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Residents Study

Clackamas County Tourism Development Council

July 2006

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Introduction

This report summarizes the results of a telephone survey conducted in June of Clackamas County, Oregon residents who had visiting friends and relatives (VFRs) within the past 12 months. The primary purpose of this study was to create a profile of resident influence upon VFRs, assessing various trip characteristics and to determine means to educate and market to residents about activities available in Clackamas County. Key points explored include:

- Key VFR themes that resonate most with residents.
- Thoughts, perceptions and motivations regarding events and attractions.
- The decision making process for the VFR market.
- Areas of improvement within the county to attract the VFR market.
- Clackamas County events and attractions offerings.
- Proposed marketing promotions.

Methodology

BNResearch conducted telephone interviews with Clackamas County residents who had visiting friends and relatives within the past 12 months. The telephone survey approach allowed for greater control of quotas, efficient collection of data, and higher levels of quality control.

403 residents were interviewed from June 5th to June 19th, 2006. A sample of this size gave us reliable information regarding residents' awareness, behavior and attitudes regarding the VFR market and enabled segmentation and analysis of urban versus rural residential data.

Urban/Suburban – 72%		Rural – 28%	
Clackamas	Oregon City	Beavercreek	Government Camp
Gladstone	West Linn	Boring	Molalla
Lake Oswego	Wilsonville	Brightwood	Mulino
Milwaukie		Canby	Rhododendron
		Colton	Sandy
		Eagle Creek	Welches
		Estacada	Zigzag

For residents who had more than one VFR party in the past 12 months, one random party was selected to ask questions about so we could sample a cross section of visitors across all seasons. In addition, some survey questions were asked of all VFR parties within the past 12 months.

Executive Summary

Resident Profile

Clackamas County resident demographics were gathered to better understand who the Clackamas County Tourism Development Council can market to.

Resident Demographic Profile		Clackamas County Residency	
		<1 year	4%
Median Age	~51	1-5 years	17%
Median Income	~\$68k	5-10 years	14%
		10-20 years	23%
		>20 years	40%

Residents with VFRs are a bit older, have higher income, and have lived in Clackamas County longer than the general population.

Visiting Friends and Relatives Demographics

There were roughly 240,000 VFR parties staying in Clackamas County within the past 12 months.

These parties were composed of 780,000 individuals: 615,000 adults and 165,000 children. This is a very substantial segment.

Guests visit frequently and return often. 77% of VFRs visit at least once a year (18% visit at least once every 2-10+ years) and 80% have traveled to visit residents specifically, rather than for some other activity. Only 6% of VFRs were first time visitors and .0025% (1 out of 400) VFRs were once in a lifetime visitors.

Guest visits are evenly dispersed throughout the year. VFRs overwhelmingly stay overnight (88%) or longer. Their choice of lodging is usually the resident's home (86%), while 8% stayed at a hotel or motel, 6% staying at someone else's home and 2% staying at an alternative venue (campgrounds, etc.).

For 55% of VFRs who stayed in hotels or motels, the resident they visited recommended the place to stay, either independently or jointly with the visiting party.

Frequencies of Visiting Friends and Relatives (within the past 12 months)

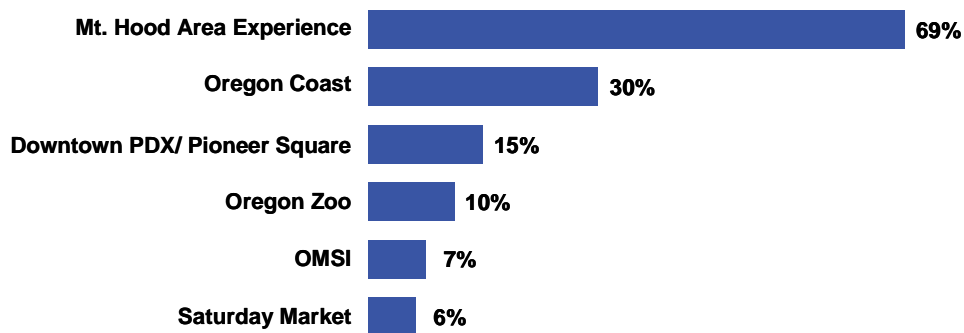
Households in CC (2005)	140,500
Percent of respondents having VFRs	57%
Household in CC having VFRs	80,100
Average number of VFRs entertained	2.96
Average number of visiting parties to CC	240,000
Average number of individuals	780,000
	615,000 adults 165,000 children

Seasonal Visits	
Winter	28%
Spring	28%
Summer	25%
Fall	19%

Residents as Ambassadors

Residents have a strong influence on VFR activities. 85% of residents polled indicated that they either planned on their own or through cooperation with VFRs what to do during the visiting party's trip. Based on VFR projections, this equates into over 650,000 VFRs who let residents help guide their recreational choices.

Activities Always Considered

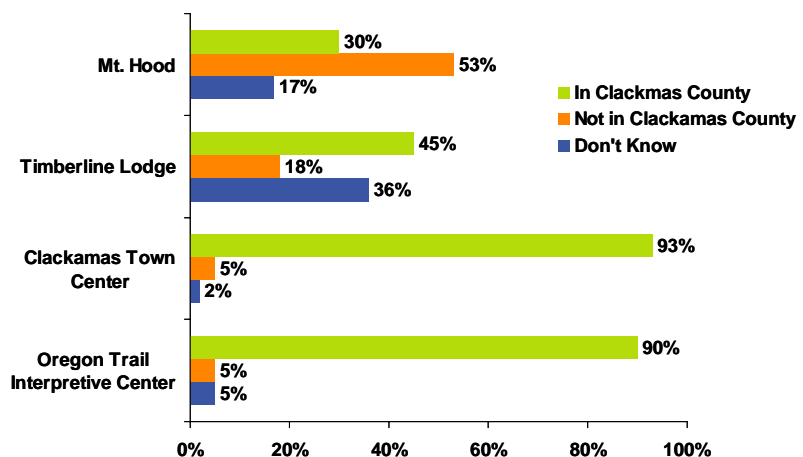


The majority of residents often consider the "Mt. Hood Area Experience" as part of their recreational choice. Encompassing Mt. Hood, Clackamas Town Center, Timberline Lodge, Multnomah Falls and the Columbia Gorge, the "Mt. Hood Area Experience" accounted for 69% of all activities considered by residents when friends and family visit. The Oregon Coast is the next destination for 30% of residents, followed by downtown Portland and Pioneer Courthouse Square (15%), the Oregon Zoo (10%), OMSI (7%) and Saturday Market (6%).

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Awareness for many of the top ranking Clackamas County activities is high. For both Clackamas Town Center and the End of the Oregon Trail Interpretive Center, 90% or more of respondents knew these attractions were in Clackamas County. 45% of respondents also knew that Timberline Lodge was located in-county. However, only 30% knew that Mt. Hood was located within Clackamas County.

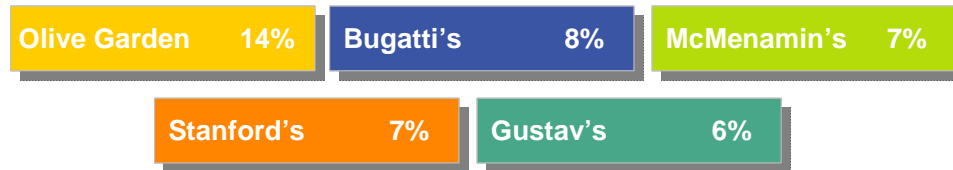
Top Ranking Clackamas County Activities



Respondents were very satisfied with all activities they engaged in within the county, giving an average rating of 4.3 on a 5-point scale, where 1=extremely dissatisfied and 5=extremely satisfied.

There are a variety of restaurants recalled by respondents, with 57% listing a diverse assortment of dining options other than the top five most recalled restaurants.

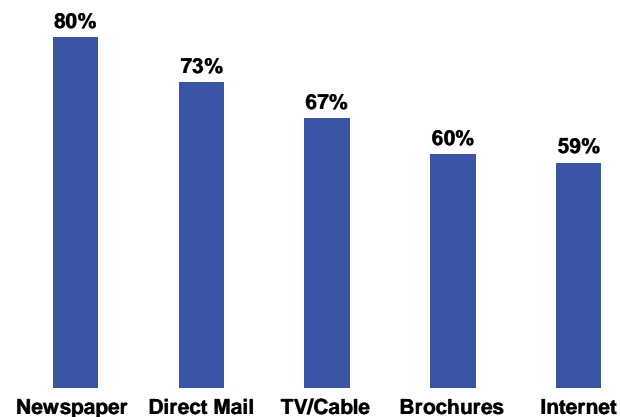
Most Recalled Restaurants



Where Residents Get Their Information

When it comes to how Clackamas County residents want to be informed about specific county events and activities, 80% rank newspapers as their primary choice, followed by direct mail (73%), TV/ cable (67%), brochures (60%) and the Internet (59%). 54% of residents also indicate that discount coupons influence their decision to go to events and attractions.

Top 5 Media Outlets



Regarding "Mt. Hood Territory", 41% of residents polled say they recall an advertisement or hearing information about the brand. Of those that remember an ad, 54% say they recall the information from newspapers and 47% say they remember it from TV/cable. The Oregonian is the primary newspaper recalled with Mt. Hood Territory advertisements (34%) and Channel 8 (KGW) is the primary TV/cable station residents remember (12%).

Study Overview

This study confirms that residents definitely have influence upon visiting friends and relatives. Both lodging and activity choices are influenced either directly or in cooperation with residents. The impact residents have is amplified by the estimated 780,000 visiting friends and relatives within the past 12 months traveling to Clackamas County. CCTDC can reach a notable percent of the VFR segment by marketing to and educating residents.

The most significant activity (or group of activities) residents consider revolves around the "Mt. Hood Area Experience". 69% of residents always consider the experience when entertaining VFRs. Together with CCTDC's recent Mt. Hood Territory advertisement campaign, resident knowledge and awareness of the "Mt. Hood Area Experience" is positive.

Data gathered for this study is consistent across all demographic segments with no segment preferring specific activities over another.

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Residents Study

Verbatim Report

Prepared for:

Clackamas County Tourism Development Council

August 2006

Residents Study

Q1A. When you have out-of-town guest, what are the events, activities and places that are always on the list of things to do and see?

00151 Oregon Symphony and ballet in Portland.

00230 Mt. St. Helens

00392 Chinese Gardens

00500 Sports

00519 Mt. St. Helens

00524 Oaks Park

00559 Chinese Gardens in downtown Portland

00644 Mt. St. Helens

00713 Tony's Fish Market

00992 East Moreland Golf Course

00993 Play cards.

01091 Mt. St. Helens

01163 Chinatown

01317 Fish hatchery

01339 Jazz Festival

01485 A play at Molalla High School, as well as a Christmas function at same place.

01488 Golfing

01796 The Cascades

01802 Lake Oswego events

01849 Mt Hood Jazz Festival

01862 Harvey's Comedy Club

01868 Stone Creek Golf Course

02046 Sunriver

02182 Skamania Lodge

02201 Scenic Highway. Fish Hatchery.

Residents Study

Q1A. When you have out-of-town guest, what are the events, activities and places that are always on the list of things to do and see?

02750 Fishing

02922 The clubs.

02959 Mulino Golf Course

02986 Hawthorne

03081 The school play of one of the grandkids.

03190 Salmon fishing and seeing the Lion King at Keller Auditorium.

03238 NW Children's Theater, Stone Creek Golf Course, Keller Auditorium. Hill Top Nine in Oregon City.

03312 Shady Dell Trolley

03393 Skamania Lodge

03517 West Linn Library

03528 Forest Grove

03627 Pittock Mansion, Northwest Portland, Detroit Lake

03707 Stockcar racing

03745 Lake Chinook

03756 Fishing, gun shows, antique shows.

03849 Chinese Gardens

03906 Pittock Mansion

04111 Religious things locally.

04205 Steven Crawford's Historical House

04209 Eastern Oregon, in Madras.

04396 Concerts

04439 Rockwood Bowling

04489 Woodburn Drag Strip

04553 Molalla. Silverton Gardens.

04758 Faraday Lake

04950 Pittock Mansion

Residents Study

Q1A. When you have out-of-town guest, what are the events, activities and places that are always on the list of things to do and see?

05094 Chinese Garden

05118 Hiking and the falls in Brightwood, Oregon.

05166 Oktoberfest. Sandy Mountain Festival.

05318 Hawthorne. Pearl District.

05444 Charleston, Oregon. Christmas Garden. Fish hatchery.

05951 Chinese Garden

06216 Mt. St. Helens

06690 The kid's course.

06743 Picnics. Plays.

06790 Pittock Mansion

06863 Family activities.

06987 Silverton.

07071 Camping

07197 Crater Lake

07287 Timothy Lake

07579 Wooden Shoe Dahlia Garden

07628 Pittock Mansion

07787 Oregon Interpretive Center

08322 Wineries, mountains, and Portland.

08398 Silverton Falls

08420 Kid's games

08658 The Grotto

09337 Mt. St. Helens

09365 Hawthorne and NW 23rd.

09461 Safari Sam's

09509 Portland waterfront, Working Wonders, Enchanted Forest.

10242 Rodeo. Calf roping.

Residents Study

Q1A. When you have out-of-town guest, what are the events, activities and places that are always on the list of things to do and see?

11194 Woodburn

11394 Visiting Canby, Molalla, Detroit Lake.

11526 Portland Raceway. The Grotto. Portland Center Stage to see plays. Sternwheeler.

11571 Aquarium

11848 Oregon Trail

11876 Visiting relatives here, or going hiking.

Q1B. Which events, activities and places did you do and see the last time you had out of town visitors?

00047 Wildlife Safari in Medford.

00151 Wine tasting.

00161 We went to a concert.

00202 Visited old-growth forest

00465 Drove around Portland.

00500 Little League baseball and high school softball.

00519 Mt. St. Helens

00524 Oaks Park.

00527 We visited family.

00836 The Carnegie Center

00887 Dundee. Eugene.

00992 We went to Salem and had a picnic.

01027 Tri-On Funds, which is a community of people that puts on shows.

01160 VFW, which is a members only club.

01297 Corvallis

01310 The Oregon Historical Railroad Center

01339 The jazz festival.

01485 We played at Molalla High School.

01488 Golf.

01538 Plant and Flower Show. Clackamas County Fair.

01796 Mt. St. Helens

01862 Wordstock

01868 Stone Creek Golf Course

01990 We went to a wedding

02201 Fish hatchery.

02674 St. Helens

02874 Concert at Roseland.

Q1B. Which events, activities and places did you do and see the last time you had out of town visitors?

02922 Skiing. Concerts.

02927 Birthday party.

03081 School play.

03190 Fishing and plays.

03220 Bonneville Dam

03279 Winery. Crater Lake.

03407 Roseland and Tonic Lounge.

03528 Downtown Lake Oswego.

03534 Church.

03745 Bowling group in Wilsonville.

03756 Fishing

03762 My son and his girlfriend hiked, but I'm not sure where.

03860 Church event.

04205 Steven Crawford's house.

04439 Rockwood Bowling

04459 A model train in NE Portland.

04489 Woodburn Drag Strip.

04826 Weddings and birthdays.

04994 First Friday in Silverton. Aurora.

05094 Chinese Garden

05166 Oktoberfest and Sandy Mountain Festival.

05216 Peacock Lane

05318 Bike rides.

05410 Ollalie Lake

05519 We went to listen to music.

05534 NW 23rd

Q1B. Which events, activities and places did you do and see the last time you had out of town visitors?

05782 The Grotto and Enchanted Forest.

05951 Christmas Ships on the river.

06151 Wine tasting.

06216 St. Helens

06350 The Molalla Corridor

06547 Portland Theater for the Performing Arts

06578 Lakes

06745 High school play (Jesus Christ Superstar).

06863 We went to a wedding.

06864 We went fishing on the Willamette.

07071 Camping

07512 Iris Gardens.

07628 Pittock Mansion

07697 Long Beach, Washington

07918 Clackamas County Fair

08155 Master Gardener convention at the Red Lion.

08322 Winery.

08393 A wedding.

08837 Wine tasting in Dundee.

08925 Hood River

08954 Mt. St. Helens

09343 We drove through Canby.

10519 Rockwood Bowling.

11107 Lake Oswego Train.

11152 Car show in Estacada.

11376 We went and saw friends in the Willamette Valley. We went down by Salem. I used to live there.

11526 We went to Portland Center Stage to see a play.

Q1B. Which events, activities and places did you do and see the last time you had out of town visitors?

11565 Live theatre in downtown Portland.

11848 Oregon Trail

11859 Football game. Baseball game.

Q2A. What are the top restaurants you recommend when you have visitors?

00161 Mazu. Cooperstown.
00289 Juan Colorado. Cheesecake Factory.
00325 Benihana's
00359 Hong Kong 97
00392 Gubanc's. Sanjo. Lady Di's
00446 Calamity Jane. Tollgate Inn.
00486 The Brewery. Marcum.
00500 Takahashi
00524 Pho Van on 82nd Ave.
00527 Waight's Bar and Grill in downtown Portland.
00535 Mt. Hood.
00559 Higgins. Clarke Lewis Restaurant in Portland.
00578 Suberious. High Spoon.
00644 The Bomber. Stuart Anderson's.
00742 Silver Grill
00807 Beesaw's
00832 Noble House at John's Landing
00836 Super-Tora
00887 Linn City Pub
00980 Rose and Raindrop. Aranawanda.
00982 Small local places.
00992 Tebo's.
00993 Redland Cafe
01000 Stanley's Corner in Gladstone.
01027 Main Street Cafe in Oregon City.
01076 Walk Inn in Wilsonville.
01080 Country Bills

Q2A. What are the top restaurants you recommend when you have visitors?

01091 La Costita

01160 Ringside

01173 The Blue Hour. Clark Lewis.

01258 Best Buffet

01268 Huber's and The Montage.

01269 Salty's

01278 Calamity Jane's in Sandy. Asia Kitchen in Gresham.

01339 Bob's Red Mill. Pastini's. Tully's.

01467 Wild Hair. Steven's Grill.

01488 Macaroni Grill.

01635 Thai Villa

01692 Season and Regions. Acadia.

01695 Original Pancake House

01786 Bob's Red Mill

01849 Mickey Finn's

01862 Baja Peruvian.

01868 The Wichita. Rotters.

01892 Stuart Anderson's

01934 La Costita

01950 Wichita Pub

02038 Rigoberto's.

02111 Vinotopia in Vancouver.

02146 El Gaucho

02201 Red Baron

02273 Typhoon

02302 Papa Murphy's

02320 Red Robin in Clackamas Town Center.

Q2A. What are the top restaurants you recommend when you have visitors?

02323 Jaretto's

02326 La Bamba in Sandy.

02332 Todai.

02418 Old Town Buffet

02454 Thai Village

02636 Taco Bell, McDonald's, KFC, Subway.

02702 Round Table Pizza

02733 Macaroni Grill

02750 Terry's. Happy Chinese. Markham Inn.

02766 Yoko's, Patty's, Higgins.

02768 Taco Loco, Round Table on McLaughlin and Kell's in Portland.

02826 Ringside

02843 Giuseppe's in Gresham

02861 La Hacienda. Extapas.

02865 California Pizza Kitchen

02874 Ringside

02986 Manzinetta's in Lake Oswego.

03054 Charthouse

03071 Thai Mango

03209 California Pizza Kitchen. Buffalo Gap Saloon in Multnomah County.

03220 Binn's

03225 Takahashi

03312 Mia Sandwich Shoppe in Molalla. El Trido in Molalla.

03361 Arroline Thai Food

03383 Stark Street Pizza

03393 Flast in Lake Oswego.

03407 Windermere. Berlin Inn.

Q2A. What are the top restaurants you recommend when you have visitors?

03425 Sushi Takahashi

03472 Top of the Hill in Canby. Tacho's in Oregon City.

03528 Oyster Bar

03534 Tollgate in Sandy

03637 Opa. The Simpatico Dining Hall. Higgins.

03738 Tad's. Ruth's Chris Steakhouse.

03756 Canby Pub and Grill. Jimmy Ho's Pizza.

03815 Imperial Garden.

03849 Higgins

03862 Morton's. Melting Pot.

03906 Chris Steak House. Benson Hotel.

04071 Got Curry?. Sushi Land in the Clackamas Promenade. Poki's in Oregon City.

04166 Guilt Club. Pin Tal Restaurant.

04205 Burrito place on Washington Street. It's a hole in the wall Mexican place.

04209 Tebo's and the Golden Globe.

04377 Tacho's in Oregon City.

04396 Montage. Gubanc's.

04446 Hayden's on the lake in Tualatin.

04489 Marquain

04517 Mexican restaurant in West Linn.

04532 Gino's in Sellwood. Pastini in Portland. Three Doors Down in Portland.

04553 Arrowhead Golf Club called The Homestead. Hoffman House Restaurant.

04793 Shorewood in Oregon City.

04826 Giuseppe's

04898 Caprios. Bob's Red Mill. Happy Cafe.

04962 London Grill

04994 PF Chang's

Q2A. What are the top restaurants you recommend when you have visitors?

05007 Zigzag Inn

05091 El Gaucho. Typher. Big Belly.

05094 Buzano in Lake Oswego.

05099 El Gaucho. Morton's. Alamir.

05116 Thien Hong

05118 Longview Restaurant and the lounge at Timberline Lodge.

05166 Tollgate. Elucias Troutpie. People's Grill.

05216 Esparza's. Montage.

05280 Oba in the Pearl District.

05288 Hurley's

05318 Rose Garden. Columbia Gorge restaurants. Pearl District restaurants.

05326 Andina. Abou Karim.

05331 Benihana

05410 Sizzler in Portland. McDonald's in Molalla or Woodburn.

05467 PF Chang's

05519 Rigobertos.

05534 Kappia. Iron Horse.

05612 Swanson's in Clackamas Town Center.

05675 Wichita's. Taco Bell. McDonald's.

05777 El Gaucho

05782 Redland Café. Hitching Post Pizza.

05854 Tebo's.

05901 Marquam Inn.

05914 Eleni's in Sellwood.

05935 Blue Hour.

05951 Gubanc's. Senoul. Three Degrees.

05969 Stone Hedge Garden in Hood River. Don Guido's.

Q2A. What are the top restaurants you recommend when you have visitors?

- 06012 Ringside
- 06031 Kell's. Huber's. Kornblatte's Deli.
- 06151 Wild abandon. La Provence in Lake Oswego.
- 06311 Gino's. Azteca.
- 06350 The Farmstead at the golf course. Jasper's. The Hoffman House.
- 06371 Stuart Anderson's.
- 06562 Today in Portland. Jimmy Ho's Pizza in Oregon City.
- 06578 Adobe's Mexican in Sellwood. Alexis in Portland. The Indian food place on Barbur Blvd.
- 06598 Gino's. Three Doors Down. Fernando's Hideaway.
- 06605 Taco Bell.
- 06631 Our House.
- 06665 Yourts
- 06690 Street Fish House. Freemont Pub.
- 06718 Chacho's
- 06725 Genoa. Paley's Place. Hurley's.
- 06745 Caprial's in Milwaukie.
- 06790 Georgio's. Tuscany. Cafe Mingo. Andina.
- 06863 The Marquam Inn.
- 06864 Ripe in Portland. Old Cider Mill.
- 06935 Giuseppe's in Gresham.
- 07068 Acadia
- 07287 House of Louie. La Costita.
- 07293 Sparky's Pizza. Fearless Brew Pub. Barbara's Coffee and Flowers. Frotis Greek Deli. Elusive Trout. Arawan. Super Torte. The places need to be inexpensive and child friendly for us to go there.
- 07449 Amadeus
- 07472 Hales
- 07512 Tebo's. Pine Garden in West Linn.
- 07545 Amadeus

Q2A. What are the top restaurants you recommend when you have visitors?

07579 Dory Cove in Lincoln City.
07582 Cooper's Town.
07663 Salty's on the river.
07787 Chart House. Koji Osayaka.
07875 Cazadero Inn.
07894 Flying Pie Pizzeria. Local Mexican restaurants.
07918 The Four Seasons
07928 Zigzag Inn.
07933 Teoff's
07949 Morton's Charthouse
08006 The Airport Cafe in Molino.
08107 Mio Sushi
08126 Pazzo's Restaurant
08155 Nicholas. Modi. The Cuban restaurant in Portland. Burgerville.
08195 Round Table Pizza. Tacho's.
08226 Macaroni Grill. Chez Jose.
08260 Caro Amico's
08272 Tazadaro
08300 Wichita Pub
08322 South Park
08365 Macaroni Grill. Cheesecake Factory.
08393 Imperial Gardens. Biscuits.
08398 Tacho's in Oregon City.
08420 Ruth's Chris Steakhouse
08438 Riverside Restaurant
08551 Mingo's
08658 Huber's. Hen's. Sammy's. Capriel's Bistro.

Q2A. What are the top restaurants you recommend when you have visitors?

08706 Today.

08761 Three Doors Down. Portland Brewing Company. Bridgeport.

08767 Hoffman. The Farmstead.

08837 Ringside. Heathman Hotel.

08855 Gubanc's

08924 Tollgate Inn. Calamity Jane's.

08925 Gino's. Caprial's.

08954 The Bomber.

09116 Red Robin in Clackamas.

09161 Biscuits. The Farmstead Inn.

09250 Mingo's Café

09277 El Jarrito

09343 PF Chang'. El Gaucho.

09365 Three Doors Down

09397 Cheesecake Factory

09435 Szechwan Garden. Cafe Duberry.

09453 Harborside.

09455 PF Chang's

09478 Hong Kong 97

09509 Tony Roma's

09601 Oba. Fratelli.

09945 Acacia

10098 Old Country Buffet

10242 Viewpoint

10249 Azteca at Clackamas Town Center.

10519 La Tarras

10564 Lee's kitchen. Gubanc.

Q2A. What are the top restaurants you recommend when you have visitors?

- 10730 Pine Garden. Miller's Homestead.
- 11107 Pepper Tree Thai restaurant. La Provence.
- 11152 Country Restaurant
- 11311 Cassadero
- 11351 Boots and Spurs
- 11376 Howells
- 11409 Los Volcano
- 11524 Foamve Restaurant
- 11526 Melting Pot
- 11643 Seasons Inn
- 11731 Heidi's
- 11741 Deans in Damascus.
- 11876 Mike's Drive In.

Q4. And do you recall where you read or heard the information or advertisements?

00446 East County Gazette

01278 Sandy newspaper

01339 Willamette Week

01695 The Damascus paper.

02239 East County papers.

02590 East County Gazette

02922 East County Gazette. Portland Mercury.

02927 Northwest Gazette

03312 Molalla Pioneer

04205 Oregon City News.

04844 Mountain Times

05118 Mountain Town Newspaper

05216 East County Gazette and Sandy Post.

05777 West Linn Tidings

05833 Sandy Post

05901 Molalla Pioneer

05969 Mountain Times. Sandy Post.

06726 Sandy Post

06743 Clackamas County Review

06745 I saw it in the newspaper.

07894 Oregon City Community News. Clackamas Review.

07928 Sandy Profile. Mountain News, Mountain Gazette.

08767 Molalla Pioneer

08924 Clackamas Gazette

09751 East County Gazette

11731 The Observer

11876 In a newspaper, but nothing specific.