



Sustainable
Tourism
Lab

[OSUsustainableTourismLab.com](https://osusustainabletourismlab.com)

Community | Economic | Environmental

ANNUAL REPORT

COMMUNITY SENTIMENT OF TOURISM

Investigating the relationships between
tourism and community needs in order to
provide decision-makers with objective
information for informed decisions.

2023



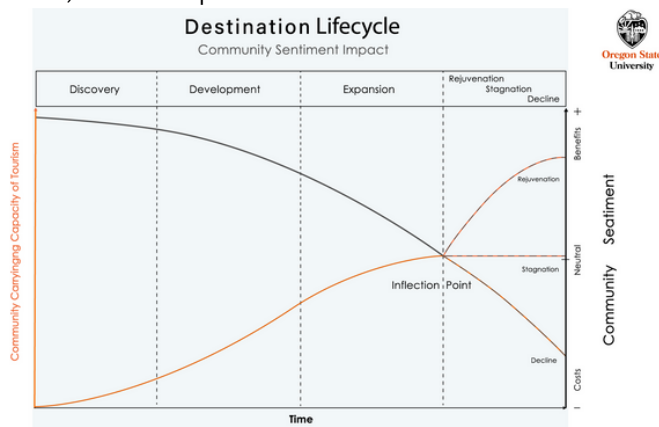
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Oregon State
University

Communities throughout the world have grappled with the positive and negative impacts of tourism for years. Oregon State University's (OSU) Sustainable Tourism Lab was created in 2021 to support such global destinations and help them pursue a sustainable path – inclusive of economic, community, and environmental perspectives. Our first step in this process has been to quantify how communities feel about tourism.

By conducting in-person and online surveys, focus groups, and interviews we collected data from the US Pacific Northwest region, including Alaska, Hawaii, and the Northern Marianas Islands. We received 2,342 survey responses and verified 2,105 as complete.



We hypothesize that there is a strong relationship between a destination's lifecycle stage and its community's sentiment level. We also hypothesize that community sentiment levels impact the community's tourism carrying capacity. Once a destination's community sentiment falls below neutral, the community acts—directly or indirectly—via political entities to reduce the carrying capacity of the area as a whole.

Across all respondents and a statistically representative random sample, we found 37 percent of respondents felt neutral towards the costs and benefits of tourism, with 35 percent feeling that benefits exceeded costs. The remaining 28 percent felt costs outweighed benefits.

Regardless of how respondents felt about the benefits of tourism in their community, there appears to be a high level of acceptance that tourism is still important to their community. When asked what the benefits of tourism are, respondents most often cited economic benefits such as Jobs, Money, and Business.

The tourism industry is known for its customer and workforce diversity. As a result, we felt it was imperative to capture it in our study. We found respondents making less than \$35,000, under 34 years old, and non-white tended to view tourism as more beneficial.

Also, we get a glimpse of the costs of tourism when respondents are asked how it impacts them personally.

Welcome

Executive Summary

Traffic, Overcrowding, Cost of Living, and Environmental Impacts were the most cited impacts of tourism. Also, there was a relationship between respondents' age and length of residency. The older the respondent and the longer they had lived in their community, the fewer benefits they perceived from tourism.

To help address the costs of tourism, the highest priority for respondents was wanting tax revenue reinvested to deal with its environmental impact. Using funds to support the community was second, and investing in economic initiatives third. Finally, the data supports education regarding current tourism policies, the prioritization of the environment, benchmarking destination performance, and community engagement as the best strategies for improving community sentiment toward tourism.



Todd Montgomery
Founder / Director
OSU Sustainable Tourism Lab



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Project Goals

"Our mission is to protect tourist destinations for future generations of travelers and community members."

Todd Montgomery

Build relationships with destinations

Quantify community sentiment across a diverse set of destinations

Measure factors that contribute to sentiment

Develop a destination data warehouse for benchmarking

Support application of results and solutions



Overview

How does the local community view tourism?

Team

Todd Montgomery - Director of Lab
Johnny Chen - Director CMCI
Lucia Pigni - Lab Research Assistant
Tim Galantine - Research Assistant
Thi Quynh Nhu Tu - Research Assistant
Ruijing Chen - Data Analyst

Partner

OSU Center for Marketing and
Consumer Insights (CMCI)

Project Duration

January 1, 2022 -
December 31, 2027

Lab Supporters

Visit Bend
Visit McMinnville
Baney Endowment

Target Audience

This report is written for the residents of current or potential tourist destinations. Our goal is for people to better understand the costs and benefits of tourism within their community.

The Oregon State University (OSU) Sustainable Tourism Lab is an objective source for such information and strives to give readers the data necessary to draw their own opinions. In order to provide additional insights and perspectives, we have asked tourism experts to comment on our findings. Their opinions do not necessarily reflect those of the report's author.

2022 Timeline



Why This Research ?

Communities around the world have grappled with tourism—its positive and negative impacts—for years. For many, it is the primary economic driver providing for community members' basic economic needs. For other destinations, the tourism cost/benefit outcome is less clear.

Due to the pandemic , communities are reassessing their relationship with tourism and asking how to make their tourism industry sustainable from economic, community, and environmental perspectives.

The goal of the OSU Sustainable Tourism Lab is to support such efforts by providing applied research, objective information, and best practices.



Previous Research on Community Sentiment of Tourism

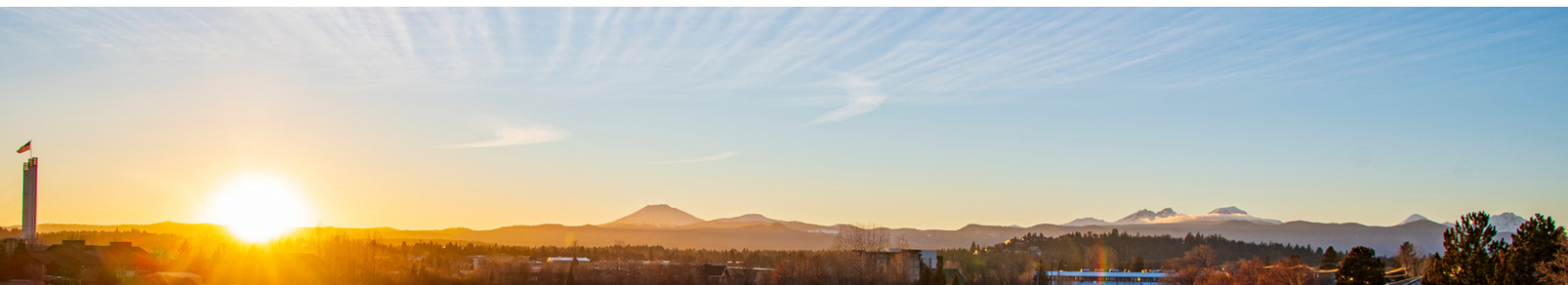
Statistically Representative of the Community



In preparation for this five-year research project, we reviewed forty-plus studies conducted around the globe. The quality of these surveys varied greatly, with common gaps identified including:

- Were underrepresented groups part of the study?
- Was the sample statistically representative of the community?
- Were non-tourism stakeholders equally represented?
- Finally, were these one-off studies or were follow-up studies conducted?

Our major priority was to make sure community-specific survey data was statistically representative of the entire community in question. Therefore, to give all community members a voice, we went to great lengths to engage people where they were. Consequently, we conducted surveys in person and online. Once the data was received, we performed outreach efforts to groups underrepresented in our sample. Even with these efforts, we knew more was needed.



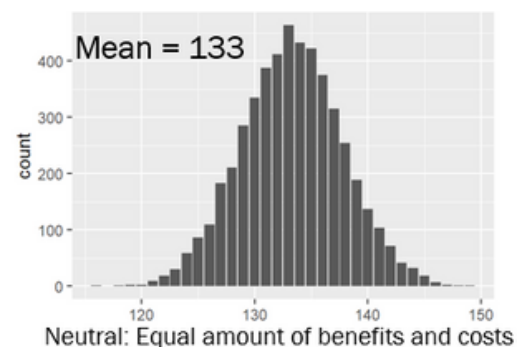
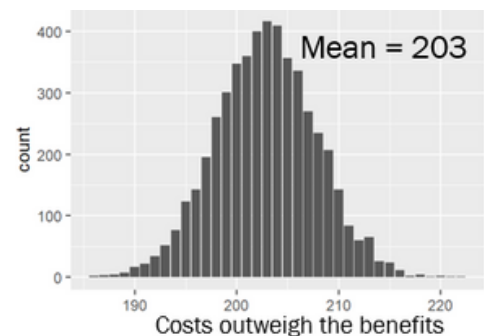
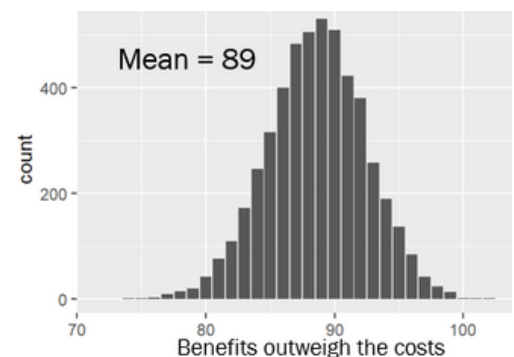
Research Methodology

Quantitative & Qualitative

During the course of 2022, we performed quantitative and qualitative research to better understand community sentiment toward tourism. The survey portion of the study was conducted in person and online. Respondents were primarily from US Pacific Northwest states and territories, including Alaska, Hawaii, and the Northern Marianas Islands. We received 2,342 responses and verified 2,105 as complete.

Random Sampling

To achieve our goal, we performed stratified random sampling followed by a downsampling technique to match category percentages in census reports. Downsampling must be performed repeatedly for each question—in our case 5,000 times—as one random sample drawn from the original data set can be different each time. The histograms to the right illustrate this variability via a bell curve.



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"It is necessary that the people of the communities express their perspectives, allowing a much more contextualized tourism, which protects and regenerates their history, culture and ways of life."

Professor Erick Madrigal
Universidad Nacional,
Costa Rica

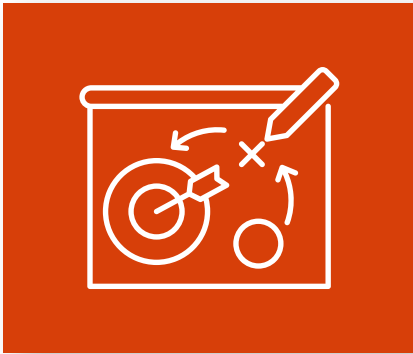
Seeking All Voices

Throughout the report, you will see data represented in multiple ways. The first is the data results for all survey respondents (i.e., N=2,105), which will be referred to as “All.” The second is from randomly selected sample-based percentages of census data discussed earlier, which will be referred to as “Random.”

An example of data represented in these two ways can be seen below.

All vs. Random Responses		
	ALL RESPONSES	RANDOM
Benefits	19%	35%
Neutral	28%	36%
Costs	51%	28%
Sample Size	(N=2105)	(N=1183)





Destination Lifecycle

Community Impact

Lifecycle of Tourism

Like any product or service, a tourist destination has a natural lifecycle. It starts when the destination is discovered by outsiders and continues to grow as more people visit. With a new economic revenue source, the community's carrying capacity for tourism also increases. However, as the costs of tourism grow, community sentiment toward tourism declines. At some point, the community reaches an inflection point that will decide whether the destination grows, stagnates, or declines in the future.

Hypothesis

We hypothesize that there is a strong relationship between the destination's lifecycle stage and community sentiment and that community sentiment levels impact the community's carrying capacity for tourism. Once community sentiment falls below neutral, the community acts—directly or indirectly via political entities—to reduce the carrying capacity of the destination as a whole.

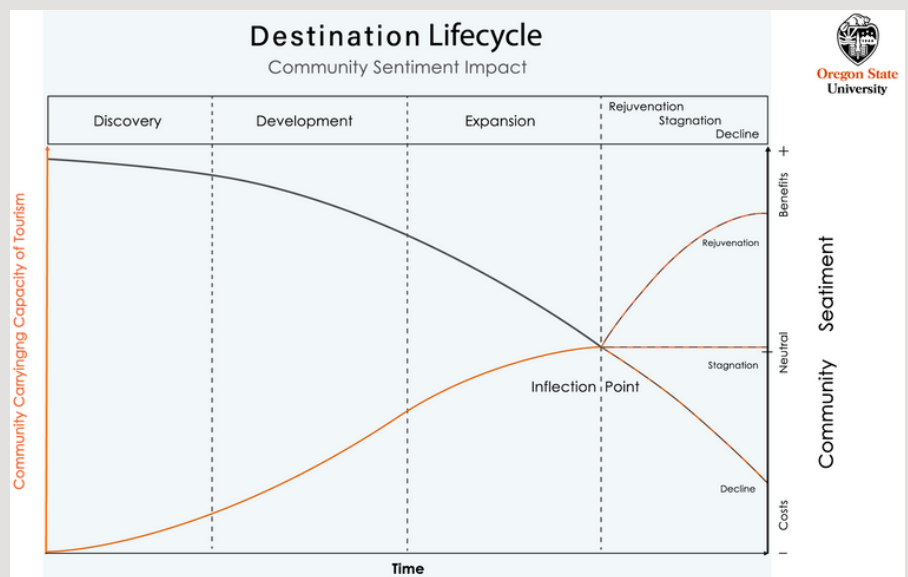
Impact on Sentiment

Understanding and quantifying where a destination is in its lifecycle is complex, requiring the measurement of tourism's positive and negative impacts on both the surrounding community and the specific destination. Throughout this report, we will refer to this lifecycle in the context of our findings. The OSU Sustainable Tourism Lab has further research ongoing in this area.

Definition: Carrying Capacity

The American Heritage® Dictionary defines carrying capacity as the maximum number of individuals that a given environment can support without detrimental effects.

Community Carrying Capacity is the maximum number of tourists a destination can hold without detrimental impacts.



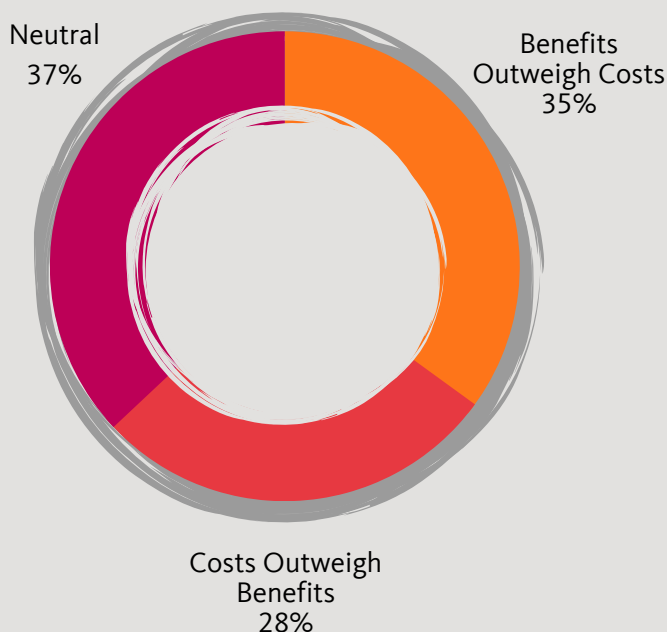


Benefits vs. Costs of Tourism

In general, do you feel the benefits of tourism outweigh the costs or the costs of tourism outweigh the benefits in your town?

One key benchmark question in assessing overall sentiment towards tourism is: “Do you feel the benefits of tourism outweigh the costs or do the costs of tourism outweigh the benefits in your town?” Our data includes responses from the Pacific Northwest including Alaska, Hawaii, and the Northern Marianas Islands. It also included responses from communities that are not tourist destinations.

Overall, most responses were Neutral, with Benefits Exceeding Costs not far behind at 35 percent. Respondents who felt Costs Outweigh Benefits finished last at 28 percent.

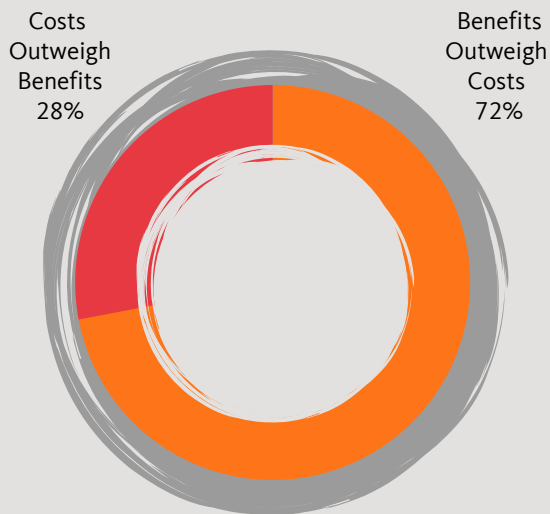


Benefits vs. Costs of Tourism

	All	Random
Benefits	35.1%	36.6%
Neutral	36.2%	37.1%
Costs	27.9%	26.3%
	[N=2105]	[N=1183]



Do Benefits Outweigh Costs?



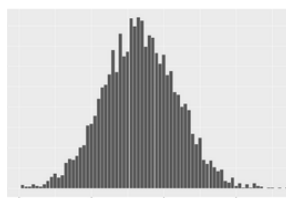
"Visit Bend takes a keen interest in finding balance between the benefits of tourism and the overall cost to the community. It's an issue we must face head-on to ensure a sustainable, long-term tourism model."

To be a sustainable tourist destination, communities must find the optimal balance of tourism and community benefits. We know when the community feels that Costs Exceed Benefits, the community is not in balance, and a decline in the community carrying capacity is likely.

Respondents that feel Neutral or that Benefits Exceed Costs indicate the community is closer to an optimal balance between tourism and community needs. As a result, we've found it helpful to combine Benefits Exceed Costs and Neutral into a single data point, as this more clearly indicates when a destination is in or out of balance.

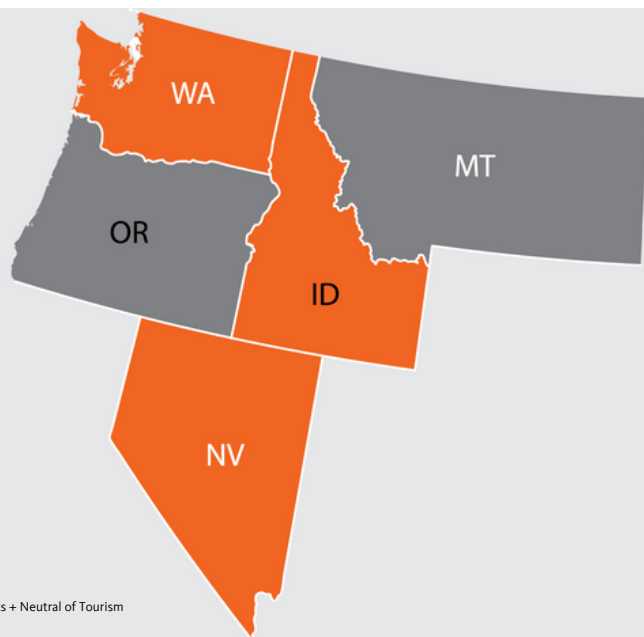
Going forward, some data and charts will be represented using this new combined metric, similar to the breakdown to the left.

**Kevney Dugan - CEO
Visit Bend**



Benefits vs. Costs of Tourism

	All	Random
Benefits/Neutral	71.3%	73.7%
Costs	27.9%	26.3%
	(N=2105)	(N=1183)



North Mariana Islands

Regional View of the Benefits of Tourism

The percentage of respondents who said that Benefits Exceed Costs vary by state. This variation is expected, as each state has diverging factors that impact the community differently. The responses also include respondents within the state that do not live in a typical tourist community. Finally, as outlined in the Destination Lifecycle earlier, these states include tourist destinations at various stages in the lifecycle.

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"While many destinations struggle with overtourism, undertourism especially due to external factors is a real issue too. Island economies can be incredibly fragile and I think the pandemic reminded everyone here of some of the harsh realities around the absence of tourism.

Living in a place that others want to visit is both a privilege and a responsibility and sustainable tourism requires thought, effort, and investment at each step of the process."

Chris Nelson
Owner, Marianas Trekking and Guam Adventures
Board Member, Marianas Visitors Authority

These factors, and their impact on community sentiment, are detailed in the following pages. However, an important point is that there is a wide variance of sentiment across states. This is also indicative of the variance in community sentiment across destinations and further supports the conclusion that every tourist destination has a unique set of factors impacting community sentiment. As a result, universal strategies to improve community sentiment have limitations. To do so, destinations will need to understand and act on the factors driving sentiment at their specific destination.

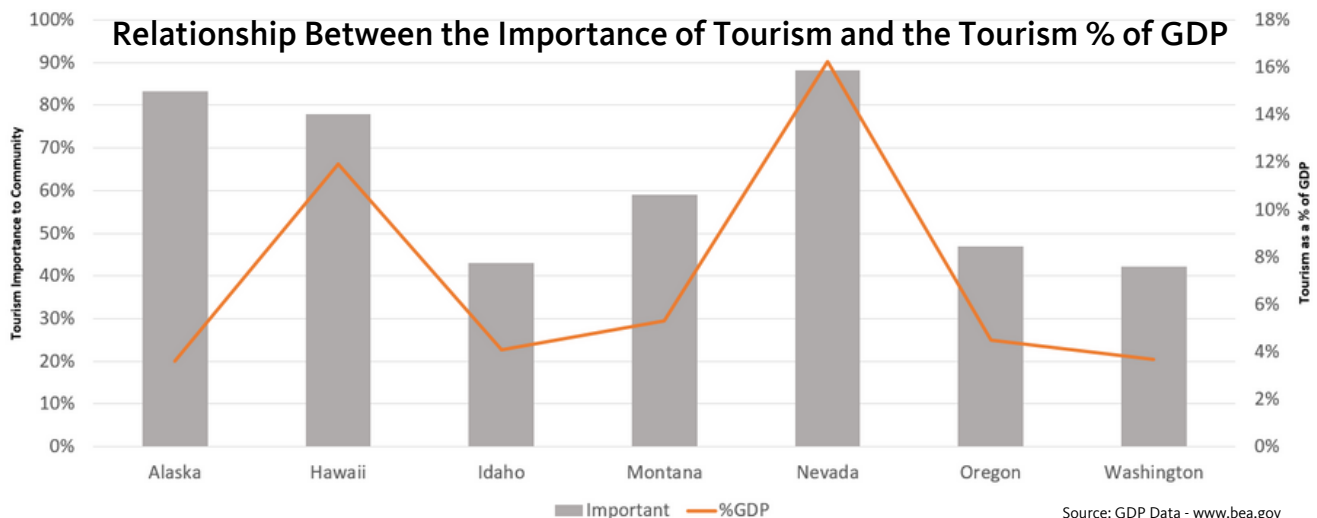
Positive Impact



Even if benefits are not perceived, respondents feel tourism is important to the community.

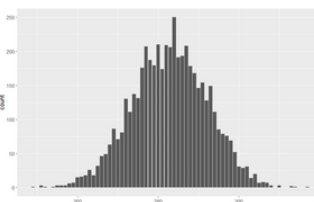
Regardless of how the respondents feel about tourism in their community, there appears to be high-level acceptance that tourism is still important to their community. As expected, the economic diversity in each of these locations likely impacts their perceptions.

For states like Nevada and Hawaii, where tourism is a large economic driver, respondents felt tourism was very important to the community. For respondents in more economically diversified states, responses were lower.



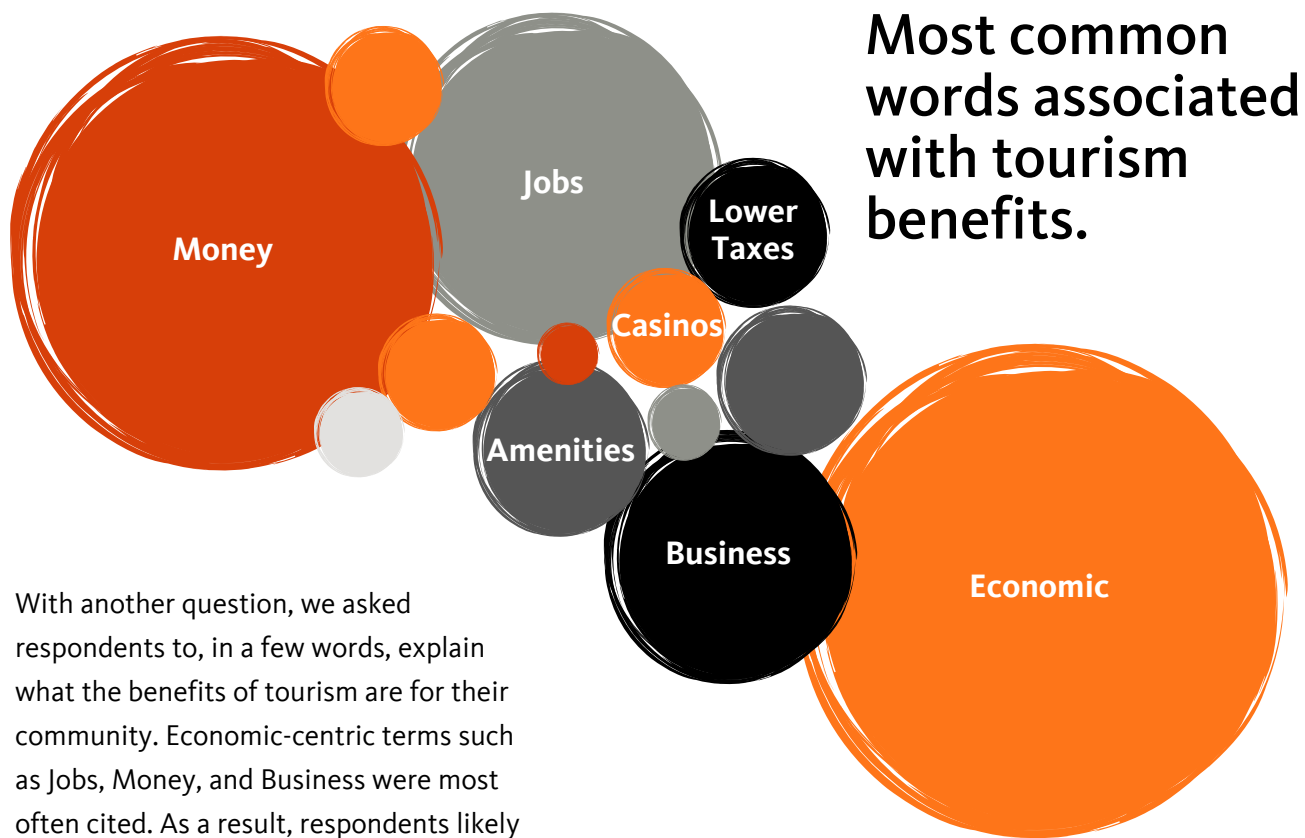
"The future success of the visitor economy is directly tied to ensuring a balanced, data-driven approach that will allow us to act as stewards as we endeavor to improve quality of life for our communities."

Jeff Knapp - CEO Visit McMinnville



Tourism Importance

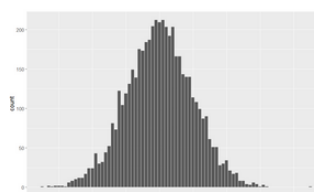
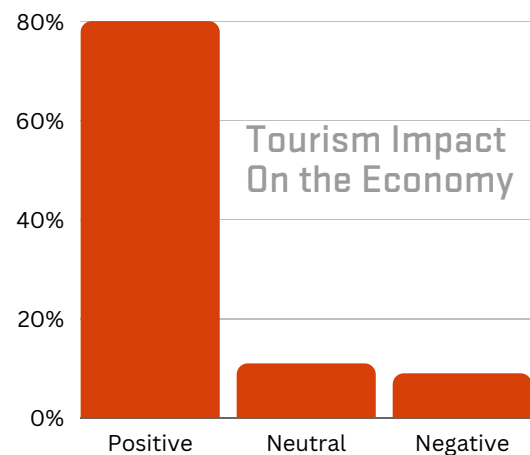
	All	Random
Important	62.9%	62.2%
Neutral	9.0%	9.3%
Unimportant	28.0%	28.4%
	(N=1605)	(N=911)



With another question, we asked respondents to, in a few words, explain what the benefits of tourism are for their community. Economic-centric terms such as Jobs, Money, and Business were most often cited. As a result, respondents likely associate “Tourism Importance” with economic performance.

This finding is further supported by another question where respondents are asked to rate the impact of tourism on the economy. The vast majority, 80 percent, rated the impact as either Extremely Positive or Somewhat Positive.

Not surprisingly, these numbers vary when breaking down the data by whether respondents live in a tourist destination or not.



Impact on Economy: Positive vs. Negative

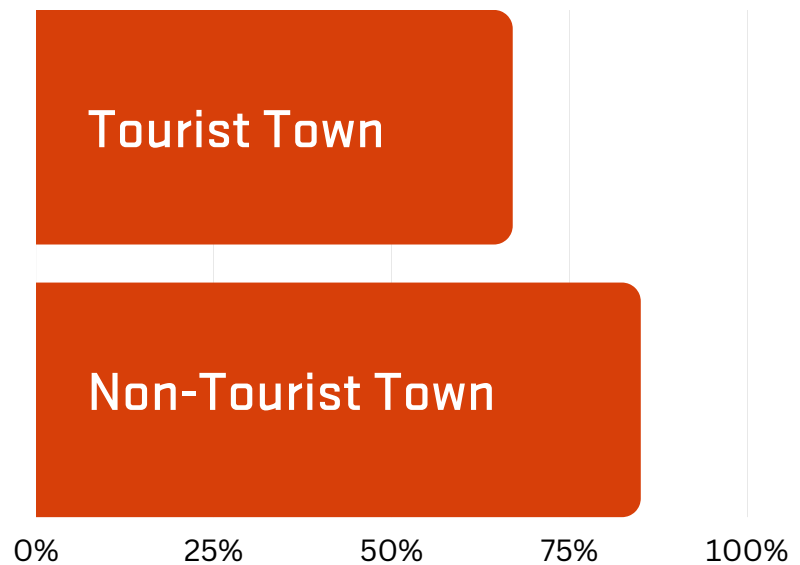
	All	Random
Positive	80.2%	80.3%
Neutral	12.1%	12.2%
Negative	7.7%	7.5%
	(N=2076)	(N=1177)



Tourism vs. Non-Tourism Towns

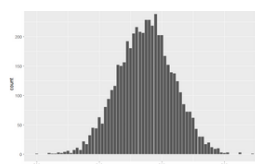
Statewide view of Benefits vs Costs of Tourism can be misleading.

Tourism Benefits Outweigh Costs



Potential tourist towns in the early stages of the Destination Lifecycle have not experienced the costs of tourism and focus more on the benefits.

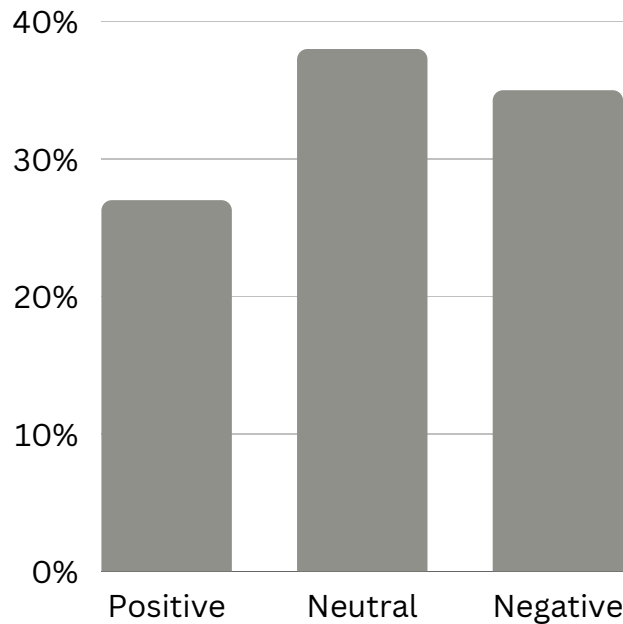
Aggregate reports that sample larger geographical areas, such as regions versus specific communities, often report higher perceived community benefits from tourism. For example, in our own data favorability towards tourism was exceptionally high. Although it is likely high as a whole, this fails to capture respondents who do not live near tourist areas and usually do not share in the costs of tourism. This is one reason why destinations at the early stages of the destination lifecycle often have a higher view of tourism than in later stages.



Tourism Town Benefits of Tourism

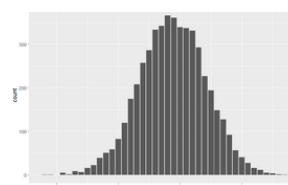
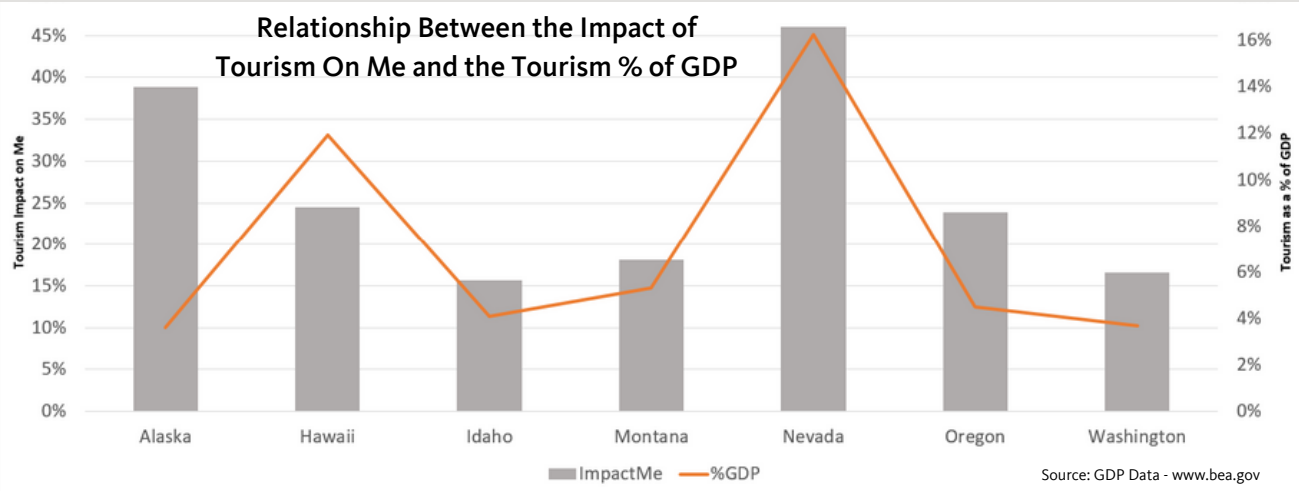
	All	Random
Tourist Town	66.6%	69.1%
Non Tourist Town	85.1%	84.9%
	(N=1585)	(N=906)

Tourism Impact on Me



We begin to get a glimpse of the costs of tourism when respondents are asked how it impacts them personally. Both Negative and Neutral impacts were higher than Positive impacts across all states.

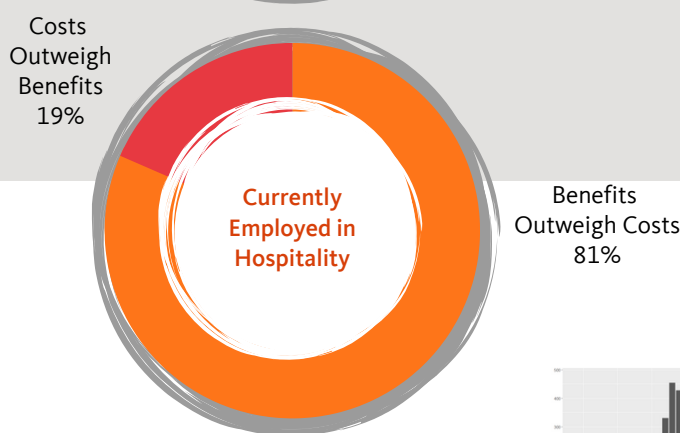
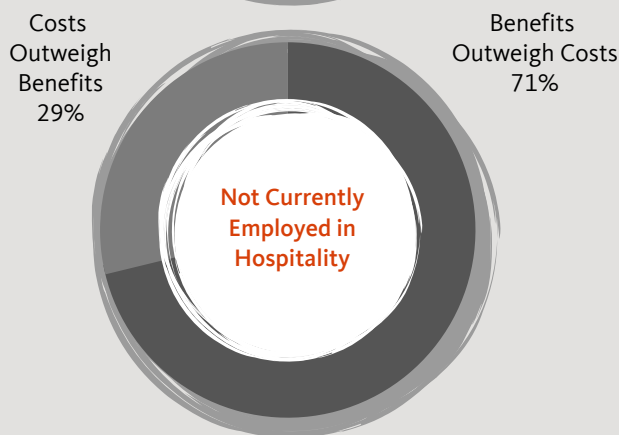
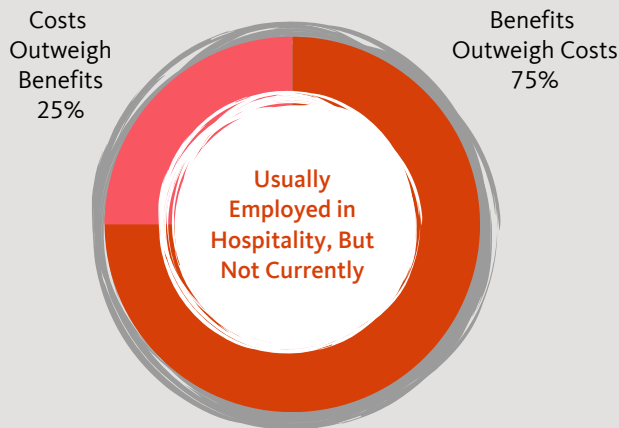
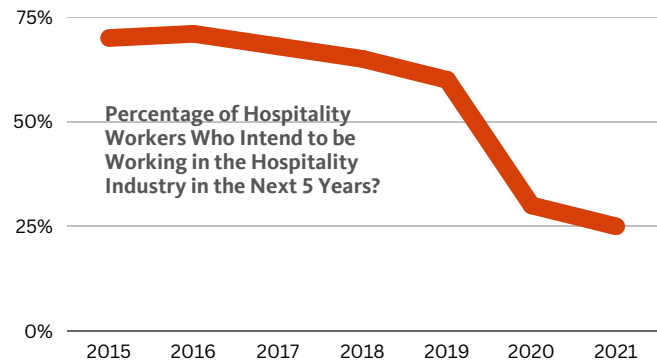
At the state level, the most positive Impact on Me came from Nevada at 46 percent, with the lowest in Idaho at 16 percent. We also see tourist destinations with a larger percentage of tourism GDP as having a more positive impact on them personally.



Positive vs. Negative Impact on Me

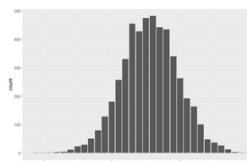
	All	Random
Positive	28.7%	28.6%
Neutral	41.0%	43.5%
Negative	30.3%	27.9%
	[N=2052]	[N=1161]

A View of Tourism Impacts from Workers in the Industry



The tourism industry is labor-intensive. As a result, its workforce is a major stakeholder in a destination's community. OSU has studied labor issues within the travel industry since 2014. Over the years, we've seen declining interest in the industry as a career choice. One such finding showed that the tourism workforce was finding more opportunities outside of the industry. Consequently, what we have learned over the years researching labor in our industry was included in the study.

Respondents who worked in the travel industry viewed the benefits of tourism as higher than costs by about 10 percent. Although this finding would appear obvious, our research team was curious if the negative sentiment towards a career in the industry would carry over to the perceived benefits of tourism as a whole. Based on these results, it appears the workforce also sees the benefits of tourism in areas outside of their work.



	Workforce Benefits + Neutral	
	All	Random
Employed Tourism	81.5%	82.8%
Not Employed Tourism	71.2%	73.2%
	(N=1466)	(N=87)

Factors Related To Sentiment

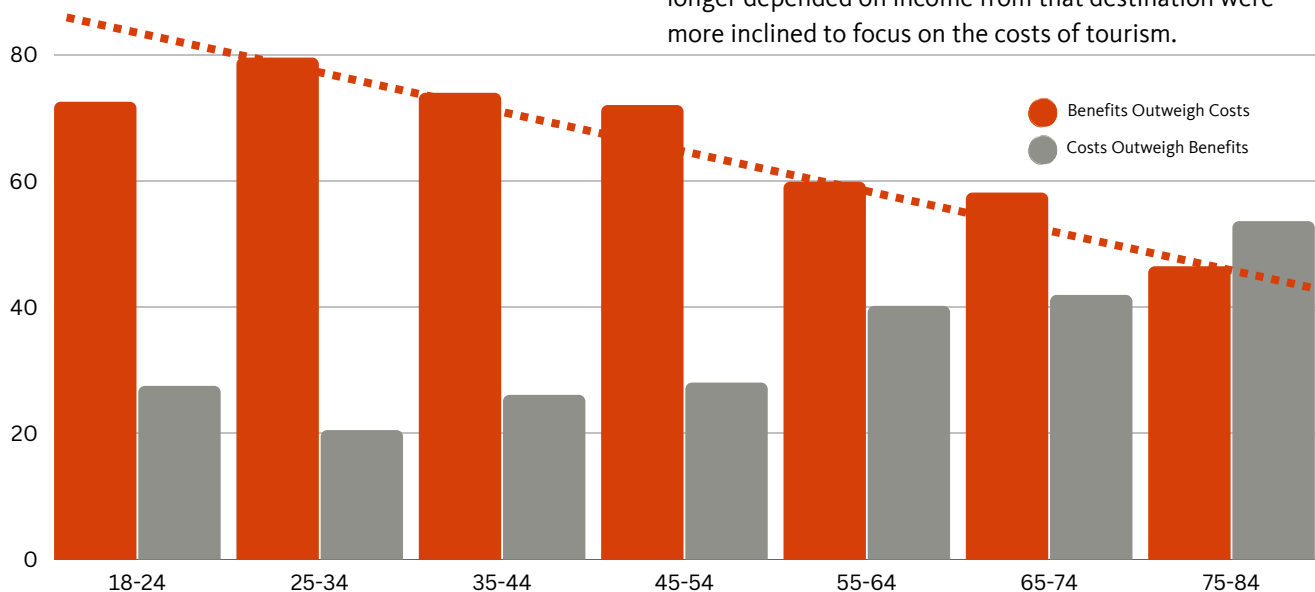


Perceptions of Tourism By Age Group

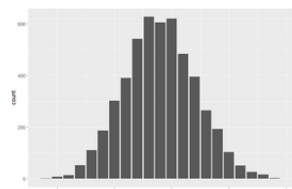
Quantifying, and then identifying, factors that relate to tourism sentiment was a key study objective. One of those is the age of the respondent. As the graph shows, there is a significant relationship between respondents' age and their view of tourism.

Specifically, the older the respondent, the more likely they feel the costs of tourism outweigh the benefits. The word cloud to the left was filtered by respondents over the age of 65. These respondents identified many of the same costs as the broader group; however, Traffic, Environmental Impact, and Overcrowding were seen as the greatest costs.

Through our qualitative research, we found older respondents that moved to tourist destinations and no longer depended on income from that destination were more inclined to focus on the costs of tourism.



65 and Older Benefits vs Costs



	All	Random
Benefits	25.9%	28.0%
Neutral	30.7%	32.0%
Costs	43.3%	40.0%
	(N=213)	(N=50)



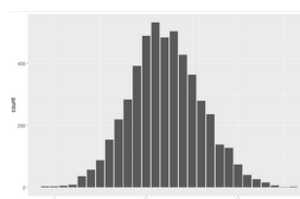
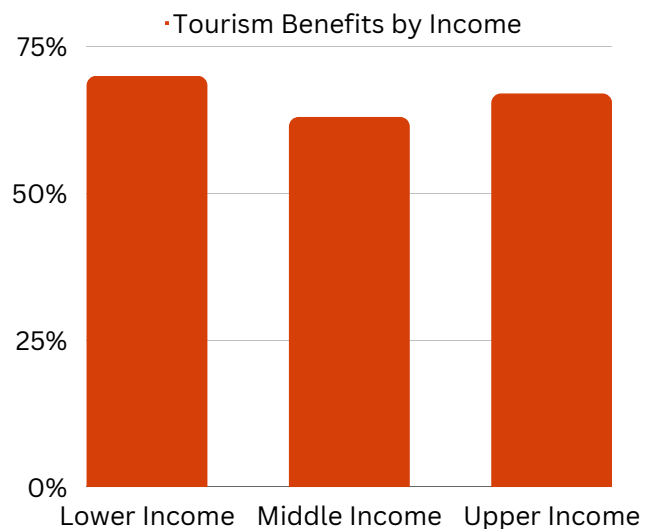
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"Measuring and addressing resident sentiment is one of the best means to ensure tourism improves resident, visitor and environmental well-being by design. This includes maximizing accessible and beneficial employment opportunities for locals."

Brian Mullis - Tourism & Conservation Technical Advisor at the Rwanda Development Board and Sierra Leone Ministry of Tourism & Cultural Affairs

Income Level Was Less Pronounced

We did not see much of a relationship between a respondent's income level and the benefits they perceived from tourism. We did find that lower income levels—between \$25,000–\$35,000—generally saw more benefits from tourism than wealthier income brackets. Middle-income earners perceived less benefit from tourism by about 7 percent compared to other income brackets. We then filtered the costs they identified in a word cloud and found they were less excited about tourism due to Overcrowding, Traffic, Environmental Impact, and Tourist Behavior.



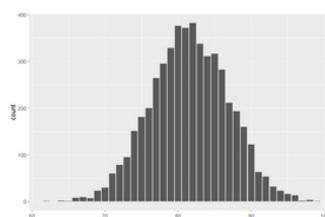
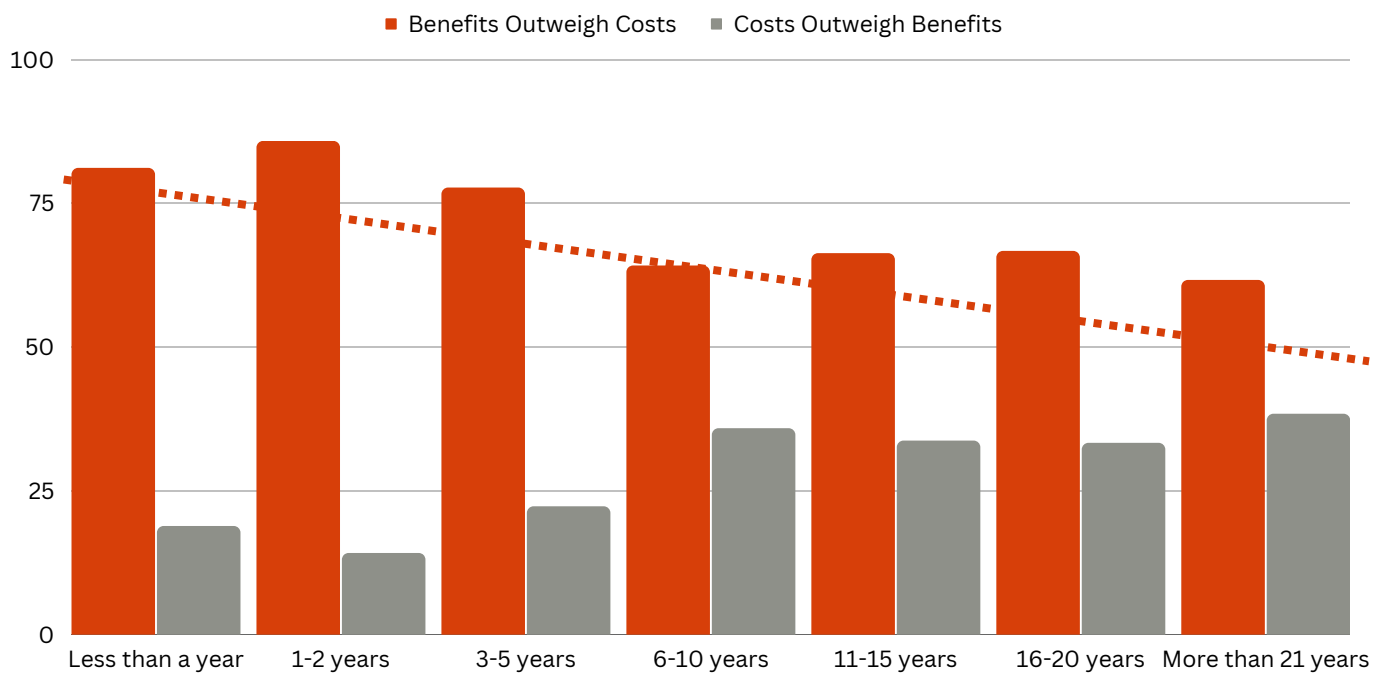
Under \$35K Benefits vs Costs

	All	Random
Benefits	30.5%	31.4%
Neutral	41.8%	43.0%
Costs	27.6%	25.6%
	(N=282)	(N=86)



Perceptions of Tourism By Length of Residency

How long a respondent had lived in a community was strongly related to their view of tourism. The longer the time period, the fewer benefits perceived from tourism. 86 percent of respondents who had lived in a community for less than two years saw tourism benefits while only 56 percent who lived in a destination community for over 21 years saw benefits.



21+ Years of Residency Benefits vs Costs

	All	Random
Benefits	28.2%	30.6%
Neutral	33.4%	35.1%
Costs	38.4%	34.3%
	(N=1545)	(N=268)

Underrepresented Community Results

“It is necessary that the people of the communities express their perspectives, that allows a much more contextualized tourism, which protects and regenerates their history, culture and ways of life.”

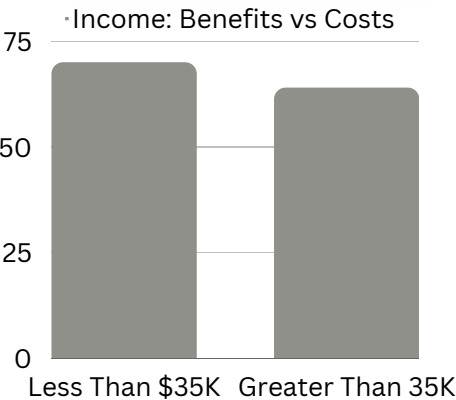
Professor Erick Madrigal V.
Universidad Nacional, Costa Rica

In terms of both customers and workforce, the tourism industry is one of the most diverse in the United States. As a result, we felt it was imperative to capture this diversity. We see respondents making less than \$35,000 and younger than 34 years old tending to view tourism as more beneficial than higher-income, older respondents.

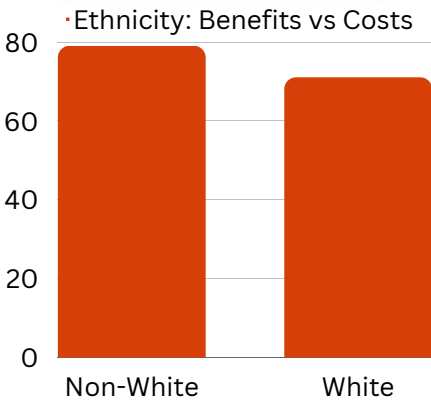
We also see that non-white respondents have a 9 percent higher view of the benefits of tourism than white respondents. As stated at the beginning of the report, we intend to highlight these voices, which tend to be underrepresented in community studies focusing on tourism.

Furthermore, for many tourist destinations, a significant number of Indigenous cultures are being promoted to tourists and creating profits for businesses. Work is underway to better capture and understand how Indigenous populations perceive the costs and benefits of tourism on their communities.

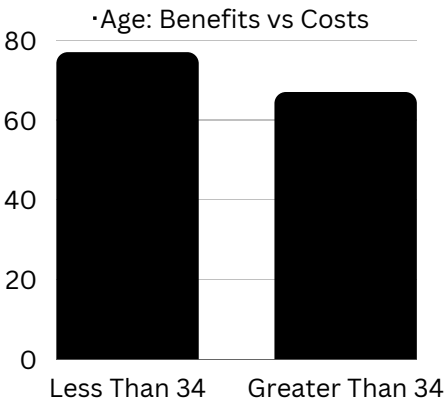
Income



Ethnicity

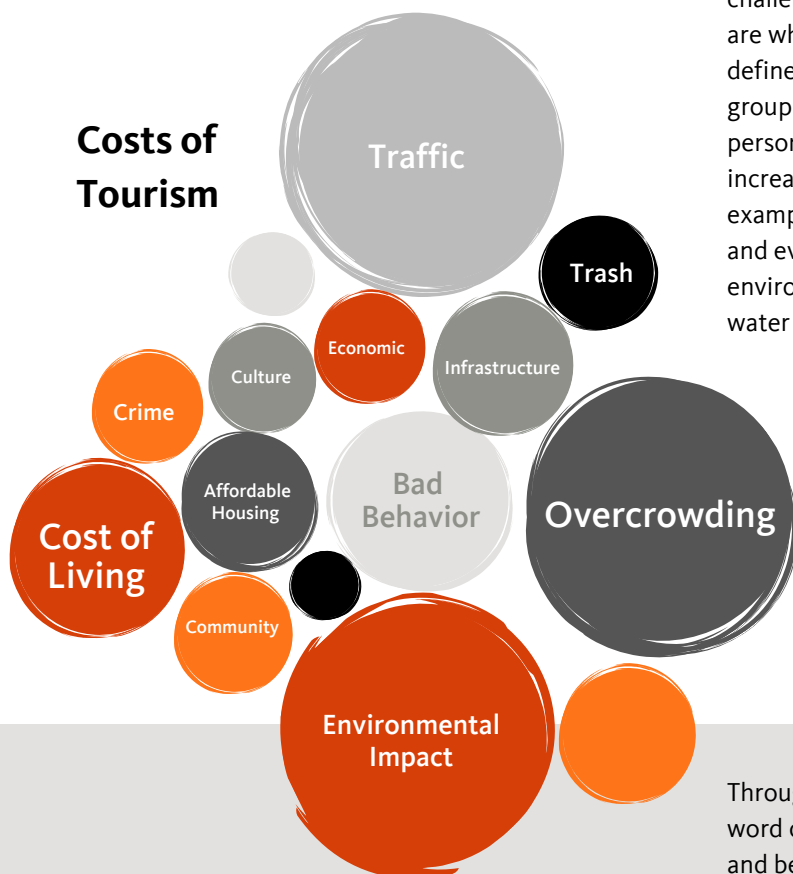


Age





Costs & Pain Points



Although tourism has many benefits, costs to destination areas are difficult to quantify. The challenge of accounting for these costs is that they are what economists refer to as an externality, defined as a cost or benefit caused by one person or group that is not suffered or enjoyed by that same person or group. For example, costs such as increased traffic and overcrowding are good examples of externalities because they can be seen and even quantified. In contrast, costs such as environmental impact, access to activities, pollution, water usage, etc., are more of a challenge.

Throughout this report, we have shown the response word clouds that are most associated with the costs and benefits of tourism. In this chart, we see Traffic, Overcrowding, Environmental Impact, and Cost of Living cited most often. These tend to be universal pain points across most destinations. In the next few pages, we dig deeper.

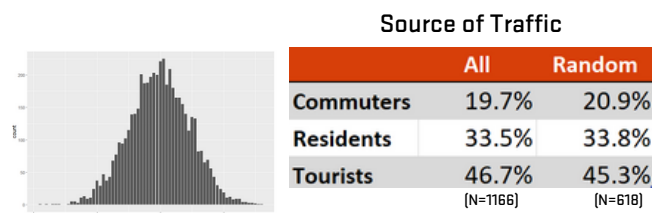
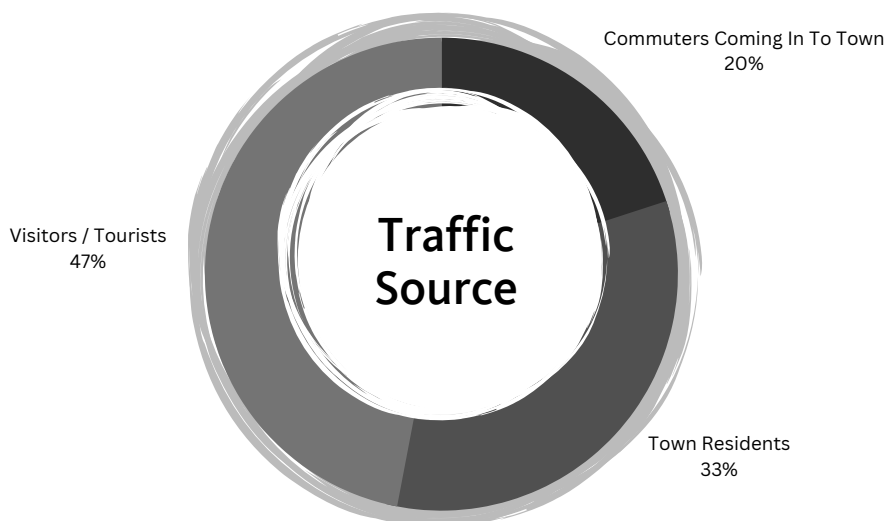


Most Attribute Traffic Congestion to Tourists

In our research we dug further into the impact of traffic. Specially we asked respondents, "Who contributes most to traffic congestion in your town?"

Across all destinations, 47 percent of respondents felt that visitors contributed the most to traffic congestion. Like most of these factors, this depends on the destination's situation (i.e., infrastructure). It also depends on the seasonality of the destination and accessibility to popular tourist spots by car. Unlike other negative externalities, this is an area where data may exist to ascertain if community perceptions match reality. As a result, we are adding traffic data sources in future reports.

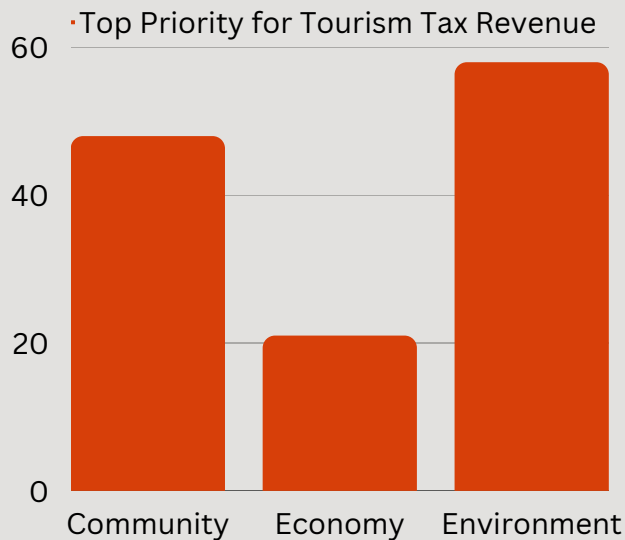
For those respondents feeling that costs exceeded benefits, they attributed traffic issues significantly higher to tourists. This further highlights the impact traffic has on the overall perceptions of tourism in a community. Not surprisingly, respondents that did not live in self-identified tourist destinations did not blame tourists for traffic congestion. This would seem obvious, but it is worth noting, especially for those destinations that are in the early stages of the destination lifecycle.



Tax Revenue Priorities

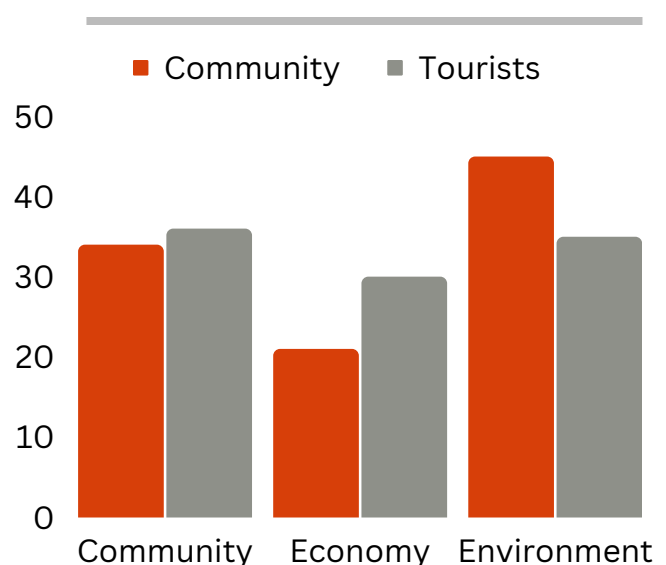
Tourist destinations will often institute a tourism tax to fund reinvestment in the community and/or to expand the marketing and promotion of the destination. One common tax is the transient room tax, which is based on the premise that guests staying in a local hotel or short-term vacation rental are tourists. Our research found a majority of respondents were not aware that a tax existed on tourists and that those who were aware did not understand its purpose or how the money was reinvested.

We also asked respondents what their top priorities for tourist tax revenue should be. Support for investing in the Environment was the highest priority. Using funds to support the Community was second and investing in the Economy finished third. These results were further supported by earlier word clouds throughout the report. The Environmental Impact of tourism was frequently indicated as a major cost across most demographics.



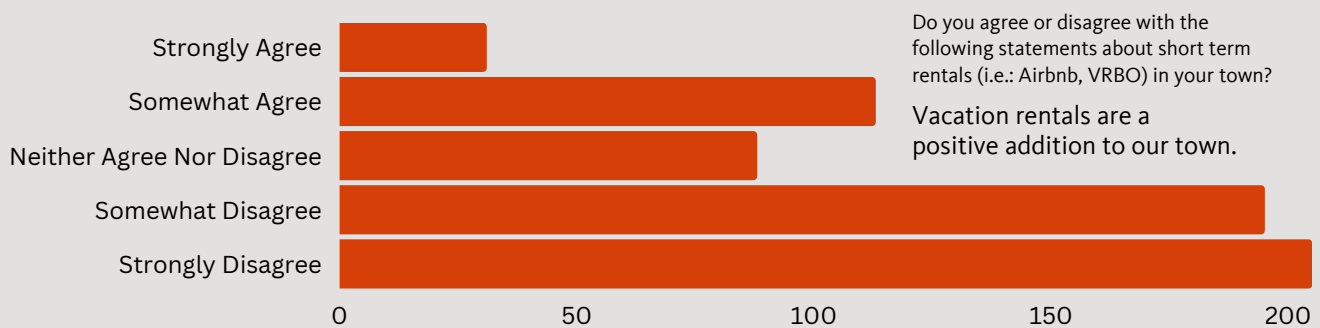
To understand if the tourists generating the tax revenue had similar priorities as community members, we asked tourists how their tax revenue should be used.

We then asked respondents: If you had \$100, how would you like that money reinvested? In this case, the results were less clear, with the Community and Environment nearly tied and the Economy finishing a close third.



Perceptions of Vacation Rentals

The boom in short-term vacation rentals across tourist destinations has provided additional benefits for tourists looking for accommodation. However, the data shows they have not been well-received by many community members. When respondents were asked if short-term vacation rentals were a positive addition to their town, a vast majority did not think so. Communities that do not identify as tourist destinations have a more favorable view.

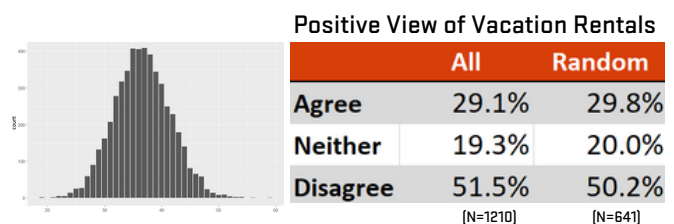


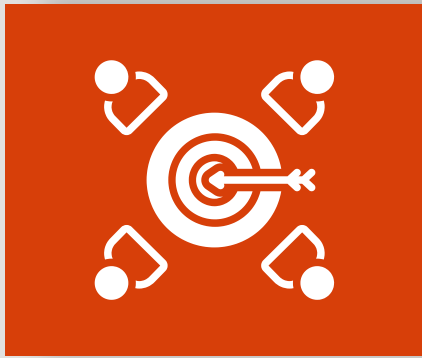
Perception That Vacation Rentals Drive Up Cost of Living For Community Members

For respondents who did not have a favorable view of vacation rentals, approximately 87 percent felt they were driving up the Cost of Living. As illustrated earlier in the report, Cost of Living was identified as a significant cost of tourism. It would also appear that vacation rentals and the larger housing issues are considered linked by some respondents.

Another interesting finding was that even self-identified non-tourist destinations also feel vacation rentals should be regulated. This is likely indicative of the US housing affordability concerns in 2022. As rising interests rate take hold in 2023, it could impact perceptions of vacation rentals.

One of the more fascinating findings was that respondents wanted vacation rentals to be regulated. What was surprising was that many of the respondents lived in communities that already had vacation rental regulations in place. This would indicate that current regulations were not being communicated effectively and /or more regulation was desired.





Conclusions & Recommendations

01

Education on Current Policies

Throughout our data collection process, there has been a lack of awareness and/or understanding of current tourism policies and practices within communities. This was particularly the case around policies dealing with tourism tax collection and vacation rental policies. For example, some respondents did not understand their community collected taxes from tourists and even fewer knew how such revenue was spent. A similar education gap existed for vacation rentals, as many did not know there were existing regulations in place—either at the community or neighborhood (i.e., HOA) level.

During the data collection event (i.e., a survey), various questions would arise from respondents. Although the research team was well-versed about such policies, the team felt it was challenging to explain current policies in a succinct matter. As a result, we understand the challenge ahead for many destinations regarding education. Nonetheless, we believe such an effort is critical for communities to make informed decisions about tourism.

02

Environmental Priorities

Many global tourist destinations exist because their local environment provides and sustains something that people flock to, things like beaches, mountains, rivers, and pleasant weather. In this report, we found that the impact of tourism on the environment was a top concern and a priority for community respondents.

The Environment was the most common response regarding the costs of doing tourism business. Respondents also indicated that addressing this environmental impact was a top priority. As with many negative externalities, it's difficult to quantify the impact of tourism, which is often only visible once significant damage has already been done.

Regardless, the data shows that communities clearly want environmental issues addressed. There is also a strong indication that addressing this impact will result in a more positive view of tourism within destination communities.



03

Benchmark Destination Performance

Every destination has a unique set of factors that drive sentiment regarding tourism. This makes comparing community sentiment results across destinations difficult, and it can also be difficult to understand a destination when only looking at one year's results. Both of these factors were key reasons for making the duration of our research project five years.

We recommend all destinations include performance within the community as a key performance indicator (KPI) and to measure it on an ongoing basis. As we have seen in the destination lifecycle, understanding community priorities is critical to preserving a destination for future generations.

We aim to be an objective source of such benchmarking data for years to come. To ensure that data is actionable, we will continue to collect, benchmark, and disseminate data-driven best practices that can be used to improve community sentiment.

04

Community Engagement

During this time of public health uncertainty, engaging the community around important tourism topics has proven even more difficult. Over the last year, we heard from many destinations that there was an eagerness to engage with their community. However, many communicated that previous engagement efforts lacked community participation and that only the fringes of each topic participated. During our in-person research, we found a similar issue.

Respondents were willing to voice opinions in passing but were unwilling to participate in research and have their opinions recorded. There is no easy solution to this dynamic. But as our research outreach became more frequent and visible, we found that the community came to recognize our sincerity, after which we saw greater participation.

It is our belief that any community engagement effort will take time and require multiple touches within a community. Above all, communities will ultimately engage when they see a sincere and ongoing effort. And finally, communities will see themselves as a tourism partner when action is taken to address their concerns.

The Future



Greater Scope and More Destinations

Our research effort is expanding in 2023 and is likely to double, if not triple, the number of destinations participating in our research. This expansion is not only throughout the US, but also around the world with new destinations joining in Central America and the Pacific. With this expansion, we will continue to add new university and NGO partners.

We also look forward to building off our research successes in 2022 as new destinations join the project. Throughout this past year, we have identified new research opportunities and look forward to including them in our 2024 Annual Report.

Thank you.

We are excited about the work ahead and will always be in gratitude to our partners and, of course, the many communities that give us a glimpse through their community lens.

2023



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