE

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

	18 – 24	25 – 34	35 – 44	45 – 54	55 – 64	65+
E-Newsletter (Monthly)	15%	44%	51%	37%	38%	32%
E-Newsletter (Quarterly)	23%	15%	19%	14%	18%	19%
Website	31%	12%	6%	17%	11%	16%
In person annual listening and engagement sessions	4%	2%	6%	9%	9%	9%
Conference	8%	7%	7%	5%	6%	6%
Webinars	4%	3%	5%	2%	6%	3%
Virtual annual listening and engagement sessions		4%	2%	6%	3%	4%
LinkedIn		7%	2%	4%	1%	2%
YouTube	8%	3%	1%	1%	3%	3%
Basecamp		3%	1%	1%	0.5%	1%
Other (please specify):	8%	1%	1%	4%	3%	5%
n=	26	113	187	223	208	155

Note: Caution is advised when interpreting results based on sample size of less than 30.

Source: RRC

# RESPONDENT PROFILE



# TOURISM SECTORS

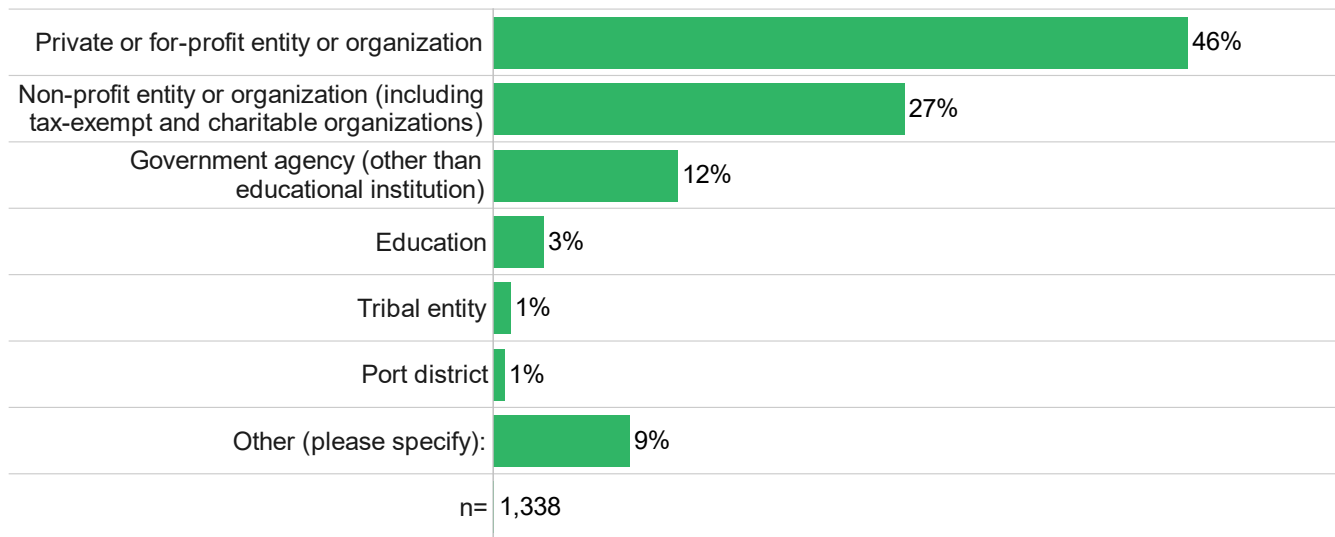
- DMOs and lodging were the industries with the strongest participation in 2024.
- Food and beverage, tour operators, arts/cultural heritage, and attractions were also fairly well represented in 2024's sample.

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



# ENTITY TYPE

## Which entity type best describes your business/organization?



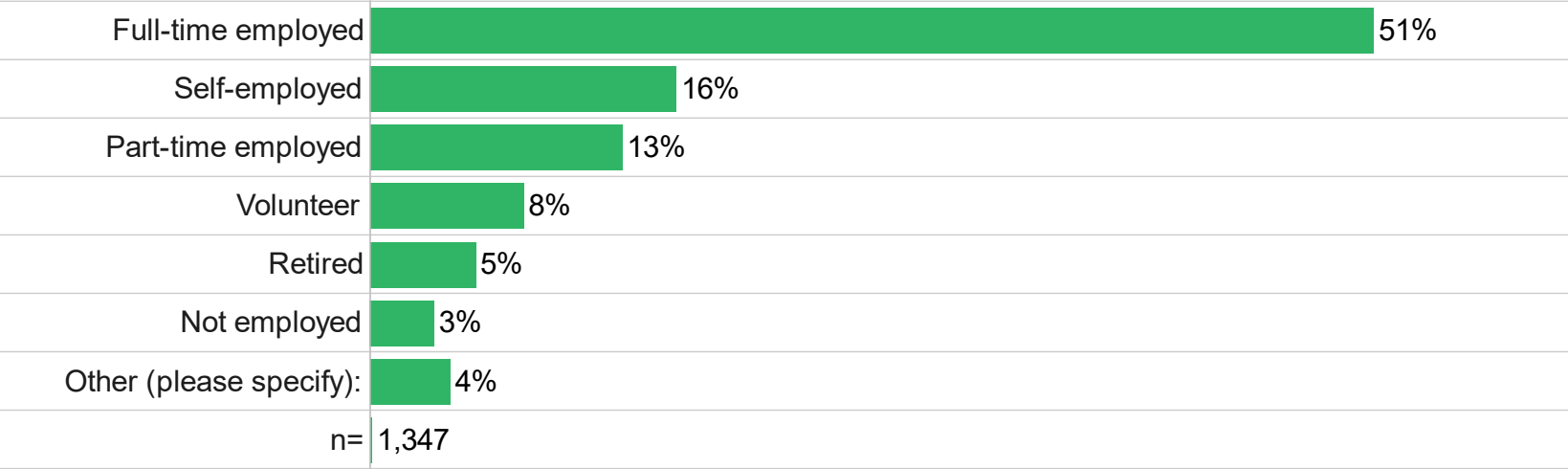
Source: RRC

- The majority of the participants were with private or for-profit entities and organizations, with nonprofits second in overall responses.



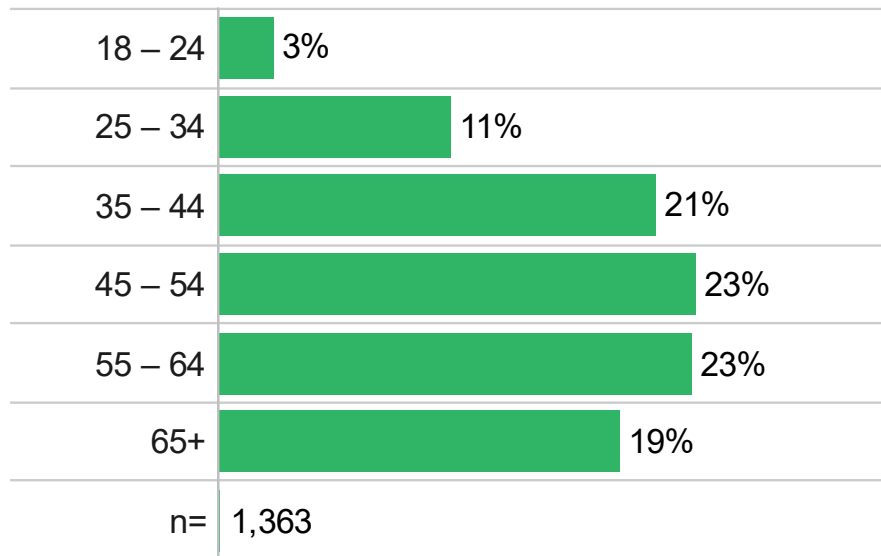
# EMPLOYMENT STATUS

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



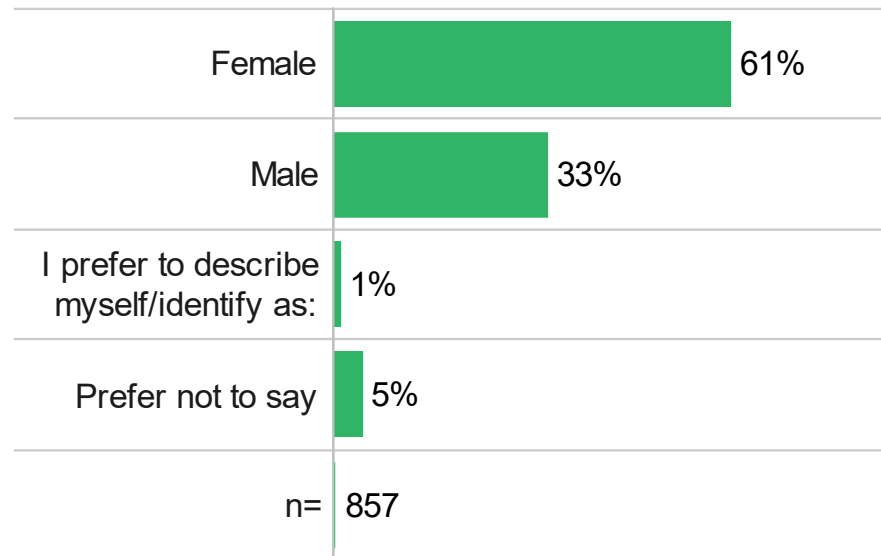
# AGE & GENDER

## What is your age?



Source: RRC

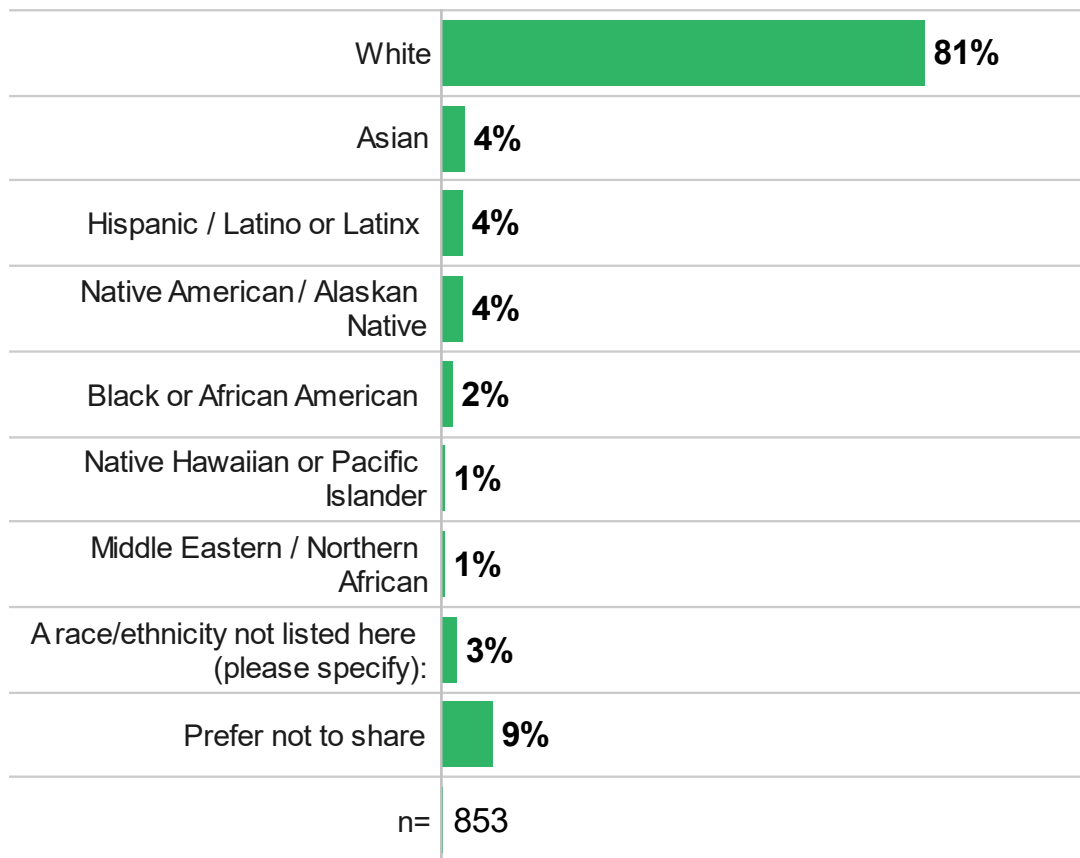
## What is your identified gender?



Source: RRC

# RACE AND ETHNICITY

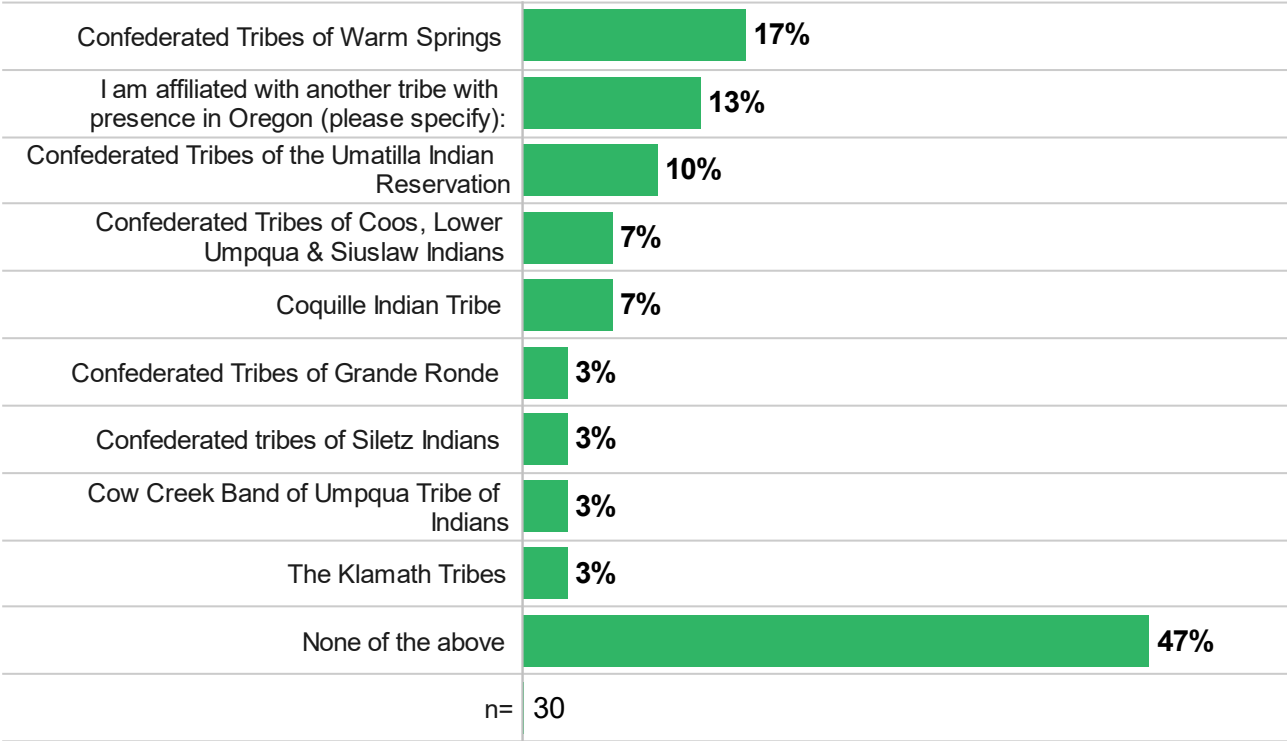
Which of the following best describes you?



Source: RRC

# TRIBE AFFILIATION

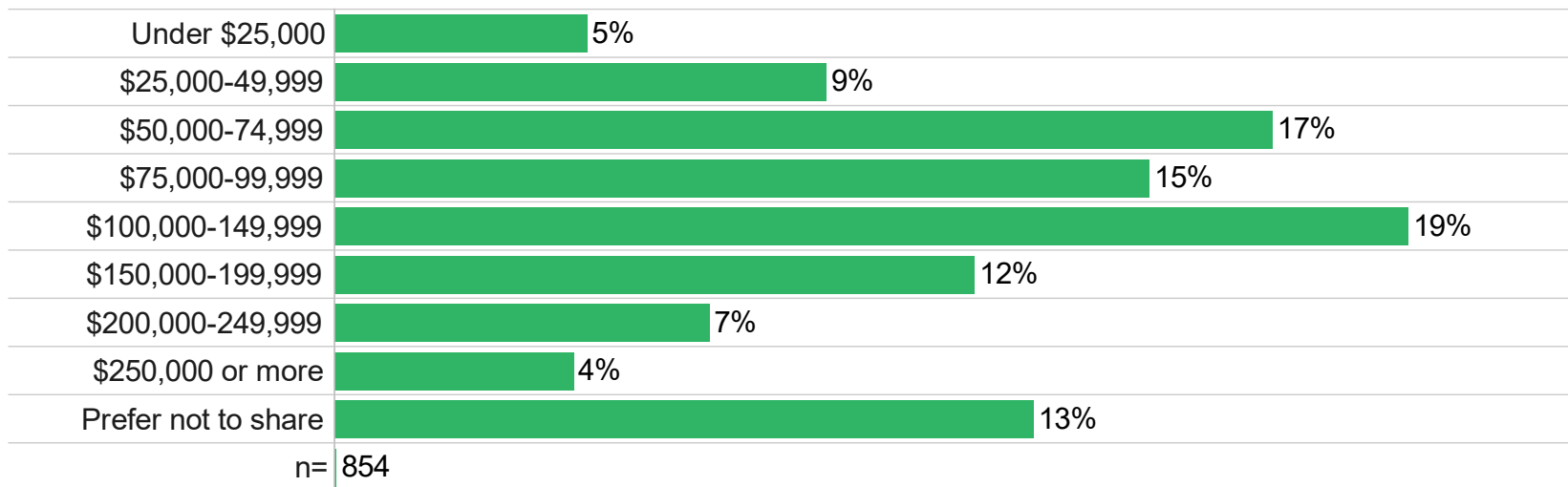
## Which of the nine federally recognized tribes in Oregon do you identify with ?



Source: RRC

# INCOME

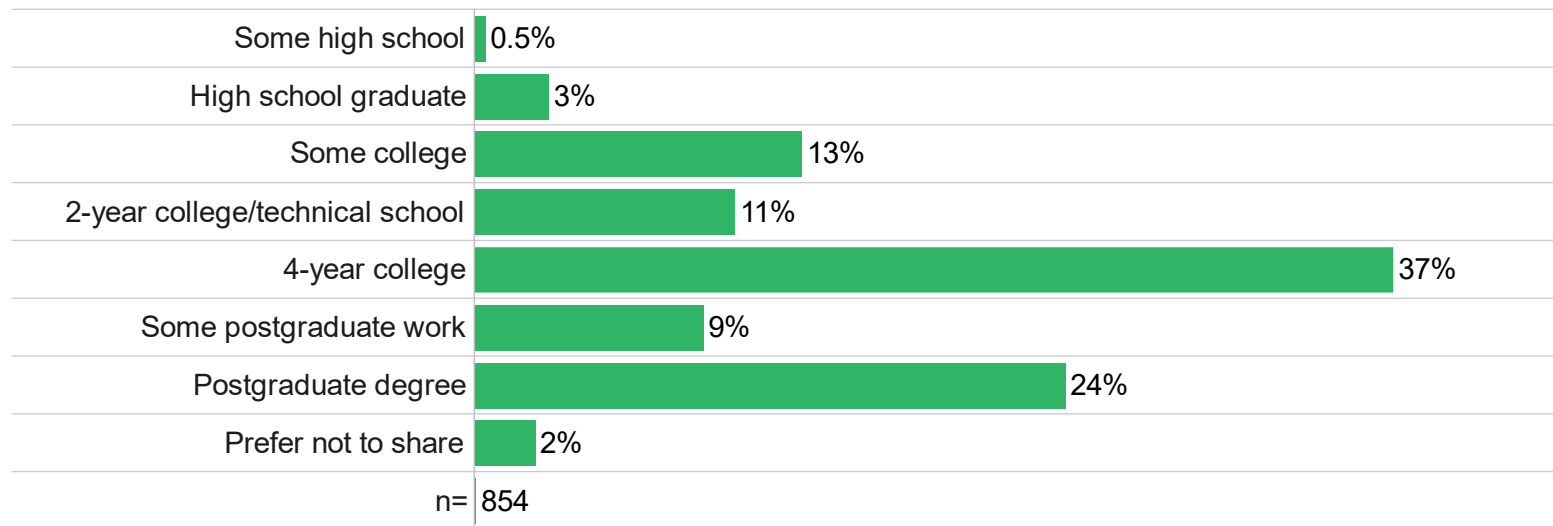
Which of these categories best describes the total gross annual income of your household (before taxes)?



Source: RRC

# EDUCATION

Which option best describes your education?

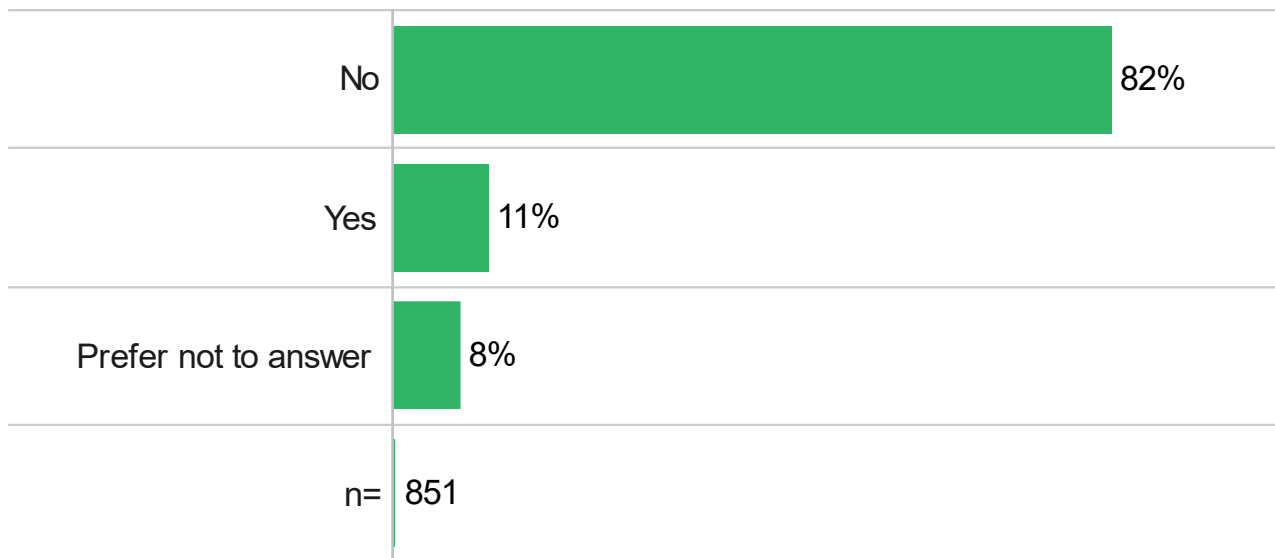


Source: RRC



# LGBTQIA2S+

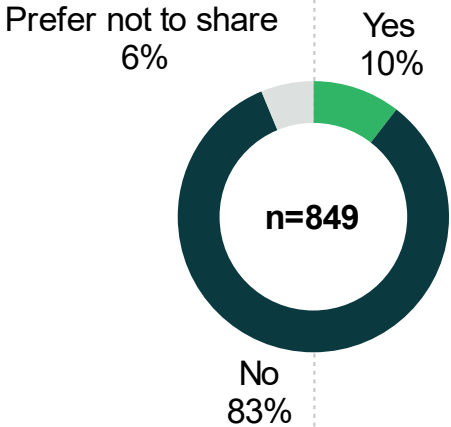
Do you identify as part of the LGBTQIA2S+ community?



Source: RRC

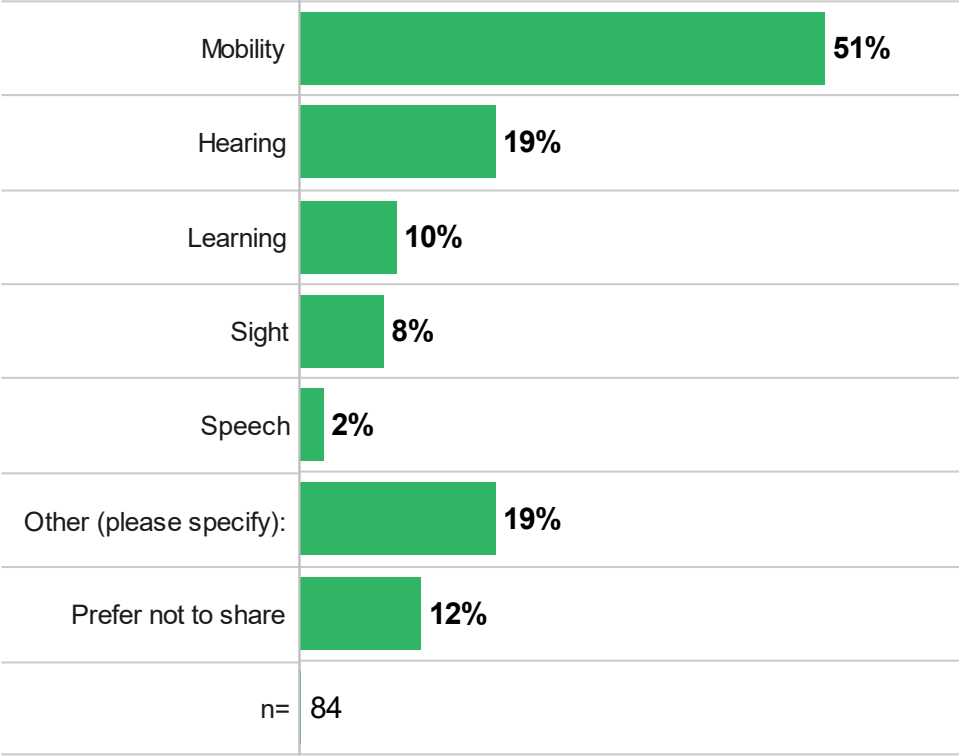
# DISABILITIES

Do you have a disability?



Source: RRC

Which of the following best describes these disabilities ?



Source: RRC

# Thank you

