

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.

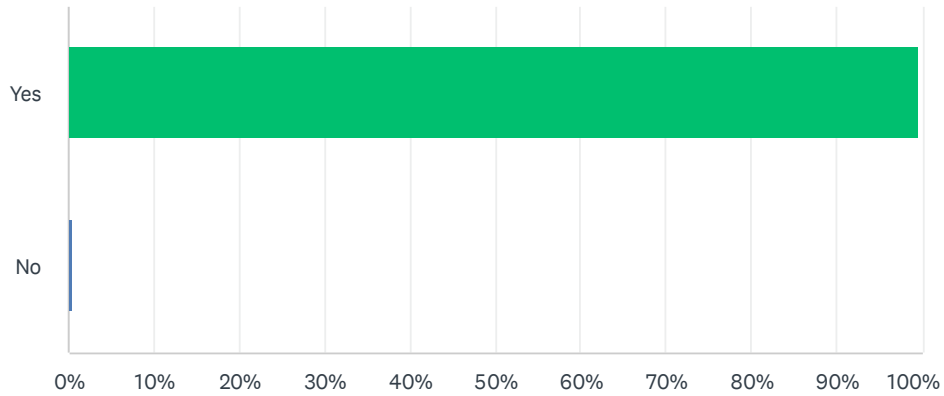
The "Full Mountain" report includes 429 responses from residents of Government Camp, Brightwood, Zigzag, Rhododendron, Welches, Sandy, Boring, Estacada, Eagle Creek and Damascus. Open-ended question responses as well as any personal identifying data have been omitted from this report.

Questions? Contact Samara Phelps at
samara@mthoodterritory.com



Q1 Are you 18+ years old?

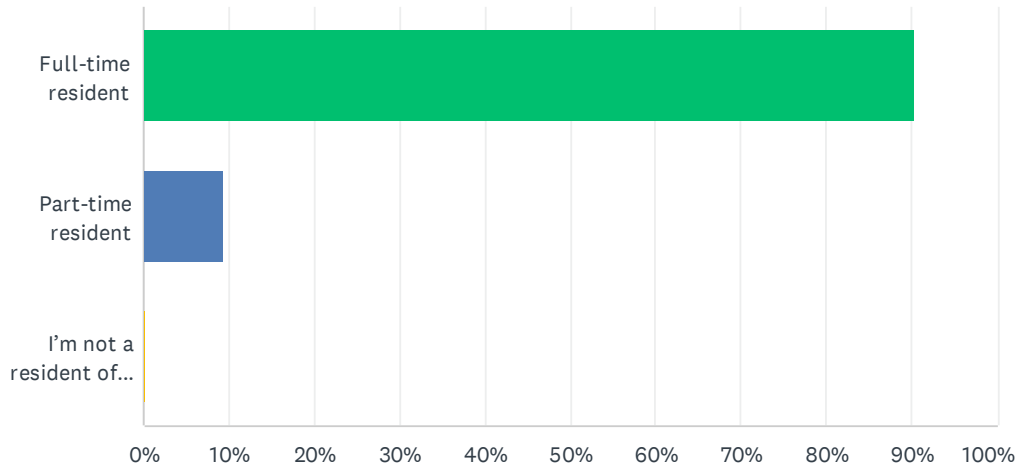
Answered: 429 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	99.53%	427
No	0.47%	2
TOTAL		429

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

Answered: 429 Skipped: 0



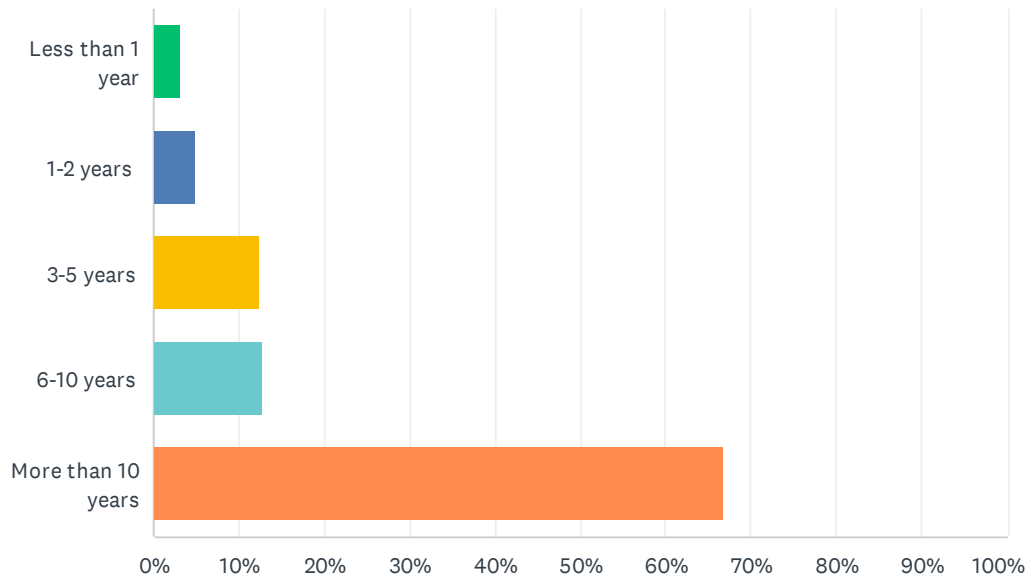
ANSWER CHOICES	RESPONSES	
Full-time resident	90.44%	388
Part-time resident	9.32%	40
I'm not a resident of Clackamas County	0.23%	1
TOTAL		429

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

Answered: 429 Skipped: 0

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

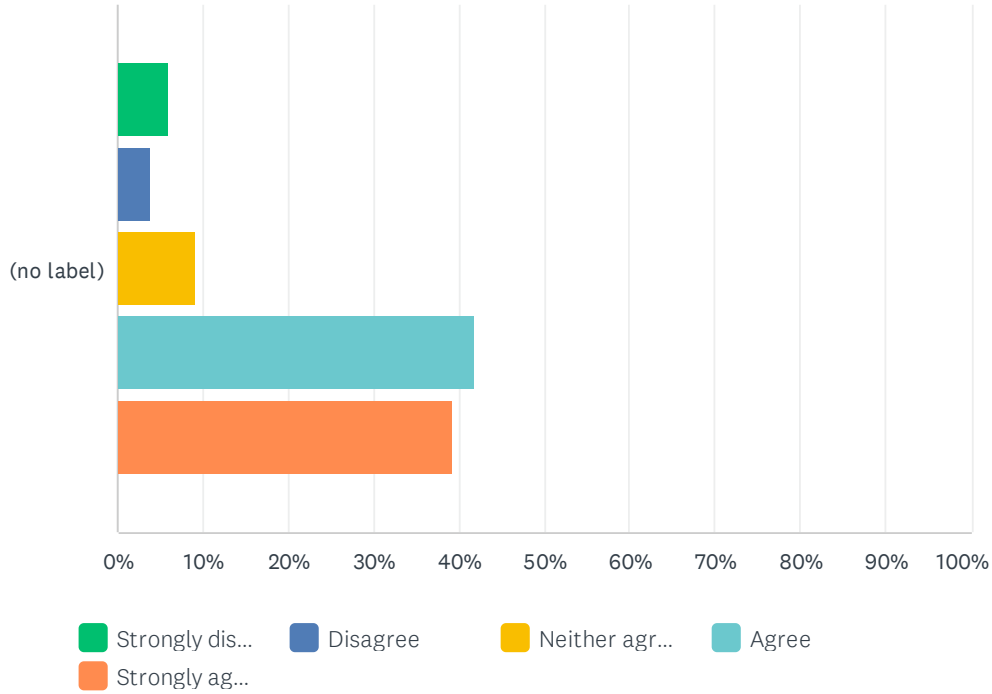
Answered: 429 Skipped: 0



ANSWER CHOICES	RESPONSES	
Less than 1 year	3.26%	14
1-2 years	4.90%	21
3-5 years	12.35%	53
6-10 years	12.82%	55
More than 10 years	66.67%	286
TOTAL		429

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

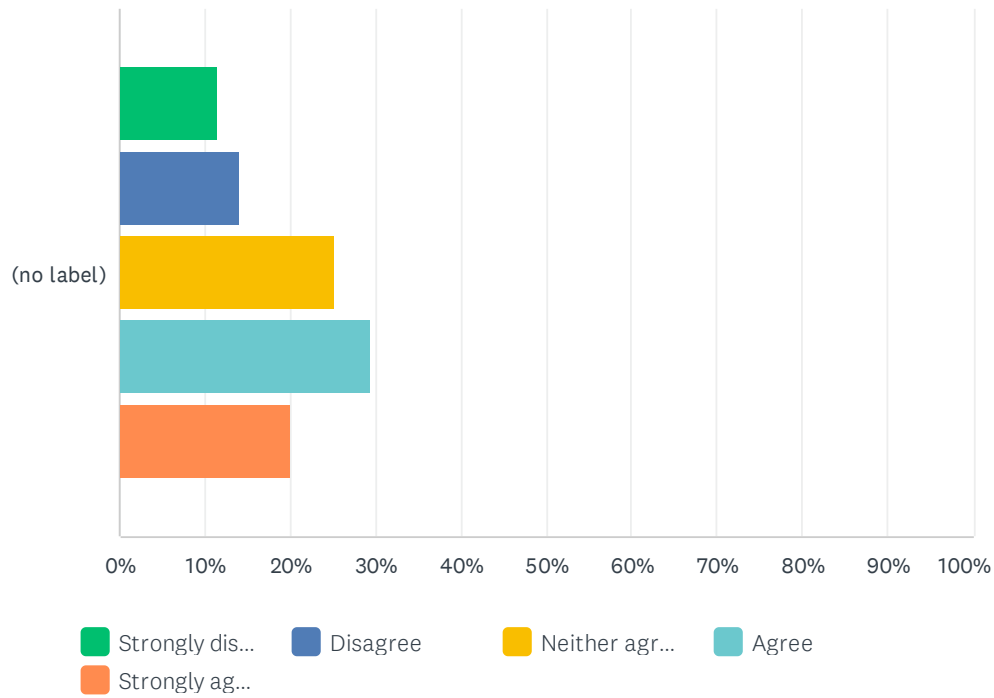
Answered: 385 Skipped: 44



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	5.97% 23	3.90% 15	9.09% 35	41.82% 161	39.22% 151	385	4.04

Q6 There are benefits for myself from tourism within Clackamas County

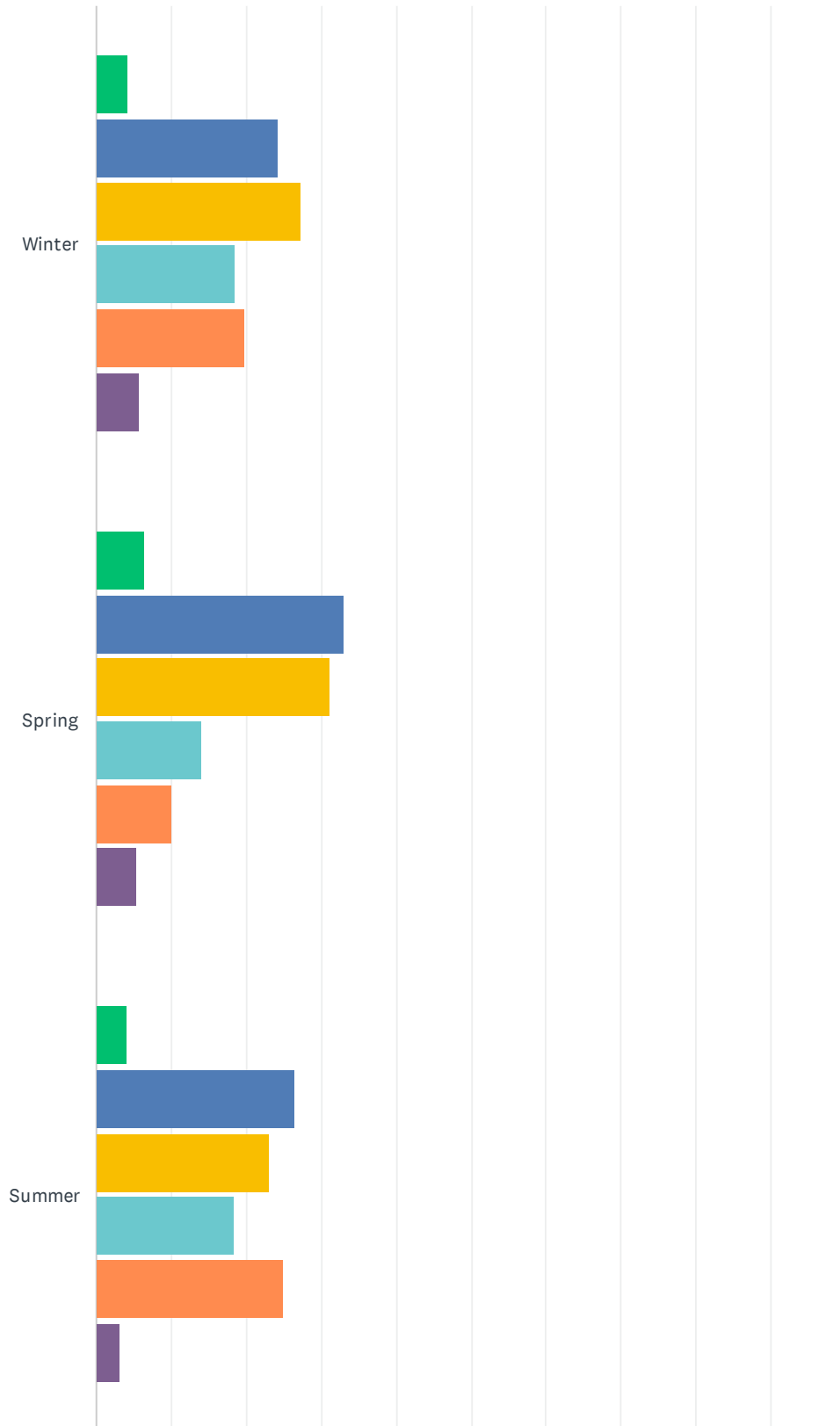
Answered: 385 Skipped: 44



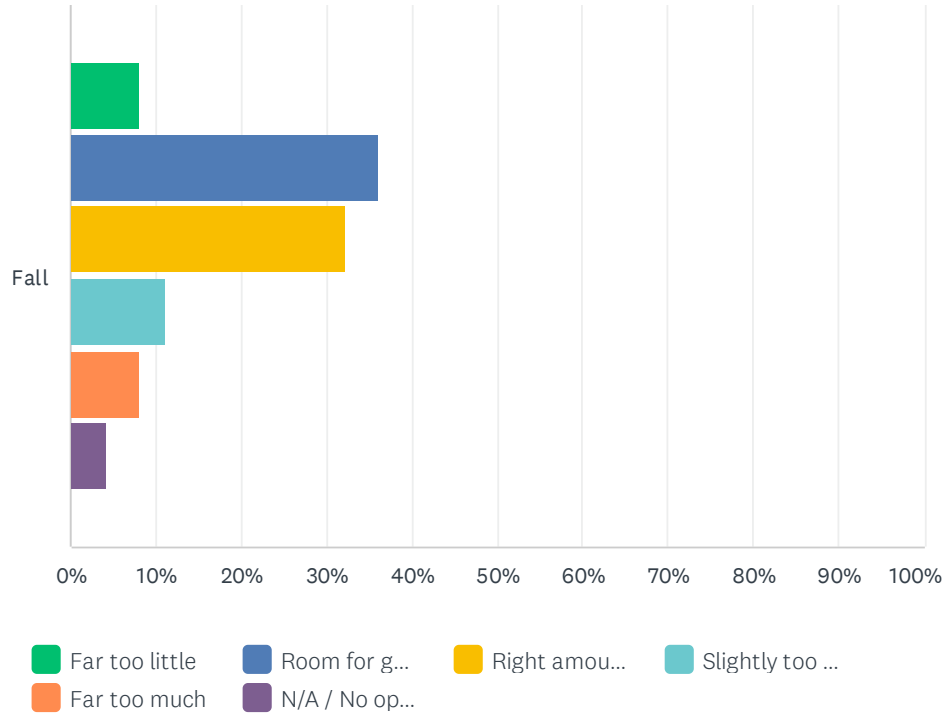
	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	11.43%	14.03%	25.19%	29.35%	20.00%	385	3.32
	44	54	97	113	77		

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

Answered: 385 Skipped: 44



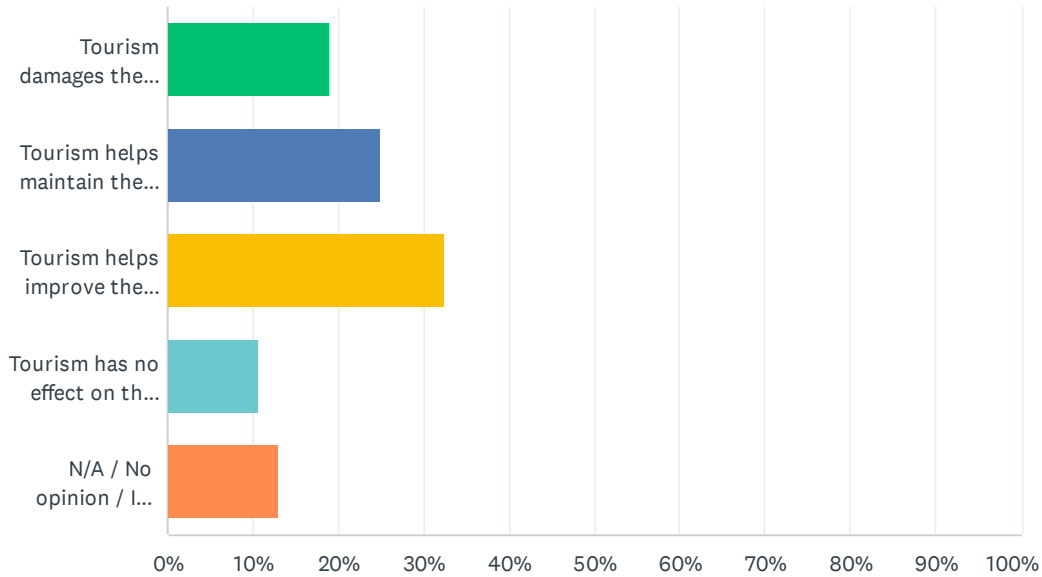
Clackamas County Tourism: Resident Survey



	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	4.23% 16	24.34% 92	27.25% 103	18.52% 70	19.84% 75	5.82% 22	378	3.27
Spring	6.45% 24	33.06% 123	31.18% 116	13.98% 52	9.95% 37	5.38% 20	372	2.87
Summer	4.02% 15	26.54% 99	23.06% 86	18.23% 68	24.93% 93	3.22% 12	373	3.35
Fall	8.13% 30	36.04% 133	32.25% 119	11.11% 41	8.13% 30	4.34% 16	369	2.74

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

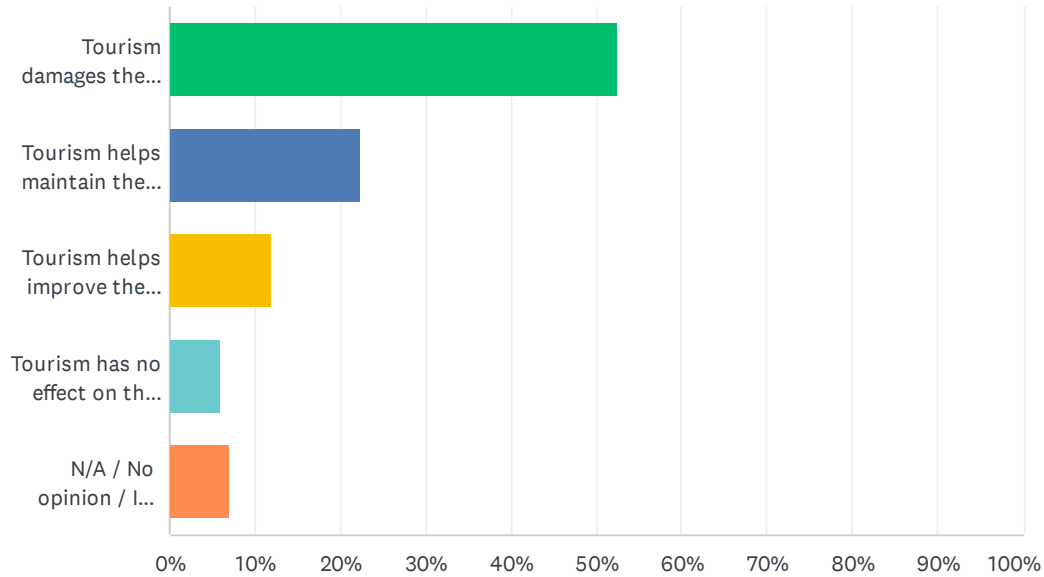
Answered: 385 Skipped: 44



ANSWER CHOICES	RESPONSES	
Tourism damages the county's culture and heritage	18.96%	73
Tourism helps maintain the county's culture and heritage	24.94%	96
Tourism helps improve the county's culture and heritage	32.47%	125
Tourism has no effect on the county's culture and heritage	10.65%	41
N/A / No opinion / I don't know	12.99%	50
TOTAL		385

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

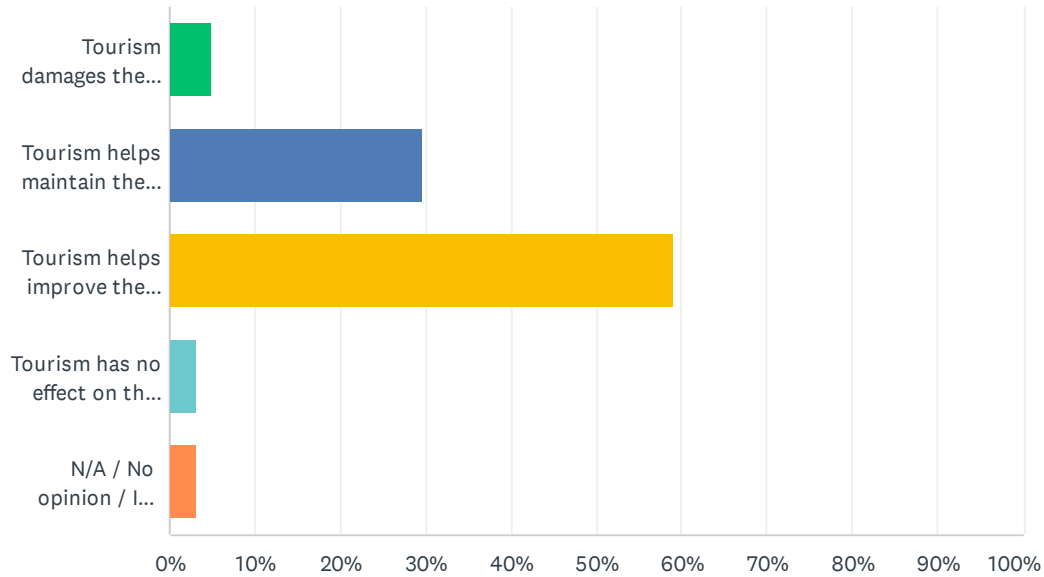
Answered: 383 Skipped: 46



ANSWER CHOICES	RESPONSES	
Tourism damages the county's natural environment	52.48%	201
Tourism helps maintain the county's natural environment	22.45%	86
Tourism helps improve the county's natural environment	12.01%	46
Tourism has no effect on the county's natural environment	6.01%	23
N/A / No opinion / I don't know	7.05%	27
TOTAL		383

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

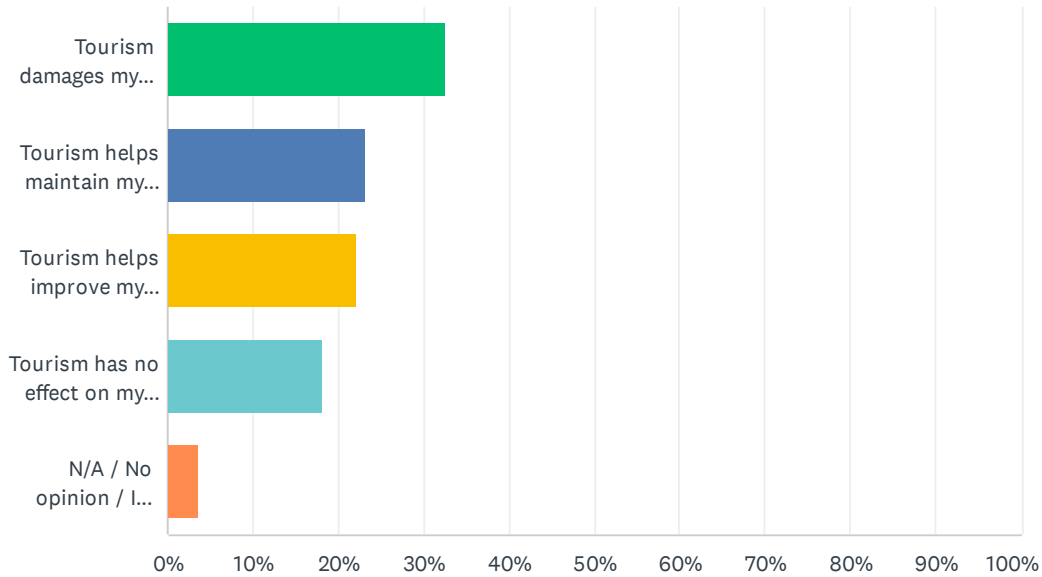
Answered: 384 Skipped: 45



ANSWER CHOICES	RESPONSES	
Tourism damages the county's economy	4.95%	19
Tourism helps maintain the county's economy	29.69%	114
Tourism helps improve the county's economy	59.11%	227
Tourism has no effect on the county's economy	3.13%	12
N/A / No opinion / I don't know	3.13%	12
TOTAL		384

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

Answered: 386 Skipped: 43



ANSWER CHOICES	RESPONSES	
Tourism damages my quality of life	32.64%	126
Tourism helps maintain my quality of life	23.32%	90
Tourism helps improve my quality of life	22.28%	86
Tourism has no effect on my quality of life	18.13%	70
N/A / No opinion / I don't know	3.63%	14
TOTAL		386

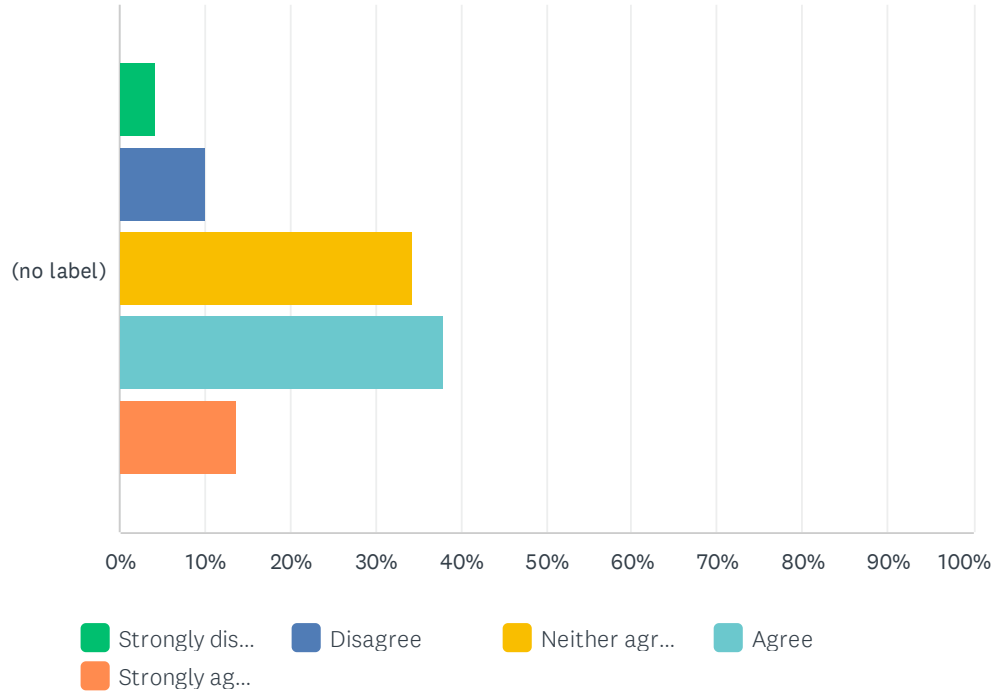
Q12 If you listed "damages" for any of the choices above, please explain why below.

Answered: 194 Skipped: 235



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

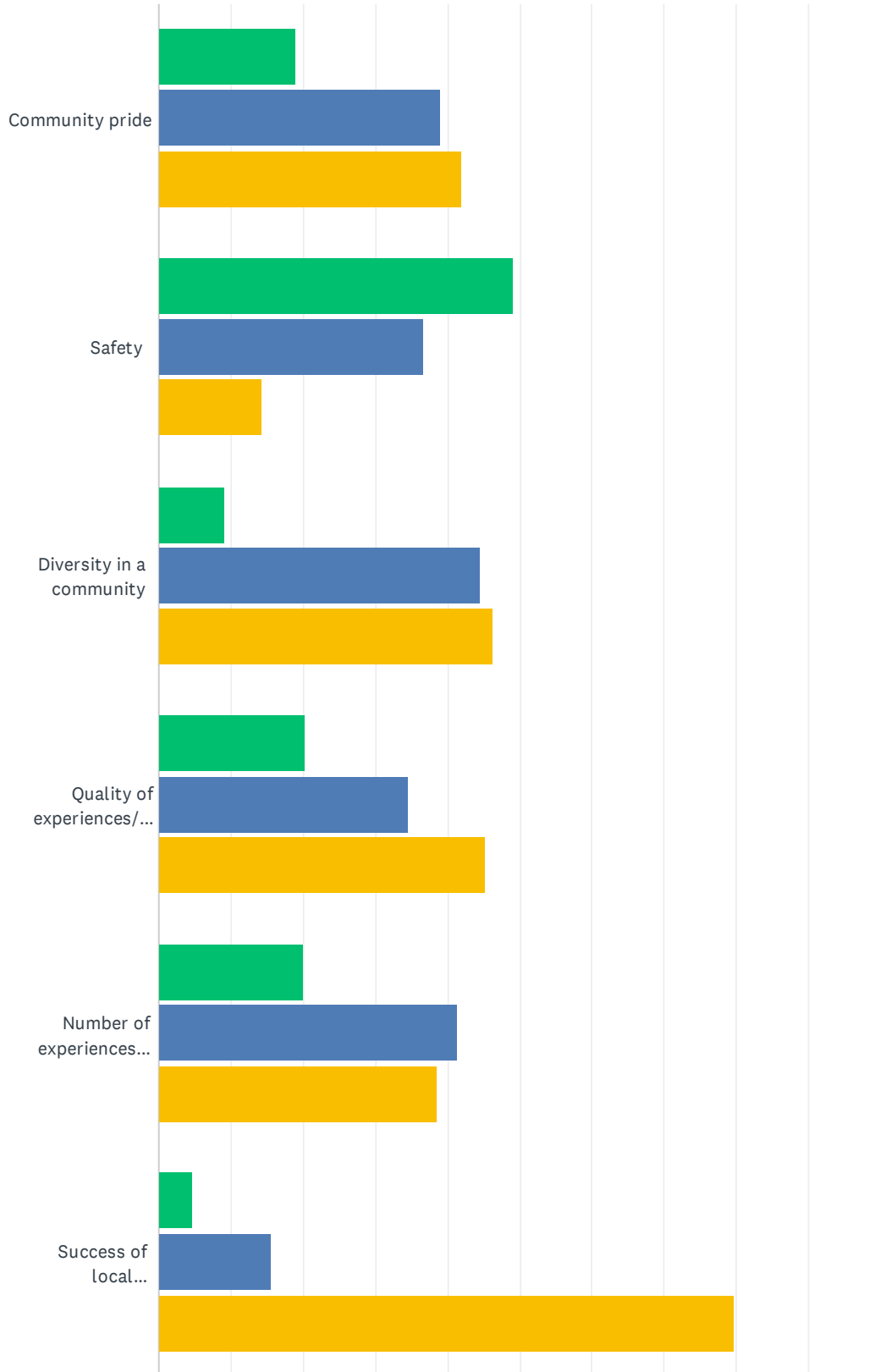
Answered: 353 Skipped: 76



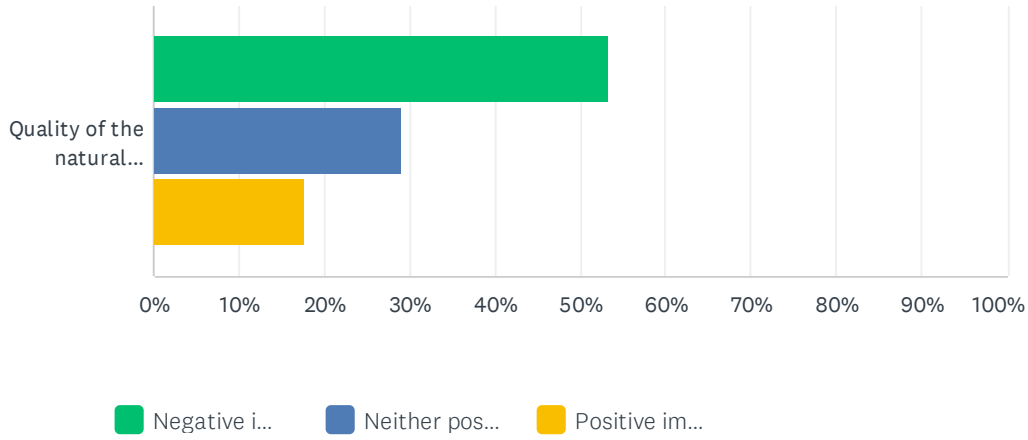
	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	4.25% 15	9.92% 35	34.28% 121	37.96% 134	13.60% 48	353	3.47

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

Answered: 357 Skipped: 72



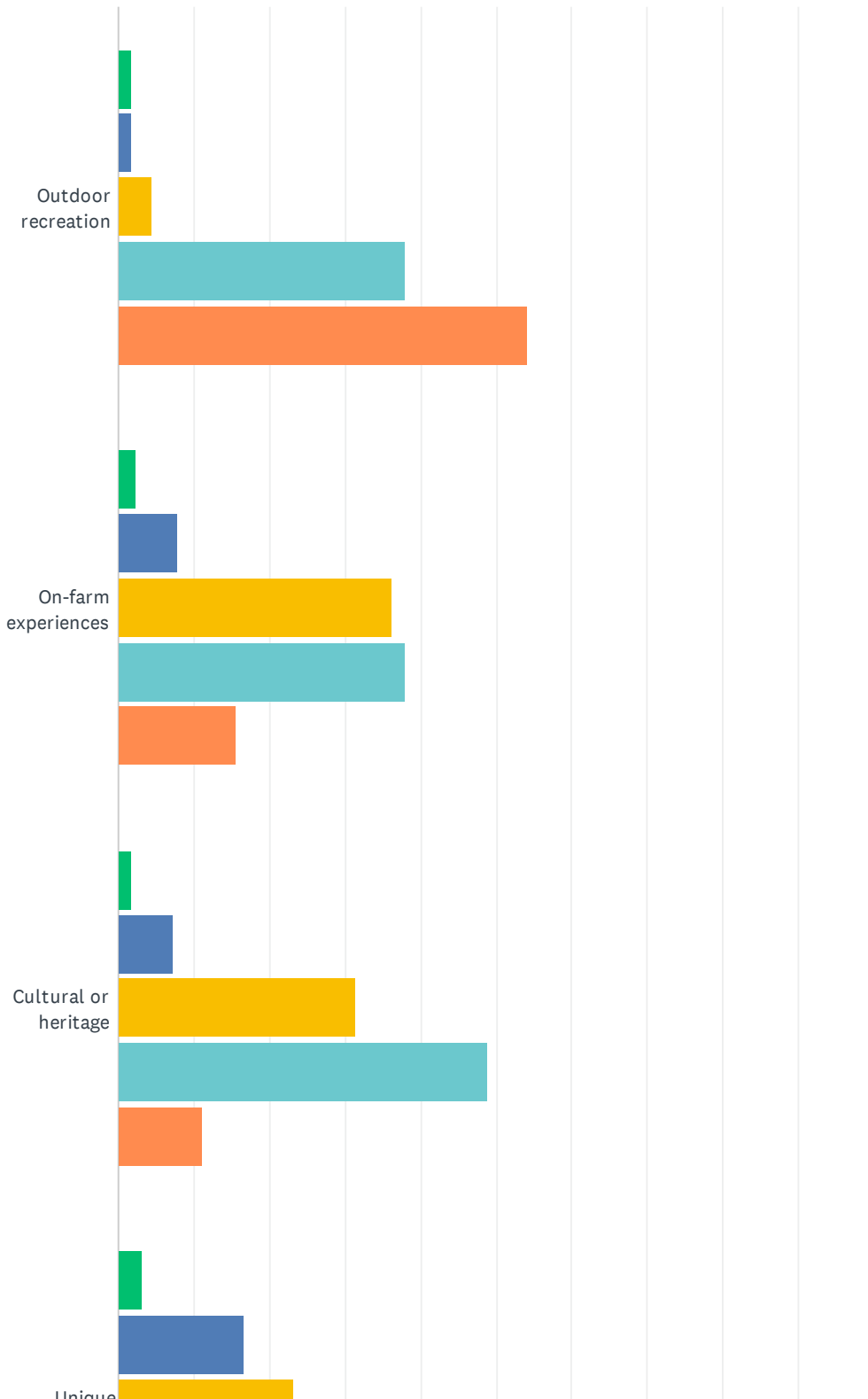
Clackamas County Tourism: Resident Survey



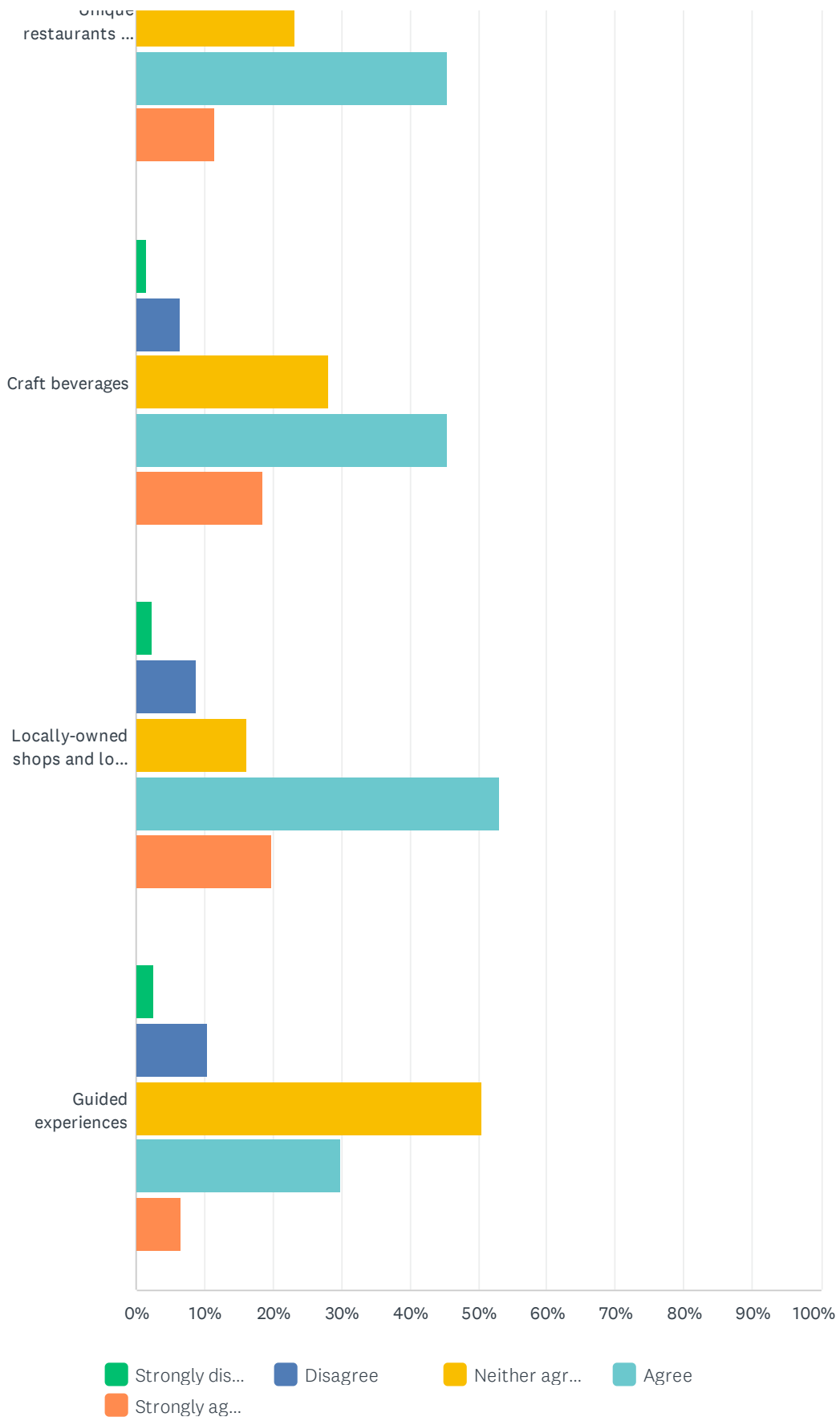
	NEGATIVE IMPACT	NEITHER POSITIVE NOR NEGATIVE	POSITIVE IMPACT	TOTAL	WEIGHTED AVERAGE
Community pride	19.03% 67	38.92% 137	42.05% 148	352	3.46
Safety	49.11% 166	36.69% 124	14.20% 48	338	2.30
Diversity in a community	9.14% 32	44.57% 156	46.29% 162	350	3.74
Quality of experiences/attractions	20.22% 72	34.55% 123	45.22% 161	356	3.50
Number of experiences available to me	20.00% 69	41.45% 143	38.55% 133	345	3.37
Success of local businesses	4.68% 16	15.50% 53	79.82% 273	342	4.50
Quality of the natural environment	53.39% 181	28.91% 98	17.70% 60	339	2.29

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

Answered: 357 Skipped: 72



Clackamas County Tourism: Resident Survey



Clackamas County Tourism: Resident Survey

	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
Outdoor recreation	1.75% 6	1.75% 6	4.37% 15	37.90% 130	54.23% 186	343	4.41
On-farm experiences	2.27% 8	7.93% 28	36.26% 128	37.96% 134	15.58% 55	353	3.57
Cultural or heritage	1.69% 6	7.32% 26	31.27% 111	48.73% 173	10.99% 39	355	3.60
Unique restaurants or culinary experiences	3.12% 11	16.71% 59	23.23% 82	45.33% 160	11.61% 41	353	3.46
Craft beverages	1.45% 5	6.40% 22	28.20% 97	45.35% 156	18.60% 64	344	3.73
Locally-owned shops and local products	2.31% 8	8.65% 30	16.14% 56	53.03% 184	19.88% 69	347	3.80
Guided experiences	2.66% 9	10.36% 35	50.59% 171	29.88% 101	6.51% 22	338	3.27

Q16 If you listed “Strongly disagree” or “Disagree” with any of the choices above, please explain why below.

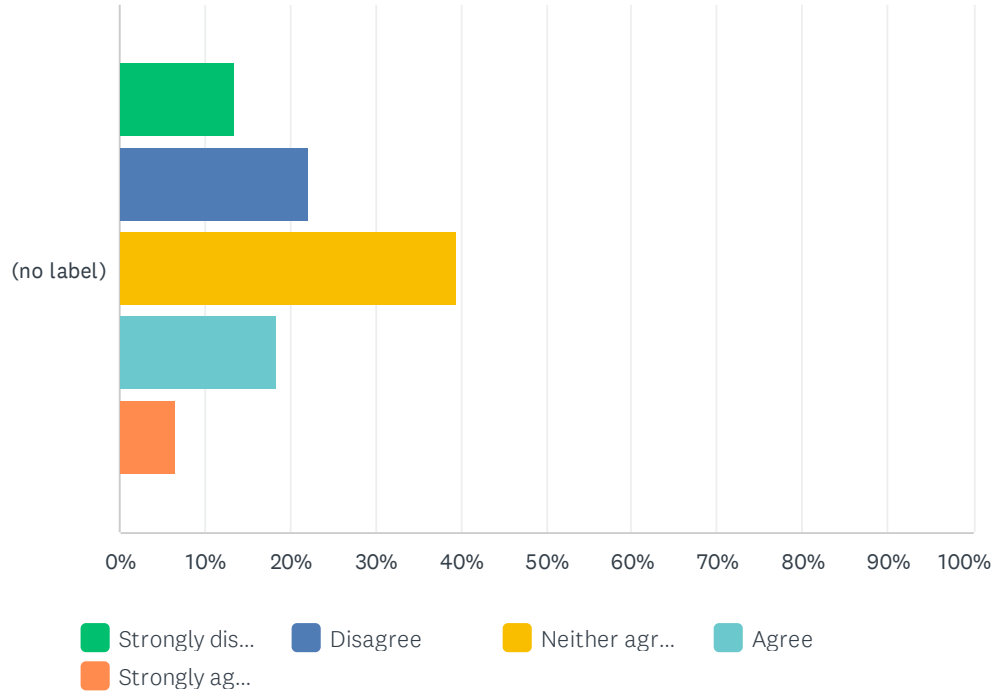
Answered: 102 Skipped: 327

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

Answered: 234 Skipped: 195

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

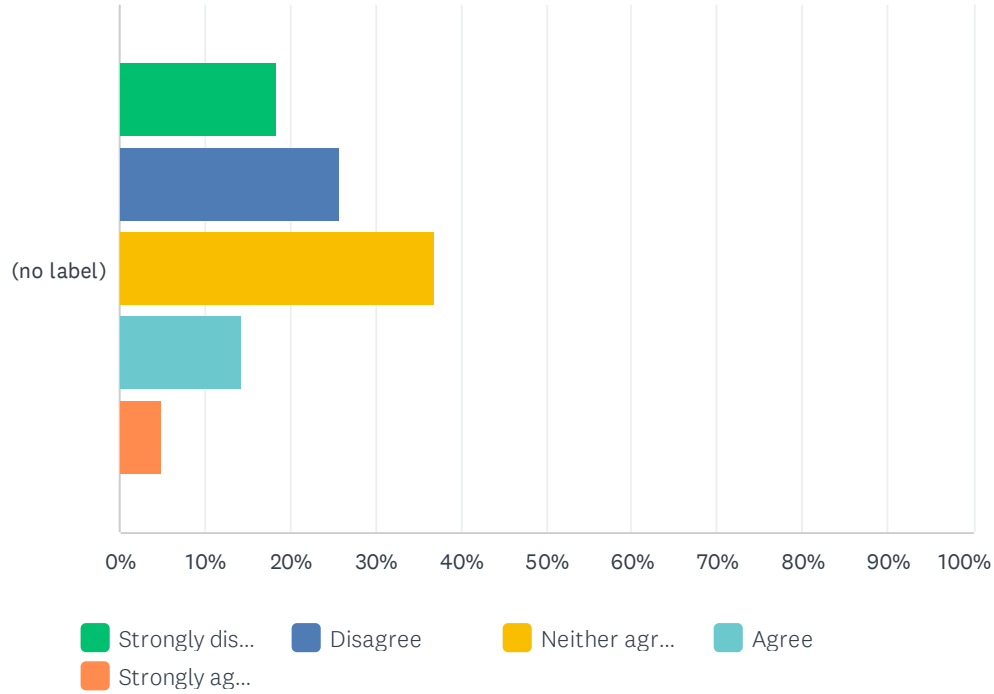
Answered: 344 Skipped: 85



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	13.37% 46	22.09% 76	39.53% 136	18.31% 63	6.69% 23	344	2.83

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

Answered: 345 Skipped: 84



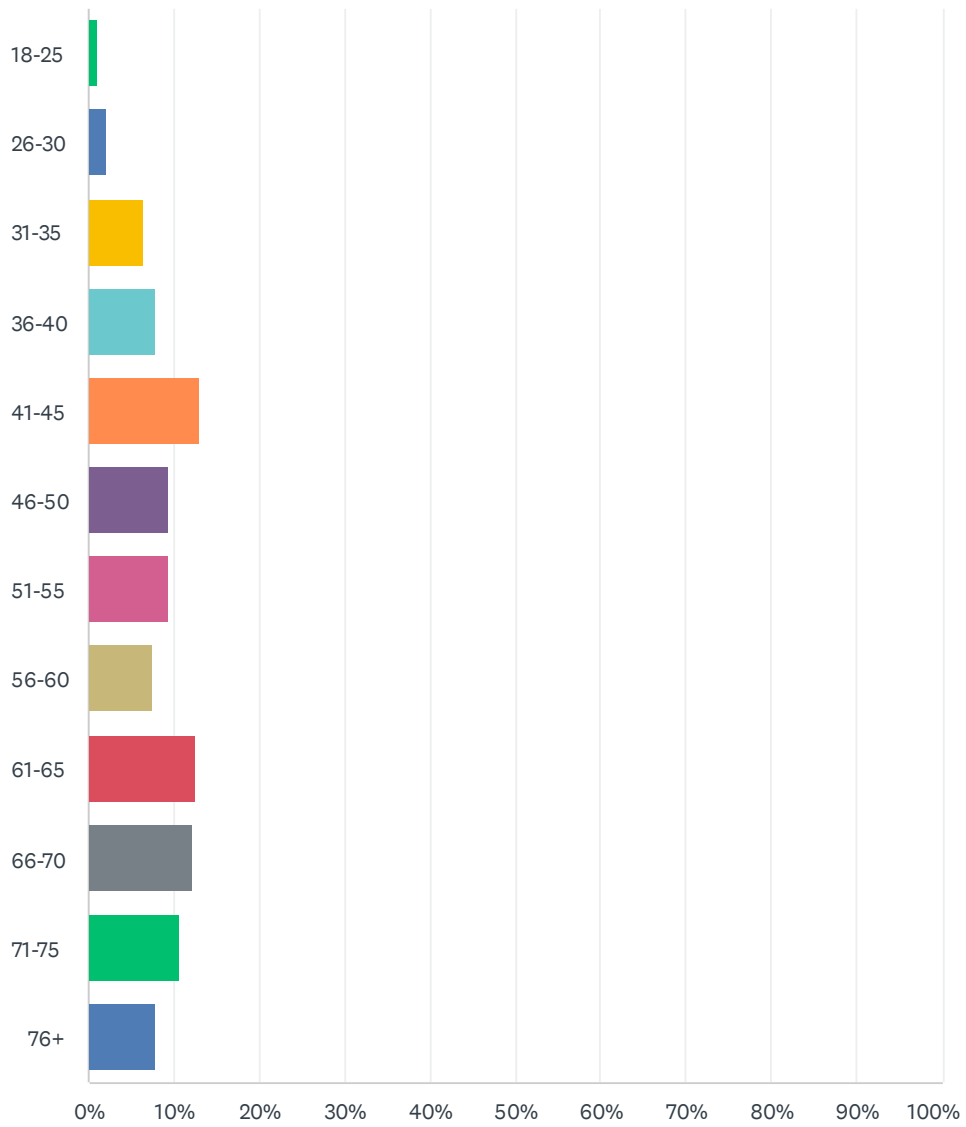
	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	18.26% 63	25.80% 89	36.81% 127	14.20% 49	4.93% 17	345	2.62

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

Answered: 177 Skipped: 252

Q21 What is your age?

Answered: 344 Skipped: 85

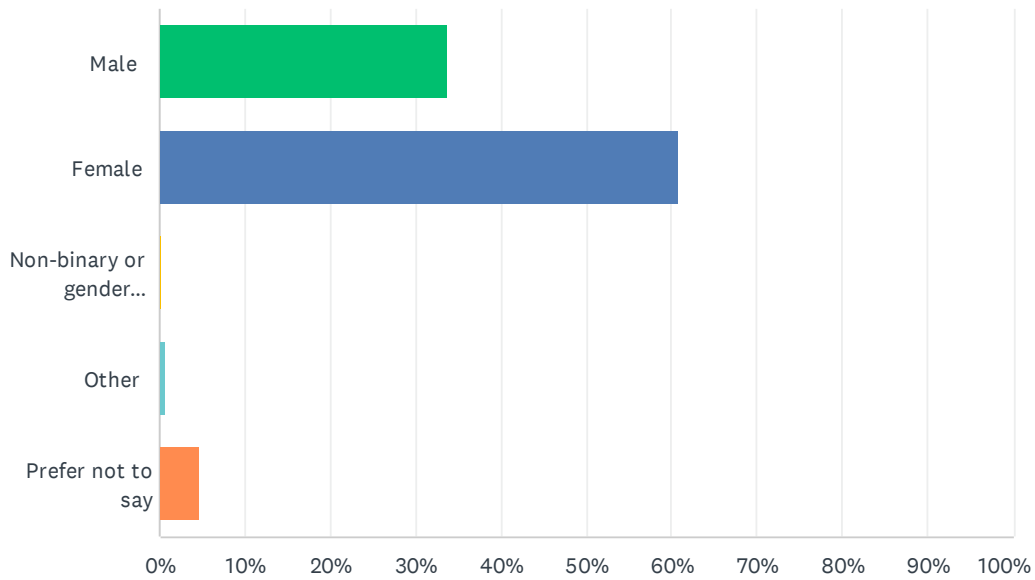


Clackamas County Tourism: Resident Survey

ANSWER CHOICES	RESPONSES	
18-25	1.16%	4
26-30	2.03%	7
31-35	6.40%	22
36-40	7.85%	27
41-45	13.08%	45
46-50	9.30%	32
51-55	9.30%	32
56-60	7.56%	26
61-65	12.50%	43
66-70	12.21%	42
71-75	10.76%	37
76+	7.85%	27
TOTAL		344

Q22 With what gender do you identify?

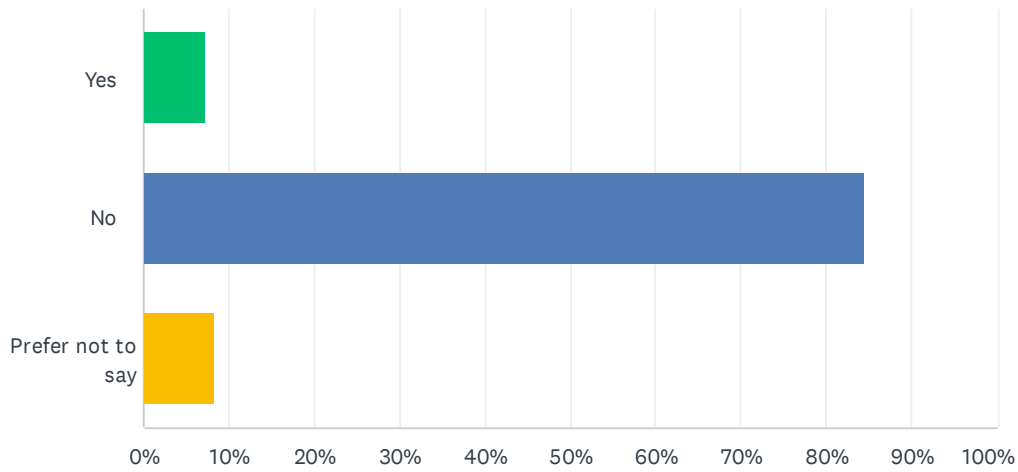
Answered: 345 Skipped: 84



ANSWER CHOICES	RESPONSES	
Male	33.62%	116
Female	60.87%	210
Non-binary or gender non-conforming	0.29%	1
Other	0.58%	2
Prefer not to say	4.64%	16
TOTAL		345

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

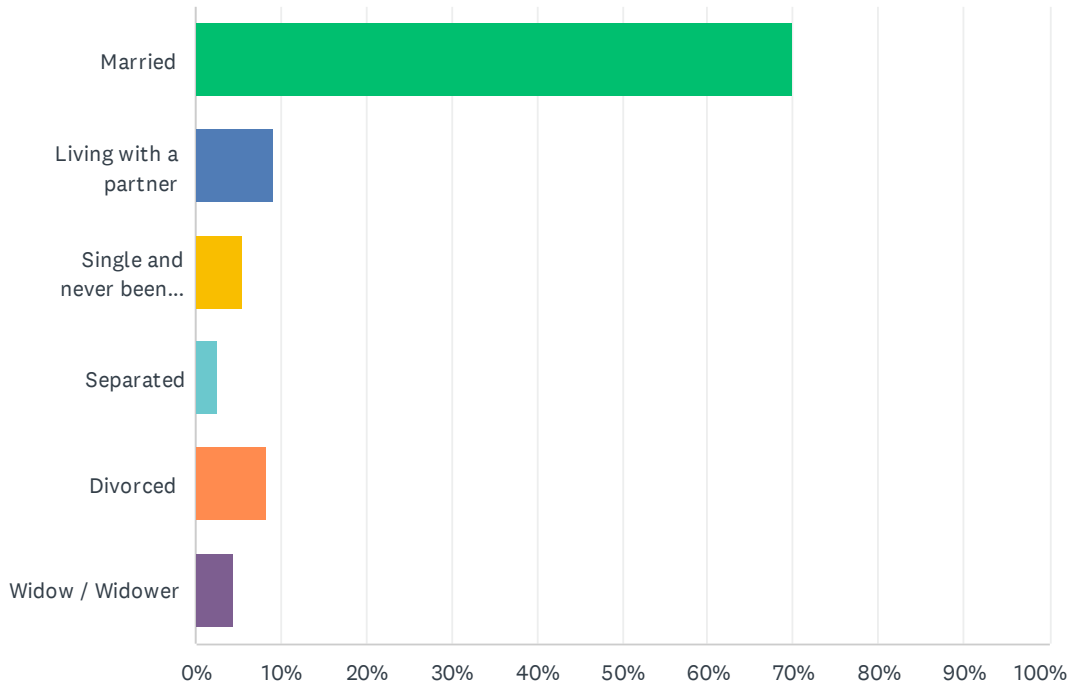
Answered: 341 Skipped: 88



ANSWER CHOICES	RESPONSES	
Yes	7.33%	25
No	84.46%	288
Prefer not to say	8.21%	28
TOTAL		341

Q24 What is your marital status?

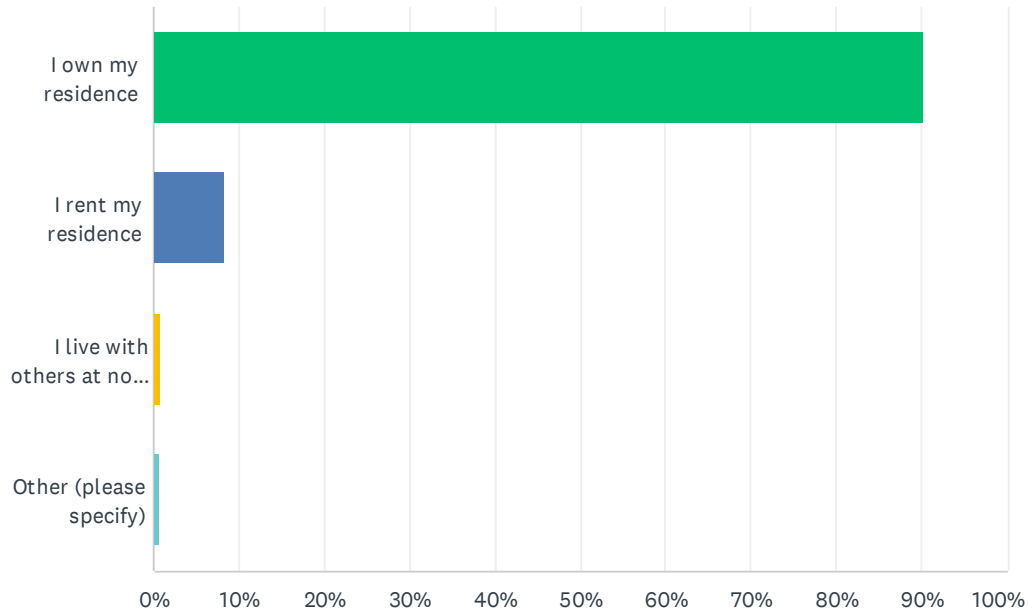
Answered: 339 Skipped: 90



ANSWER CHOICES	RESPONSES	
Married	69.91%	237
Living with a partner	9.14%	31
Single and never been married	5.60%	19
Separated	2.65%	9
Divorced	8.26%	28
Widow / Widower	4.42%	15
TOTAL		339

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

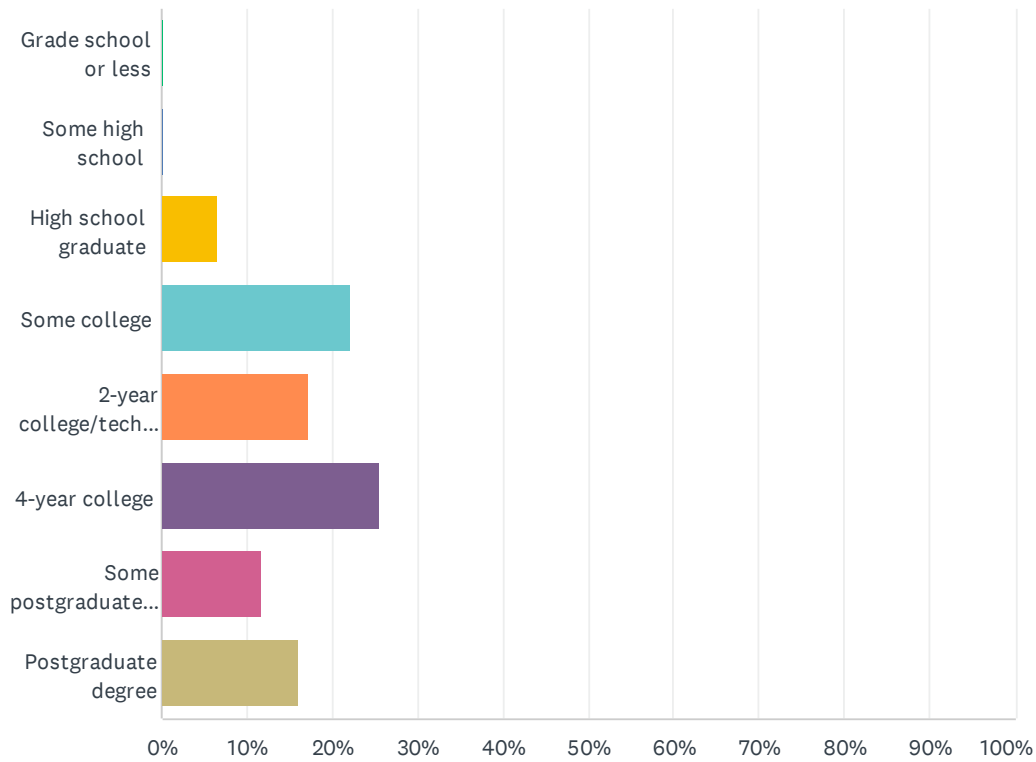
Answered: 345 Skipped: 84



ANSWER CHOICES	RESPONSES	
I own my residence	90.14%	311
I rent my residence	8.41%	29
I live with others at no cost	0.87%	3
Other (please specify)	0.58%	2
TOTAL		345

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

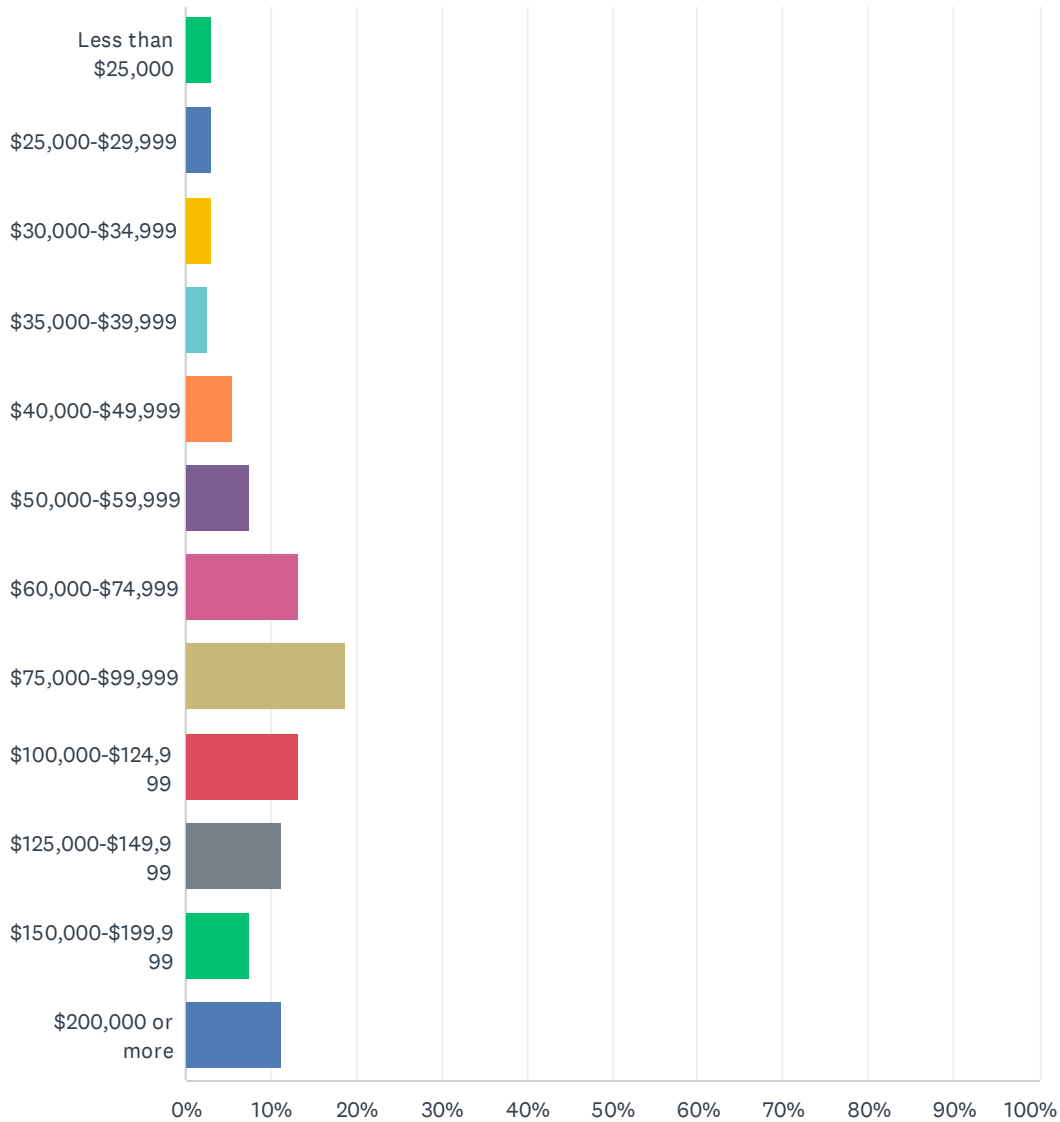
Answered: 343 Skipped: 86



ANSWER CHOICES	RESPONSES	
Grade school or less	0.29%	1
Some high school	0.29%	1
High school graduate	6.71%	23
Some college	22.16%	76
2-year college/technical school	17.20%	59
4-year college	25.66%	88
Some postgraduate work	11.66%	40
Postgraduate degree	16.03%	55
TOTAL		343

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

Answered: 325 Skipped: 104

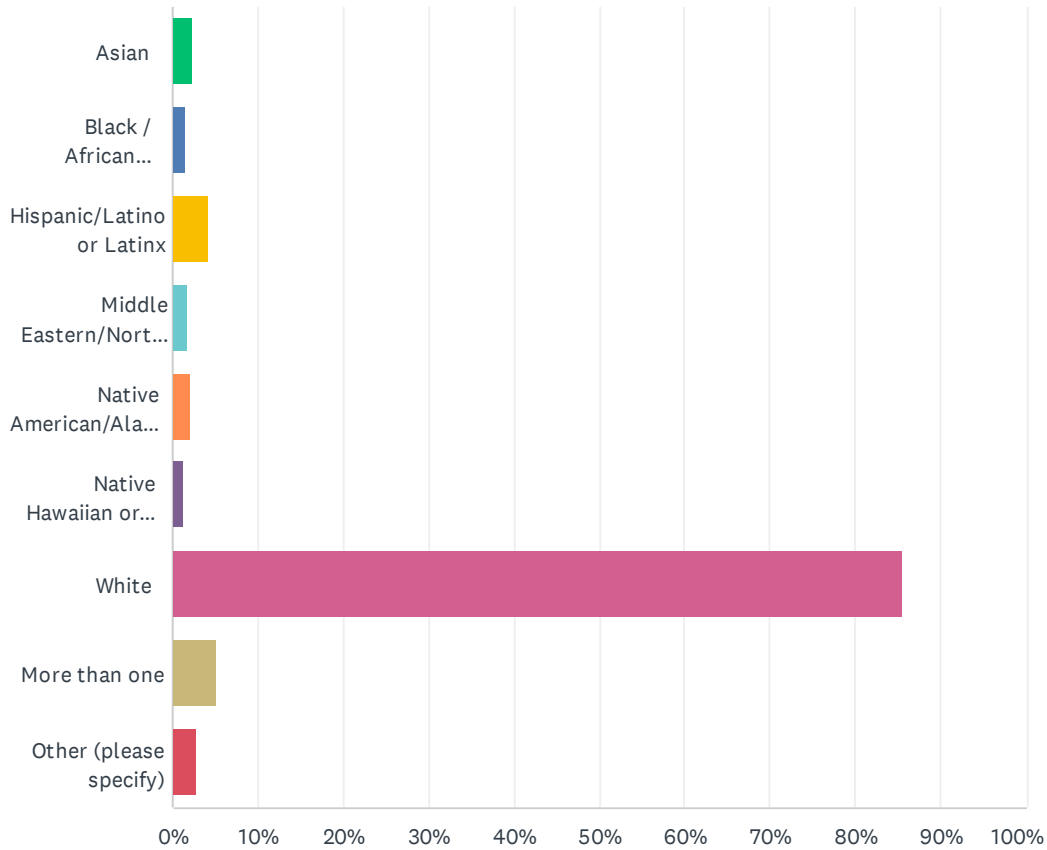


Clackamas County Tourism: Resident Survey

ANSWER CHOICES	RESPONSES	
Less than \$25,000	3.08%	10
\$25,000-\$29,999	3.08%	10
\$30,000-\$34,999	3.08%	10
\$35,000-\$39,999	2.46%	8
\$40,000-\$49,999	5.54%	18
\$50,000-\$59,999	7.38%	24
\$60,000-\$74,999	13.23%	43
\$75,000-\$99,999	18.77%	61
\$100,000-\$124,999	13.23%	43
\$125,000-\$149,999	11.38%	37
\$150,000-\$199,999	7.38%	24
\$200,000 or more	11.38%	37
TOTAL		325

Q28 Please select your race/ethnicity.

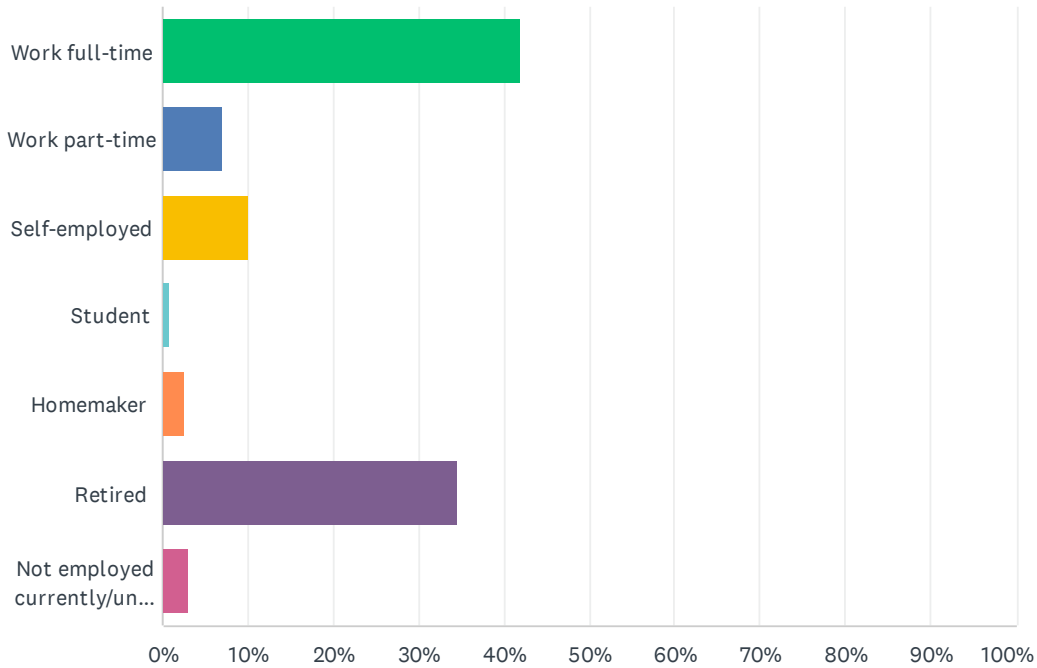
Answered: 332 Skipped: 97



ANSWER CHOICES	RESPONSES	
Asian	2.41%	8
Black / African American	1.51%	5
Hispanic/Latino or Latinx	4.22%	14
Middle Eastern/Northern African	1.81%	6
Native American/Alaskan Native	2.11%	7
Native Hawaiian or Pacific Islander	1.20%	4
White	85.54%	284
More than one	5.12%	17
Other (please specify)	2.71%	9
Total Respondents: 332		

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

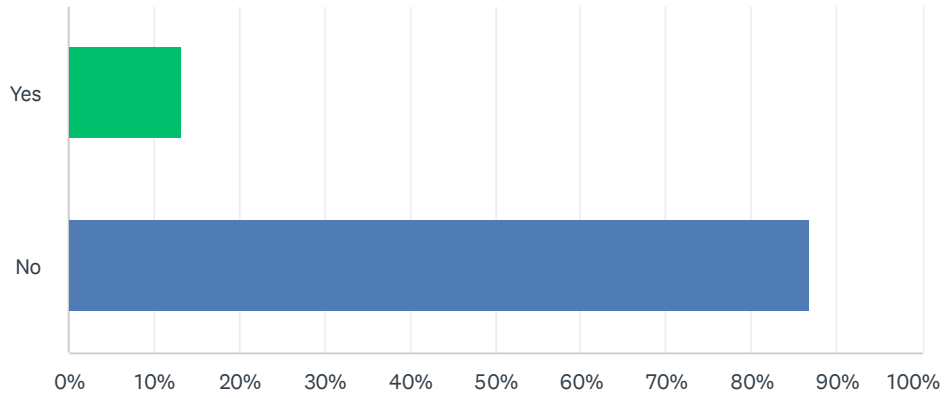
Answered: 342 Skipped: 87



ANSWER CHOICES	RESPONSES	
Work full-time	42.11%	144
Work part-time	7.02%	24
Self-employed	9.94%	34
Student	0.88%	3
Homemaker	2.63%	9
Retired	34.50%	118
Not employed currently/unable to work	2.92%	10
TOTAL		342

Q30 Do you work in the tourism industry?

Answered: 346 Skipped: 83

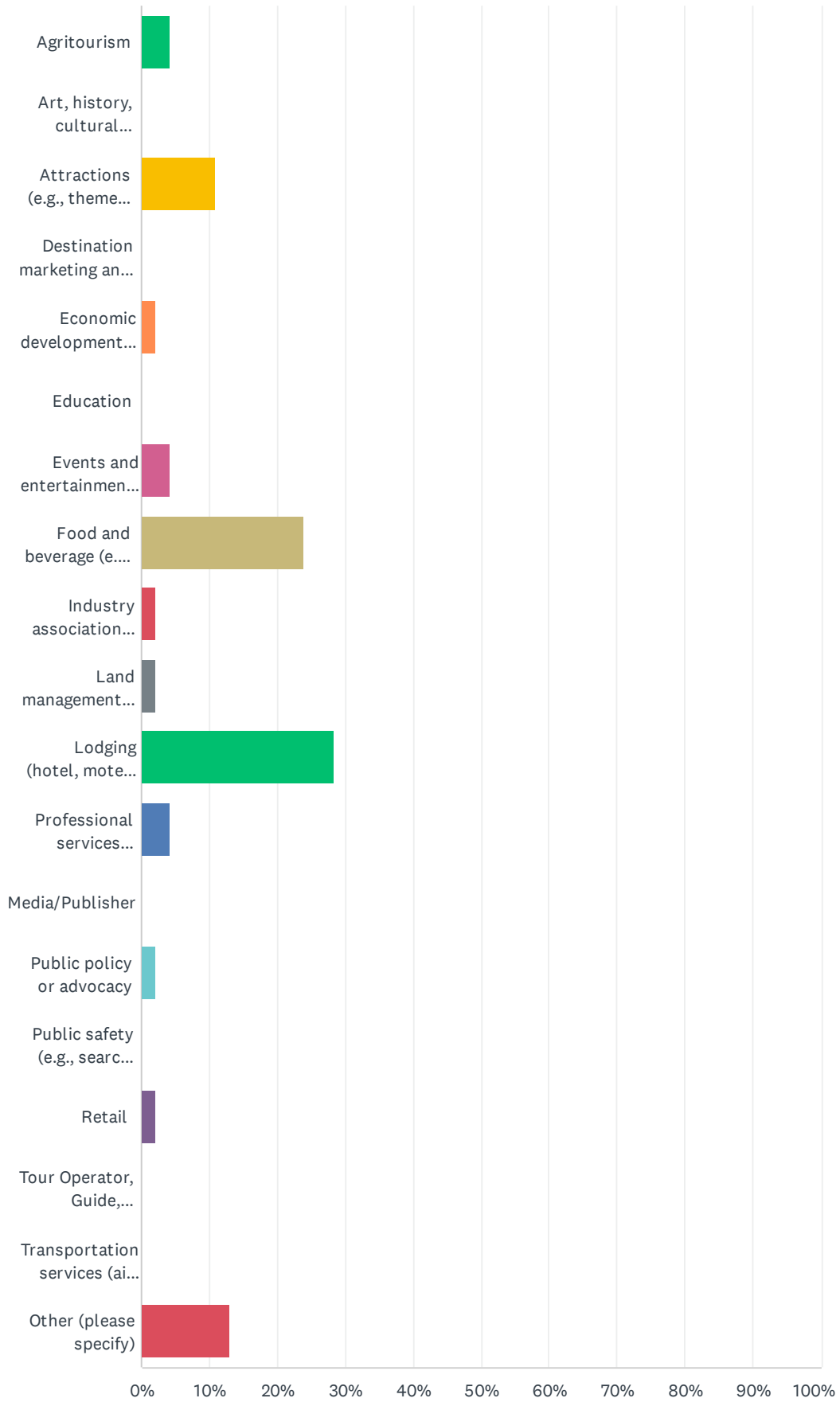


ANSWER CHOICES	RESPONSES	
Yes	13.29%	46
No	86.71%	300
TOTAL		346

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

Answered: 46 Skipped: 383

Clackamas County Tourism: Resident Survey

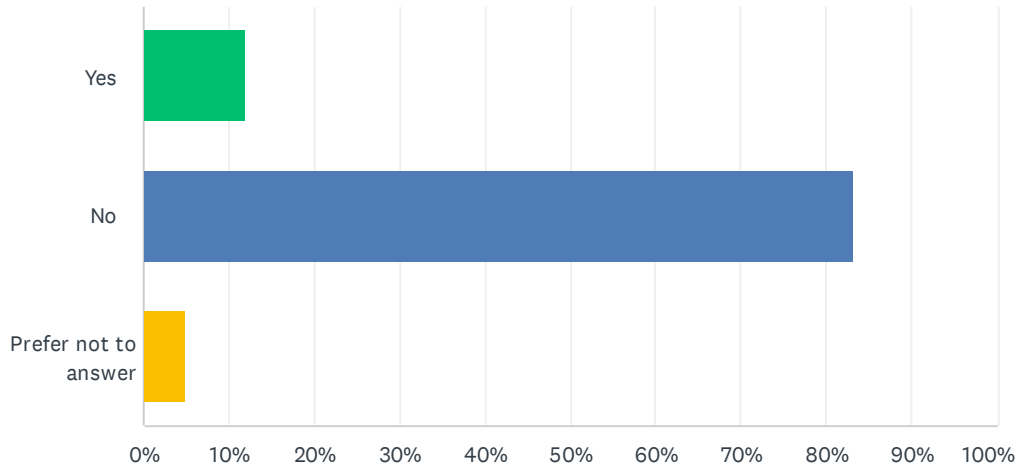


Clackamas County Tourism: Resident Survey

ANSWER CHOICES	RESPONSES	
Agritourism	4.35%	2
Art, history, cultural heritage	0.00%	0
Attractions (e.g., theme park, golf course, casino, ski resort)	10.87%	5
Destination marketing and management (e.g., Travel Portland, chamber of commerce, visitor center)	0.00%	0
Economic development agency	2.17%	1
Education	0.00%	0
Events and entertainment (e.g., sports, concerts, performing arts)	4.35%	2
Food and beverage (e.g., restaurant, bar, wineries, breweries, food cart)	23.91%	11
Industry association (e.g., Oregon Restaurant & Lodging Association)	2.17%	1
Land management (maintaining or managing parks and open spaces, trails, or other outdoor recreation amenities)	2.17%	1
Lodging (hotel, motel, vacation rentals, campground, real estate)	28.26%	13
Professional services (marketing services, creative agency, website development)	4.35%	2
Media/Publisher	0.00%	0
Public policy or advocacy	2.17%	1
Public safety (e.g., search and rescue)	0.00%	0
Retail	2.17%	1
Tour Operator, Guide, Outfitter	0.00%	0
Transportation services (air, ground, water transport)	0.00%	0
Other (please specify)	13.04%	6
TOTAL		46

Q32 Do you have a disability?

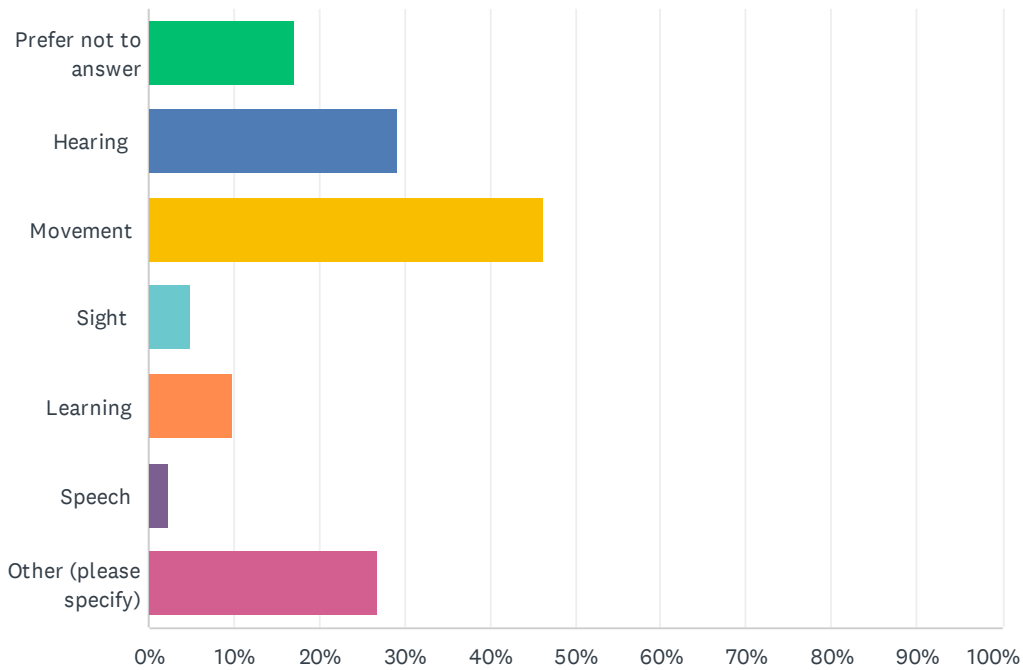
Answered: 345 Skipped: 84



ANSWER CHOICES	RESPONSES	
Yes	11.88%	41
No	83.19%	287
Prefer not to answer	4.93%	17
TOTAL		345

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

Answered: 41 Skipped: 388



ANSWER CHOICES	RESPONSES	
Prefer not to answer	17.07%	7
Hearing	29.27%	12
Movement	46.34%	19
Sight	4.88%	2
Learning	9.76%	4
Speech	2.44%	1
Other (please specify)	26.83%	11
Total Respondents: 41		