

Clackamas County Tourism Resident Sentiment Survey 2023

Clackamas County Tourism conducted this survey to collect information on residents' sentiment towards tourism in their communities. This study built on a 2019 baseline survey conducted as part of a Sustainable Destination Assessment completed by The George Washington University. The value of this information remains the same as stated by GWU in their previous research: "Local residents play a key role in the tourism ecosystem of every destination. Resident support of the tourism industry is critical to ensuring positive visitor experiences and an economically and socially viable sector that generates revenue and is well integrated into the fabric of the community."

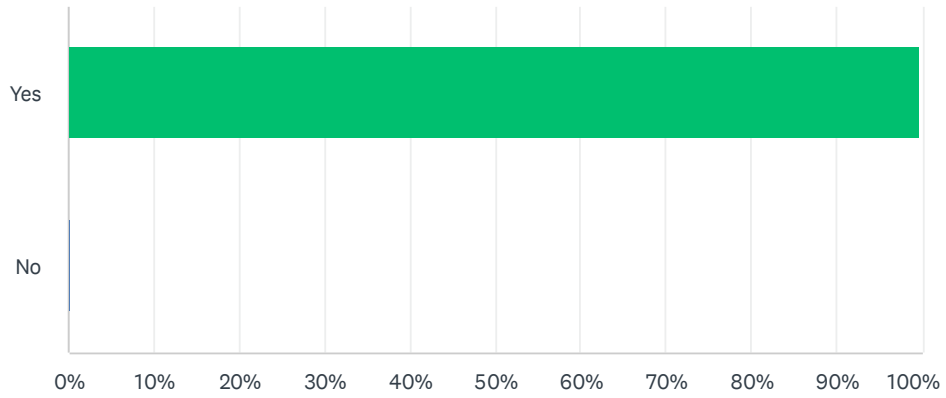
The 2023 Resident Sentiment Survey replicated questions from the 2019 baseline survey, as well as adding new topics and expanding demographic information collected to match tourism industry standards.

This survey was open from November 2 – November 30, 2023 and received 1,847 unique responses, with an 80% completion rate. The survey was promoted through Clackamas County and Clackamas County Tourism channels, newsletters and owned and paid social media. A prize drawing incentive was offered for participation.

The "Full County" report includes all responses. Open-ended question responses as well as any personal identifying data have been omitted from this report.

Q1 Are you 18+ years old?

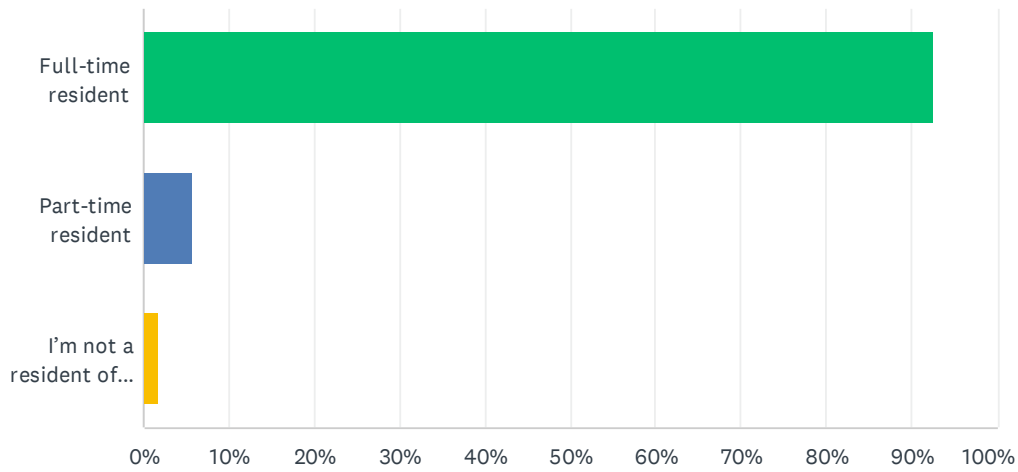
Answered: 1,847 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	99.73%	1,842
No	0.27%	5
TOTAL		1,847

Q2 Are you a part- or full-time resident of Clackamas County?

Answered: 1,847 Skipped: 0



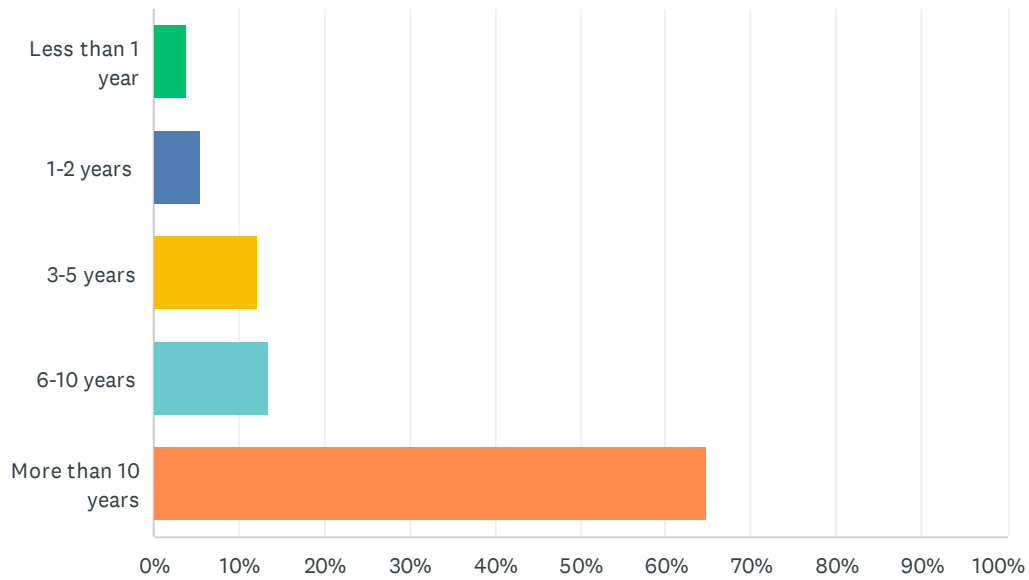
ANSWER CHOICES	RESPONSES	
Full-time resident	92.47%	1,708
Part-time resident	5.85%	108
I'm not a resident of Clackamas County	1.68%	31
TOTAL		1,847

Q3 If you are a resident of Clackamas County, what is your zip code?

Answered: 1,847 Skipped: 0

Q4 How long have you lived in Clackamas County (part or full time)?

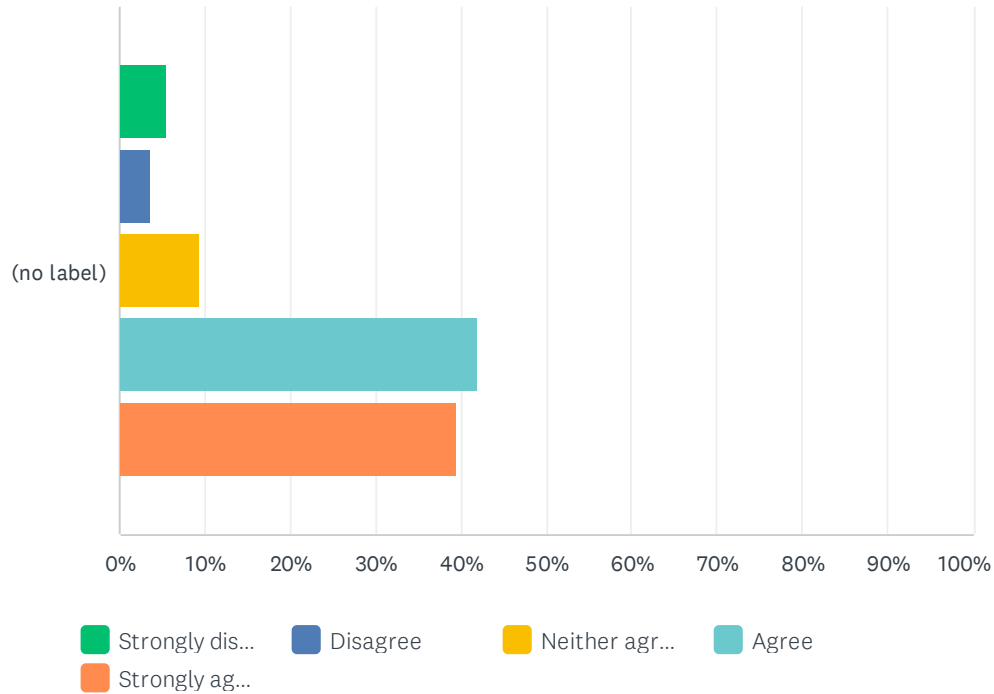
Answered: 1,847 Skipped: 0



ANSWER CHOICES	RESPONSES	
Less than 1 year	3.90%	72
1-2 years	5.52%	102
3-5 years	12.24%	226
6-10 years	13.48%	249
More than 10 years	64.86%	1,198
TOTAL		1,847

Q5 There are benefits for the community from tourism within Clackamas County.

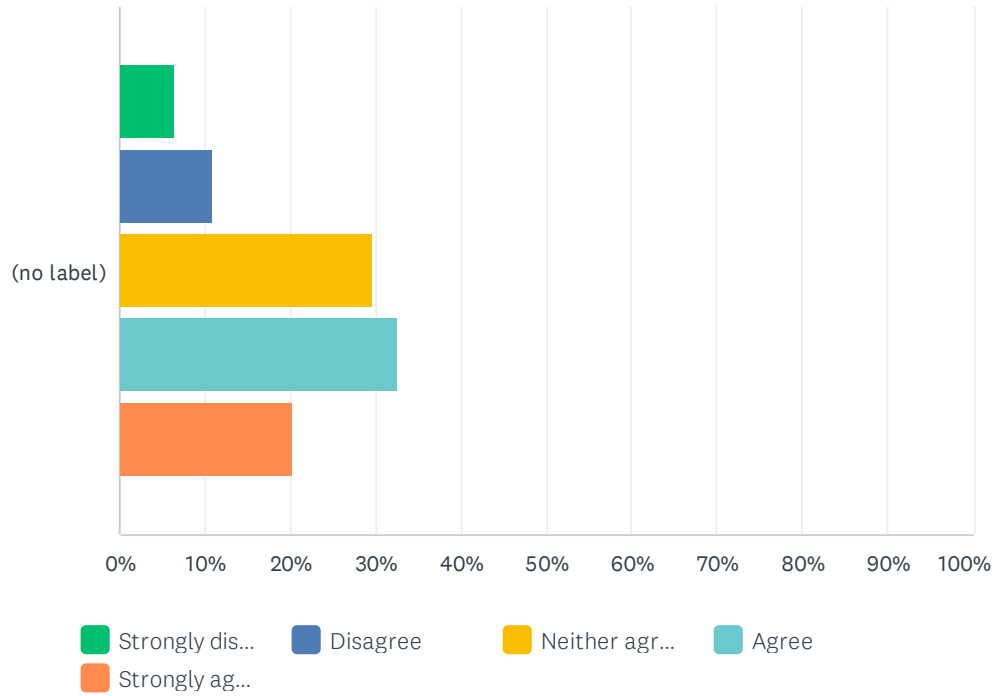
Answered: 1,660 Skipped: 187



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	5.60% 93	3.55% 59	9.40% 156	41.99% 697	39.46% 655	1,660	4.06

Q6 There are benefits for myself from tourism within Clackamas County

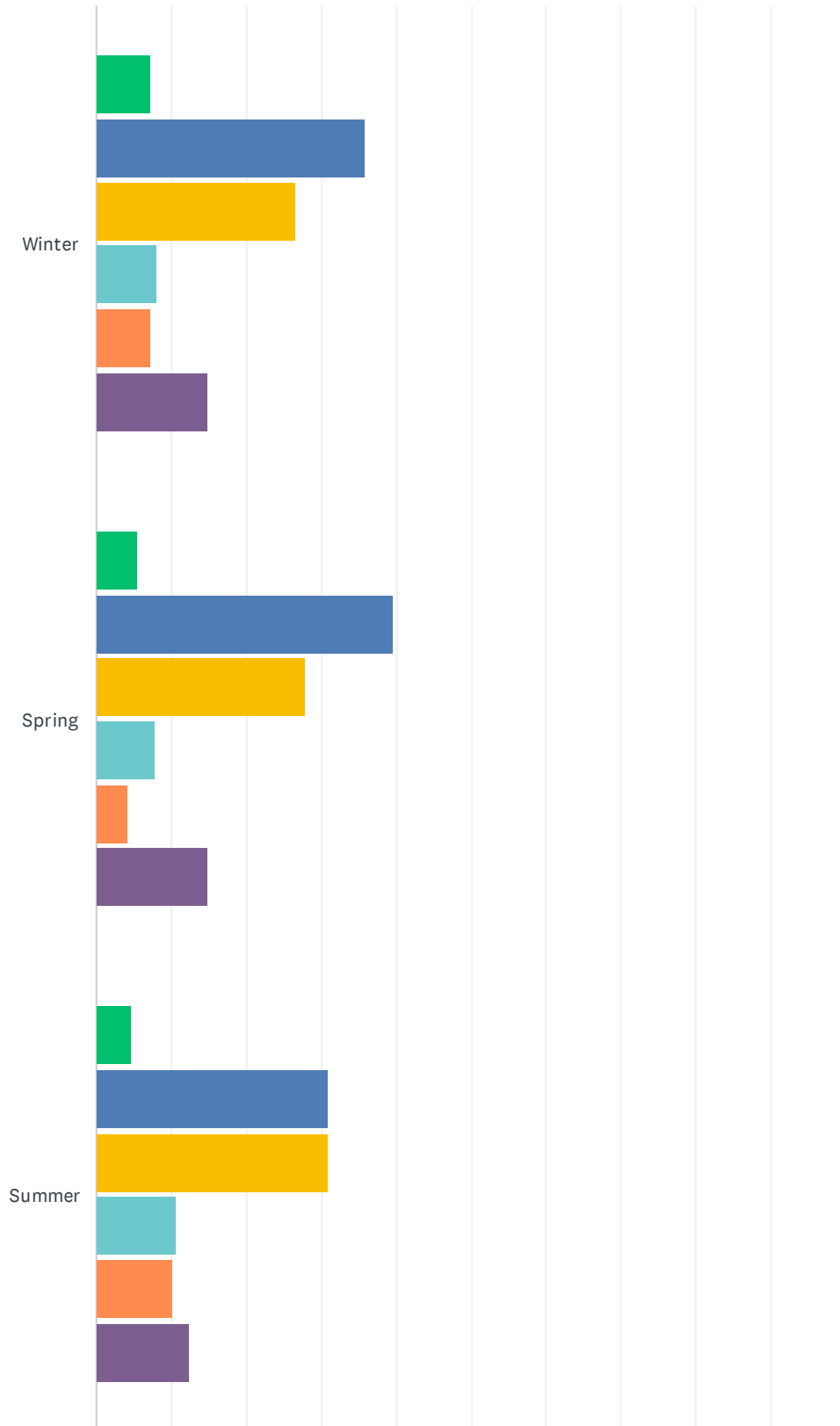
Answered: 1,659 Skipped: 188



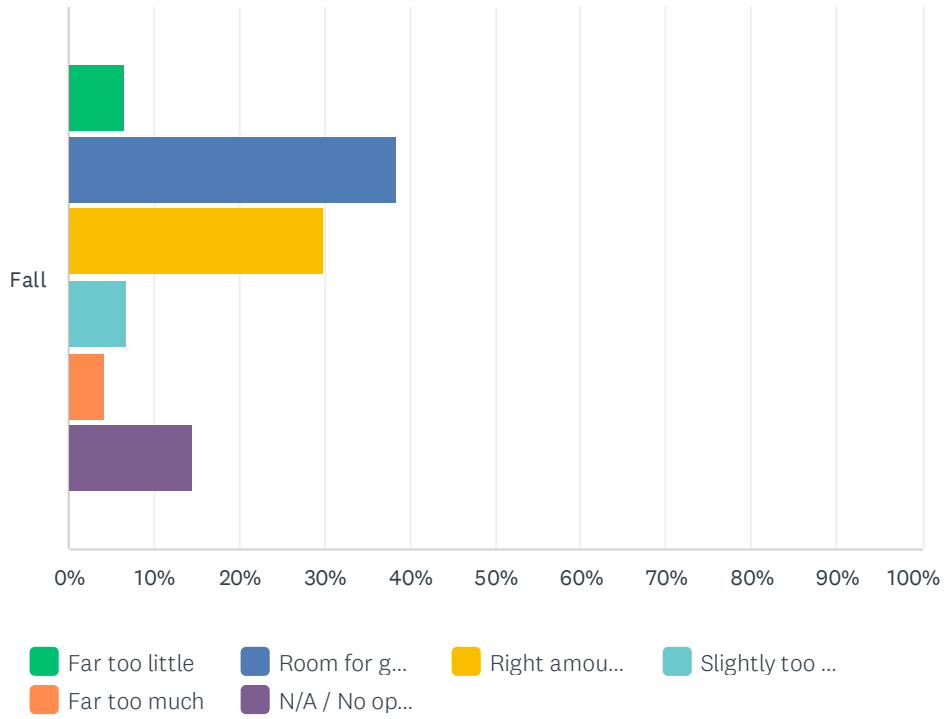
	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	6.45% 107	10.97% 182	29.72% 493	32.61% 541	20.25% 336	1,659	3.49

Q7 Overall, how satisfied are you with the level of tourism activity in your community for each season?

Answered: 1,660 Skipped: 187



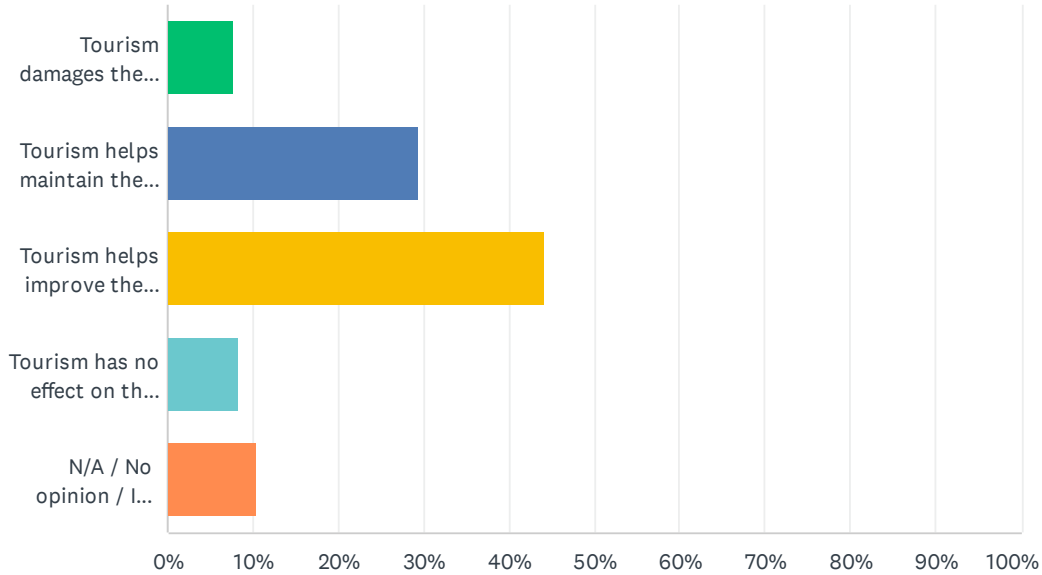
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	FAR TOO LITTLE	ROOM FOR GROWTH	RIGHT AMOUNT	SLIGHTLY TOO MUCH	FAR TOO MUCH	N/A / NO OPINION / I DON'T KNOW	TOTAL	WEIGHTED AVERAGE
Winter	7.22% 119	35.84% 591	26.56% 438	8.13% 134	7.28% 120	14.98% 247	1,649	2.68
Spring	5.55% 91	39.60% 649	27.94% 458	7.81% 128	4.27% 70	14.83% 243	1,639	2.60
Summer	4.76% 78	30.99% 508	30.99% 508	10.68% 175	10.25% 168	12.32% 202	1,639	2.89
Fall	6.55% 107	38.27% 625	29.82% 487	6.74% 110	4.16% 68	14.45% 236	1,633	2.58

Q8 In your opinion, what kind of effect does tourism have on the culture and heritage of Clackamas County?

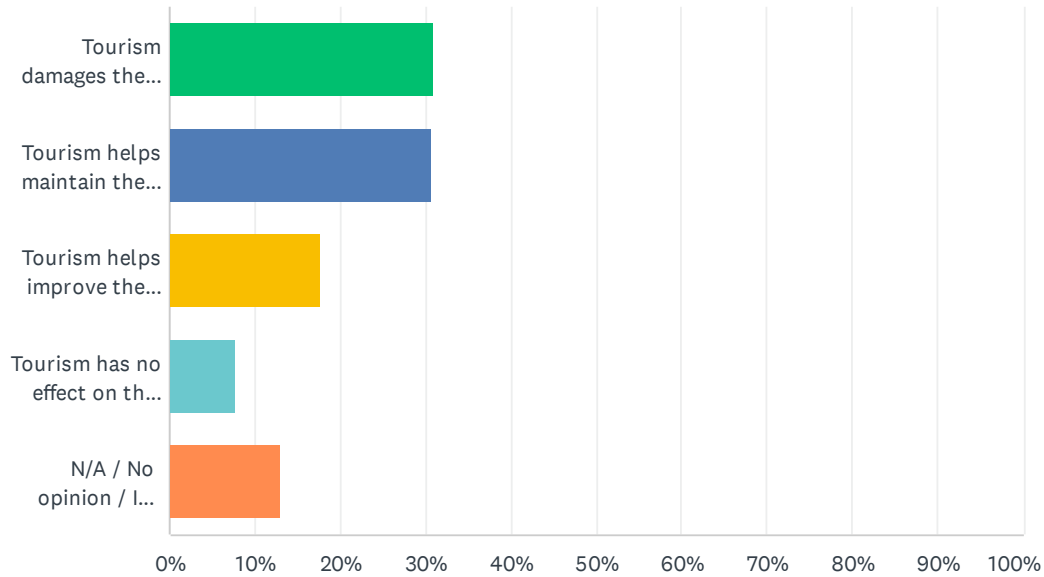
Answered: 1,653 Skipped: 194



ANSWER CHOICES	RESPONSES	
Tourism damages the county's culture and heritage	7.68%	127
Tourism helps maintain the county's culture and heritage	29.34%	485
Tourism helps improve the county's culture and heritage	44.22%	731
Tourism has no effect on the county's culture and heritage	8.23%	136
N/A / No opinion / I don't know	10.53%	174
TOTAL		1,653

Q9 In your opinion, what kind of effect does tourism have on the natural environment of Clackamas County?

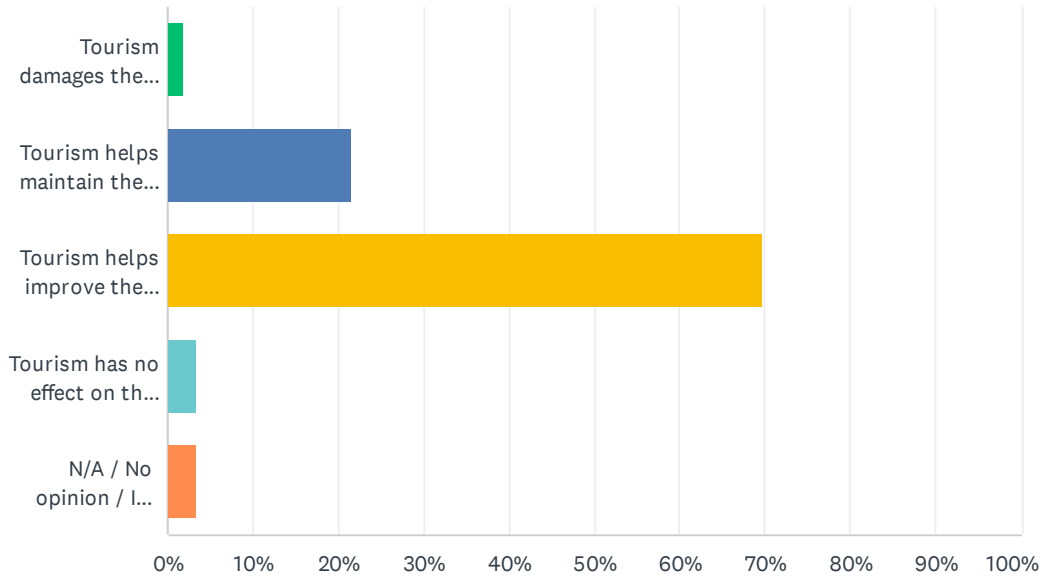
Answered: 1,653 Skipped: 194



ANSWER CHOICES	RESPONSES	
Tourism damages the county's natural environment	30.97%	512
Tourism helps maintain the county's natural environment	30.67%	507
Tourism helps improve the county's natural environment	17.79%	294
Tourism has no effect on the county's natural environment	7.62%	126
N/A / No opinion / I don't know	12.95%	214
TOTAL		1,653

Q10 In your opinion, what kind of effect does tourism have on the economy of Clackamas County?

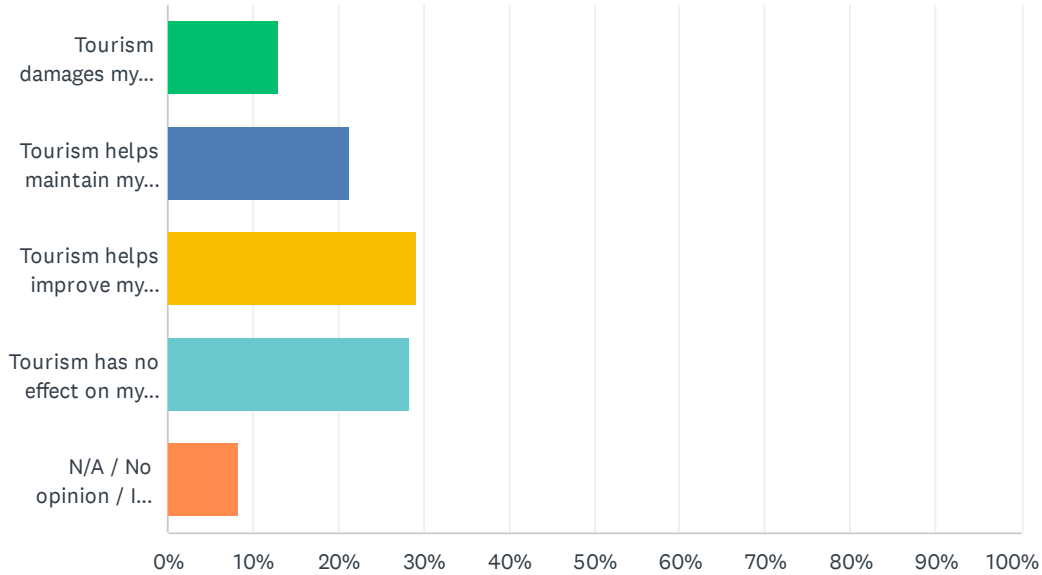
Answered: 1,657 Skipped: 190



ANSWER CHOICES	RESPONSES	
Tourism damages the county's economy	1.99%	33
Tourism helps maintain the county's economy	21.61%	358
Tourism helps improve the county's economy	69.70%	1,155
Tourism has no effect on the county's economy	3.38%	56
N/A / No opinion / I don't know	3.32%	55
TOTAL		1,657

Q11 In your opinion, what kind of effect does tourism have on your quality of life in Clackamas County?

Answered: 1,656 Skipped: 191



ANSWER CHOICES	RESPONSES	
Tourism damages my quality of life	13.04%	216
Tourism helps maintain my quality of life	21.38%	354
Tourism helps improve my quality of life	29.11%	482
Tourism has no effect on my quality of life	28.26%	468
N/A / No opinion / I don't know	8.21%	136
TOTAL		1,656

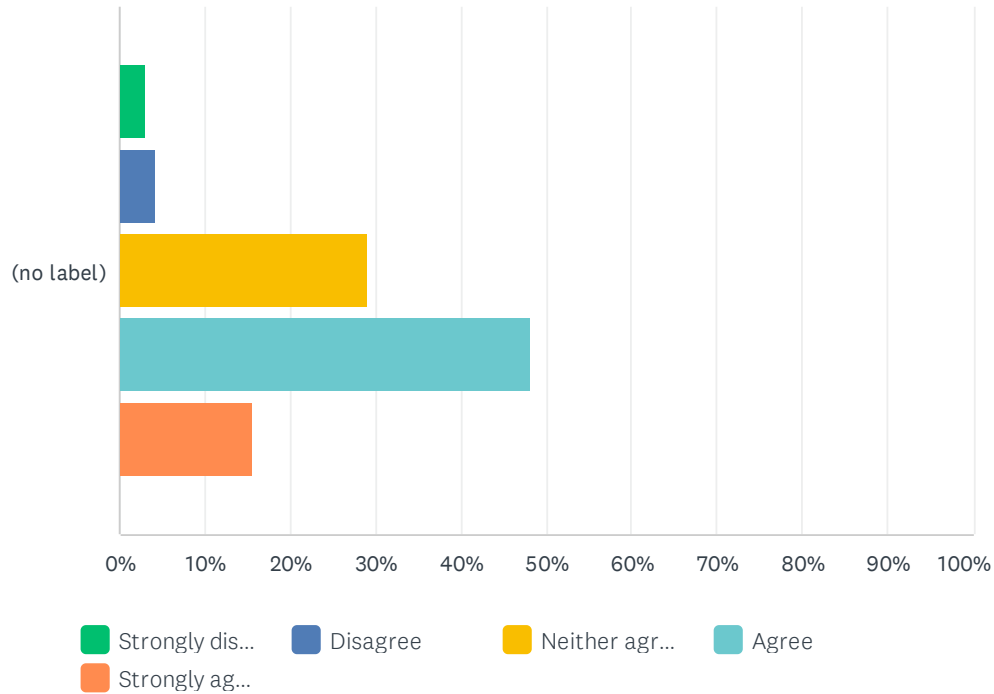
Q12 If you listed “damages” for any of the choices above, please explain why below.

Answered: 470 Skipped: 1,377



Q13 Please select your level of agreement with the following statement:
Overall, my interactions with visitors are positive.

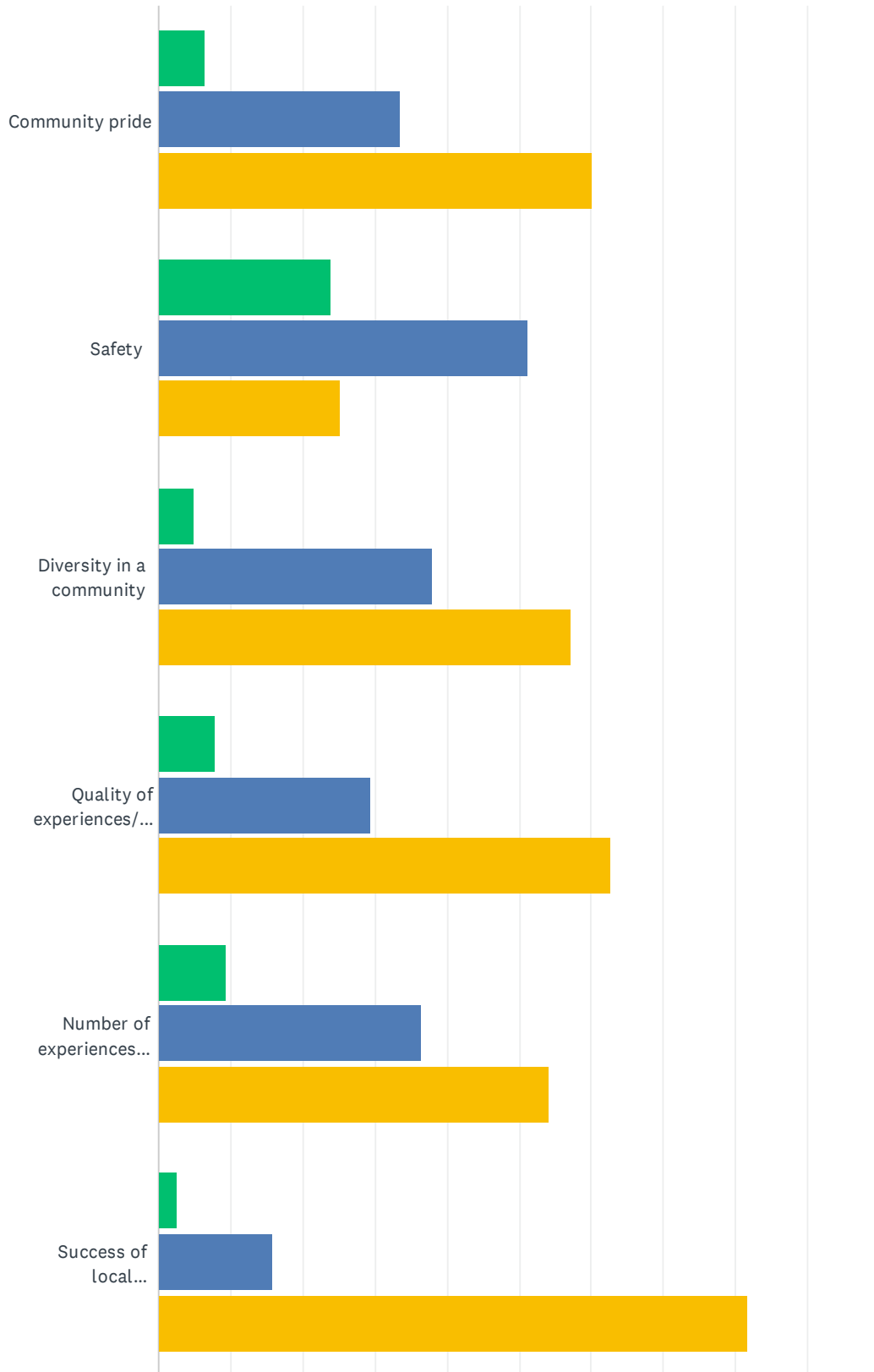
Answered: 1,531 Skipped: 316



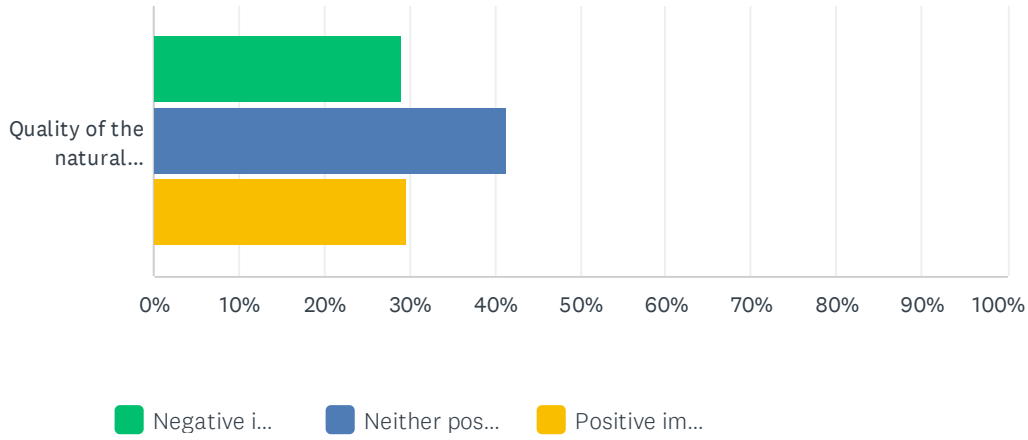
	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	3.00% 46	4.25% 65	29.00% 444	48.27% 739	15.48% 237	1,531	3.69

Q14 In the chart below, please identify whether having visitors to your community positively or negatively impacts the listed aspects.

Answered: 1,547 Skipped: 300



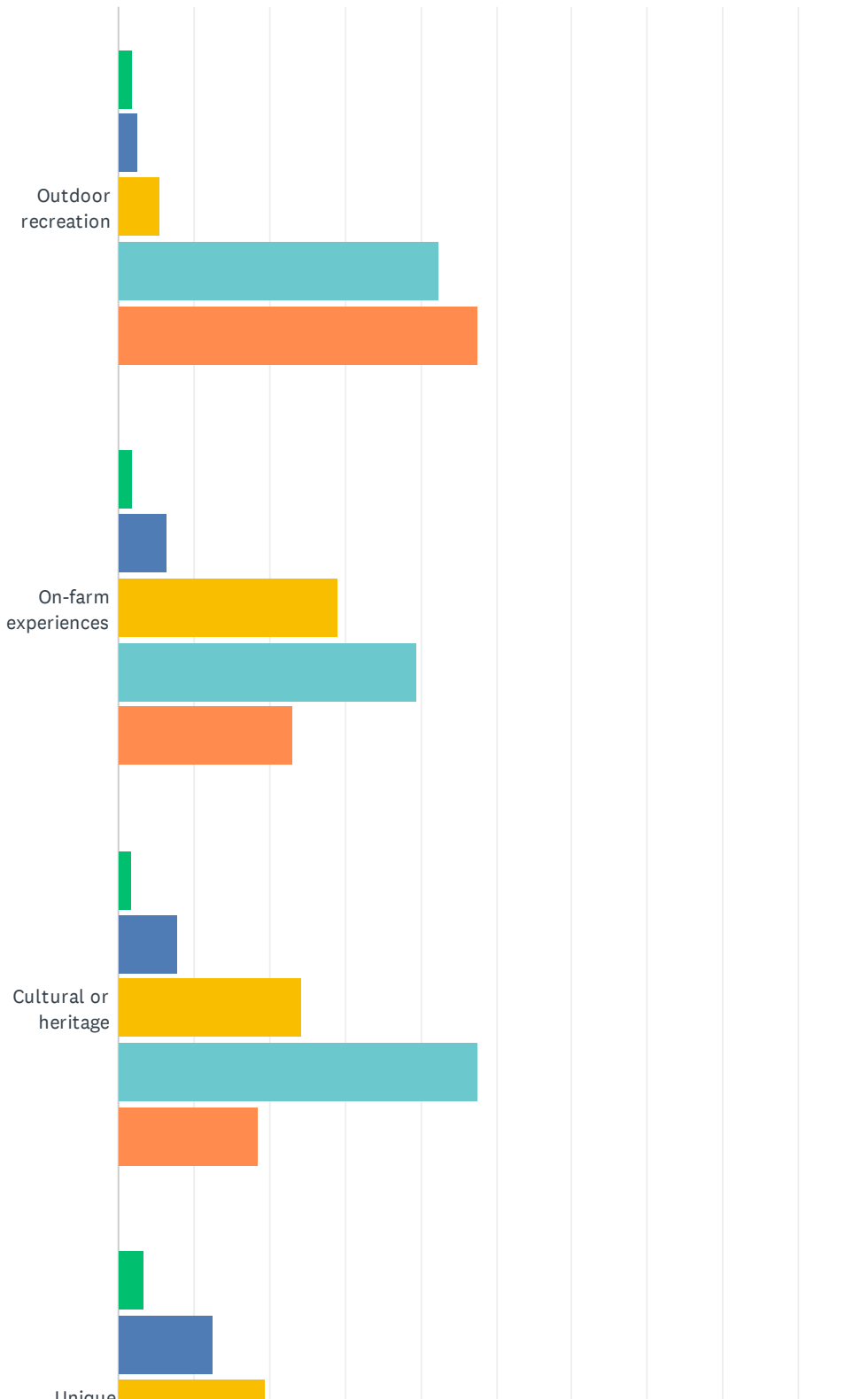
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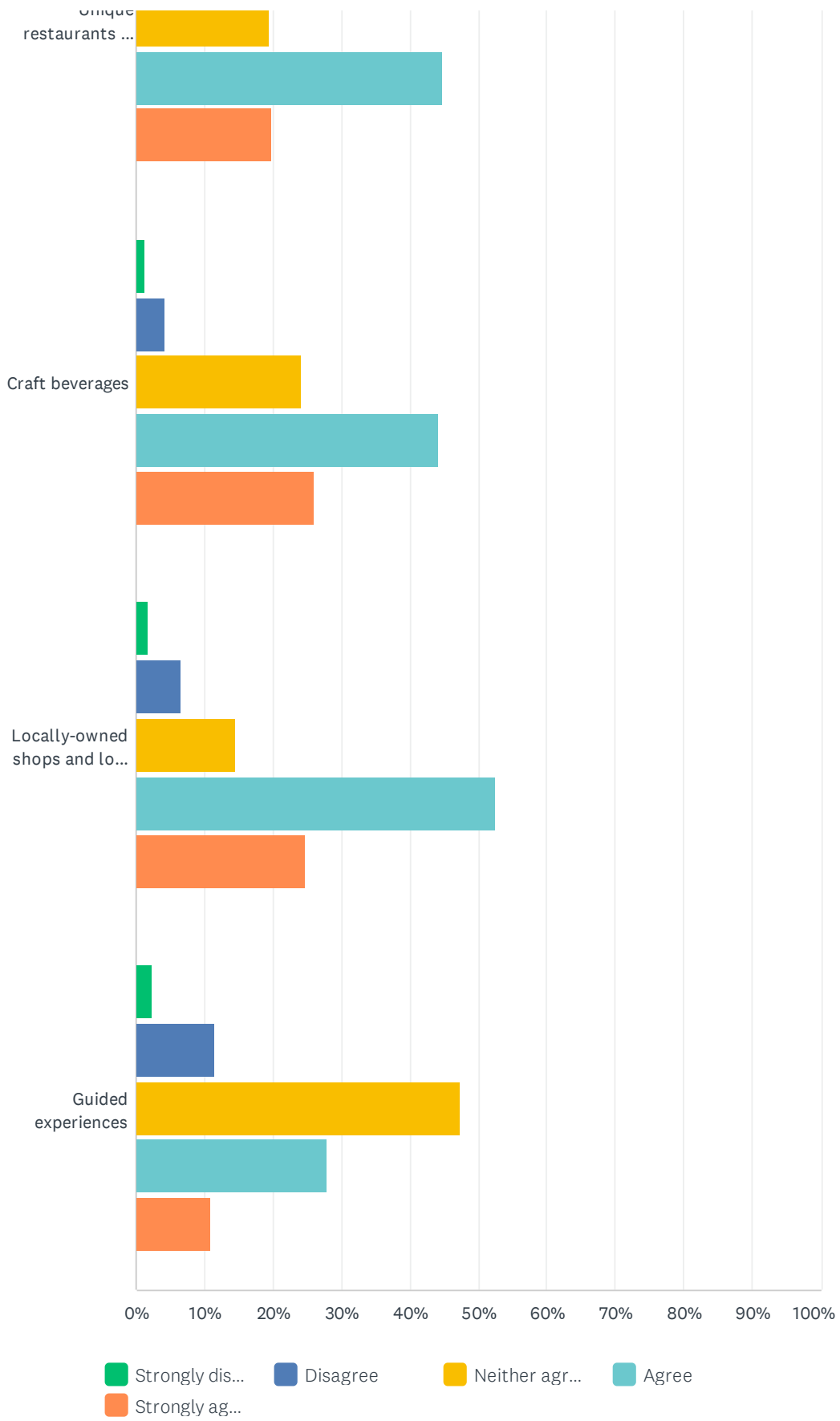
	NEGATIVE IMPACT	NEITHER POSITIVE NOR NEGATIVE	POSITIVE IMPACT	TOTAL	WEIGHTED AVERAGE
Community pride	6.37% 98	33.49% 515	60.14% 925	1,538	4.08
Safety	23.79% 360	51.09% 773	25.12% 380	1,513	3.03
Diversity in a community	4.85% 74	38.03% 580	57.11% 871	1,525	4.05
Quality of experiences/attractions	7.85% 121	29.46% 454	62.69% 966	1,541	4.10
Number of experiences available to me	9.36% 143	36.45% 557	54.19% 828	1,528	3.90
Success of local businesses	2.56% 39	15.73% 240	81.72% 1,247	1,526	4.58
Quality of the natural environment	29.01% 441	41.38% 629	29.61% 450	1,520	3.01

Q15 In the chart below, please rate your level of agreement with the following statements: "In Clackamas County, I personally have access to..."

Answered: 1,544 Skipped: 303



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	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Outdoor recreation	1.90% 29	2.62% 40	5.51% 84	42.45% 647	47.51% 724	1,524	4.31
On-farm experiences	2.02% 31	6.37% 98	29.06% 447	39.47% 607	23.08% 355	1,538	3.75
Cultural or heritage	1.75% 27	7.93% 122	24.30% 374	47.50% 731	18.52% 285	1,539	3.73
Unique restaurants or culinary experiences	3.31% 51	12.66% 195	19.48% 300	44.81% 690	19.74% 304	1,540	3.65
Craft beverages	1.31% 20	4.32% 66	24.17% 369	44.14% 674	26.06% 398	1,527	3.89
Locally-owned shops and local products	1.63% 25	6.65% 102	14.55% 223	52.51% 805	24.66% 378	1,533	3.92
Guided experiences	2.43% 37	11.51% 175	47.43% 721	27.83% 423	10.79% 164	1,520	3.33

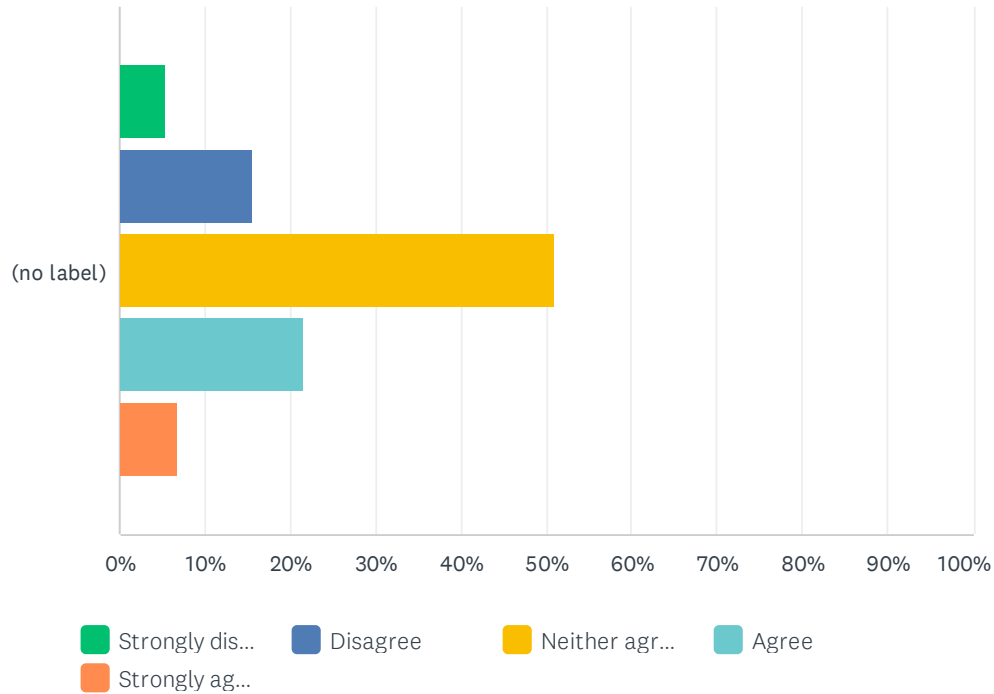
Q17 What places/experience in Clackamas County would you like to see improved and how so?

Answered: 942 Skipped: 905



Q18 Overall, I am very satisfied with residents' involvement and influence in tourism development in Clackamas County.

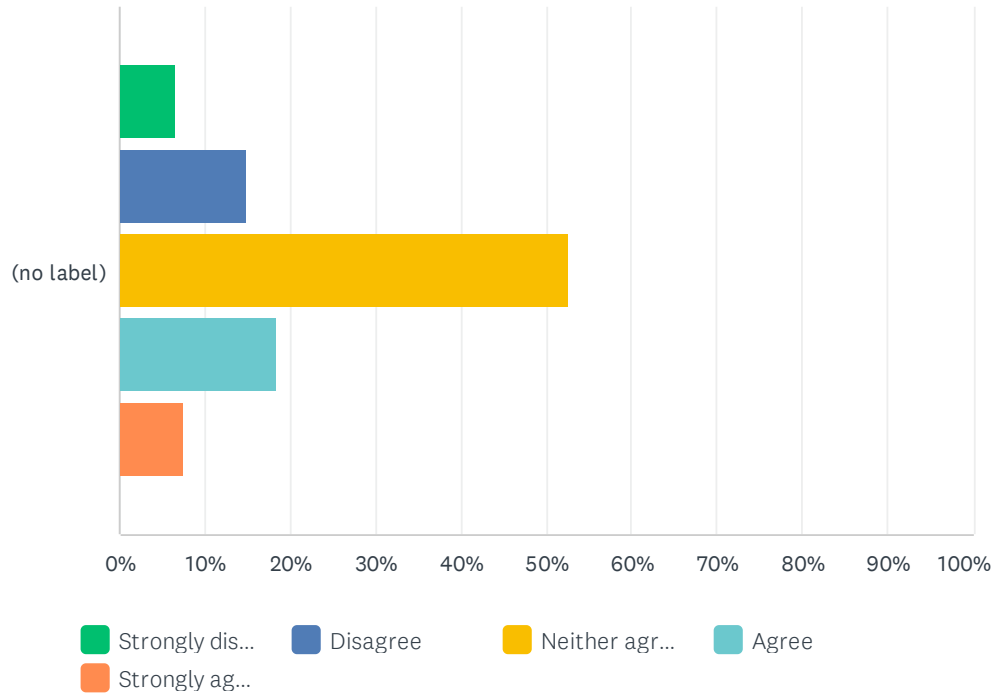
Answered: 1,474 Skipped: 373



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	5.29% 78	15.54% 229	50.88% 750	21.44% 316	6.85% 101	1,474	3.09

Q19 Overall, residents' concerns regarding tourism development are addressed in Clackamas County.

Answered: 1,476 Skipped: 371



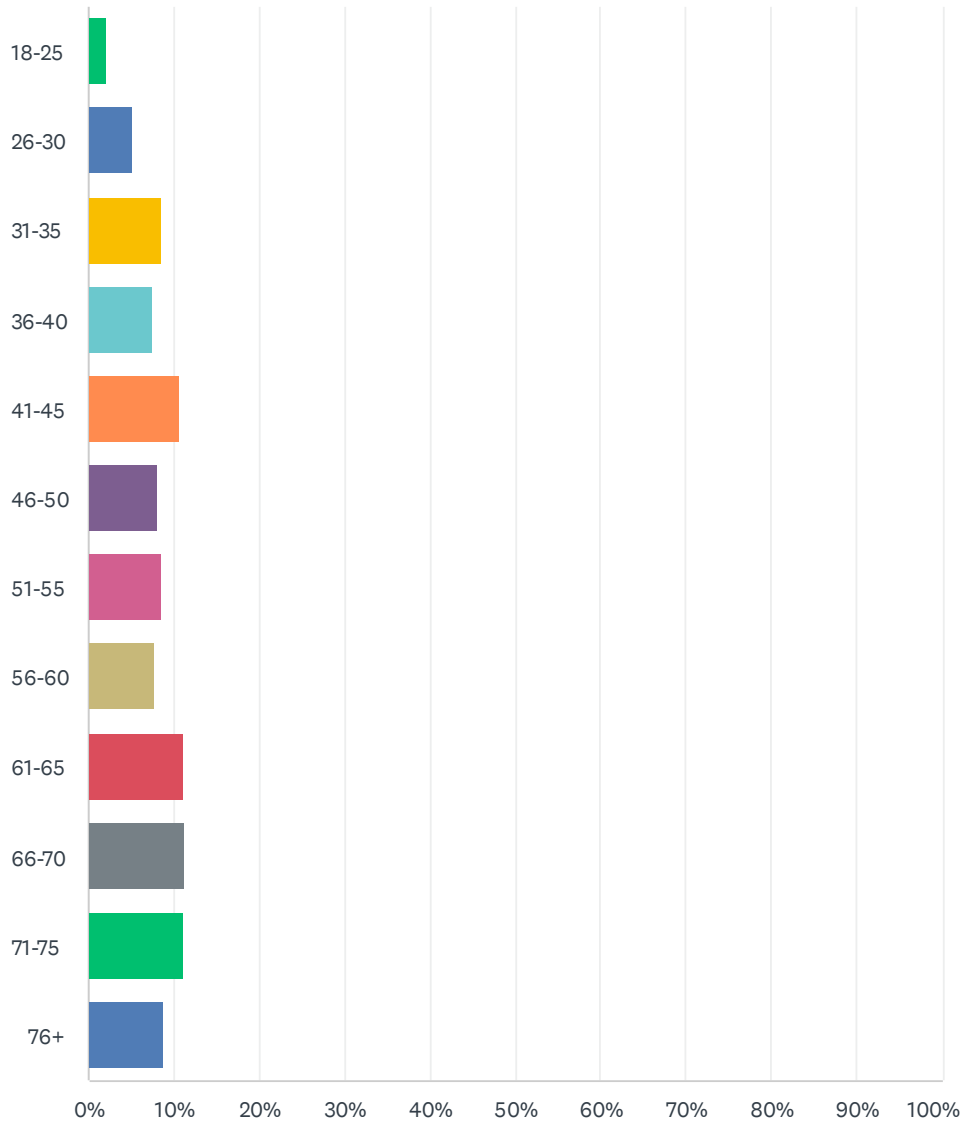
	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	6.71% 99	14.97% 221	52.57% 776	18.29% 270	7.45% 110	1,476	3.05

Q20 Do you have any comments, questions, or concerns related to tourism in Clackamas County?

Answered: 567 Skipped: 1,280

Q21 What is your age?

Answered: 1,469 Skipped: 378

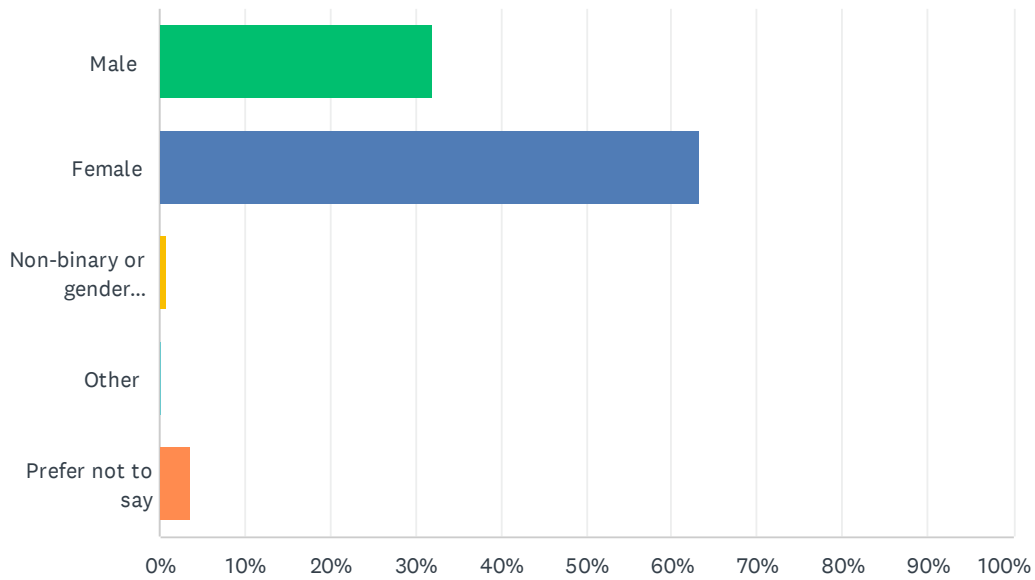


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ANSWER CHOICES	RESPONSES	
18-25	2.11%	31
26-30	5.04%	74
31-35	8.44%	124
36-40	7.42%	109
41-45	10.76%	158
46-50	8.03%	118
51-55	8.51%	125
56-60	7.76%	114
61-65	11.03%	162
66-70	11.23%	165
71-75	11.03%	162
76+	8.65%	127
TOTAL		1,469

Q22 With what gender do you identify?

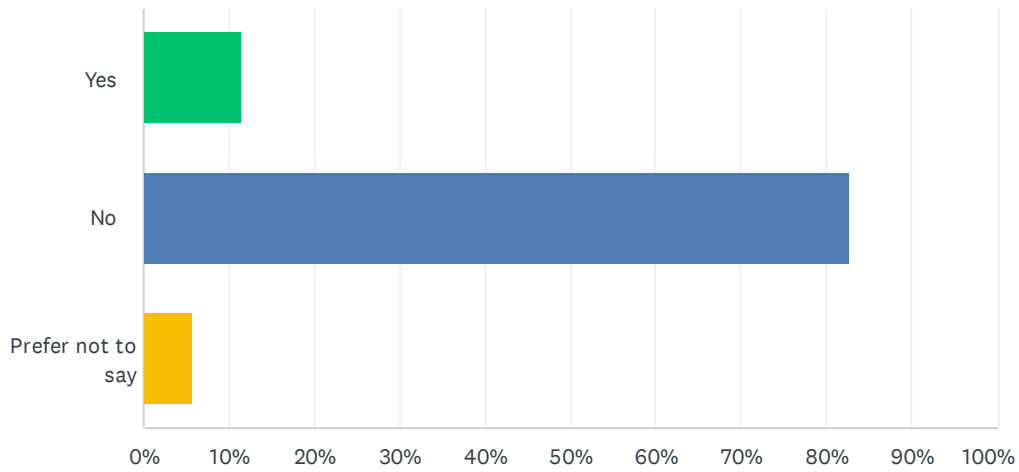
Answered: 1,468 Skipped: 379



ANSWER CHOICES	RESPONSES	
Male	31.88%	468
Female	63.42%	931
Non-binary or gender non-conforming	0.95%	14
Other	0.14%	2
Prefer not to say	3.61%	53
TOTAL		1,468

Q23 Do you identify as part of the LGBTQ+ community?

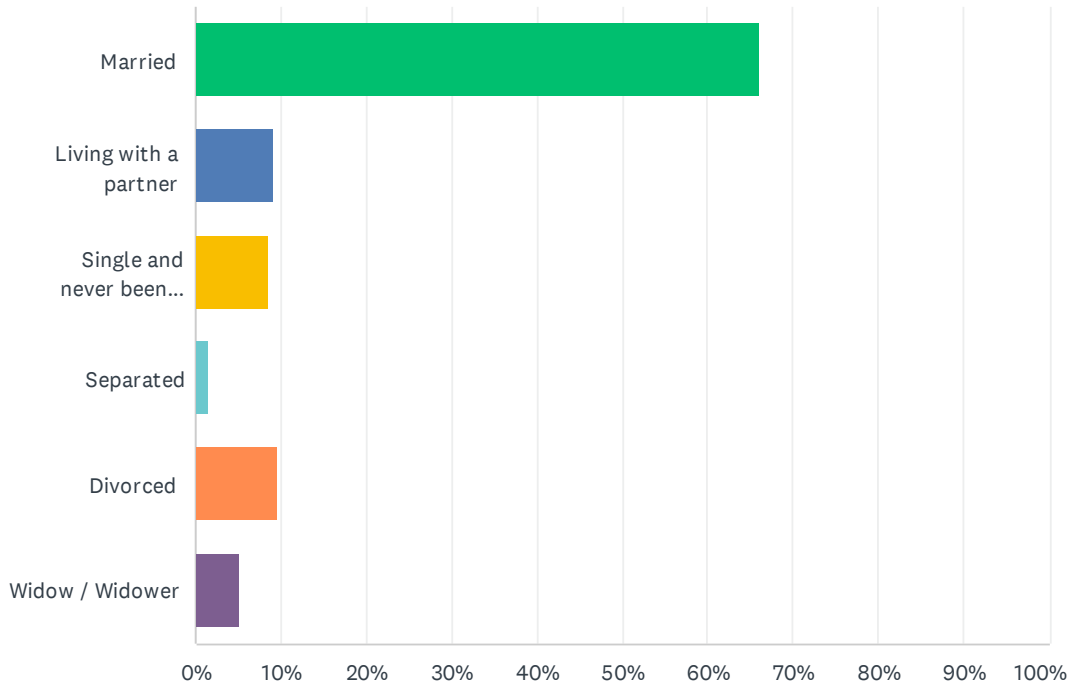
Answered: 1,463 Skipped: 384



ANSWER CHOICES	RESPONSES	
Yes	11.48%	168
No	82.78%	1,211
Prefer not to say	5.74%	84
TOTAL		1,463

Q24 What is your marital status?

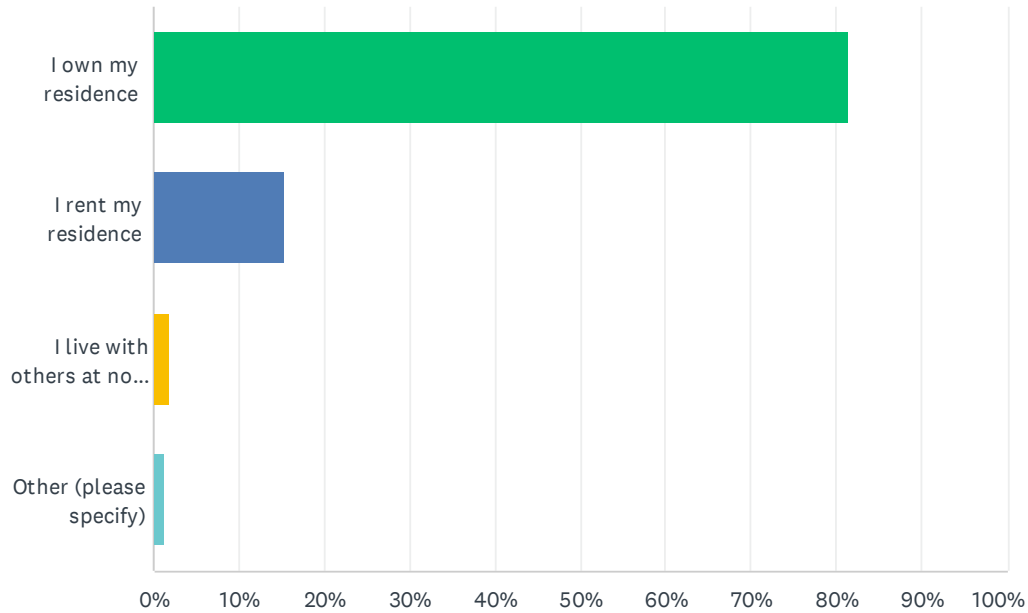
Answered: 1,445 Skipped: 402



ANSWER CHOICES	RESPONSES	
Married	66.16%	956
Living with a partner	9.07%	131
Single and never been married	8.51%	123
Separated	1.59%	23
Divorced	9.55%	138
Widow / Widower	5.12%	74
TOTAL		1,445

Q25 Do you own or rent your residence, live with others at no cost, or something else?

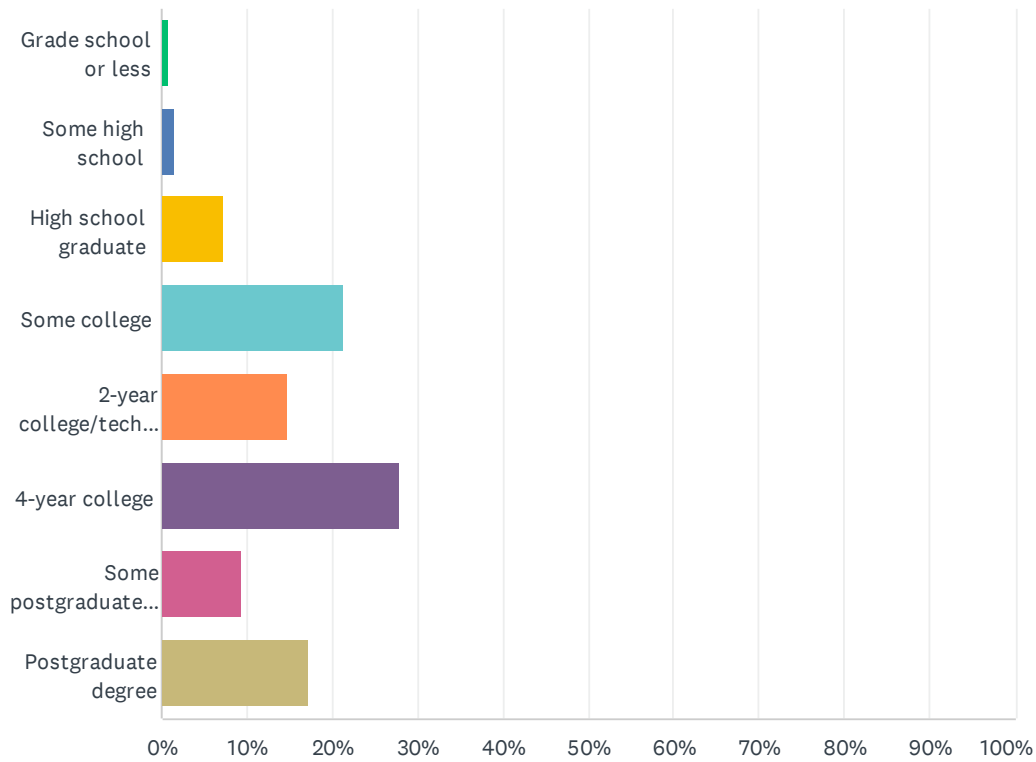
Answered: 1,440 Skipped: 407



ANSWER CHOICES	RESPONSES	
I own my residence	81.46%	1,173
I rent my residence	15.28%	220
I live with others at no cost	2.01%	29
Other (please specify)	1.25%	18
TOTAL		1,440

Q26 What is the highest level of formal education you have completed?

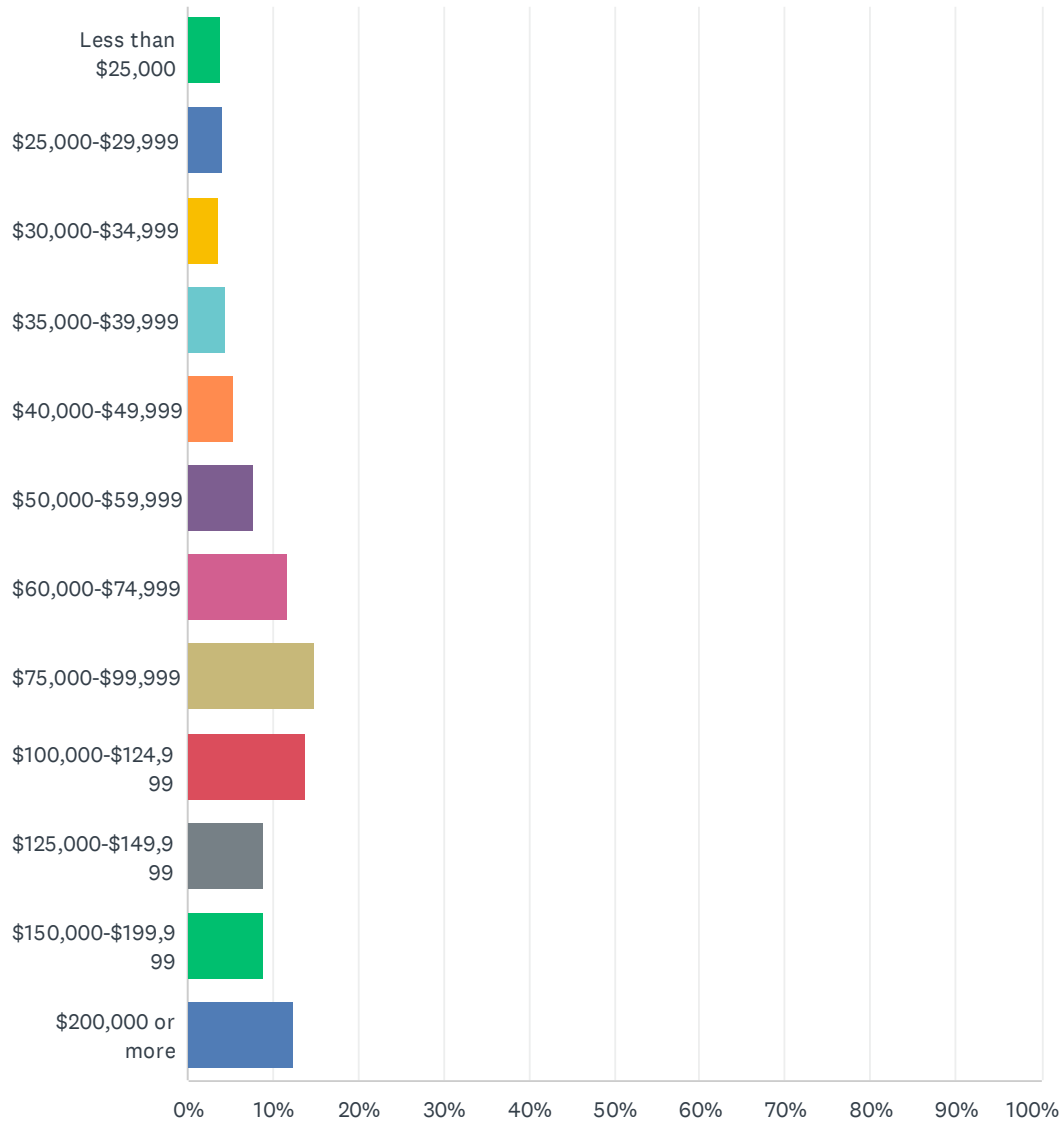
Answered: 1,448 Skipped: 399



ANSWER CHOICES	RESPONSES	
Grade school or less	0.76%	11
Some high school	1.52%	22
High school graduate	7.25%	105
Some college	21.27%	308
2-year college/technical school	14.71%	213
4-year college	27.97%	405
Some postgraduate work	9.32%	135
Postgraduate degree	17.20%	249
TOTAL		1,448

Q27 Which of the following ranges includes your total household income before taxes in 2020?

Answered: 1,340 Skipped: 507

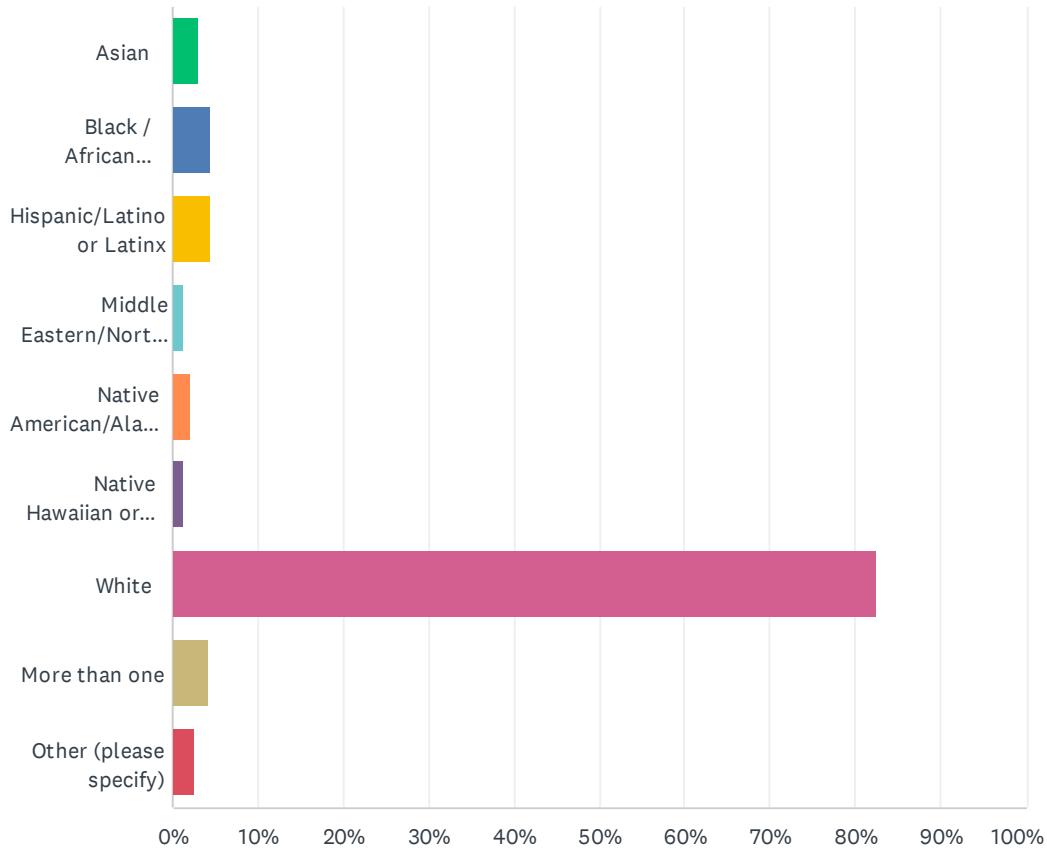


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ANSWER CHOICES	RESPONSES	
Less than \$25,000	3.88%	52
\$25,000-\$29,999	4.03%	54
\$30,000-\$34,999	3.73%	50
\$35,000-\$39,999	4.48%	60
\$40,000-\$49,999	5.37%	72
\$50,000-\$59,999	7.69%	103
\$60,000-\$74,999	11.79%	158
\$75,000-\$99,999	15.00%	201
\$100,000-\$124,999	13.88%	186
\$125,000-\$149,999	8.88%	119
\$150,000-\$199,999	8.88%	119
\$200,000 or more	12.39%	166
TOTAL		1,340

Q28 Please select your race/ethnicity.

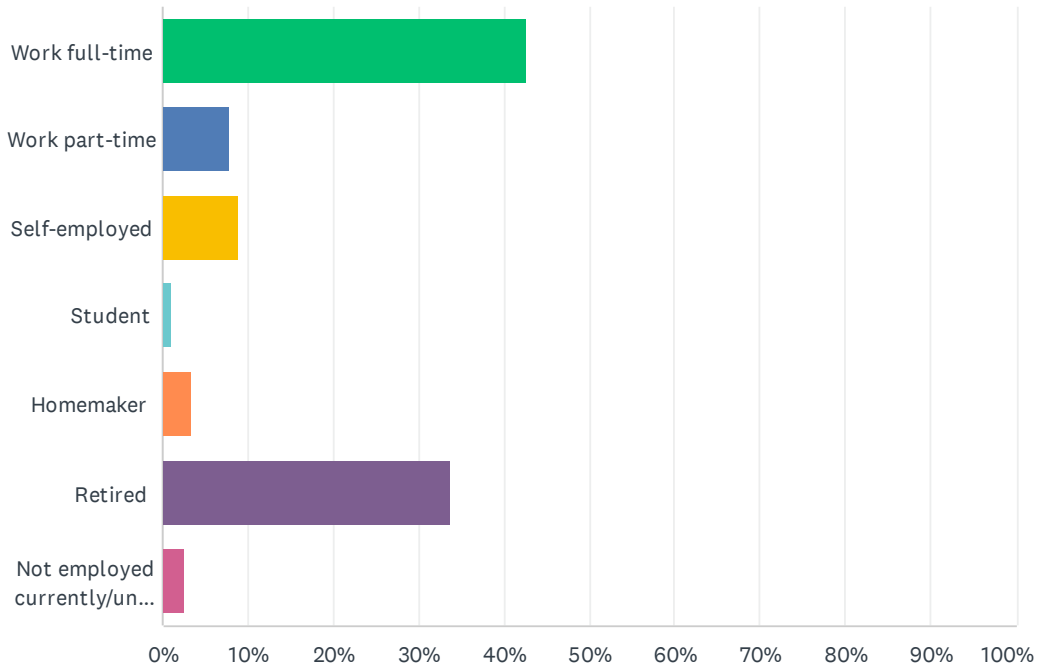
Answered: 1,414 Skipped: 433



ANSWER CHOICES	RESPONSES	
Asian	3.04%	43
Black / African American	4.46%	63
Hispanic/Latino or Latinx	4.53%	64
Middle Eastern/Northern African	1.34%	19
Native American/Alaskan Native	2.05%	29
Native Hawaiian or Pacific Islander	1.27%	18
White	82.46%	1,166
More than one	4.24%	60
Other (please specify)	2.48%	35
Total Respondents: 1,414		

Q29 Which of the following best describes your current employment status?

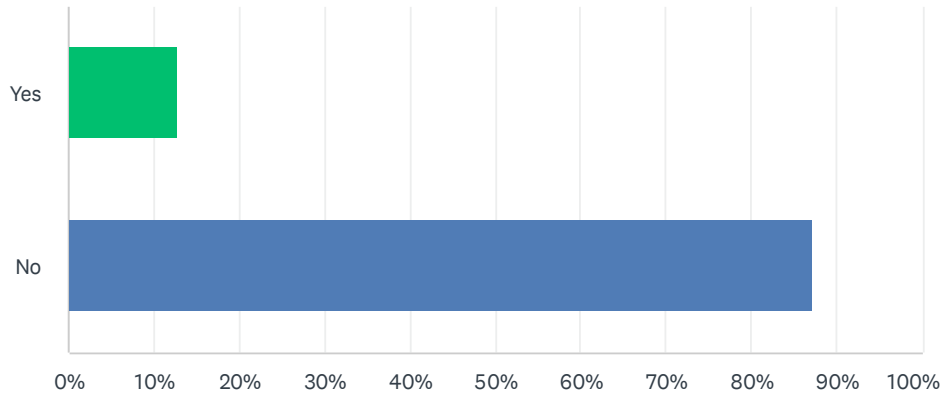
Answered: 1,441 Skipped: 406



ANSWER CHOICES	RESPONSES	
Work full-time	42.61%	614
Work part-time	7.84%	113
Self-employed	8.88%	128
Student	1.04%	15
Homemaker	3.33%	48
Retired	33.73%	486
Not employed currently/unable to work	2.57%	37
TOTAL		1,441

Q30 Do you work in the tourism industry?

Answered: 1,482 Skipped: 365

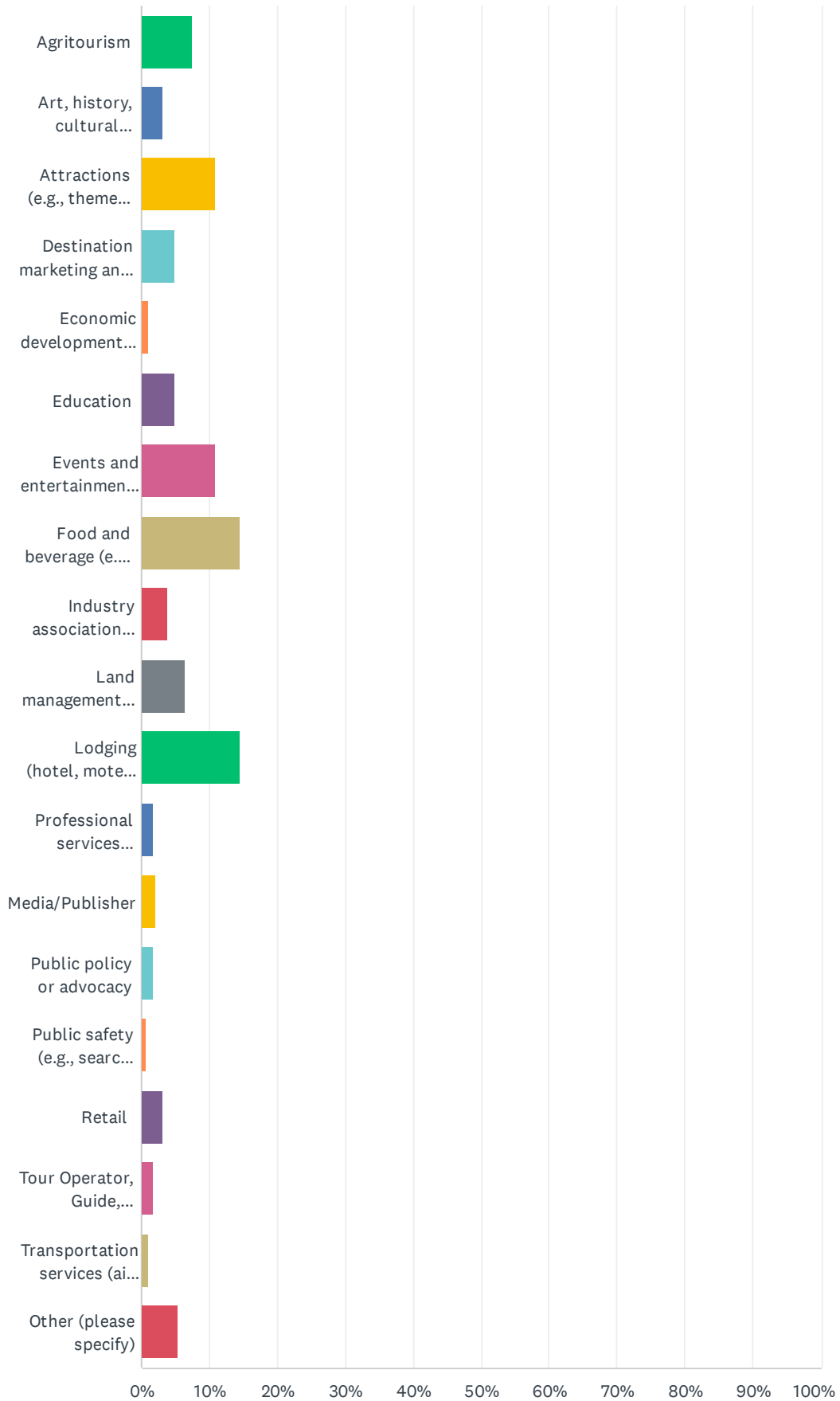


ANSWER CHOICES	RESPONSES	
Yes	12.75%	189
No	87.25%	1,293
TOTAL		1,482

Q31 In what sector of the tourism industry do you primarily work?

Answered: 185 Skipped: 1,662

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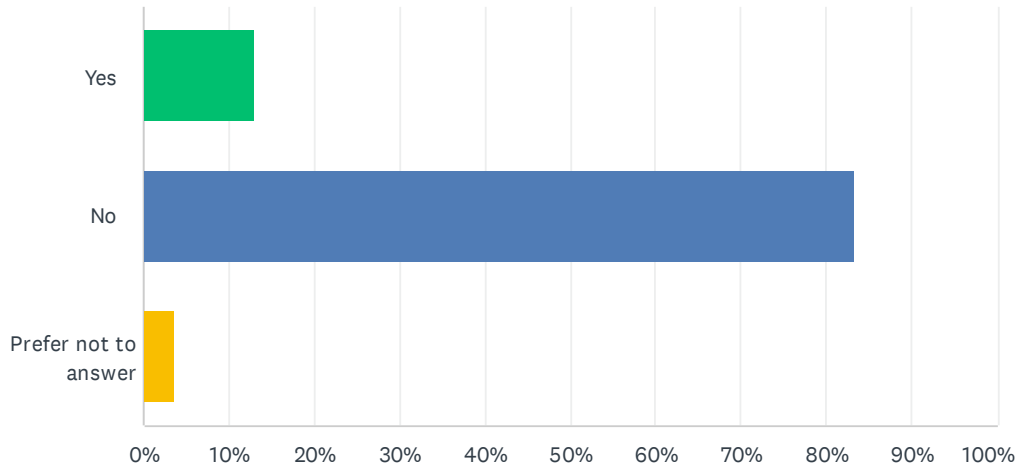


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ANSWER CHOICES	RESPONSES	
Agritourism	7.57%	14
Art, history, cultural heritage	3.24%	6
Attractions (e.g., theme park, golf course, casino, ski resort)	10.81%	20
Destination marketing and management (e.g., Travel Portland, chamber of commerce, visitor center)	4.86%	9
Economic development agency	1.08%	2
Education	4.86%	9
Events and entertainment (e.g., sports, concerts, performing arts)	10.81%	20
Food and beverage (e.g., restaurant, bar, wineries, breweries, food cart)	14.59%	27
Industry association (e.g., Oregon Restaurant & Lodging Association)	3.78%	7
Land management (maintaining or managing parks and open spaces, trails, or other outdoor recreation amenities)	6.49%	12
Lodging (hotel, motel, vacation rentals, campground, real estate)	14.59%	27
Professional services (marketing services, creative agency, website development)	1.62%	3
Media/Publisher	2.16%	4
Public policy or advocacy	1.62%	3
Public safety (e.g., search and rescue)	0.54%	1
Retail	3.24%	6
Tour Operator, Guide, Outfitter	1.62%	3
Transportation services (air, ground, water transport)	1.08%	2
Other (please specify)	5.41%	10
TOTAL		185

Q32 Do you have a disability?

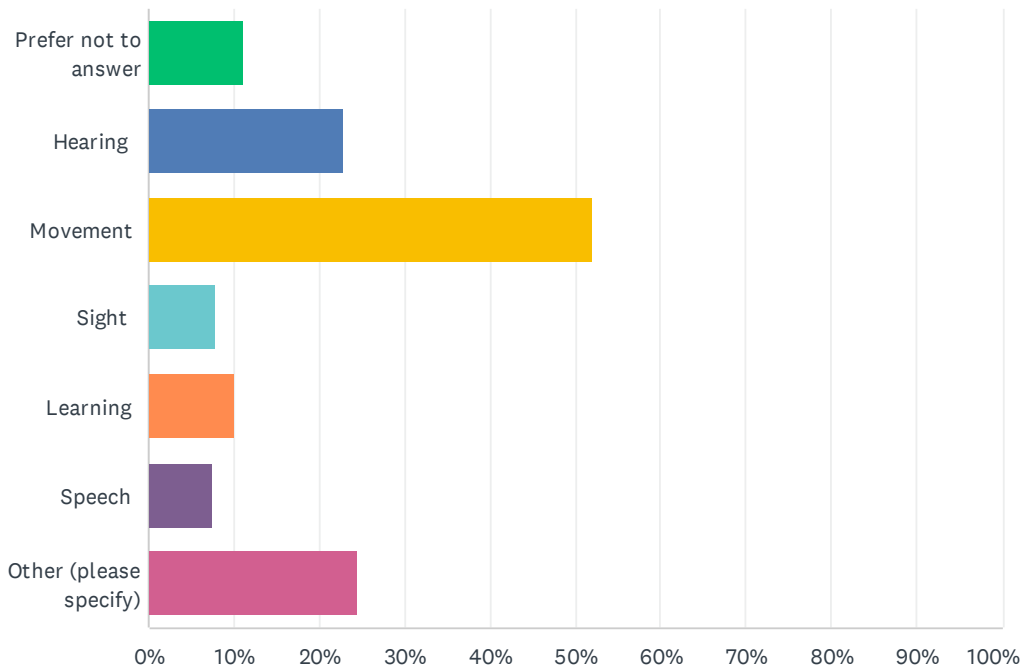
Answered: 1,480 Skipped: 367



ANSWER CHOICES	RESPONSES	
Yes	12.97%	192
No	83.31%	1,233
Prefer not to answer	3.72%	55
TOTAL		1,480

Q33 What type(s) of disability do you have?

Answered: 188 Skipped: 1,659



ANSWER CHOICES	RESPONSES	
Prefer not to answer	11.17%	21
Hearing	22.87%	43
Movement	52.13%	98
Sight	7.98%	15
Learning	10.11%	19
Speech	7.45%	14
Other (please specify)	24.47%	46
Total Respondents: 188		