

# 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."

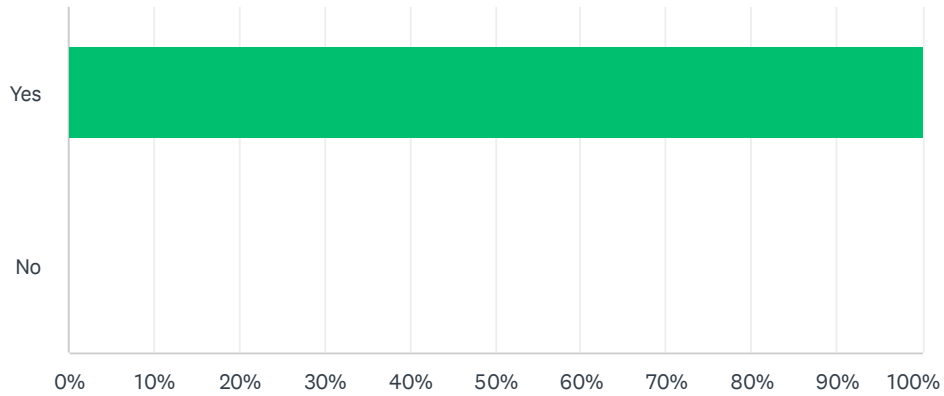
The 2023 Resident Sentiment Survey replicated questions from the 2019 baseline survey, as well as adding new topics and expanding demographic information collected to match tourism industry standards.

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 Urban" report includes 1,052 responses from Beaver Creek, Clackamas, Gladstone, Lake Oswego, Oregon City, West Linn, Milwaukie, Oak Grove, Happy Valley and Sherwood. Open-ended question responses as well as any personal identifying data have been omitted from this report.

## Q1 Are you 18+ years old?

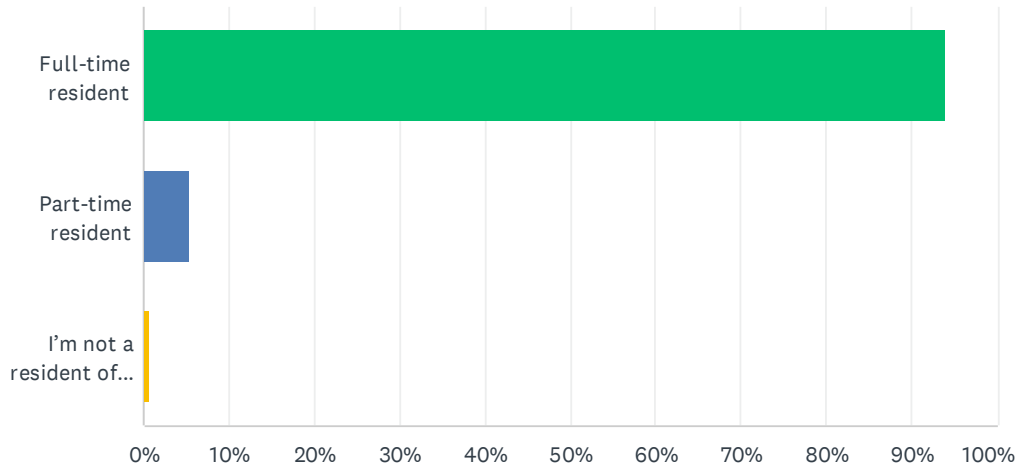
Answered: 1,052 Skipped: 0



ANSWER CHOICES	RESPONSES	
Yes	100.00%	1,052
No	0.00%	0
TOTAL		1,052

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

Answered: 1,052 Skipped: 0



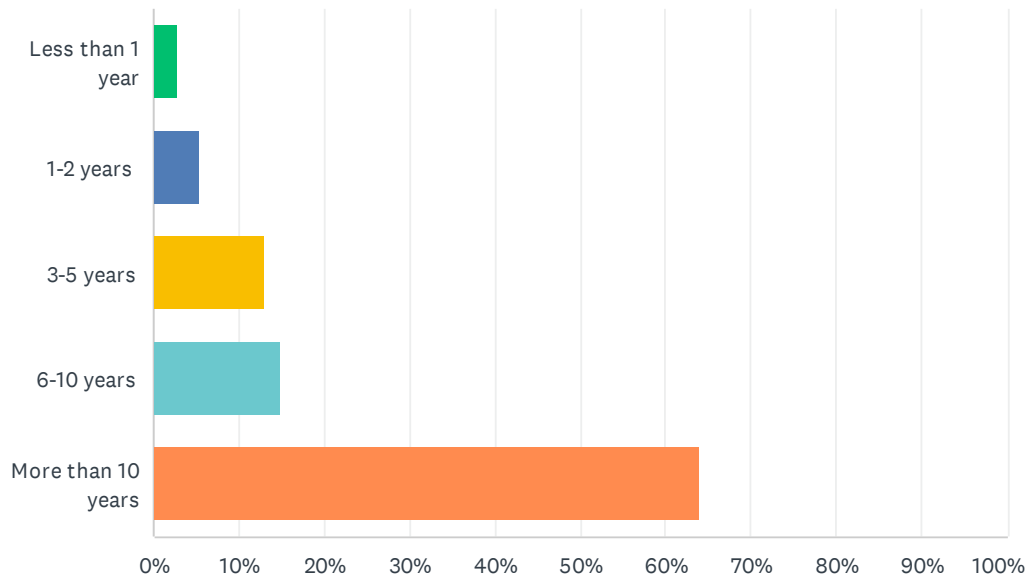
ANSWER CHOICES	RESPONSES	
Full-time resident	94.01%	989
Part-time resident	5.42%	57
I'm not a resident of Clackamas County	0.57%	6
<b>TOTAL</b>		<b>1,052</b>

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

Answered: 1,052 Skipped: 0

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

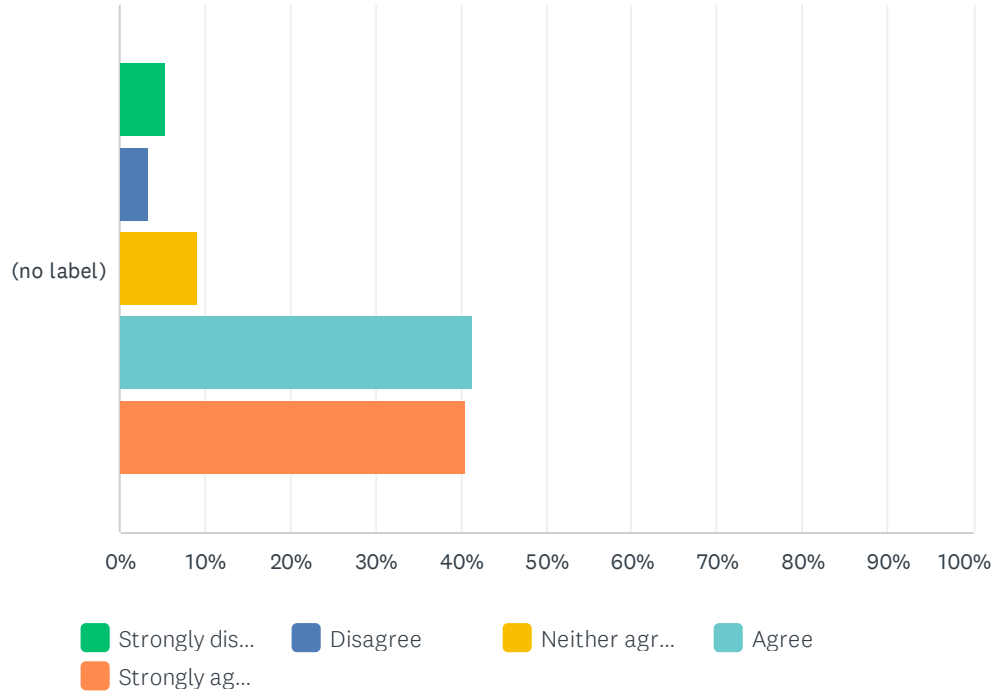
Answered: 1,052 Skipped: 0



ANSWER CHOICES	RESPONSES	
Less than 1 year	2.76%	29
1-2 years	5.42%	57
3-5 years	13.02%	137
6-10 years	14.83%	156
More than 10 years	63.97%	673
<b>TOTAL</b>		<b>1,052</b>

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

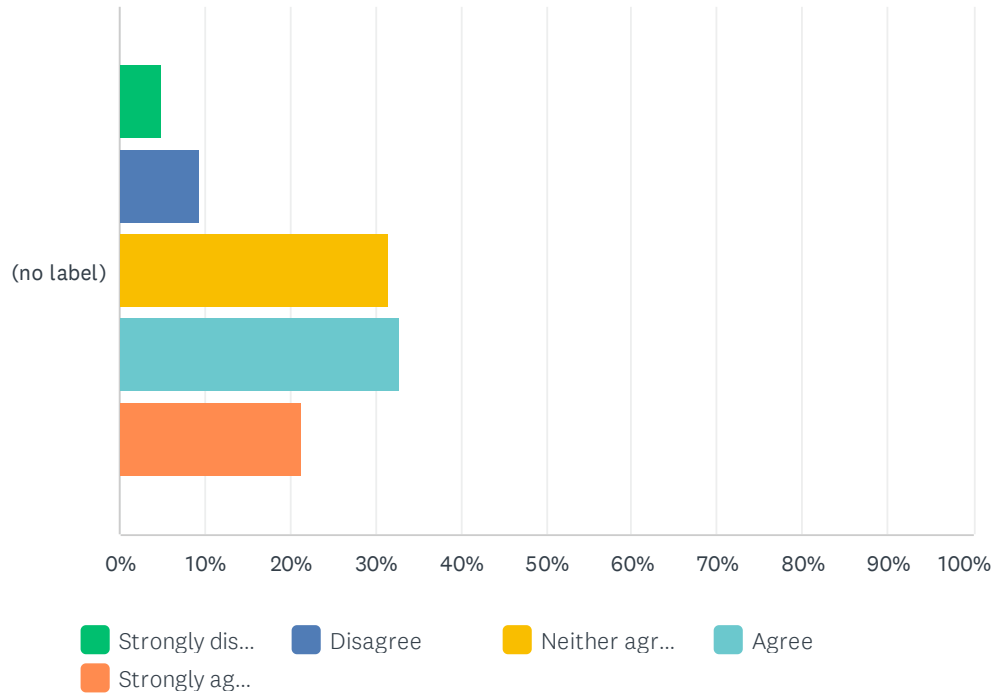
Answered: 965 Skipped: 87



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	5.39% 52	3.42% 33	9.22% 89	41.45% 400	40.52% 391	965	4.08

## Q6 There are benefits for myself from tourism within Clackamas County

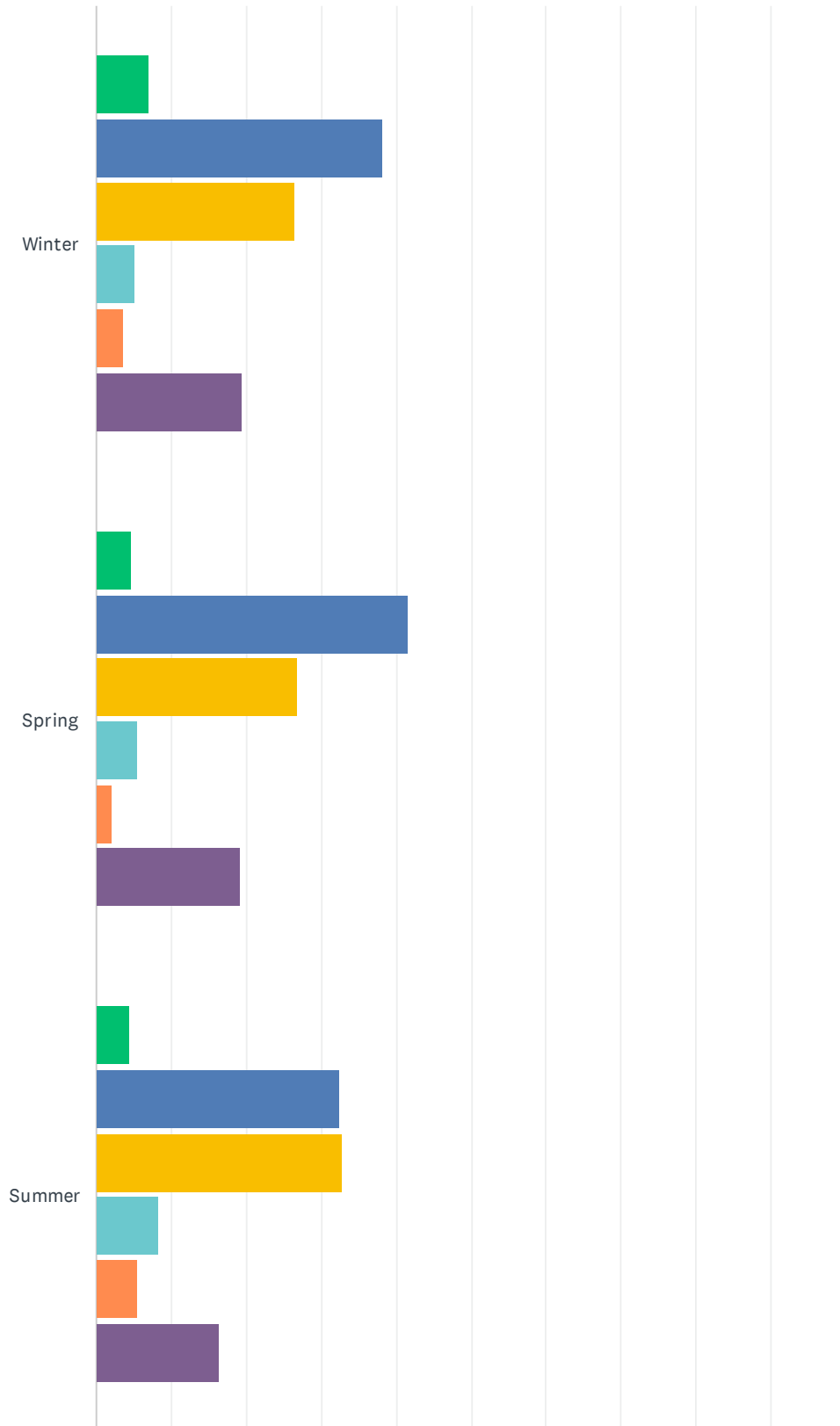
Answered: 963 Skipped: 89



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	4.98% 48	9.45% 91	31.46% 303	32.81% 316	21.29% 205	963	3.56

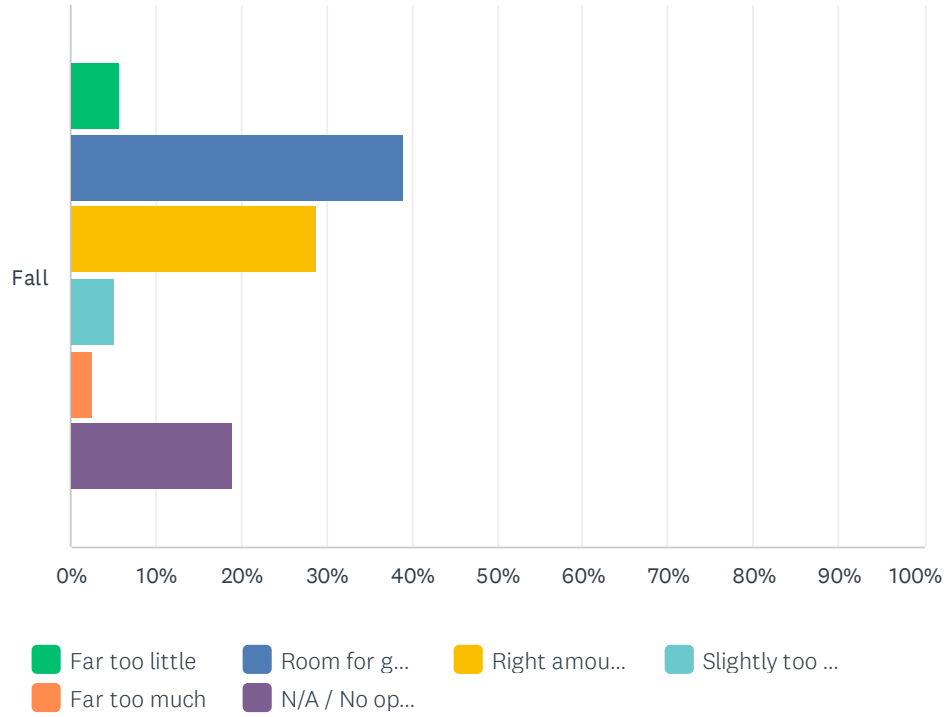
# Q7 Overall, how satisfied are you with the level of tourism activity in your community for each season?

Answered: 964 Skipped: 88





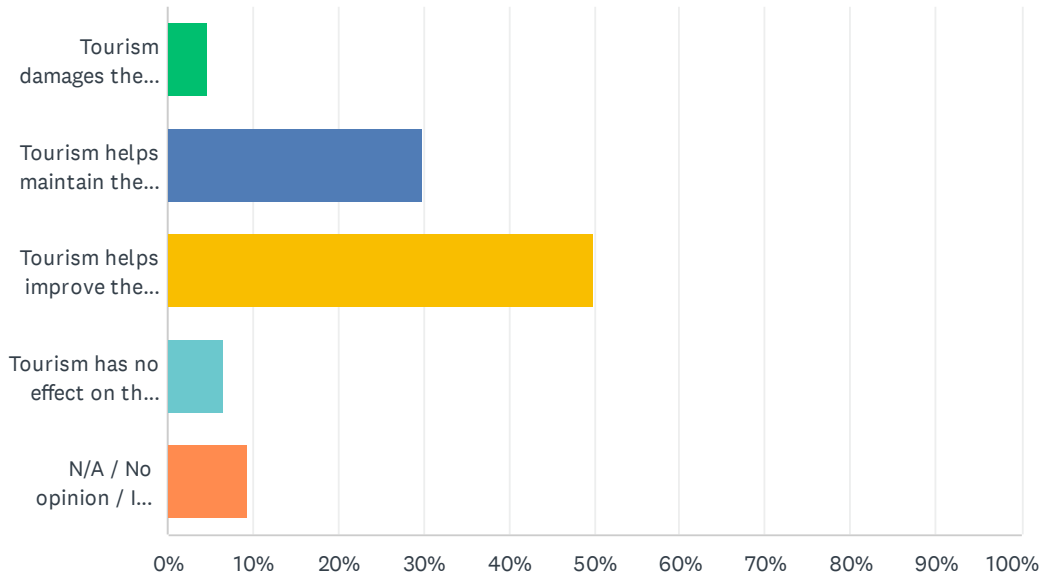
## Clackamas County Tourism: Resident Survey



	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	6.97% 67	38.19% 367	26.53% 255	5.20% 50	3.64% 35	19.46% 187	961	2.51
Spring	4.59% 44	41.65% 399	26.83% 257	5.64% 54	2.19% 21	19.10% 183	958	2.50
Summer	4.49% 43	32.50% 311	32.81% 314	8.25% 79	5.54% 53	16.41% 157	957	2.73
Fall	5.65% 54	39.06% 373	28.69% 274	5.13% 49	2.51% 24	18.95% 181	955	2.50

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

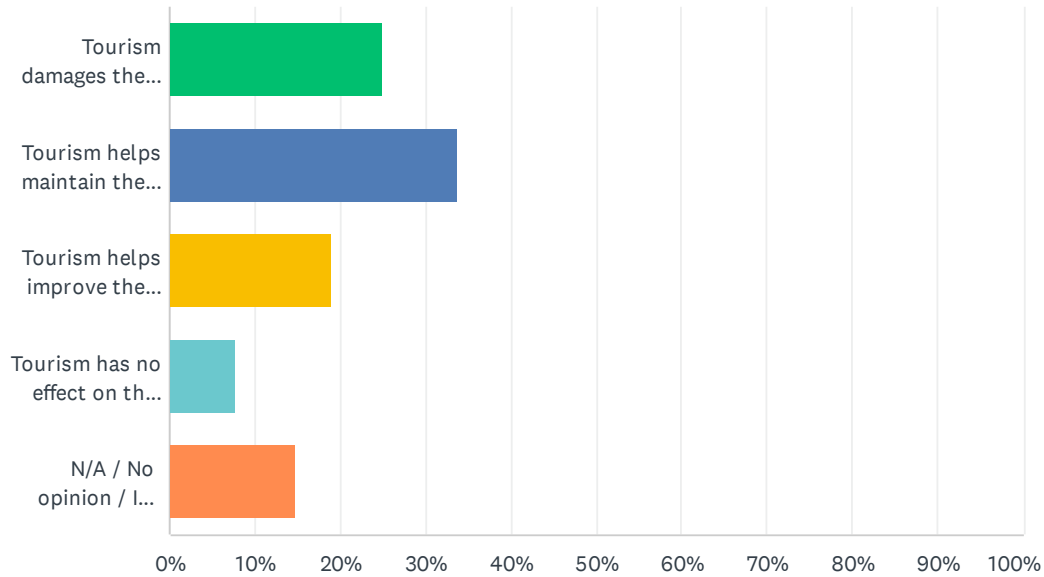
Answered: 958 Skipped: 94



ANSWER CHOICES	RESPONSES	
Tourism damages the county's culture and heritage	4.59%	44
Tourism helps maintain the county's culture and heritage	29.75%	285
Tourism helps improve the county's culture and heritage	49.79%	477
Tourism has no effect on the county's culture and heritage	6.58%	63
N/A / No opinion / I don't know	9.29%	89
<b>TOTAL</b>		<b>958</b>

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

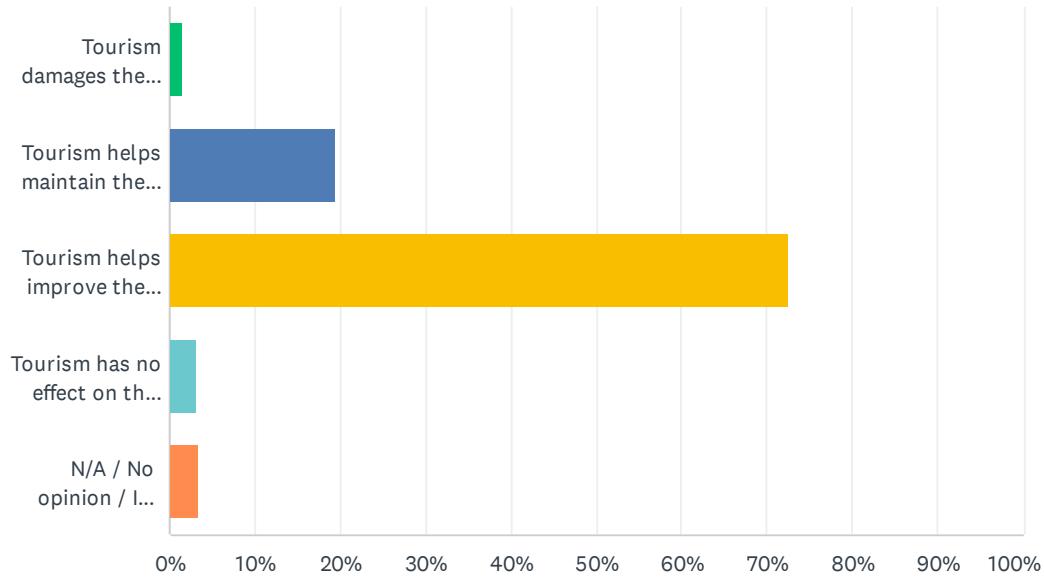
Answered: 959 Skipped: 93



ANSWER CHOICES	RESPONSES	
Tourism damages the county's natural environment	25.03%	240
Tourism helps maintain the county's natural environment	33.68%	323
Tourism helps improve the county's natural environment	18.98%	182
Tourism has no effect on the county's natural environment	7.61%	73
N/A / No opinion / I don't know	14.70%	141
<b>TOTAL</b>		<b>959</b>

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

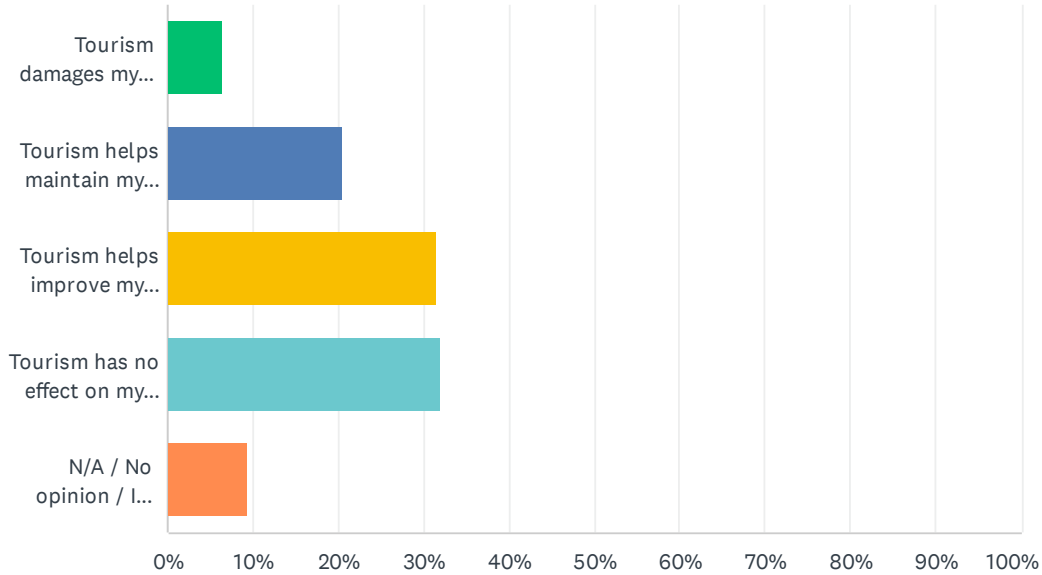
Answered: 962 Skipped: 90



ANSWER CHOICES	RESPONSES	
Tourism damages the county's economy	1.46%	14
Tourism helps maintain the county's economy	19.33%	186
Tourism helps improve the county's economy	72.56%	698
Tourism has no effect on the county's economy	3.22%	31
N/A / No opinion / I don't know	3.43%	33
<b>TOTAL</b>		<b>962</b>

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

Answered: 959 Skipped: 93



ANSWER CHOICES	RESPONSES	
Tourism damages my quality of life	6.47%	62
Tourism helps maintain my quality of life	20.54%	197
Tourism helps improve my quality of life	31.60%	303
Tourism has no effect on my quality of life	32.01%	307
N/A / No opinion / I don't know	9.38%	90
<b>TOTAL</b>		<b>959</b>

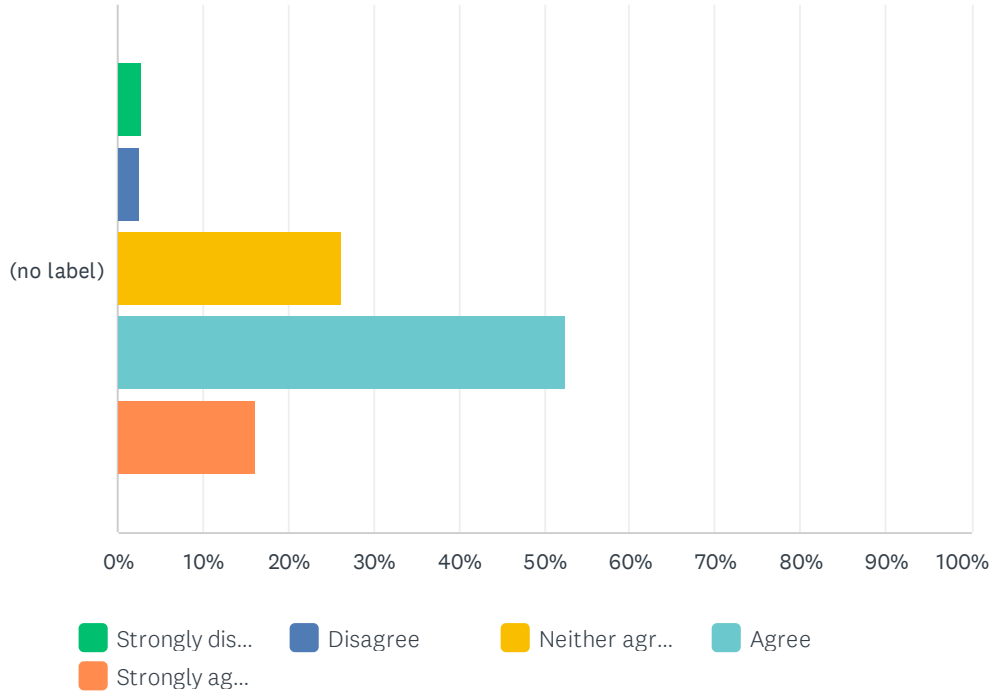
Q12 If you listed “damages” for any of the choices above, please explain why below.

Answered: 204 Skipped: 848



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

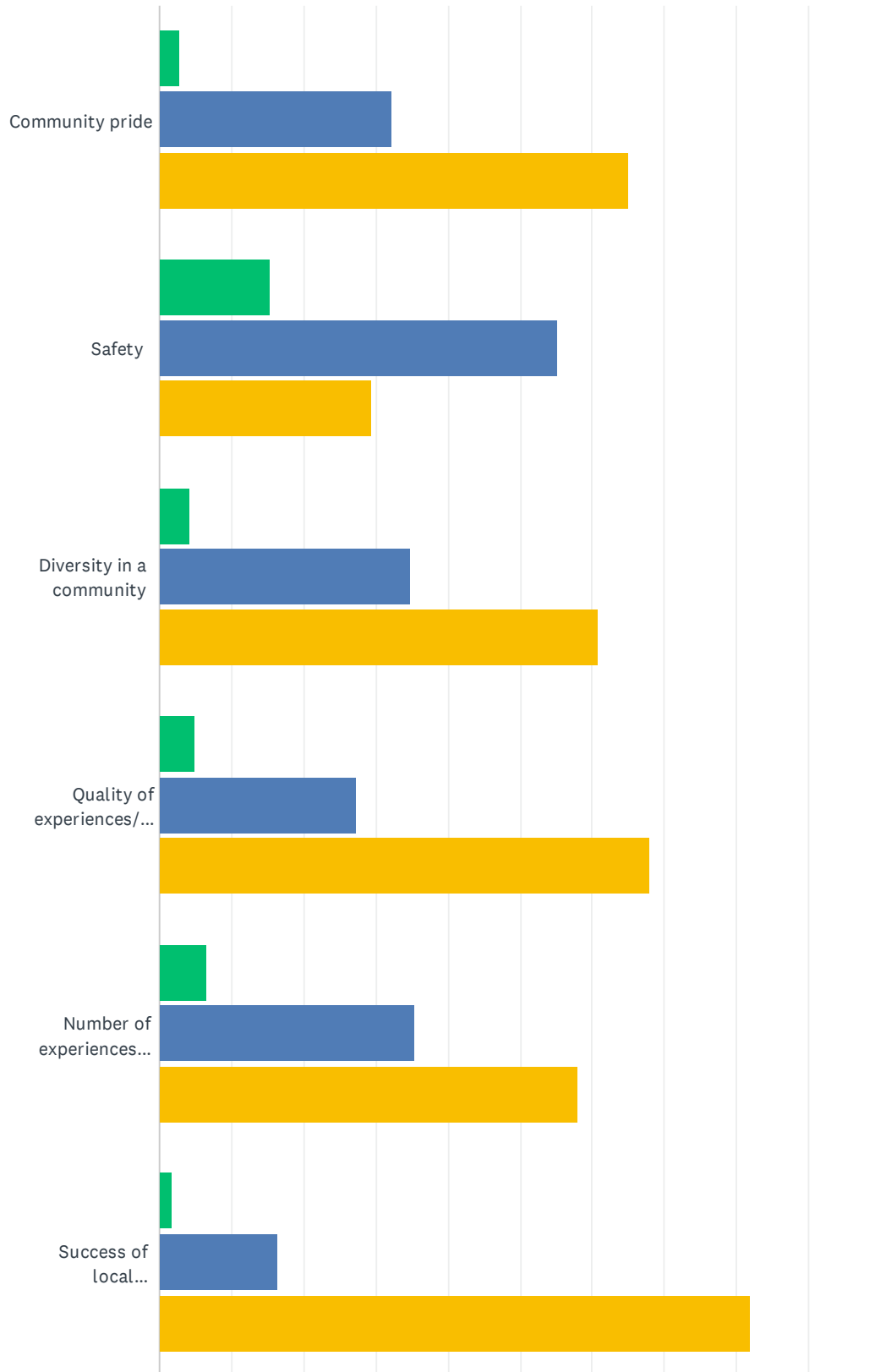
Answered: 887 Skipped: 165



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	2.71% 24	2.48% 22	26.27% 233	52.42% 465	16.12% 143	887	3.77

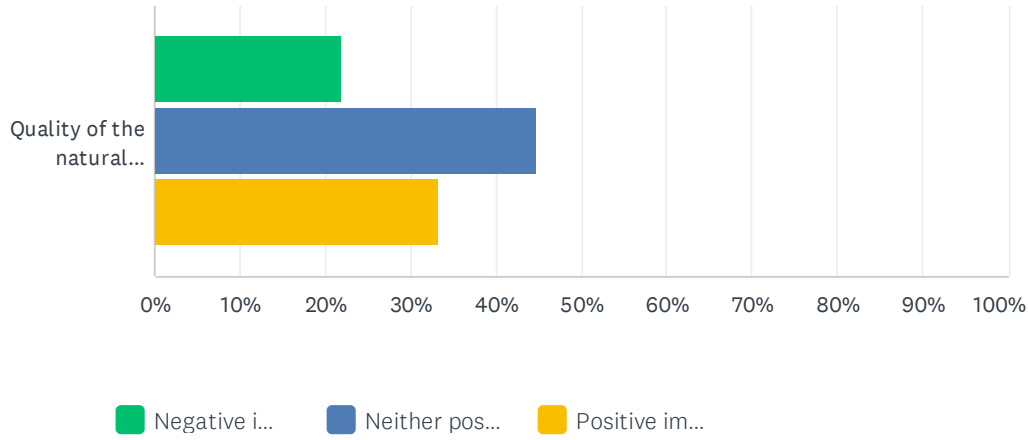
### Q14 In the chart below, please identify whether having visitors to your community positively or negatively impacts the listed aspects.

Answered: 895 Skipped: 157





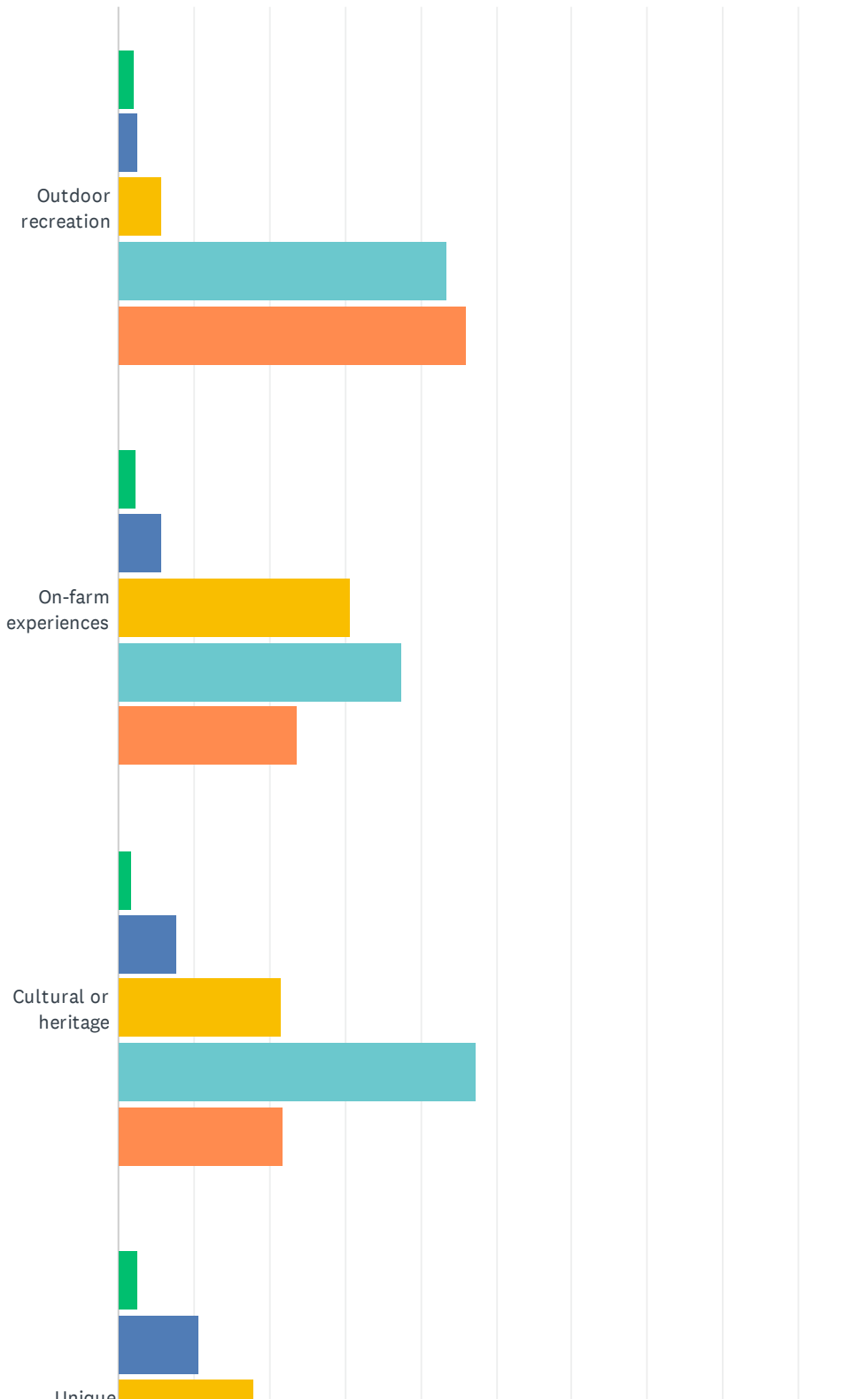
## Clackamas County Tourism: Resident Survey



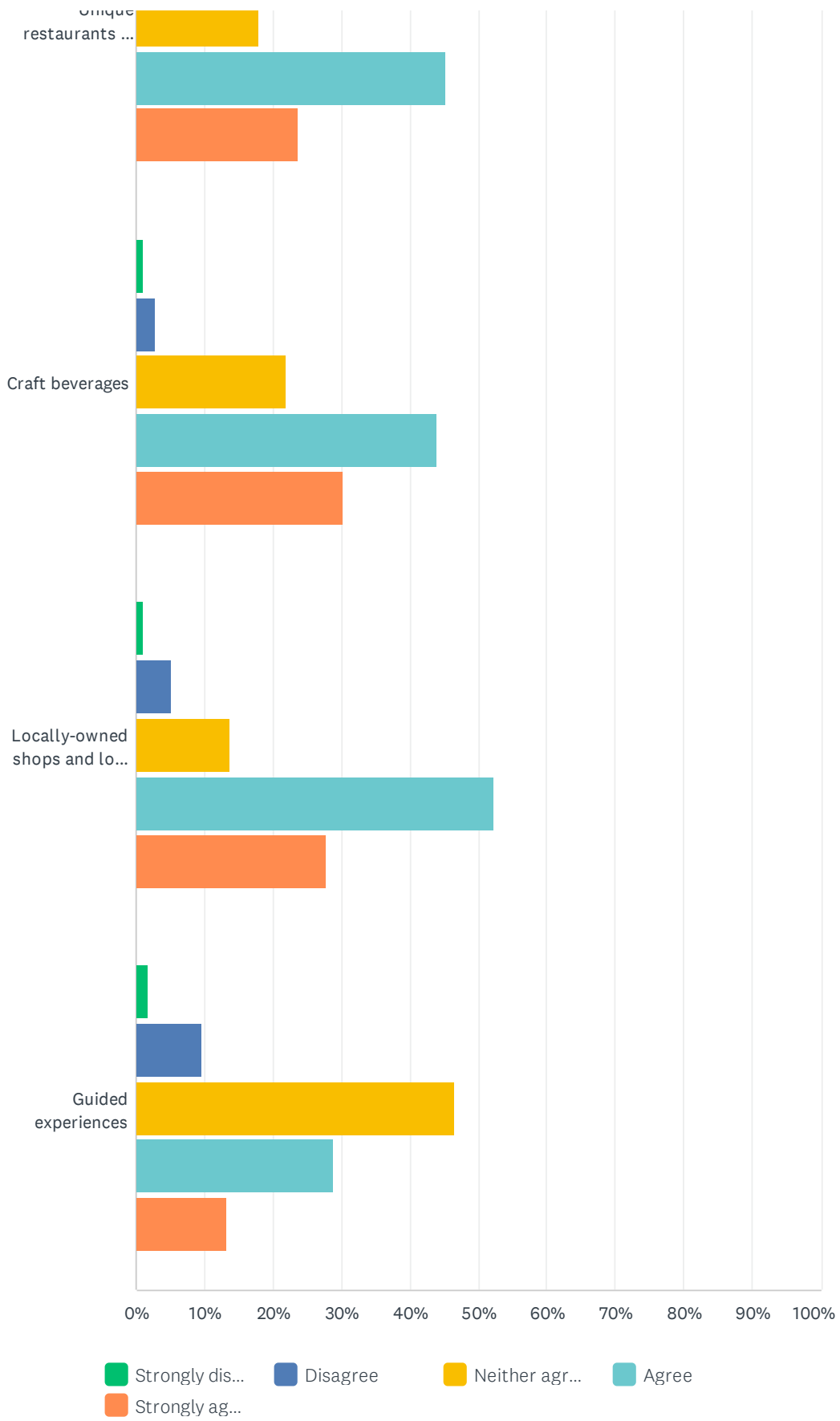
	NEGATIVE IMPACT	NEITHER POSITIVE NOR NEGATIVE	POSITIVE IMPACT	TOTAL	WEIGHTED AVERAGE
Community pride	2.69% 24	32.17% 287	65.13% 581	892	4.25
Safety	15.29% 135	55.27% 488	29.45% 260	883	3.28
Diversity in a community	4.30% 38	34.84% 308	60.86% 538	884	4.13
Quality of experiences/attractions	4.82% 43	27.21% 243	67.97% 607	893	4.26
Number of experiences available to me	6.51% 58	35.47% 316	58.02% 517	891	4.03
Success of local businesses	1.79% 16	16.37% 146	81.84% 730	892	4.60
Quality of the natural environment	21.93% 195	44.77% 398	33.30% 296	889	3.23

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

Answered: 893 Skipped: 159



# Clackamas County Tourism: Resident Survey



## Clackamas County Tourism: Resident Survey

	<b>STRONGLY DISAGREE</b>	<b>DISAGREE</b>	<b>NEITHER AGREE NOR DISAGREE</b>	<b>AGREE</b>	<b>STRONGLY AGREE</b>	<b>TOTAL</b>	<b>WEIGHTED AVERAGE</b>
Outdoor recreation	2.14% 19	2.59% 23	5.75% 51	43.52% 386	46.00% 408	887	4.29
On-farm experiences	2.24% 20	5.72% 51	30.75% 274	37.60% 335	23.68% 211	891	3.75
Cultural or heritage	1.79% 16	7.62% 68	21.52% 192	47.31% 422	21.75% 194	892	3.80
Unique restaurants or culinary experiences	2.58% 23	10.75% 96	17.81% 159	45.13% 403	23.74% 212	893	3.77
Craft beverages	1.12% 10	2.81% 25	21.91% 195	43.82% 390	30.34% 270	890	3.99
Locally-owned shops and local products	1.12% 10	5.16% 46	13.68% 122	52.24% 466	27.80% 248	892	4.00
Guided experiences	1.80% 16	9.56% 85	46.57% 414	28.80% 256	13.27% 118	889	3.42

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

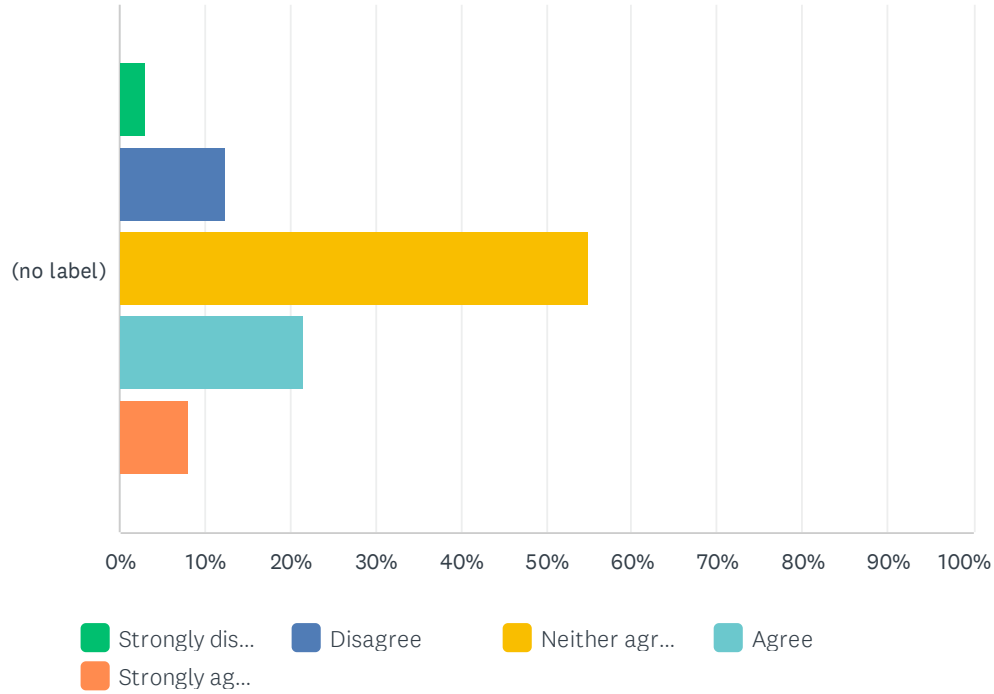
Answered: 165 Skipped: 887

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

Answered: 538 Skipped: 514

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

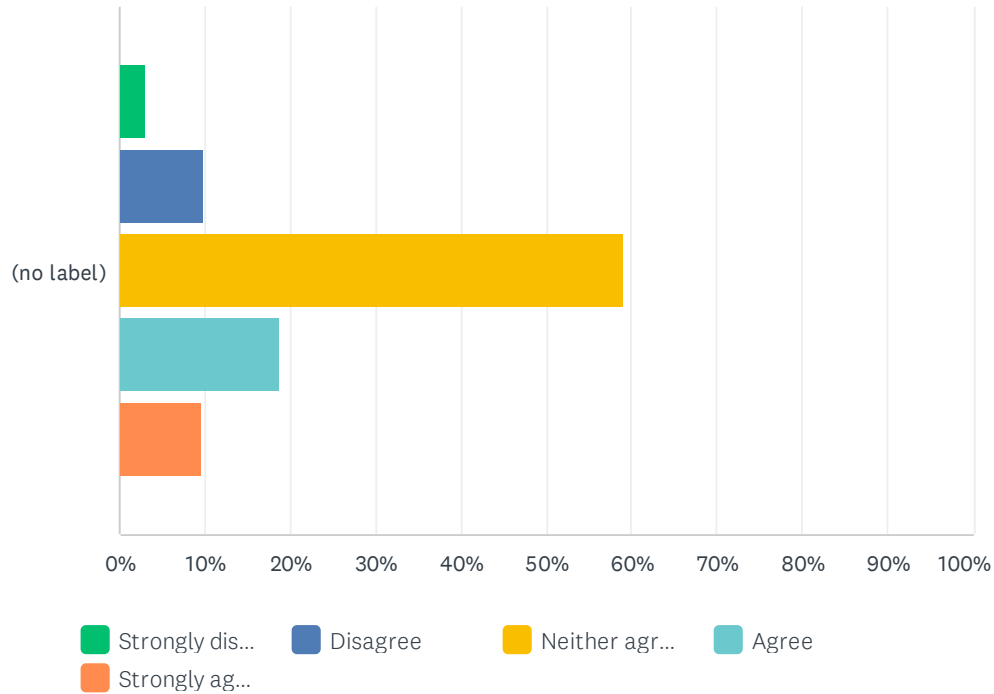
Answered: 852 Skipped: 200



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	2.93% 25	12.44% 106	55.05% 469	21.48% 183	8.10% 69	852	3.19

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

Answered: 853 Skipped: 199



	STRONGLY DISAGREE	DISAGREE	NEITHER AGREE NOR DISAGREE	AGREE	STRONGLY AGREE	TOTAL	WEIGHTED AVERAGE
(no label)	2.93% 25	9.85% 84	58.97% 503	18.76% 160	9.50% 81	853	3.22

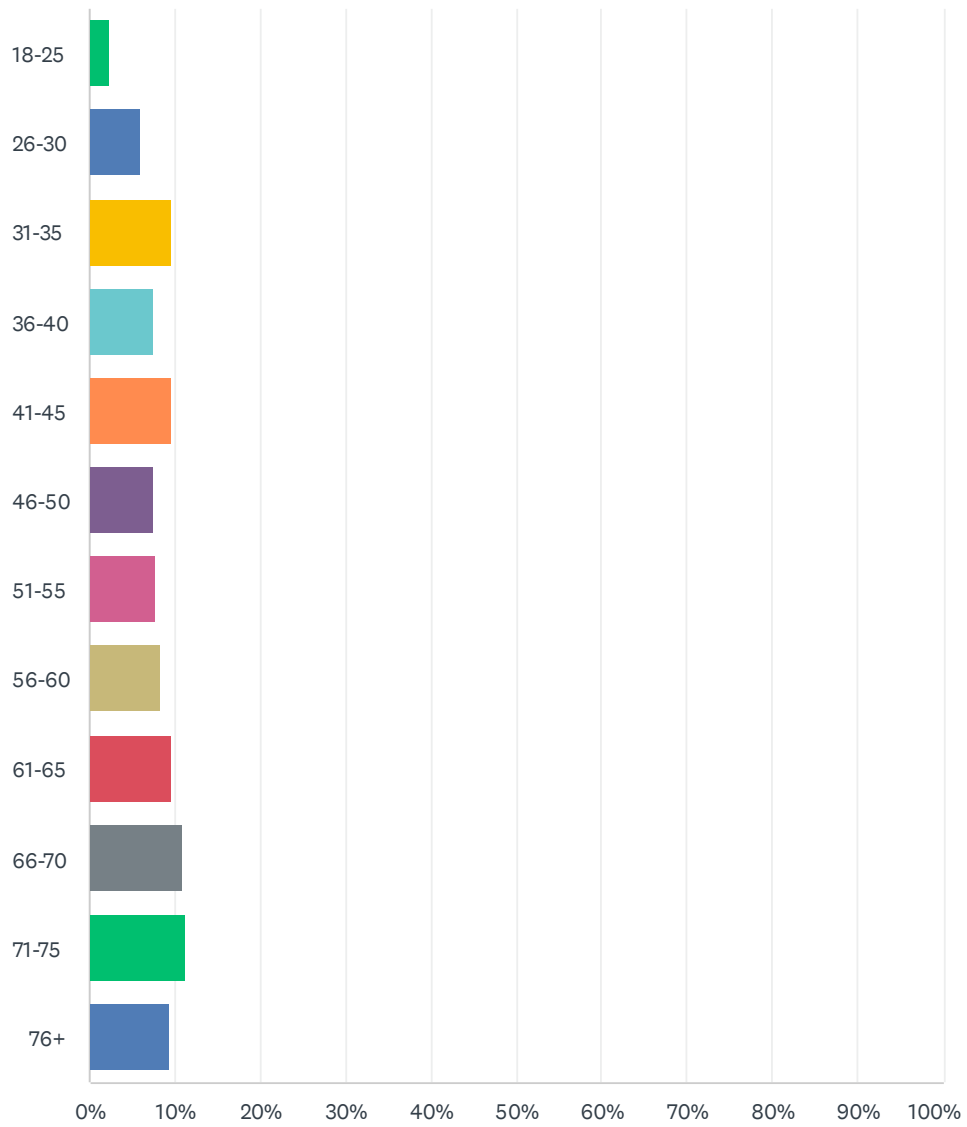


**Q20 Do you have any comments, questions, or concerns related to tourism in Clackamas County?**

Answered: 285 Skipped: 767

## Q21 What is your age?

Answered: 847 Skipped: 205

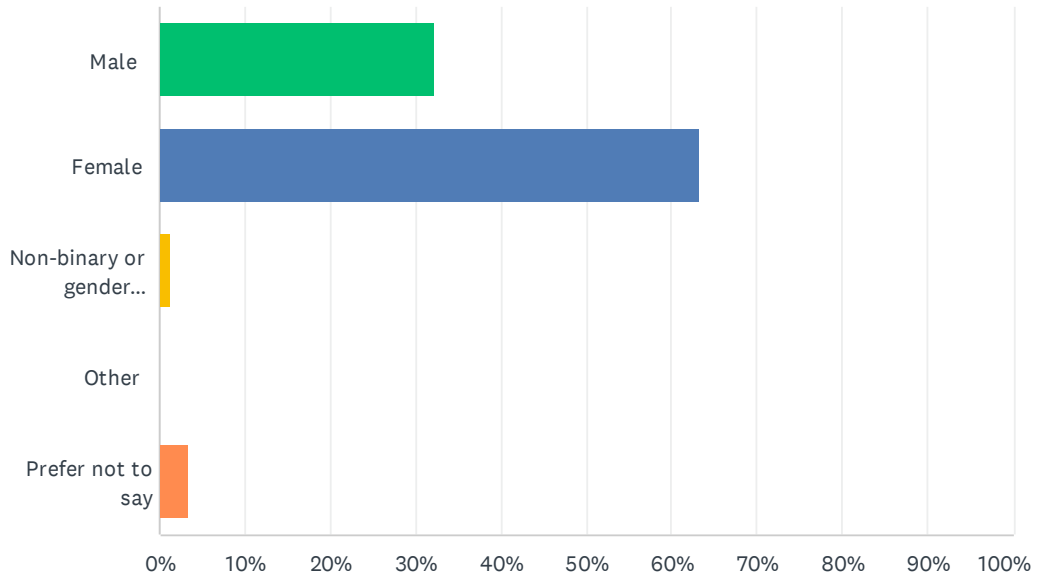


## Clackamas County Tourism: Resident Survey

ANSWER CHOICES	RESPONSES	
18-25	2.36%	20
26-30	6.02%	51
31-35	9.68%	82
36-40	7.56%	64
41-45	9.56%	81
46-50	7.56%	64
51-55	7.67%	65
56-60	8.38%	71
61-65	9.56%	81
66-70	10.86%	92
71-75	11.33%	96
76+	9.45%	80
<b>TOTAL</b>		<b>847</b>

## Q22 With what gender do you identify?

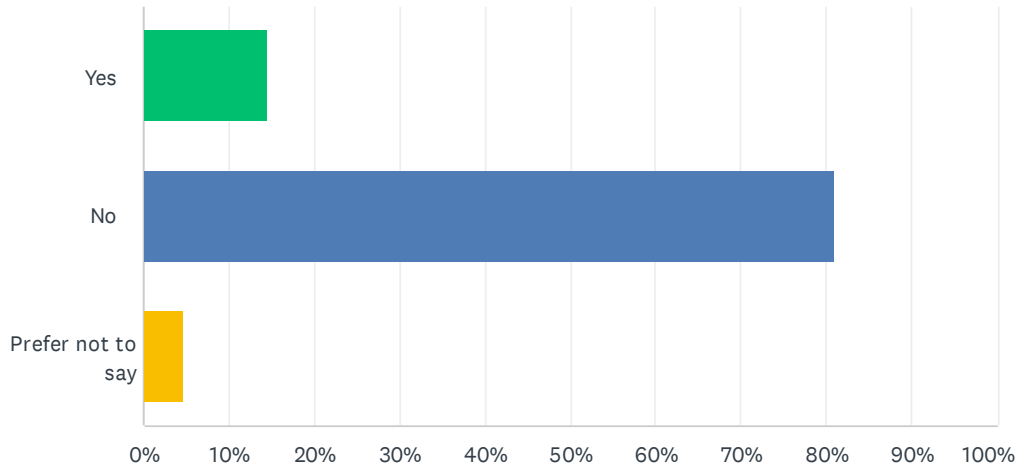
Answered: 846 Skipped: 206



ANSWER CHOICES	RESPONSES	
Male	32.15%	272
Female	63.24%	535
Non-binary or gender non-conforming	1.30%	11
Other	0.00%	0
Prefer not to say	3.31%	28
<b>TOTAL</b>		<b>846</b>

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

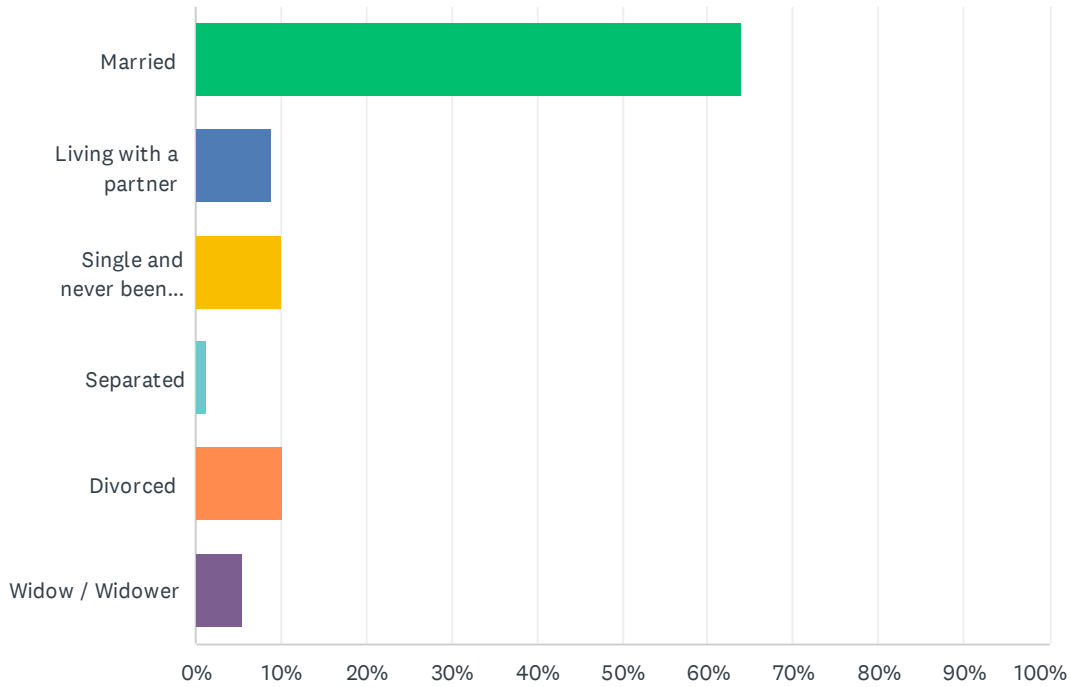
Answered: 845 Skipped: 207



ANSWER CHOICES	RESPONSES	
Yes	14.44%	122
No	80.95%	684
Prefer not to say	4.62%	39
<b>TOTAL</b>		<b>845</b>

## Q24 What is your marital status?

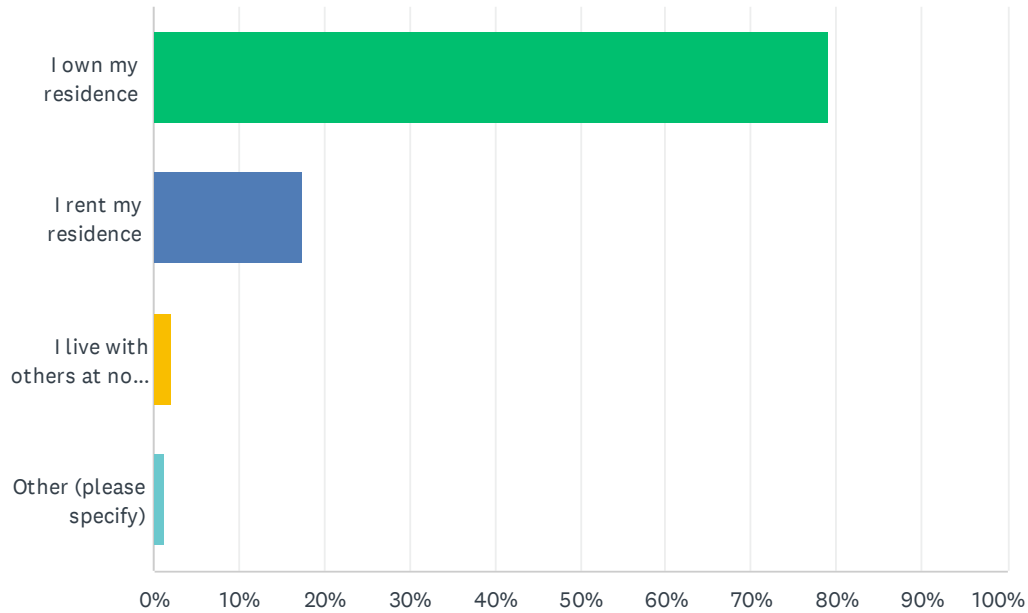
Answered: 832 Skipped: 220



ANSWER CHOICES	RESPONSES	
Married	64.06%	533
Living with a partner	8.89%	74
Single and never been married	9.98%	83
Separated	1.20%	10
Divorced	10.22%	85
Widow / Widower	5.65%	47
<b>TOTAL</b>		<b>832</b>

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

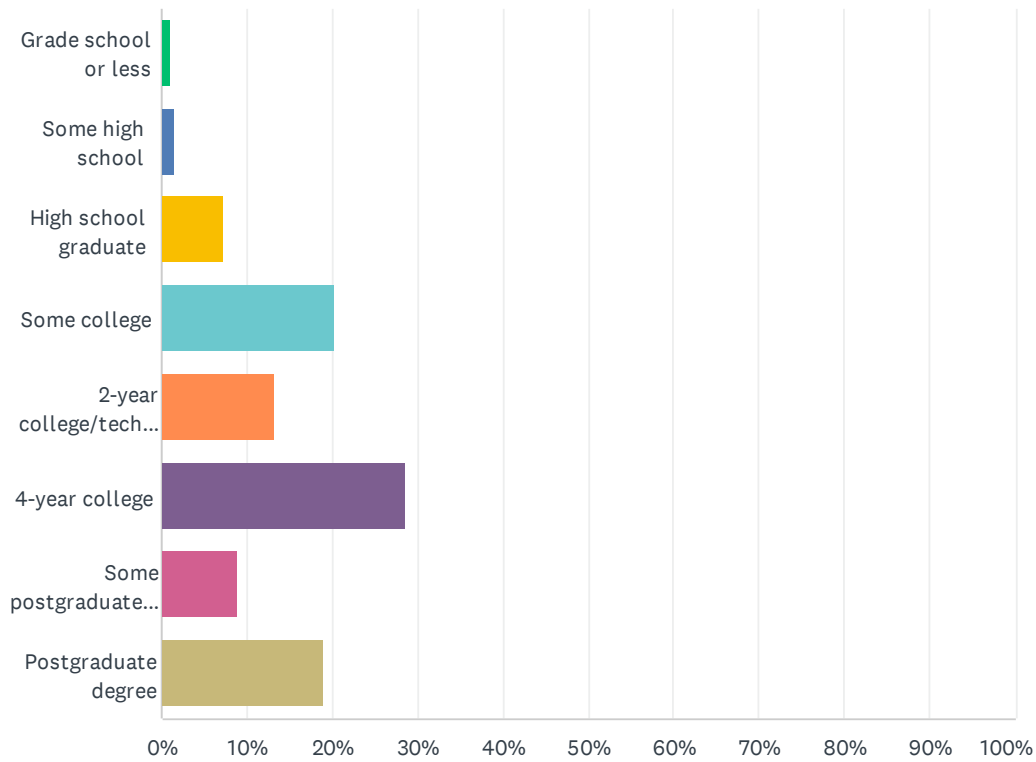
Answered: 819 Skipped: 233



ANSWER CHOICES	RESPONSES	
I own my residence	79.12%	648
I rent my residence	17.46%	143
I live with others at no cost	2.08%	17
Other (please specify)	1.34%	11
<b>TOTAL</b>		<b>819</b>

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

Answered: 827 Skipped: 225

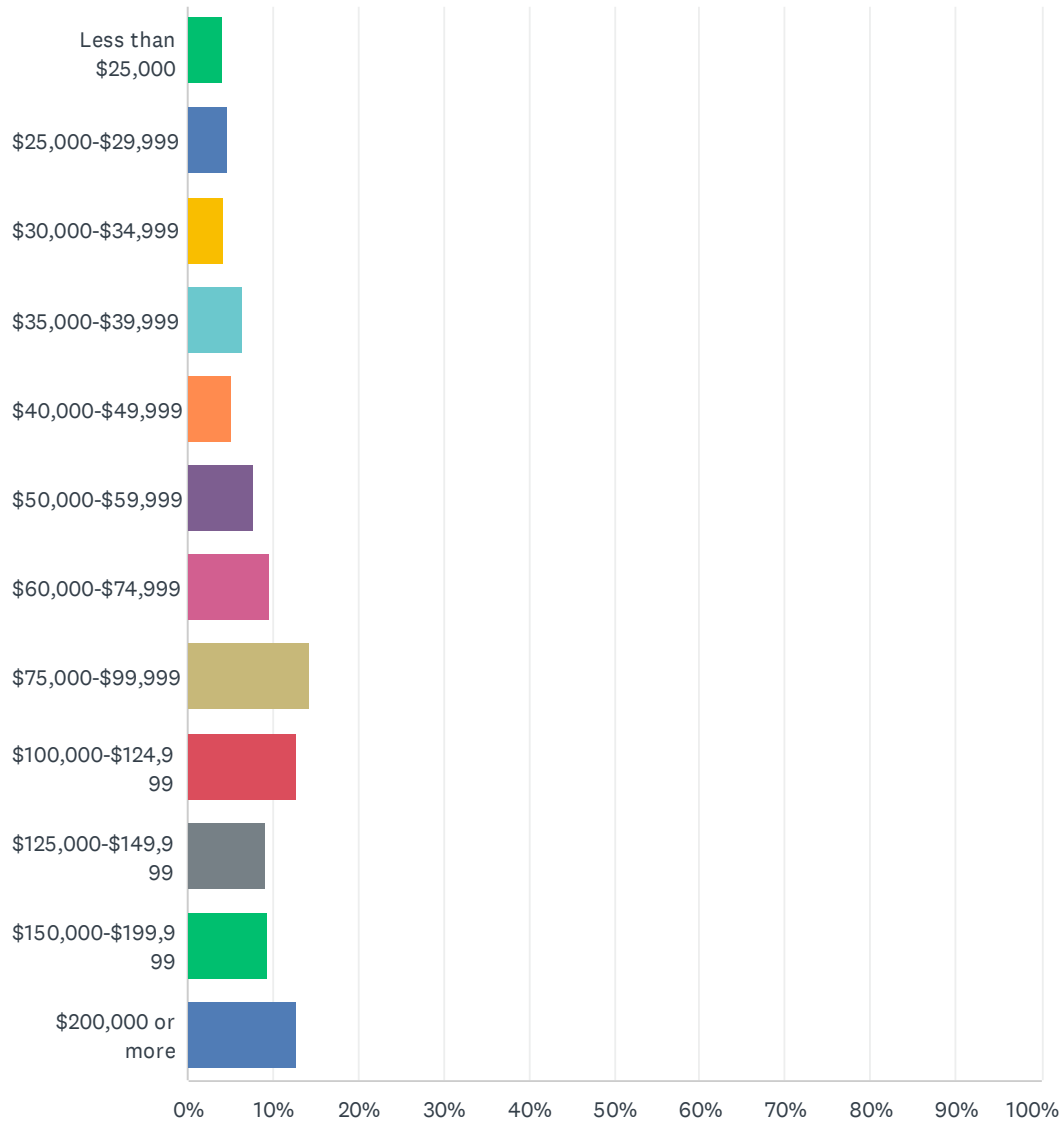


ANSWER CHOICES	RESPONSES	
Grade school or less	1.09%	9
Some high school	1.45%	12
High school graduate	7.26%	60
Some college	20.31%	168
2-year college/technical school	13.30%	110
4-year college	28.66%	237
Some postgraduate work	8.95%	74
Postgraduate degree	18.98%	157
<b>TOTAL</b>		<b>827</b>



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

Answered: 760 Skipped: 292

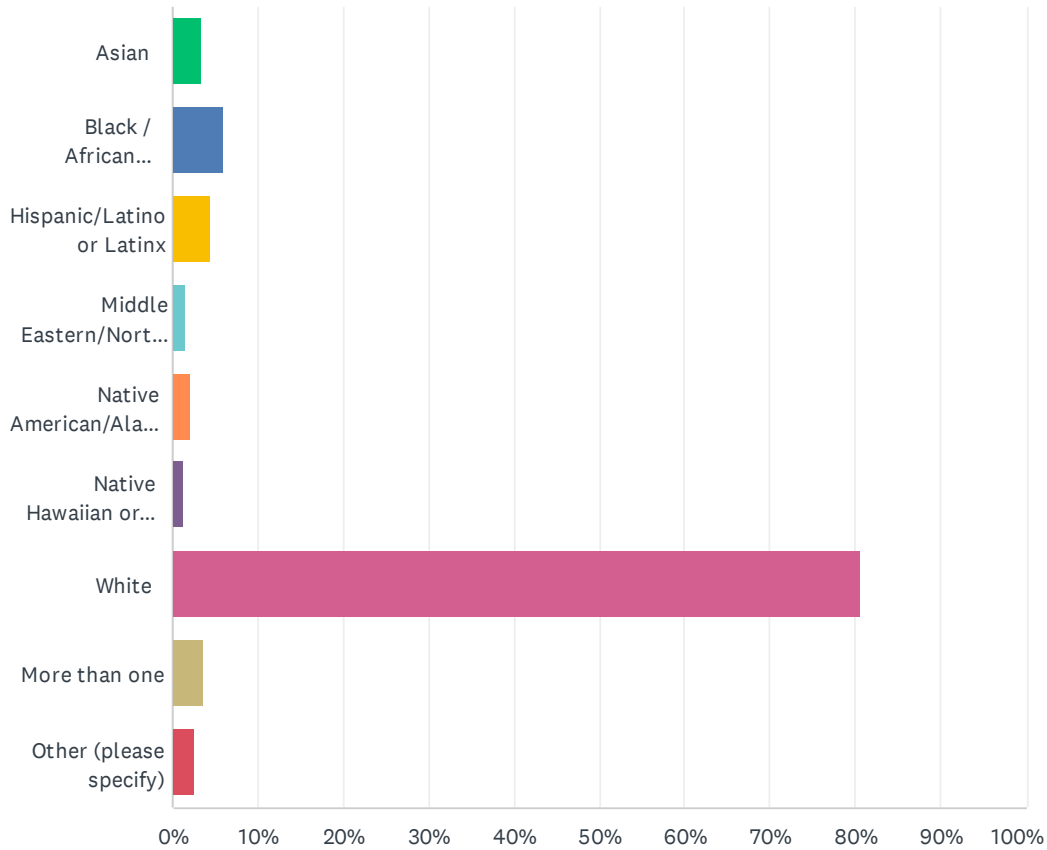


## Clackamas County Tourism: Resident Survey

ANSWER CHOICES	RESPONSES	
Less than \$25,000	3.95%	30
\$25,000-\$29,999	4.61%	35
\$30,000-\$34,999	4.21%	32
\$35,000-\$39,999	6.32%	48
\$40,000-\$49,999	5.13%	39
\$50,000-\$59,999	7.76%	59
\$60,000-\$74,999	9.61%	73
\$75,000-\$99,999	14.34%	109
\$100,000-\$124,999	12.76%	97
\$125,000-\$149,999	9.08%	69
\$150,000-\$199,999	9.34%	71
\$200,000 or more	12.89%	98
<b>TOTAL</b>		<b>760</b>

## Q28 Please select your race/ethnicity.

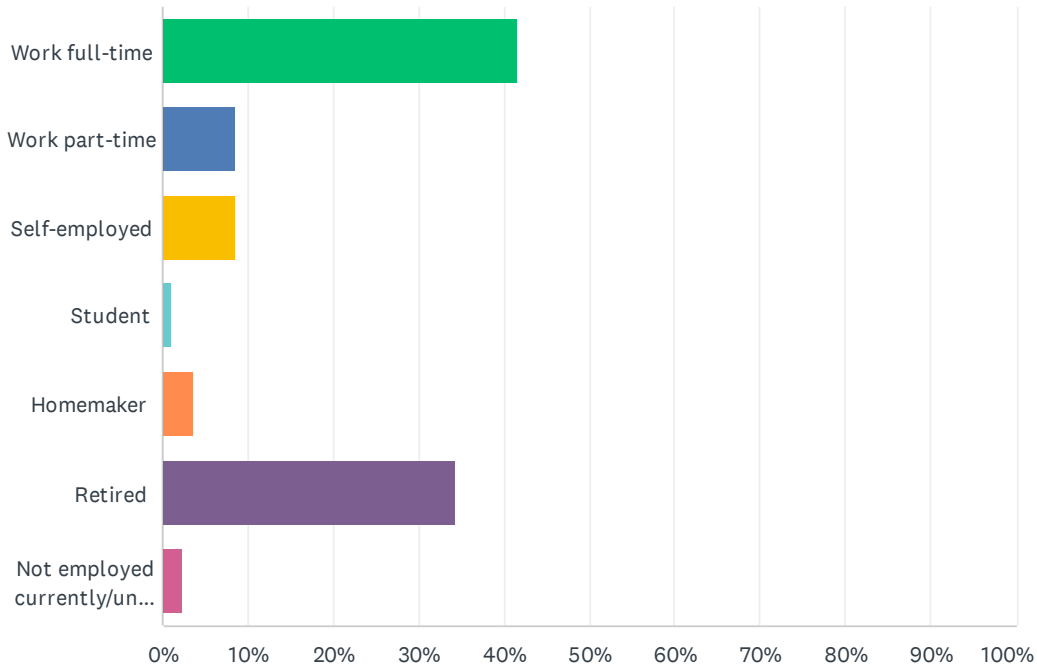
Answered: 811 Skipped: 241



ANSWER CHOICES	RESPONSES	
Asian	3.33%	27
Black / African American	5.92%	48
Hispanic/Latino or Latinx	4.56%	37
Middle Eastern/Northern African	1.48%	12
Native American/Alaskan Native	2.10%	17
Native Hawaiian or Pacific Islander	1.36%	11
White	80.64%	654
More than one	3.58%	29
Other (please specify)	2.59%	21
Total Respondents: 811		

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

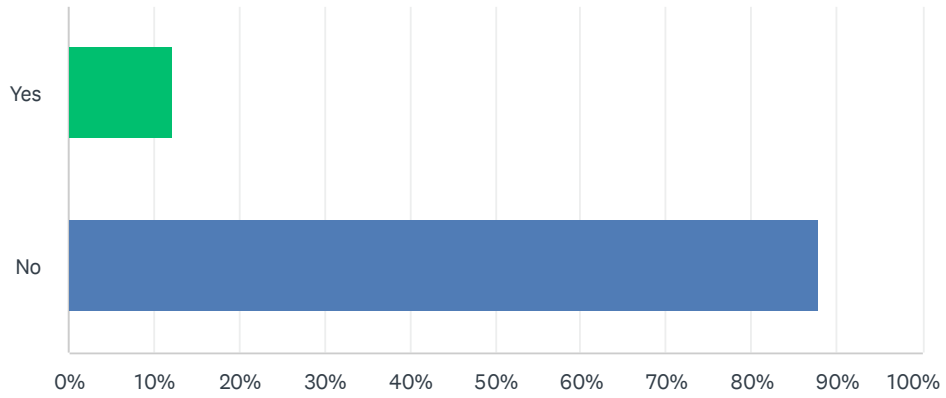
Answered: 821 Skipped: 231



ANSWER CHOICES	RESPONSES	
Work full-time	41.66%	342
Work part-time	8.53%	70
Self-employed	8.53%	70
Student	0.97%	8
Homemaker	3.65%	30
Retired	34.23%	281
Not employed currently/unable to work	2.44%	20
<b>TOTAL</b>		<b>821</b>

### Q30 Do you work in the tourism industry?

Answered: 856 Skipped: 196

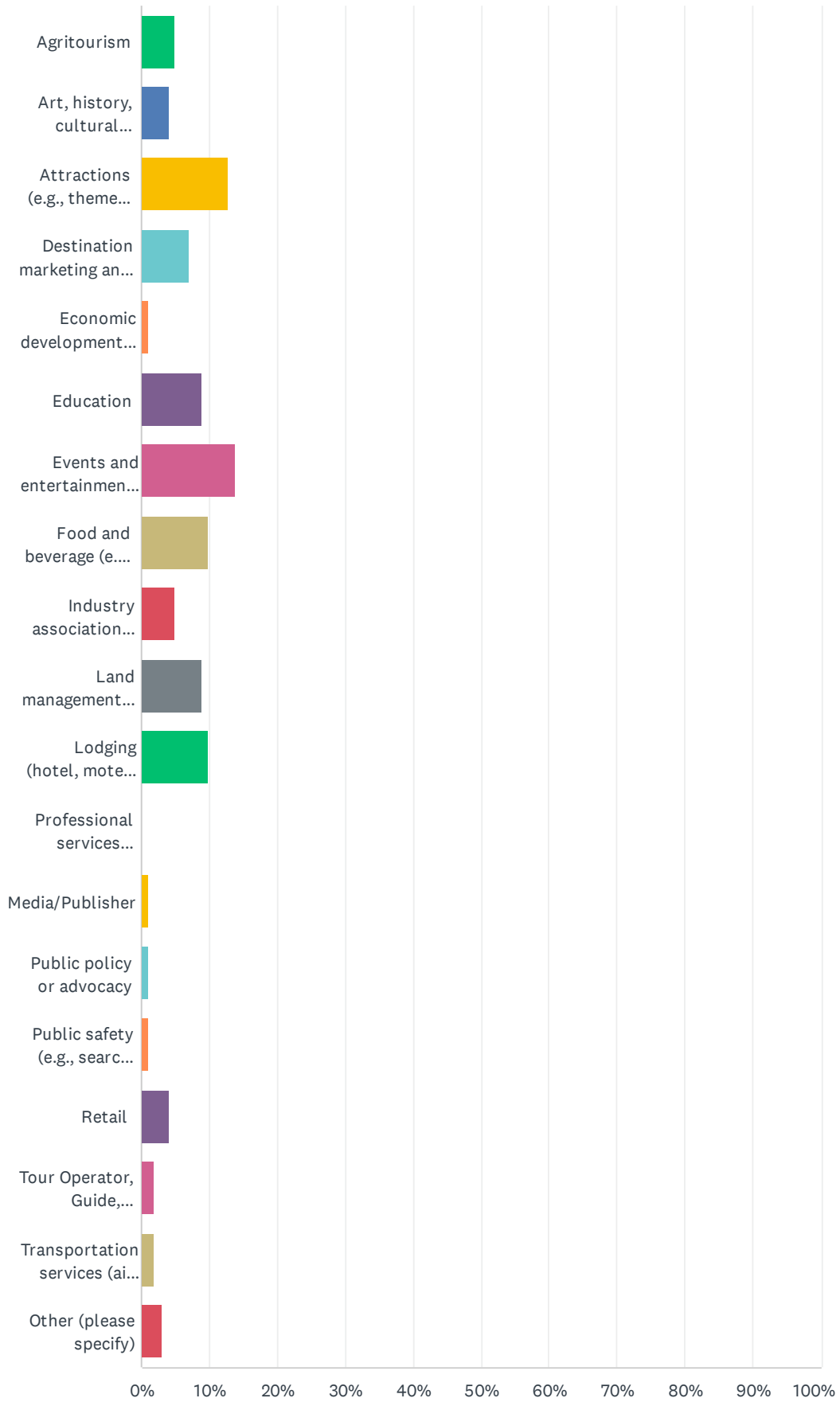


ANSWER CHOICES	RESPONSES	
Yes	12.15%	104
No	87.85%	752
TOTAL		856

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

Answered: 101 Skipped: 951

# Clackamas County Tourism: Resident Survey



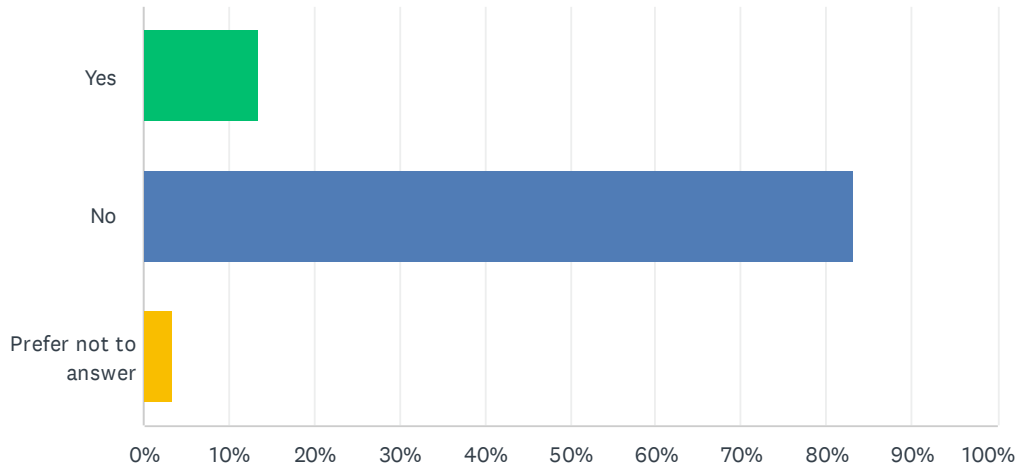
## Clackamas County Tourism: Resident Survey

ANSWER CHOICES	RESPONSES	
Agritourism	4.95%	5
Art, history, cultural heritage	3.96%	4
Attractions (e.g., theme park, golf course, casino, ski resort)	12.87%	13
Destination marketing and management (e.g., Travel Portland, chamber of commerce, visitor center)	6.93%	7
Economic development agency	0.99%	1
Education	8.91%	9
Events and entertainment (e.g., sports, concerts, performing arts)	13.86%	14
Food and beverage (e.g., restaurant, bar, wineries, breweries, food cart)	9.90%	10
Industry association (e.g., Oregon Restaurant & Lodging Association)	4.95%	5
Land management (maintaining or managing parks and open spaces, trails, or other outdoor recreation amenities)	8.91%	9
Lodging (hotel, motel, vacation rentals, campground, real estate)	9.90%	10
Professional services (marketing services, creative agency, website development)	0.00%	0
Media/Publisher	0.99%	1
Public policy or advocacy	0.99%	1
Public safety (e.g., search and rescue)	0.99%	1
Retail	3.96%	4
Tour Operator, Guide, Outfitter	1.98%	2
Transportation services (air, ground, water transport)	1.98%	2
Other (please specify)	2.97%	3
<b>TOTAL</b>		<b>101</b>



## Q32 Do you have a disability?

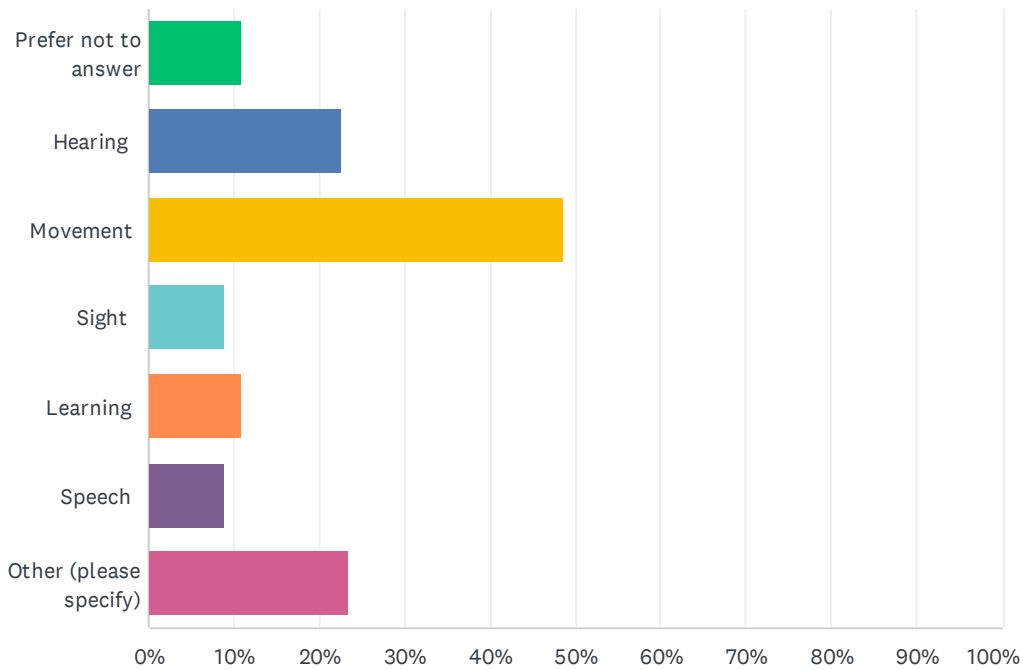
Answered: 855 Skipped: 197



ANSWER CHOICES	RESPONSES	
Yes	13.33%	114
No	83.16%	711
Prefer not to answer	3.51%	30
<b>TOTAL</b>		<b>855</b>

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

Answered: 111 Skipped: 941



ANSWER CHOICES	RESPONSES	
Prefer not to answer	10.81%	12
Hearing	22.52%	25
Movement	48.65%	54
Sight	9.01%	10
Learning	10.81%	12
Speech	9.01%	10
Other (please specify)	23.42%	26
Total Respondents: 111		