



Economic Values and Strategies from Sustainable Tourism in Bend, Oregon

PNREC 2024

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Project Overview

- Goal
- Research Questions

Sustainable Tourism

- Visitation Demand
- Congestion Analysis

Takeaways

Roadmap

Project Overview

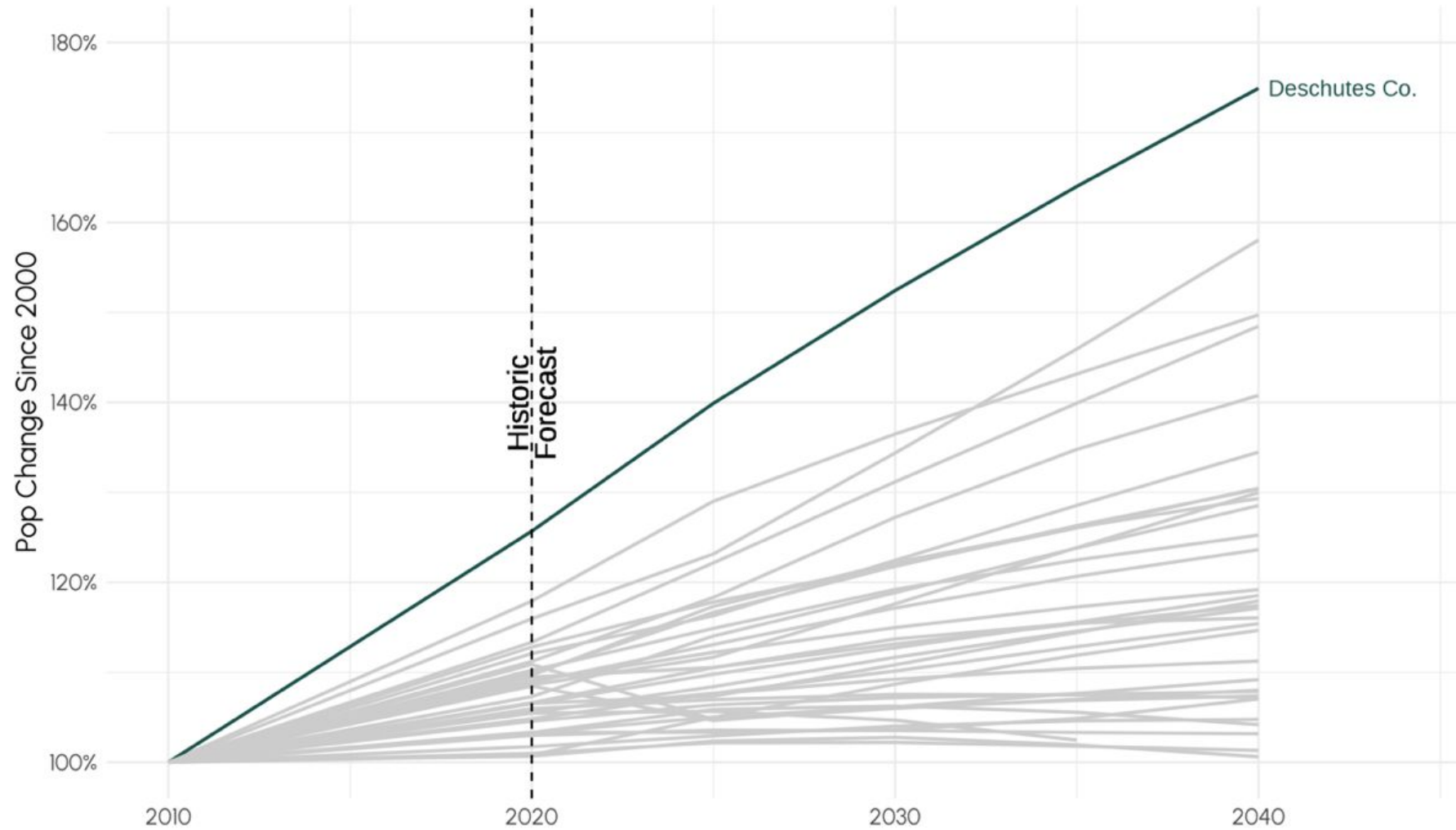
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Growth Trend: Population Change in Oregon Counties



Source: Population Research Center

Goal: support a *long-term sustainable approach to the built and natural infrastructure* of the region for visitors and residents alike.

Research Question: what is the relationship between tourism and Bend's economic and social development and trajectory? What are the key constraints and potential areas of needed investment or use management?

Sustainable Tourism in Bend



Source: Visit Bend

Areas we investigated in:

- Population Growth and Migration Trends
- Market and Non-market Economic Impact
 - ◆ Consumer Surplus
 - ◆ Cultural Amenities
 - ◆ Business Development
 - ◆ Housing Production
- **Visitation Demand & Carrying Capacity**

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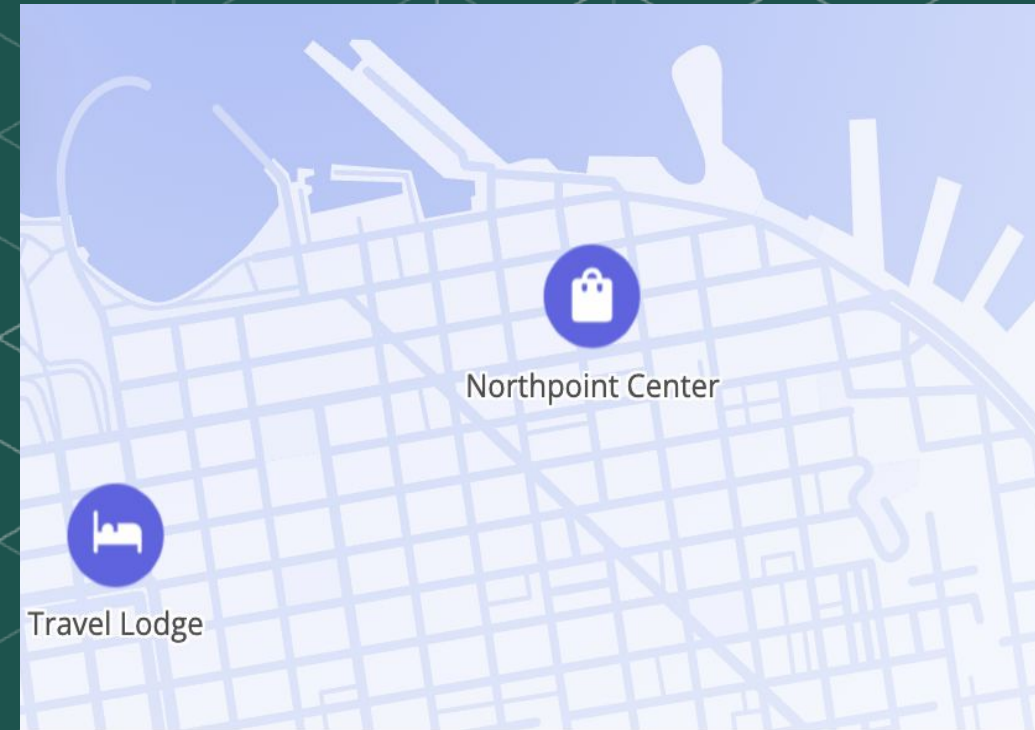
Sustainable Tourism

- Visitation Demand
- Congestion Analysis

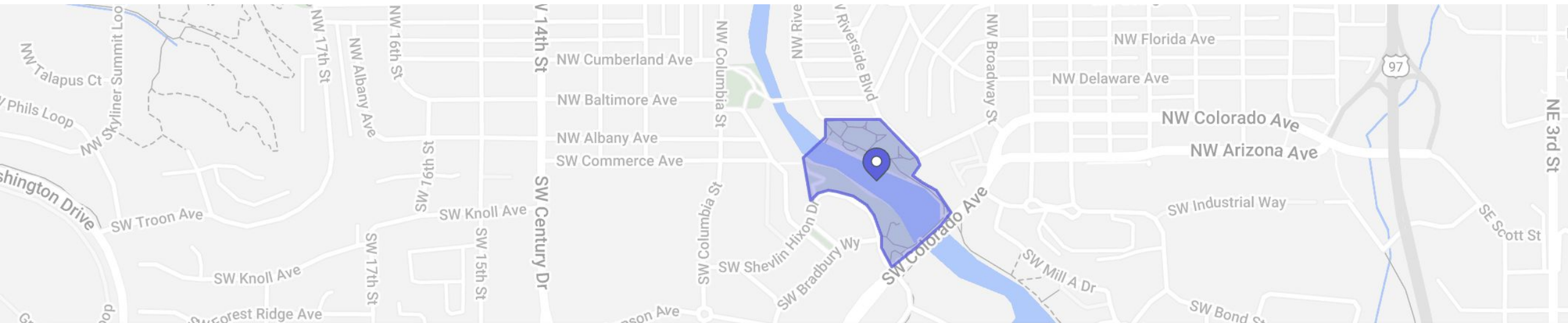
Takeaways

Using Placer.ai to Investigate Sustainable Tourism

- A location intelligence and foot traffic software
- **Aggregated** and **extrapolated** market research data
- “...with the goals of measuring economic development and planning effectively for local events”



- Select POI (Point of Interest)
- A “**Visitor**” is a person who travels more than **50 miles** from the community of residence



Bend WhiteWater Park

166 SW Shevlin-Hixon Dr, Bend, OR 97702

Old Mill District



Source: <https://www.lohrrealestate.com/bend-oregon-guide/>

Mount Bachelor



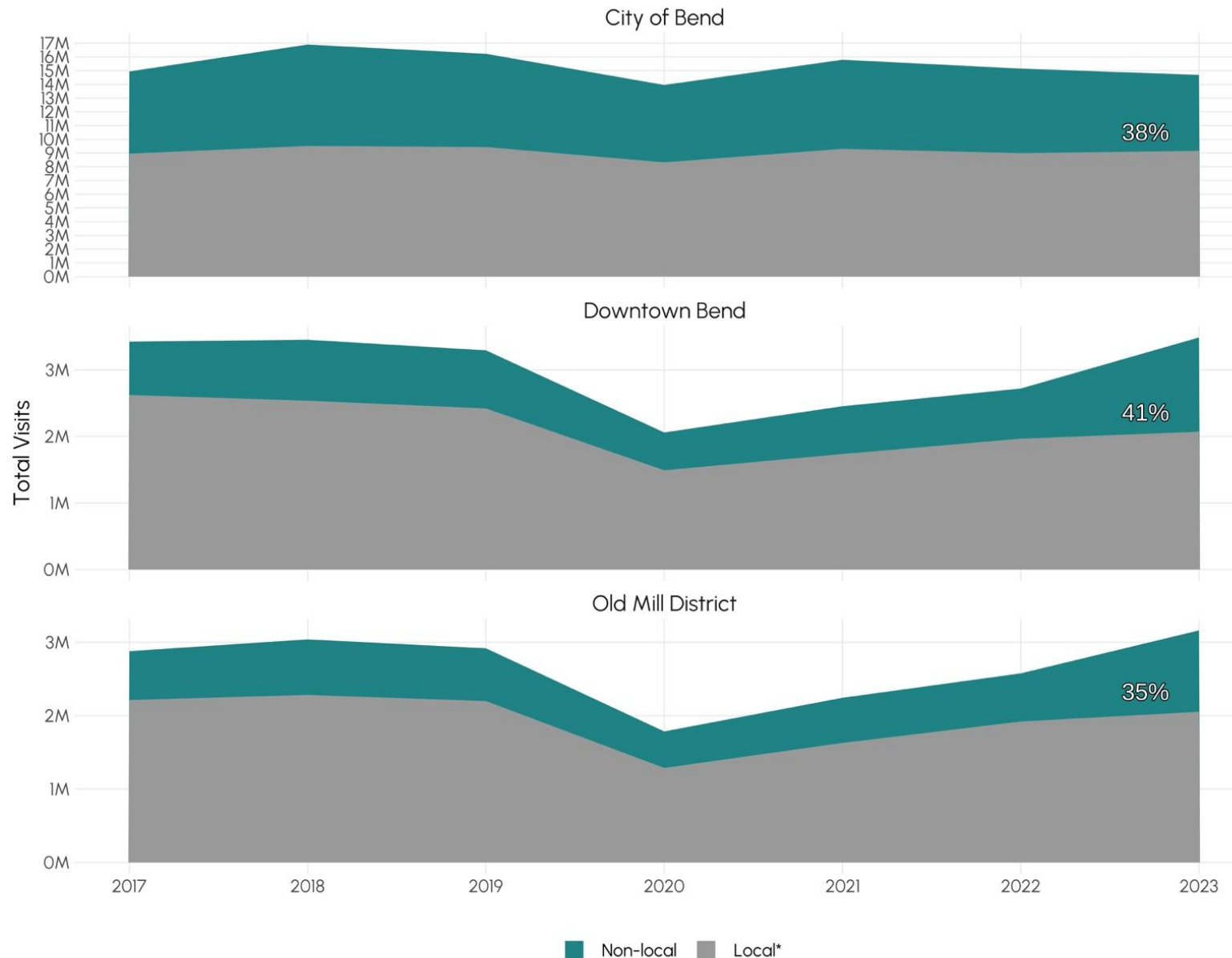
Source: <https://www.trippilot.net/post/mount-bachelor-ski-vacation>

Bend Whitewater Park

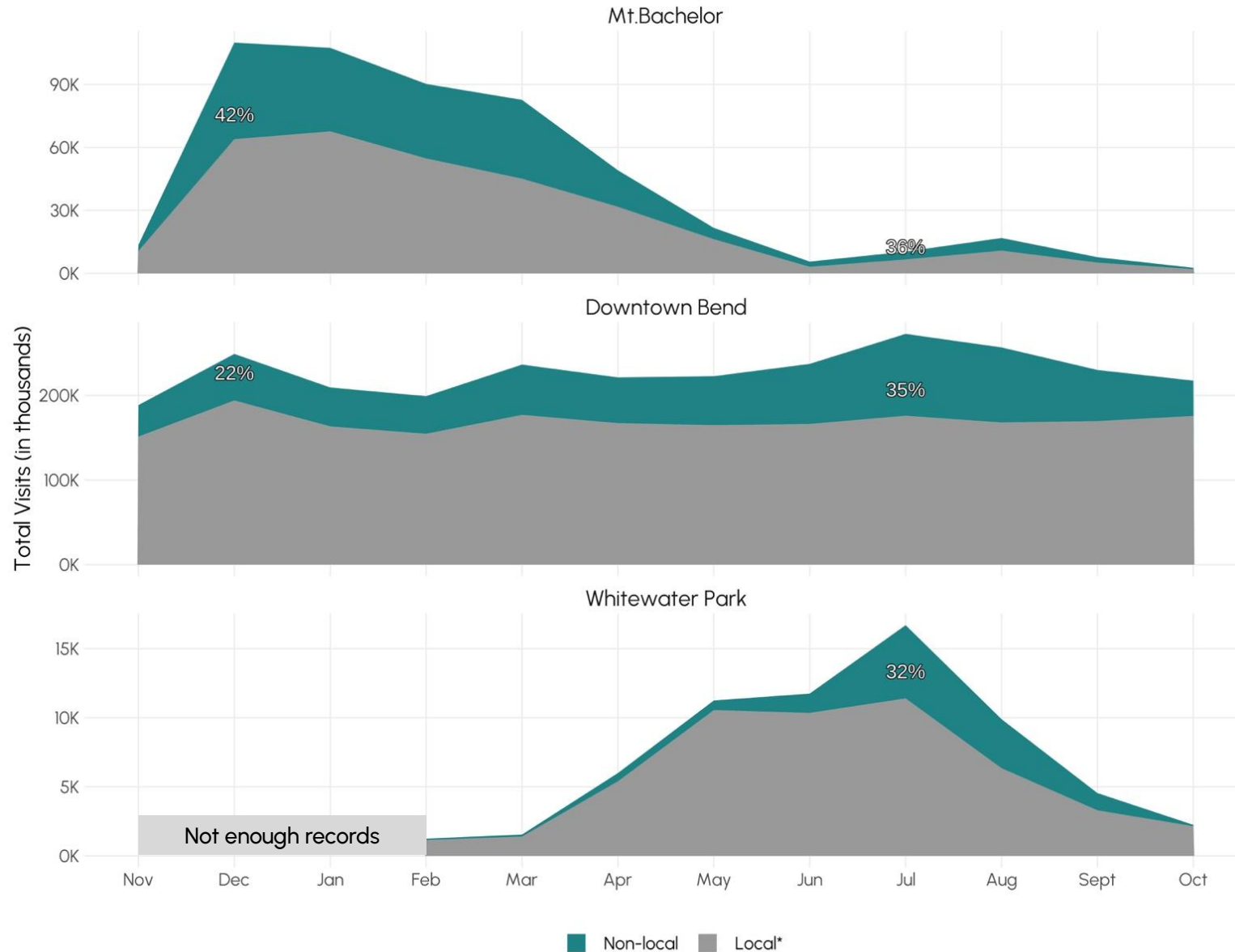


Source: <https://greenworkspc.com/ourwork/bend-whitewater-park>

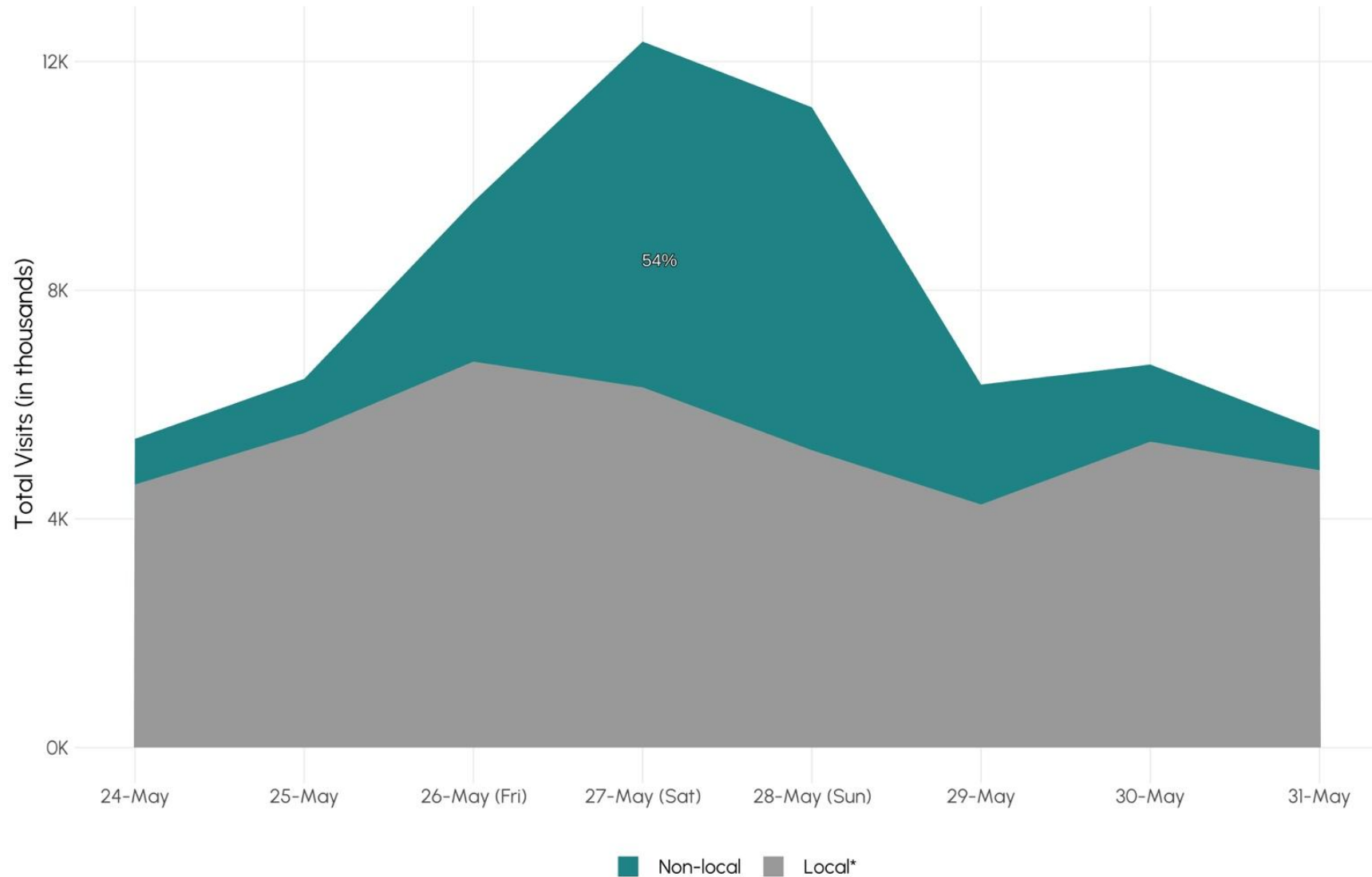
Little Variation of Resident/Visitor Ratio Over Years



Areas Experiences Seasonal Effects of Visitation



Memorial Day Weekend Downtown Visitation Spike



Source: Source: ECONorthwest analysis of Placer.ai data, 2023

*Locals are people who live within 50 miles radius of Bend

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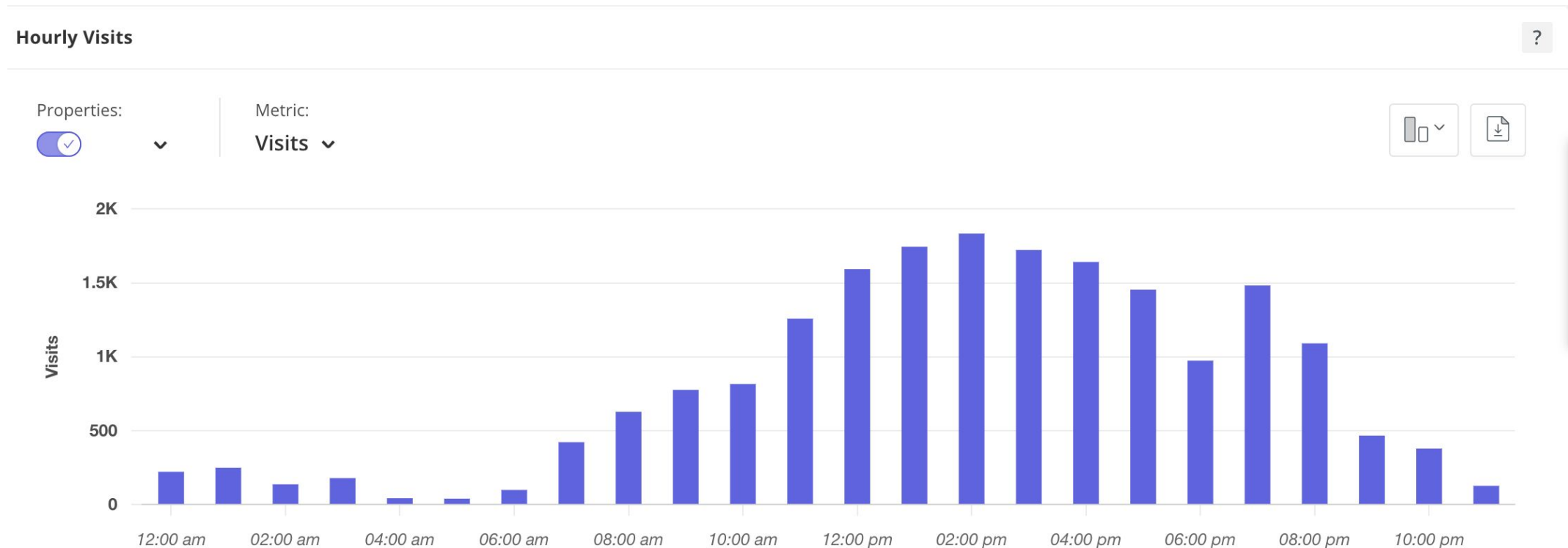
Sustainable Tourism

- Visitation Pattern
- Congestion Analysis

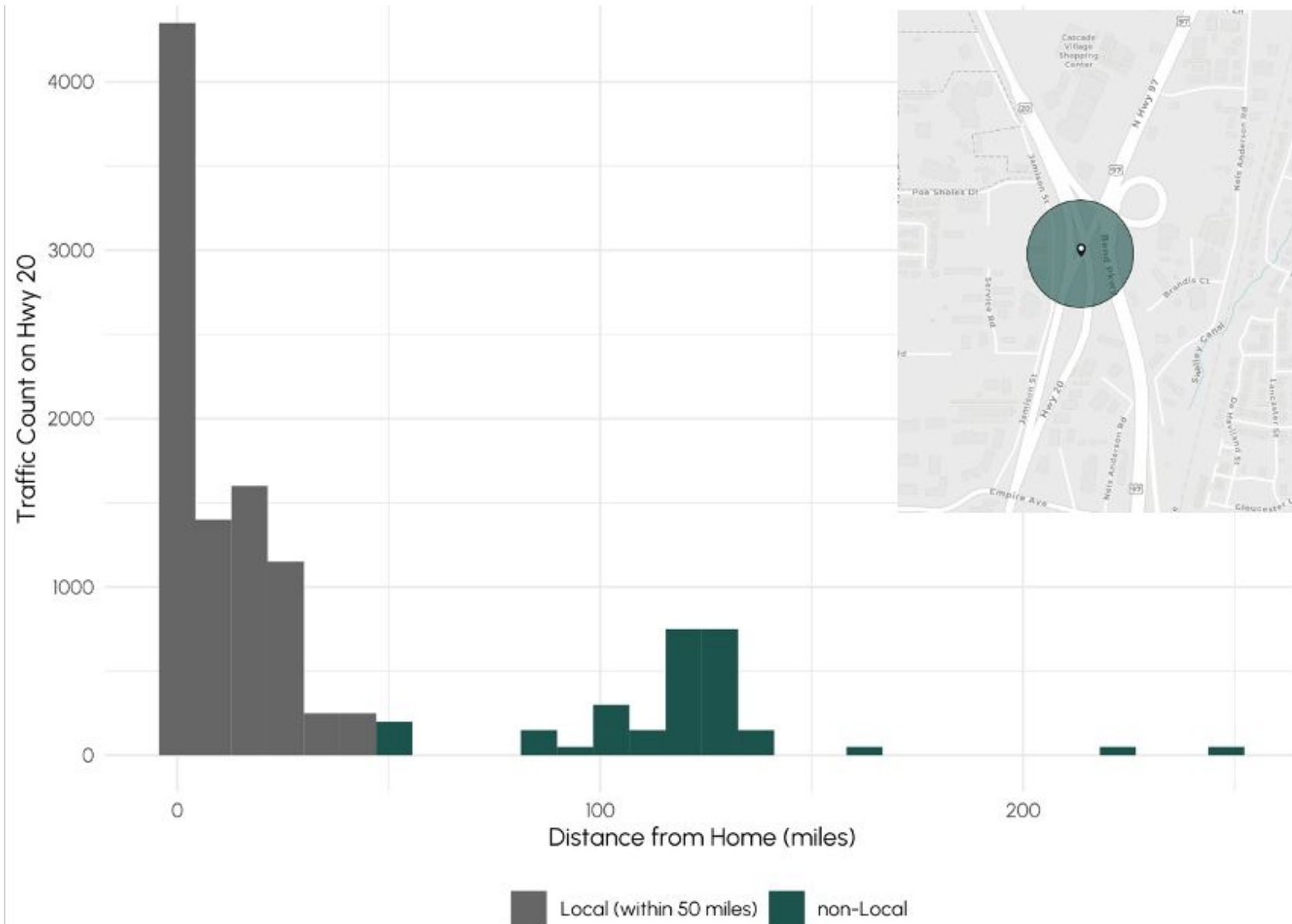
Takeaways

How do we measure congestion using Placer.ai

- Highway 20
- 5 minutes threshold



Traffic congestion are mostly from drivers who live close to Bend



Source: ECONorthwest analysis of Placer.ai January 2023 to November 2023

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Sustainable Tourism

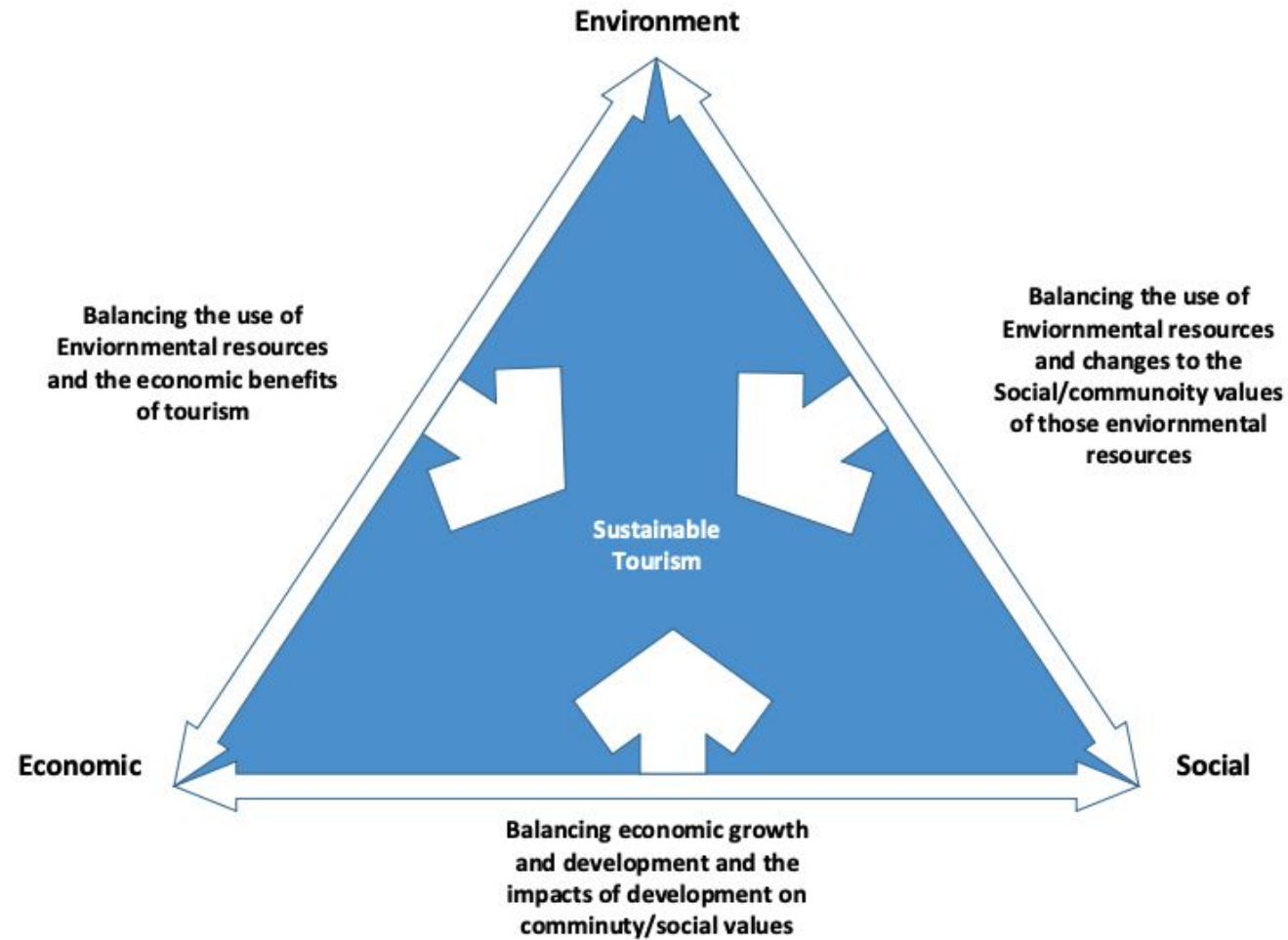
- Visitation Pattern
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Takeaways

- Bend experiences **seasonal/holiday effects** of visitation demand
 - ◆ Perception
 - ◆ Carrying capacity & policy implication
- **Tourism Perception & Reality:** overall growth

- EConorthwest
- Mark Buckley, Kathleen Cahya, Nick Chun, Alicia Milligan, Parmis Taraghi, and Natalie Walker

Sustainable Tourism Framework



Source: Grabara K. Janusza and Paula Bajdora, 2013

Sustainable Community Tourism (SCT): elevating the quality of life for residents by maximizing local economic benefits, safeguarding the natural and built environments, and ensuring that visitors have enriching experiences.

Source: Bramwell & Lane (1993), Hall & Lew (1998), McIntyre (1993), Stabler (1997), and UNCED (1992) in Choi, H.C. and Sirakaya-Turk, E. (2006). Measuring Residents' Attitude toward Sustainable Tourism: Development of Sustainable Tourism Attitude Scale. Journal of Travel Research 43(4):380-394. doi:10.1177/0047287505274651

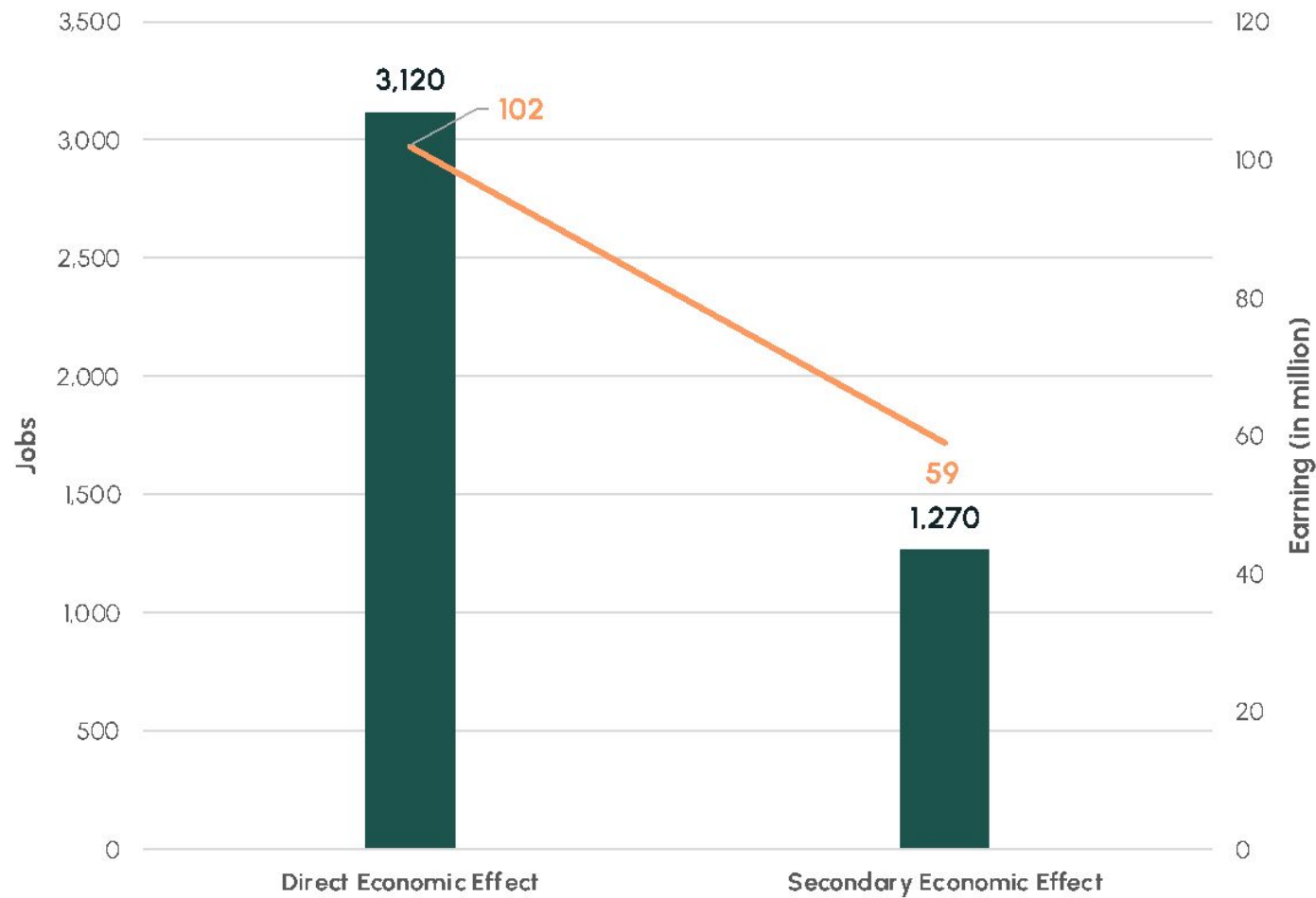
Weak sustainability states that human capital can largely replace natural capital.

Strong sustainability contends that natural capital is essential and largely non-substitutable by human capital.

Climate resilience in tourism involves the design of infrastructure and the adoption of practices that are robust against extreme weather events, sea-level rise, and other climate-driven challenges.

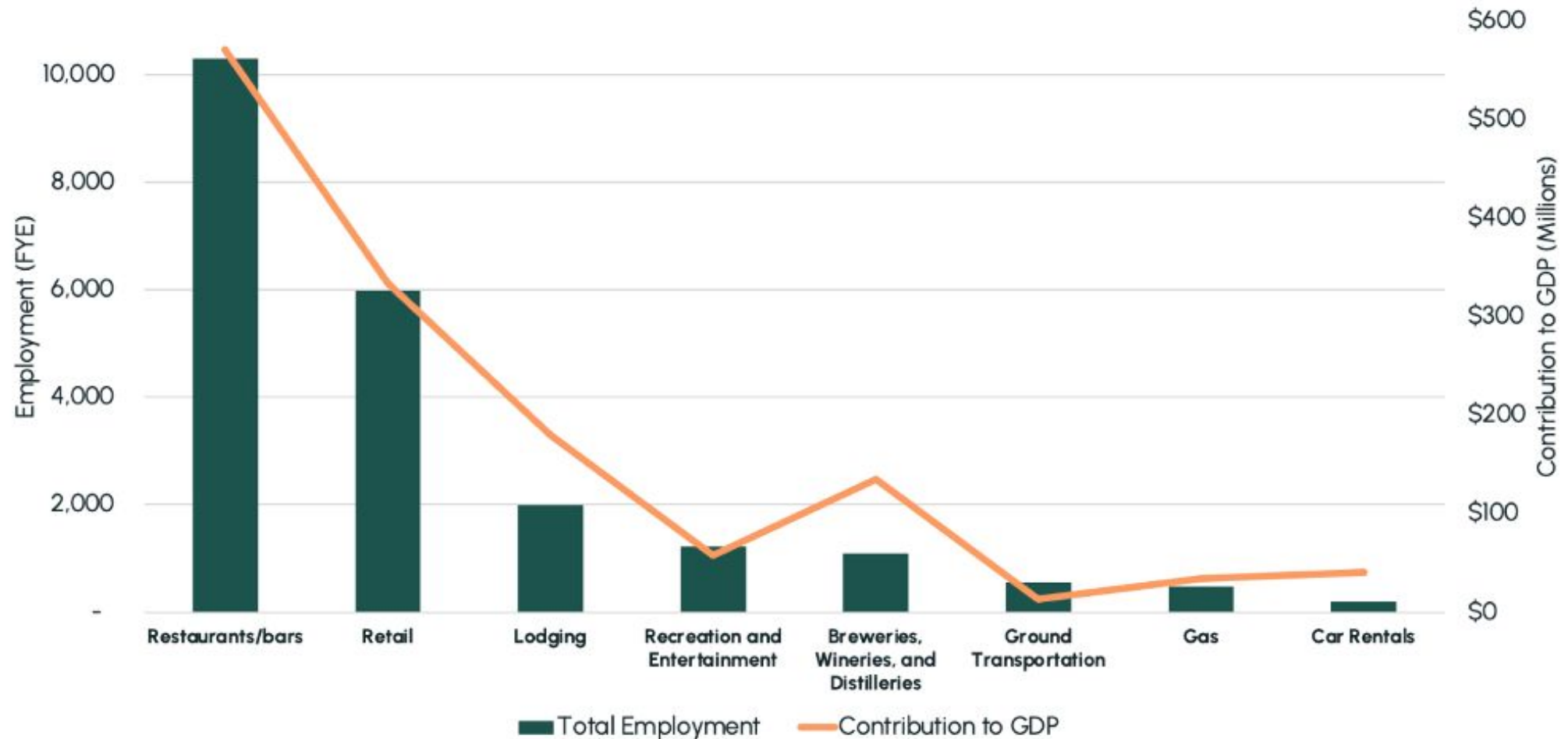
Community resilience, on the other hand, empowers local populations to navigate changes in tourism trends, ensuring their economic and social welfare even amidst fluctuating circumstances.

Travel Spending in Bend Generates Job & Earnings



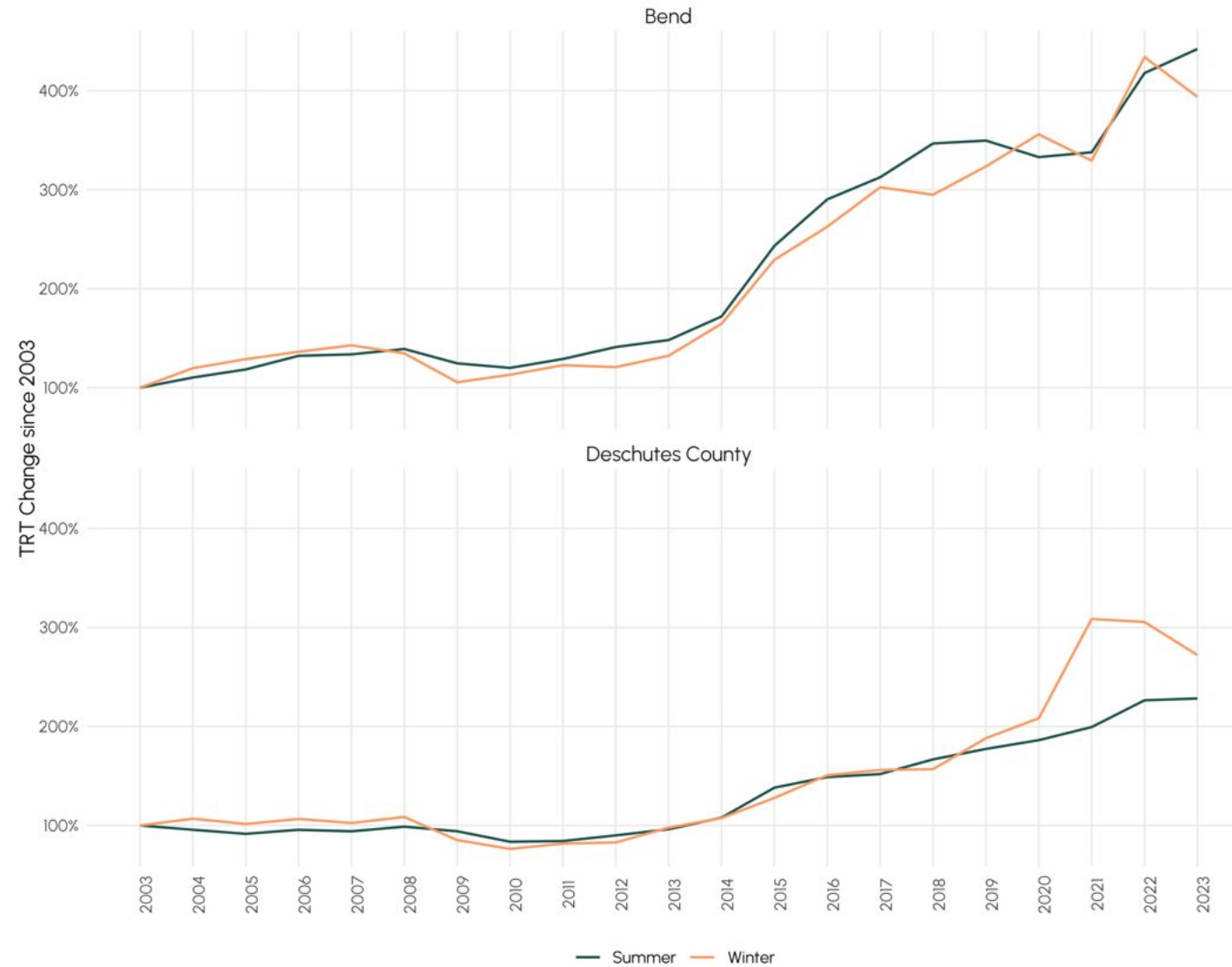
Source: The Economic Impact of Travel (2022). Visit Bend

Economic Impact of Tourism in Bend

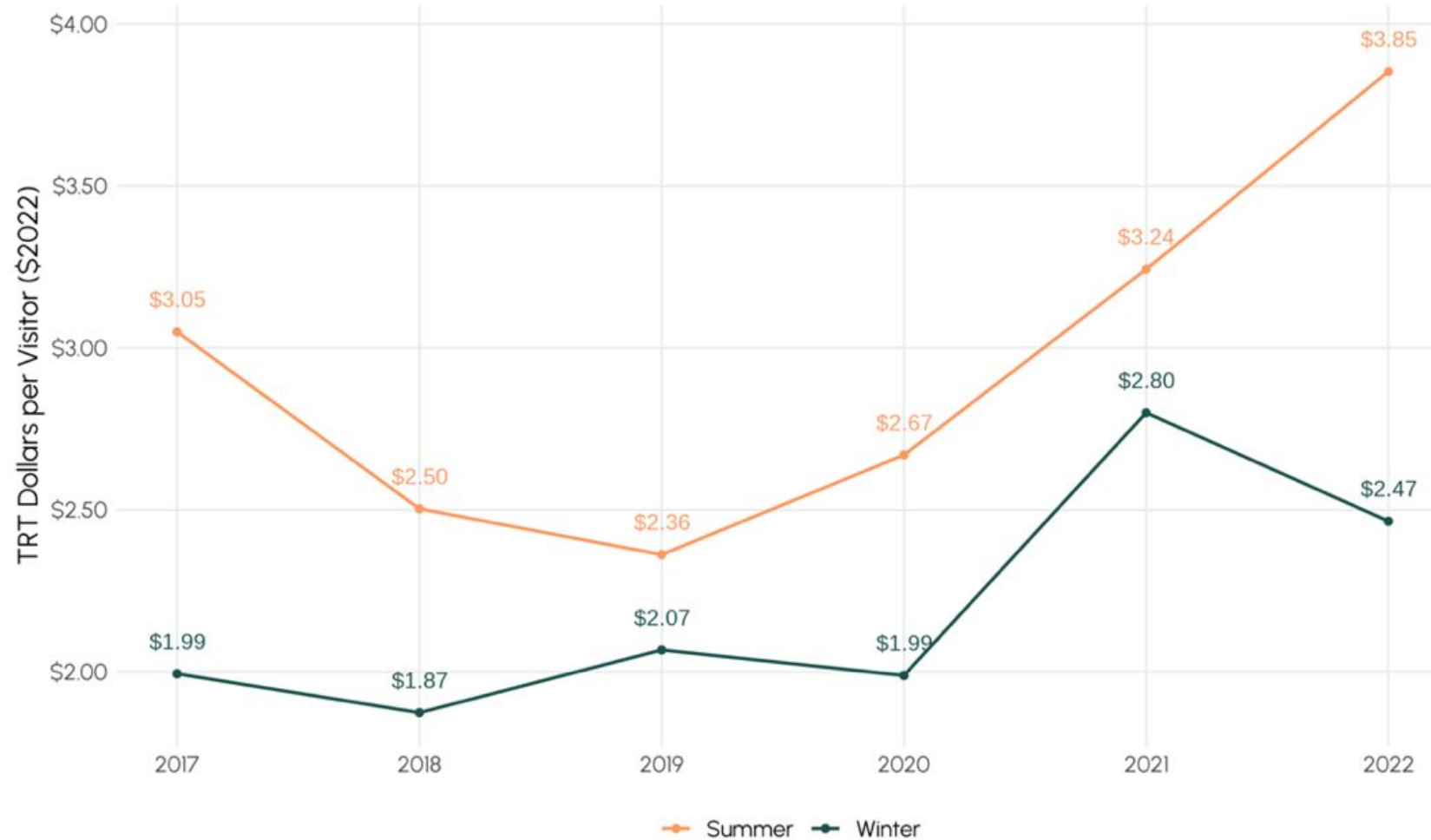


- An IMPLAN analysis shows Retail and Restaurants generating \$800 million in economic output and supporting 16,000 jobs in 2021 in Deschutes County.

Economic Impact of Tourism in Bend

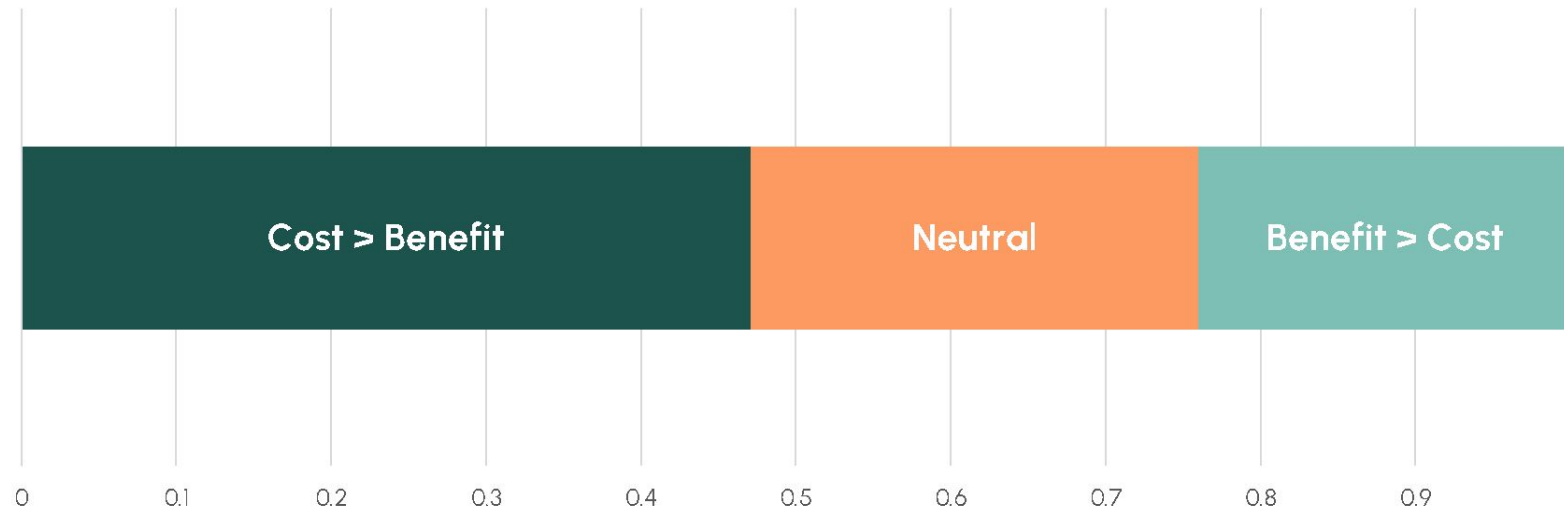


Transient Room Tax per visitor increased despite COVID



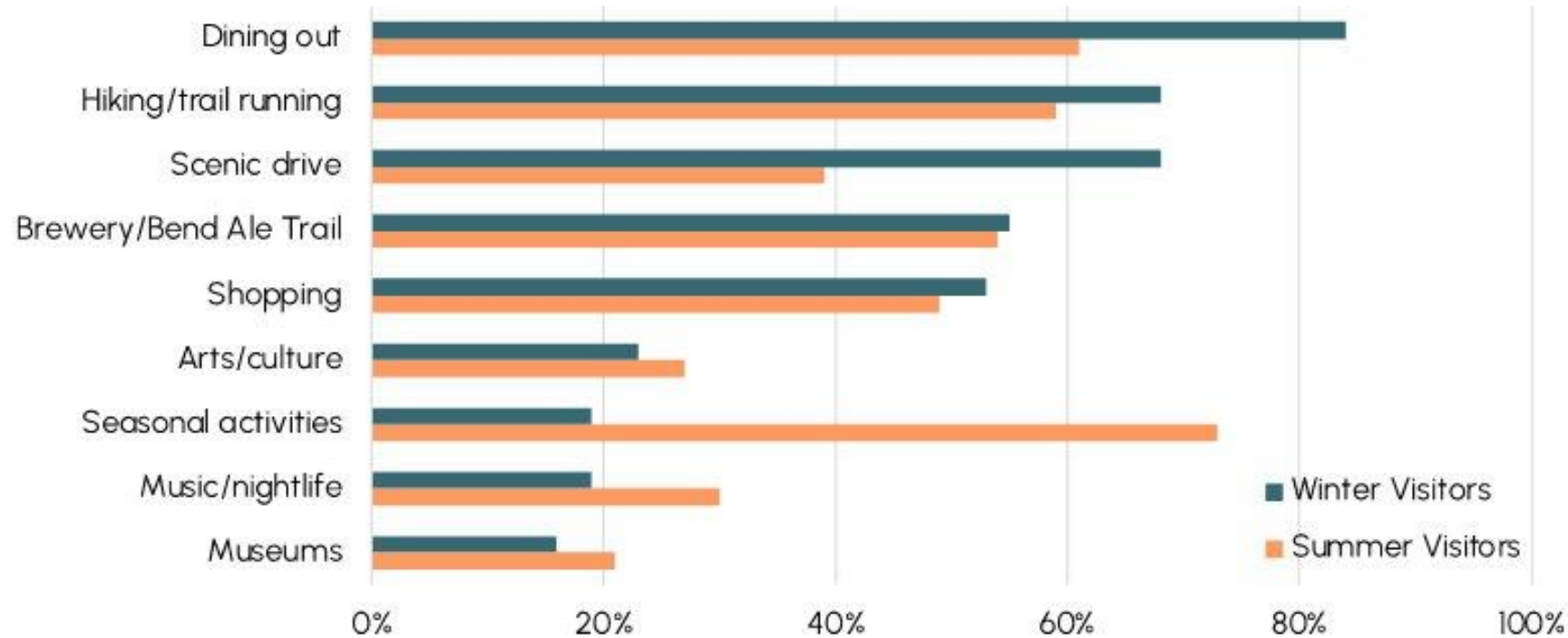
Source: Placer.ai, Visit Bend, 2023

Residents' perception of Tourism in Bend



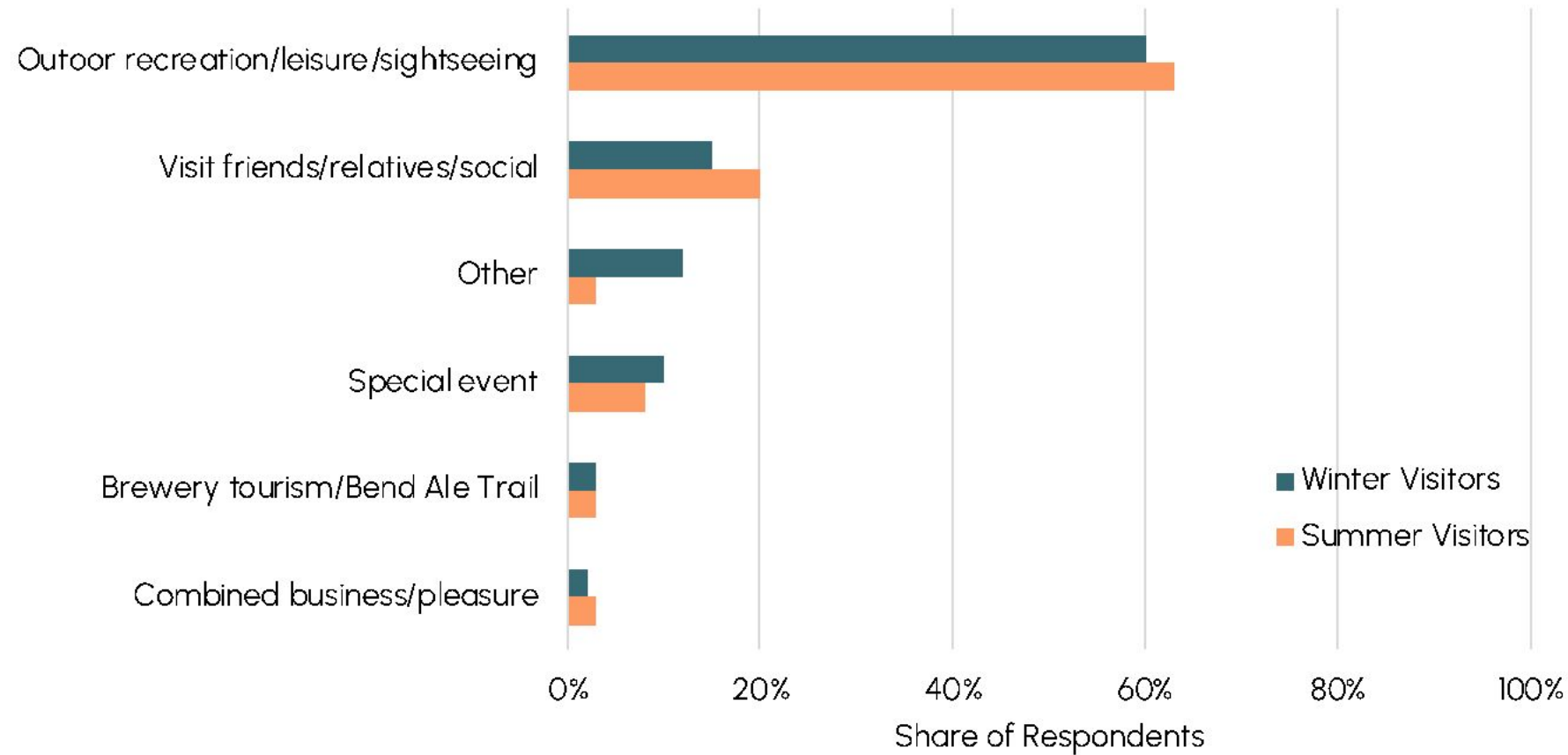
Source: Oregon State University Sustainable Tourism Lab, 2023

What do tourists do in Bend?



Source: Visit Bend, Visitor Intercept Surveys, 2021-2022

Tourism Profile in Bend: Visitor Profiles



The majority of visitation to Bend is driven by outdoor recreation and leisure activities, followed by visiting friends or family

Tourism Profile in Bend: Visitor Profiles

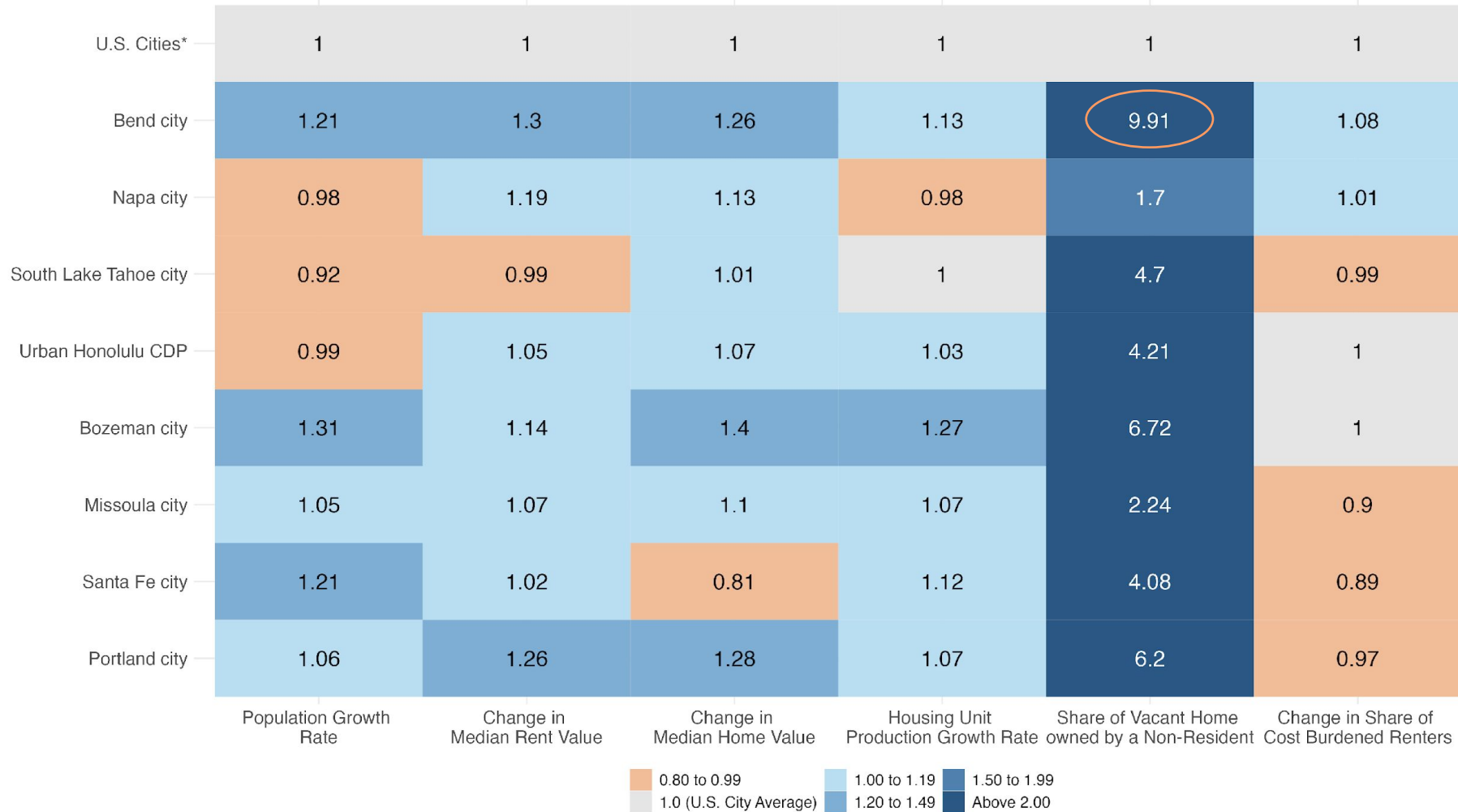


Winter visitors spend, on average, more on food and drink than on lodging (Exhibit 10). Summer visitors spend close to \$100 less on food and drink per person per trip and more on lodging compared to winter visitors. Winter visitors spend more on shopping and entertainment, likely reflecting the lower rate of participation in winter seasonal activities. Many summer activities cost less or are free while winter activities require specialized equipment and passes to participate in.

Tourism Profile in Bend: Visitation Demand

- Bend has effectively recovered from the pandemic, with counts of visits nearing pre-COVID levels. There were over 14 million recorded visits with nearly 40 percent contributed by those living beyond a 50-mile radius from Bend.
- Although there was a slight dip in visits during the pandemic, particularly in popular spots like Downtown Bend and the Old Mill District, both areas recovered from the drop in visits in 2023, leveling with or even exceeding pre-pandemic visitation levels.
- The clear seasonal peaks at key attractions demonstrate the city's ability to attract tourists year-round, but with distinct seasonal preferences.

Bend exceeds U.S. average for social and housing trends



Source: 2011-2007, 2021-2017, 2021 American Community Survey;
Median values of indicators across U.S. cities with at least 10,000 population in 2011

Assessment of Social Conditions of Bend: Comparative Cities

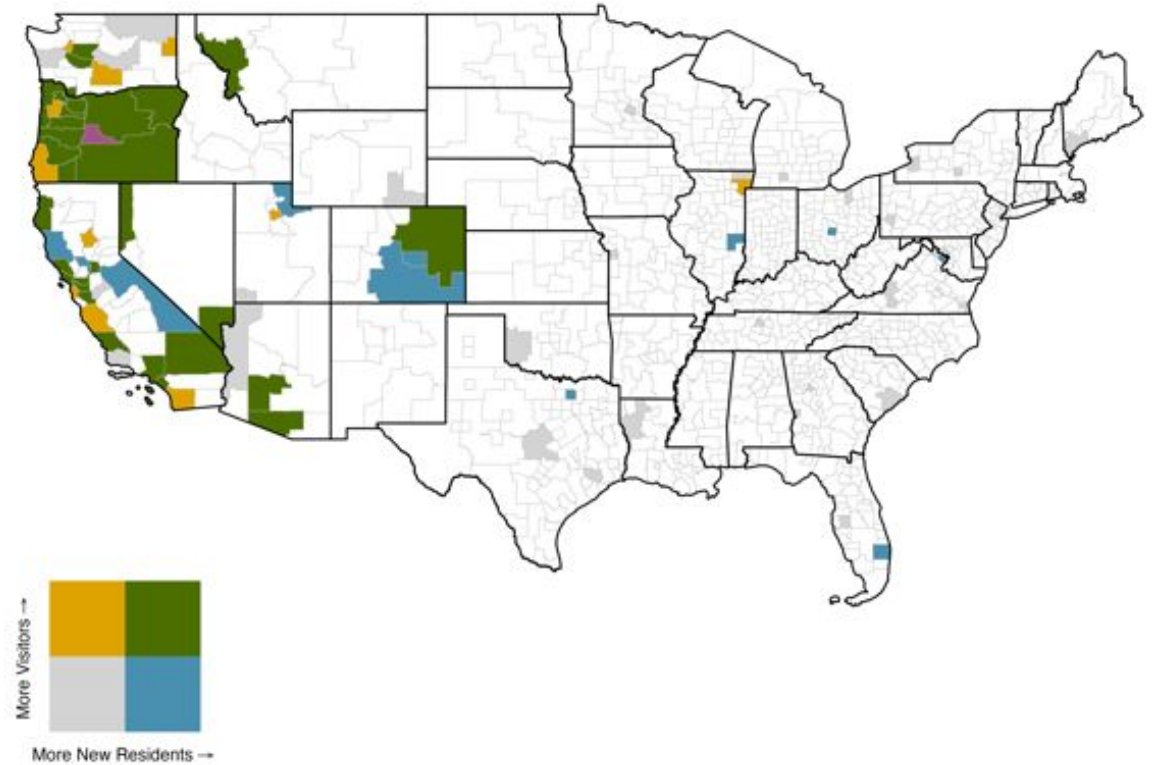
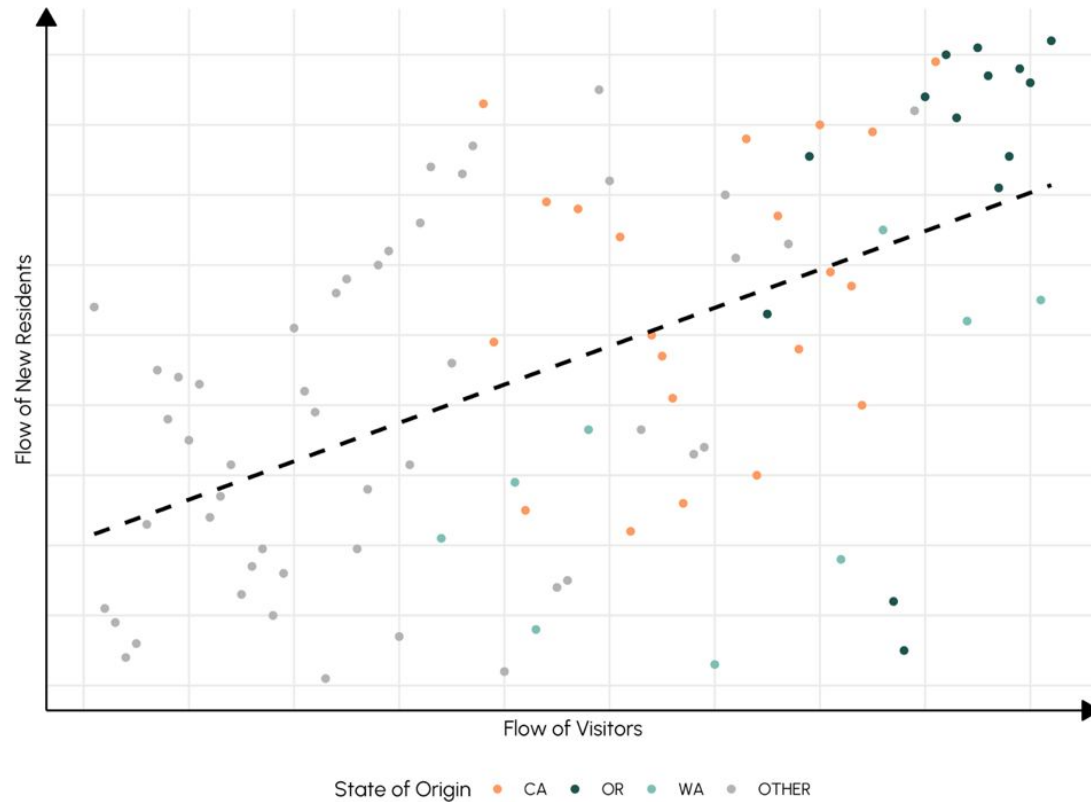
Population Growth

In terms of population growth, over half of the sister cities saw a greater growth rate than the U.S. average. Bend's growth rate from 2011 to 2021 was 1.21 times that of U.S. cities, ranking second highest among its peers.

Housing Challenge

All sister cities had a higher percentage of non-resident owned vacant homes compared to the U.S. average. Bend's rate is nearly 10 times that of the U.S. average, highlighting a significant number of seasonal homes. This is a stark contrast to other tourism-focused cities, most of which have less than five times the U.S. average.

Bend's attractiveness as a home to new residents grows



Source: 2017 through 2021 Census ACS PUMS, Placer.ai

Note: New Residents are people who did not live in Deschutes County a year ago.

(perceived) Benefits

Market

- In-migration and Property Tax Revenue
- Business Development

Non-market

- Consumer Surplus
- Cultural Amenities

(perceived) Costs

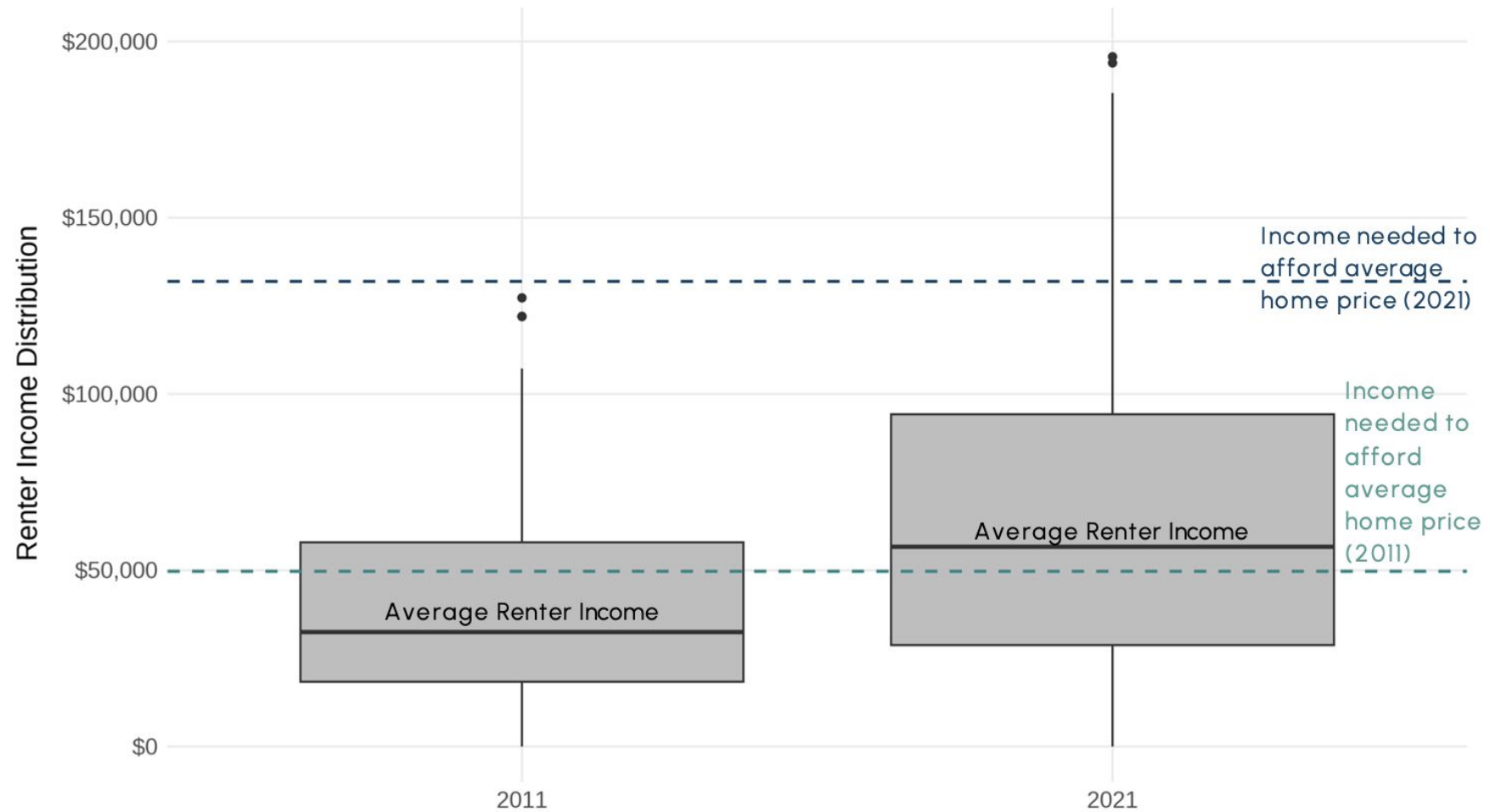
Market

- Housing

Non-market

- Congestion
- Carrying Capacity

Housing is significantly less affordable for renters



Source: 2021 1-year ACS and 2011 1-year ACS