



## **DCG RESEARCH**

*A service of the Dennett Consulting Group*

# **VISIT TILLAMOOK COAST BRAND AWARENESS AND PERCEPTION STUDY**

## **FOLLOW UP BENCHMARK STUDY #3**

**PREPARED FOR THE  
TILLAMOOK COUNTY ECONOMIC DEVELOPMENT COUNCIL (EDC)  
AND VISIT TILLAMOOK COAST (VTC)**



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## **REPORT**

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# VISIT TILLAMOOK COAST BRAND AWARENESS AND PERCEPTION STUDY

## FOLLOW UP BENCHMARK STUDY #3

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## I. INTRODUCTION

In September 2014, the Tillamook County Economic Development Council (EDC) on behalf of the Tourism Advisory Committee (TAC), retained the Dennett Consulting Group (DCG Research) to conduct a pre-campaign brand awareness and perception study prior to the launch of a new Visit Tillamook Coast marketing effort.

- Two years later (2016), DCG prepared a follow up study to help evaluate the success of the initial marketing effort in increasing brand awareness and recognition of key visitor attributes.
- Four years later (2018), a third study was conducted in September to update all data. This report compares the current study to previous studies.

### Benchmark Research Objectives:

1. Identify brand awareness and image perceptions in September 2018 vs. September 2014 with potential visitors living in three Metropolitan Statistical Area (MSA) markets: Seattle, Portland and Eugene (a 2018 study population of 6,694,962).
2. Gauge 2018 brand awareness vs. previous studies of key assets outlined in Tillamook's brand strategy.
3. Measure changes to brand awareness compared to the initial 2014 study. As stated in the initial 2014 EDC/TAC Marketing Plan, combining a pre- and post-study with Dean Runyan's Economic Impact Report for the County will help provide a benchmark for success.

## II. RESEARCH METHOD

Under the direction of Dr. Nicholas Lougee, DCG Research conducted a quantitative study using an online panel of residents living in three Metropolitan Statistical Areas (MSAs):

**Seattle MSA – 3,867,046**

**Portland MSA – 2,453,168**

**Eugene MSA – 374,748**

These three visitor markets were selected based on 2011 data from Travel Oregon (Longwood International's Regional Research Report) because they were the top three markets for trips to Tillamook County. Based on a study population of 6,694,962, a goal of collecting a minimum of 1,064 surveys was established for the 2018 study, providing a margin of error of +/-3% with a 95% confidence interval (similar to the first two studies).

**DATA COLLECTION** – Like previous studies, DCG Research used an online consumer panel from Research Now/SSI, a leader in permission-based data collection. DCG continued to select a random sample from their Travel Panel:

- Adults, 18+, living in designated MSAs
- Men and women, equal amounts, no income requirement
- Residents known to have an interest in travel

Research Now/SSI Max Universe Numbers Excluding 2014 and 2016 Participants	
Survey Markets	Plan Projection at 80% IR
Eugene-Springfield OR - 2400	1,018
Portland-Salem OR - 6442	8,944
Seattle-Tacoma-Bremerton WA - 7602	12,948

**RESEARCH INSTRUMENT:** Working with Nan Devlin, Director of Tourism for Visit Tillamook Coast, DCG Research updated the research instrument used in the two previous studies. Every effort was made to duplicate the instrument, with selective changes reflecting the current 2018 marketplace. The final 2018 survey was created to:

- Evaluate four key awareness attributes: Brand recall, brand recognition, brand attributes, and perception of brand quality and loyalty as of September 2018 vs September 2014.
- Continue to track basic demographics (gender, marriage status, age, income, travel habits) to ensure that the 2018 post-study is similar to 2014 demographics.

**STUDY MARGIN OF ERROR** - A total of 1,085 surveys were completed producing a +/-3% margin of error with a 95% confidence interval.

## FINAL RESEARCH NOW - PARTICIPANT SAMPLE

STUDY DEMOGRAPHICS	2018 STUDY (1,085) PERCENT	2016 STUDY (1,129) PERCENT	2014 STUDY (1,088) PERCENT
<b>GENDER</b>			
Male	48%	47%	46%
Female	52%	53%	54%
<b>MARITAL STATUS</b>			
Single	30%	33%	30%
Married	65%	60%	64%
Domestic Partners	5%	7%	6%
<b>AGE</b>			
Millennials (Under 35)	24%	31%	24%
Generation X (36-49)	28%	28%	25%
Baby Boomers (50-68)	32%	32%	39%
Mature/Older (Over 68)	16%	9%	12%
<b>INCOME</b>			
Under \$25,000	7%	8%	8%
\$25,000 to \$49,999	14%	17%	18%
\$50,000 to \$100,000	44%	42%	37%
Over \$100,000	36%	33%	31%
<b>TRAVEL HABIT (PAST 12 MONTHS)</b>			
Taken domestic vacation	91%	91%	85%
Have not taken a domestic vacation	9%	9%	12%
No reply	0%	0%	3%

### DEMOGRAPHIC NOTES:

- Although selected from the same Research Now City Travel Panels, the 2018 study did not re-contact participants that were surveyed in 2014 and 2016.
- Survey participant demographics remained consistent. However, current participants were slightly older and more affluent. This is consistent with national studies on who is traveling domestically for leisure.
- No sampling quotes were used for the three selected Metropolitan Statistical Areas (MSA) since no individual city data review was designed into the study. Sample: 96% of survey participants came from the Seattle MSA (615 Completes) and Portland MSA (425 Completes), and 4% came from Eugene-Springfield MSA (63 completes).

### III. QUICK LOOK

- **Aided awareness of the Tillamook Coast Brand has more than doubled since 2014.**
- **Slogan recall has increased to 26% from 20% since 2014.**
- **Tillamook media awareness and recall have increased dramatically, especially digital and social media.**
- **No major change in the attractions people recall and enjoy. Cheese, beach, hiking/walking, town of Tillamook, and museums remain popular.**
- **Three new attractions already have good recall (above 30%) - North Coast Food Trail, Trees to Sea Scenic Byway, and Oswald West State Park.**
- **Awareness of the Tillamook Destination Promise continues to increase since 2014.**
- **A majority of people now plan to visit in the future (54%) and willingness to recommend has increased 62% since 2014 (from 24% to 39%).**
- **Visitors are spending substantially more money per night and staying much longer.**

#### MEASUREMENT #1 – TOP-OF-MIND BRAND AWARENESS

Q5 How familiar are you with the term “The Tillamook Coast” as a brand for Oregon’s Tillamook County area?

<b>AIDED – TILLAMOOK COAST</b>	<b>STUDY YEAR</b>	<b>VERY FAMILIAR</b>	<b>SOMEWHAT FAMILIAR</b>
Q5 How familiar are you with the “Tillamook Coast” as a brand for the Tillamook County area?	<b>2018</b>	<b>29%</b>	<b>33%</b>
	2016	<b>21%</b>	<b>36%</b>
	2014	13%	36%

**Unaided brand awareness for all coastal destinations has declined since 2014, including Tillamook and the Tillamook Coast brand.**

Q2 When you think of vacationing on the Oregon coast, what locations come to mind first?

#### DESTINATIONS WITH MORE THAN 10% UNAIDED RECALL

Destination Recall (Unaided)	Advertising Recall (Unaided)
Cannon Beach (18%)	Seaside (22%)
Seaside (15%)	Cannon Beach (19%)
Lincoln City (13%)	Lincoln City (17%)
Newport (12%)	Newport (14%)
Astoria (10%)	Astoria (13%)
Tillamook/Coast (6%)	Tillamook/Coast (6%)

Tillamook & Tillamook Coast – Following areas were below Tillamook in unaided awareness: Florence, Coos Bay, Pacific City and Depoe Bay.

### MEASUREMENT #2 – BRAND RECOGNITION

#### RECALL: TILLAMOOK COAST MARKETING SLOGAN

**The Tillamook Coast brand slogan is increasing, but it is increasing more slowly than competitors.**

There are several issues that could be impacting this finding:

- Seaside and Newport have changed slogans, so comparisons may not be relevant.
- Seaside’s new slogan includes their name, which increases aided recall.
- Tillamook is using two slogans, not one, and this may lower aided recall.

AIDED SLOGAN RECALL TO CORRECT DESTINATION	SEASIDE	TILLAMOOK COAST	LINCOLN CITY	NEWPORT
2018	44%	26%*	21%	14%
2016	46%	25%*	15%	13%
2014	18%	20%	9%	6%

\* Figures reflect aided awareness for two slogans currently in use: “It’s the Natural Choice” and “What Can Nature Do for You.”

Often people can recall a slogan, but they cannot correctly identify the destination that uses it. This is the case with Tillamook. Overall, aided recall was good, but many respondents connected the slogan to a different destination.

- 52% had aided recall of “It’s the Natural Choice”
- 24% had aided recall of “What Can Nature Do for You”

## RECALL: TILLAMOOK COAST MEDIA ADVERTISING

<b>MEDIA RECALL - AIDED</b> Media you recall Tillamook Coast using	<b>2018</b> <i>PERCENT</i>	<b>2016</b> <i>PERCENT</i>	<b>2014</b> <i>PERCENT</i>
Online (digital and social media)	<b>72%</b>	55%	27%
Print (magazines and newspapers)	<b>49%</b>	38%	30%
Broadcast (cable, satellite, over the air TV)	<b>32%</b>	21%	13%
Radio	<b>25%</b>	19%	9%
Out of home (billboards)	<b>21%</b>	18%	11%
PR - Stories in Media	<b>17%</b>	14%	11%

## MEASUREMENT #3 – BRAND ATTRIBUTES

Q8 UNAIDED (OPEN ENDED) – What specific attractions do you think of first when considering a vacation to the Tillamook Coast area?

**Slight change in unaided attraction recall, with walking moving up and dairy moving down. The top three mentions were the only attractions with double digit recall.**

### UNAIDED TOP FIVE RECALL IN 2018

Cheese  
Tillamook  
Beach (coast, ocean)  
Walking  
Museum

### UNAIDED TOP FIVE RECALL IN 2016

Cheese  
Beach (coast, ocean)  
Tillamook  
Dairy  
Museum

**There has been little change in aided awareness of major attractions.  
Awareness of new attractions are competitive with more established attractions.**

Q9 AIDED – How familiar are you with the following Tillamook area activities and attractions.

<b>2018 AWARENESS OF ATTRIBUTES</b>	<b>Very familiar</b>	<b>Somewhat familiar</b>	<b>TOTAL</b>
Tillamook Cheese Factory	50%	31%	<b>81%</b>
Roadside viewing – forests and beaches	27%	35%	<b>62%</b>
Whale watching	22%	35%	<b>57%</b>
Highway 6 in Tillamook County	19%	23%	<b>42%</b>
Wildlife viewing	18%	31%	<b>49%</b>
Cape Kiwanda	19%	23%	<b>42%</b>
Oregon Coast Scenic Railroad	15%	25%	<b>40%</b>
Three Capes Scenic Loop	16%	21%	<b>37%</b>
Tillamook Forest Center	15%	19%	<b>34%</b>
Tillamook County Pioneer Museum	15%	19%	<b>34%</b>
Oregon Coast Railriders	14%	15%	<b>29%</b>
Salmonberry Trail	11%	14%	<b>25%</b>
Latimer Quilt and Textile Center	10%	13%	<b>23%</b>
Kilchis Point Reserve	11%	13%	<b>24%</b>
NEW - North Coast Food Trail	11%	16%	<b>36%</b>
NEW – Trees to Sea Scenic Byway	13%	18%	<b>31%</b>
NEW – Oswald West State Park	16%	20%	<b>36%</b>

Q10 – AIDED – Looking at activities you could enjoy on the coast, which activities would you most associate with the Tillamook area? CHECK ALL THAT APPLY.

<b>TOP TEN ACTIVITIES ASSOCIATED WITH TILLAMOOK AREA</b>	<b>2018</b>	<b>2016</b>	<b>2014</b>
Beachcombing	49%	45%	59%
Walking trails	45%	42%	45%
Hiking	34%	37%	38%
Camping	37%	36%	38%
Whale watching	37%	35%	33%
Wildlife viewing	33%	33%	36%
Tidal pool viewing	30%	28%	34%
Storm watching	26%	25%	30%
Crabbing, clamming	24%	24%	26%
Bird watching	17%	17%	16%
Fishing – river and lake	19%	16%	16%



## THE TILLAMOOK DESTINATION PROMISE

BRAND ATTRIBUTES (BRAND PROMISE)	Study Year	TOTAL Strongly and Somewhat Agree
It is the best place to unwind and experience the unspoiled natural beauty of the Oregon Coast.	<b>2018</b> 2016 2014	<b>63%</b> 55% 49%
It is where you'll find numerous opportunities to pursue your favorite nature based recreational and cultural interests.	<b>2018</b> 2016 2014	<b>65%</b> 61% 53%
It is the best place to experience the untamed natural beauty of the Oregon coast.	<b>2018</b> 2016 2014	<b>60%</b> 53% 48%

### MEASUREMENT #4 – PERCEIVED QUALITY AND BRAND LOYALTY

**Tillamook has significantly increased its quality and brand loyalty perceptions over the past four years.**

A majority of people now plan to visit the Tillamook Coast in the future (54%) and willingness to recommend has increased 62% since 2014 (from 24% to 39%).

### MEASUREMENT #5 – ECONOMIC IMPACT

**Compared to the two previous studies, visitors are now spending substantially more money per night and staying much longer.**

**This is the ultimate goal of any marketing effort: increased economic impact to the local economy.**

	2018 STUDY PERCENT	2016 STUDY PERCENT	2014 STUDY PERCENT
<b>DAILY AMOUNT SPENT ON VACATION</b>			
Under 100 per day	<b>35%</b>	40%	39%
\$100 to \$199 per day	<b>51%</b>	52%	34%
\$200 or more per day	<b>14%</b>	8%	6%
<b>NIGHTS SPENT IN THE AREA</b>			
1 Night	<b>33%</b>	41%	43%
2 Nights	<b>25%</b>	31%	32%
3 Nights	<b>18%</b>	16%	13%
Nights or More	<b>25%</b>	12%	12%

## IV. KEY FINDINGS AND ANALYSIS

### MEASUREMENT #1 – TOP-OF-MIND BRAND AWARENESS

**UNAIDED** – Unaided top-of-mind awareness is a measure of Brand Equity. It indicates that a stronger impression has registered in the mind of the consumer than the impression connected with aided recall. Unaided recall for all locations have declined since 2014.

<b>UNAIDED AWARENESS</b> (QUESTIONS 2 AND 3)	<b>STUDY YEARS</b>	<b>DESTINATION</b> <i>Q2 - When you think of vacationing on the Oregon coast, what locations come to mind first?</i>	<b>ADVERTISING</b> <i>Q3 - Over the past year, what Oregon coast locations/destinations do you recall having seen or heard advertised?</i>
<b>Seaside</b>	<b>2018</b>	<b>15%</b>	<b>22%</b>
	2016	39%	26%
	2014	43%	0%
<b>Cannon Beach</b>	<b>2018</b>	<b>18%</b>	<b>19%</b>
	2016	37%	20%
	2014	88%	32%
<b>Lincoln City</b>	<b>2018</b>	<b>13%</b>	<b>17%</b>
	2016	29%	23%
	2014	70%	31%
<b>Newport</b>	<b>2018</b>	<b>12%</b>	<b>14%</b>
	2016	27%	21%
	2014	29%	12%
<b>Astoria</b>	<b>2018</b>	<b>10%</b>	<b>13%</b>
	2016	21%	13%
	2014	25%	9%
<b>Tillamook</b>	<b>2018</b>	<b>6%</b>	<b>6%</b>
	2016	12%	5%
	2014	15%	3%
<b>Tillamook Coast</b>	<b>2018</b>	<b>0%</b>	<b>0%</b>
	2016	1%	2%
	2014	0%	0%
<b>Florence</b>	<b>2018</b>	<b>4%</b>	<b>5%</b>
	2016	10%	5%
	2014	12%	3%
<b>Coos Bay</b>	<b>2018</b>	<b>3%</b>	<b>2%</b>
	2016	6%	2%
	2014	16%	3%
<b>Pacific City</b>	<b>2018</b>	<b>2%</b>	<b>1%</b>
	2016	5%	2%
	2014	11%	2%
<b>Depoe Bay</b>	<b>2018</b>	<b>3%</b>	<b>0%</b>
	2016	3%	2%
	2014	14%	1%

Margin of Error +/-3%

<b>AIDED – TILLAMOOK COAST</b>	<b>STUDY YEAR</b>	<b>VERY FAMILIAR</b>	<b>SOMEWHAT FAMILIAR</b>
Q5 How familiar are you with the “Tillamook Coast” as a brand for the Tillamook County area?	<b>2018</b>	<b>29%</b>	<b>33%</b>
	2016	21%	36%
	2014	13%	36%

**TOTAL BRAND AWARENESS DEFINED:** Unaided recall and aided recall (Very Familiar) are added together.

<b>STUDY YEAR</b>	<b>UNAIDED</b>	<b>AIDED (VERY FAMILIAR)</b>	<b>TOTAL BRAND RECALL</b>
<b>2018</b>	<b>6%</b>	<b>29%</b>	<b>25%</b>
2016	13%	21%	24%
2014	15%	13%	28%

**RESEARCH NOTE:** When you ask open-ended, unaided questions that ask for locations or destination recall, most people think in terms of cities, not visitor brands. Also, it is difficult to separate unaided recall of a specific city and a regional brand that share the same name (Tillamook). Therefore, respondents mentioning Tillamook may be referring to the City of Tillamook or the Tillamook Coast (or both). This is even more of an unaided research challenge when the regional brand covers numerous cities that may run advertising without the Tillamook Coast brand.

## MEASUREMENT #2 – BRAND RECOGNITION

### AWARENESS OF TILLAMOOK COAST MARKETING SLOGAN

**Tillamook Coast slogan recall is up from 2014 but remains at 2016 levels.**

The next key measurement is the consumers' ability to recall a slogan. DCG Research tracked aided recall (slogans were included in the question). Because Seaside and Newport have changed slogans since 2014, it is difficult to compare Tillamook awareness over the six-year research period.

Remembering a slogan is not as important as being able to connect it to the destination that uses it. Often people can recall a slogan, but they cannot correctly identify the destination that uses it. This is the case with Tillamook. **Overall, 52% had aided recall of “It’s the Natural Choice,” and “What Can Nature Do for You,” had 24% aided recall; however, many respondents connect the slogan to a different destination.**

<b>SLOGAN RECALL – AIDED</b> Recalled and Connected to Destination	<b>Year</b>	<b>Recalled</b>	<b>Can't Recall</b>
<b><i>SEASIDE – It's Easy to Seaside</i></b>	2018	<b>44%</b>	<b>38%</b>
	2016	46%	45%
<b><i>SEASIDE – It's More than a Day at the Beach</i></b>	2014	18%	65%
<b><i>TILLAMOOK COAST – It's the Natural Choice</i></b>	2018	<b>19%</b>	<b>56%</b>
	2016	19%	61%
	2014	14%	61%
<b><i>TILLAMOOK COAST – What Can Nature Do for You</i></b>	2018	<b>7%</b>	<b>56%</b>
	2016	6%	68%
<b><i>LINCOLN CITY – Seven Miles of Smiles</i></b>	2018	<b>21%</b>	<b>58%</b>
	2016	15%	70%
	2014	9%	69%
<b><i>NEWPORT – The Coast You Remember</i></b>	2018	<b>14%</b>	<b>63%</b>
	2016	13%	73%
	2014	6%	70%

## MEDIA RECALL - TILLAMOOK COAST ADVERTISING

<b>MEDIA RECALL - AIDED Media you recall Tillamook Coast using</b>	<b>2018 PERCENT</b>	<b>2016 PERCENT</b>	<b>2014 PERCENT</b>
Online (digital and social media)	<b>72%</b>	55%	27%
Print (magazines and newspapers)	<b>49%</b>	38%	30%
Broadcast (cable, satellite, over the air TV)	<b>32%</b>	21%	13%
Radio	<b>25%</b>	19%	9%
Out of home (billboards)	<b>21%</b>	18%	11%
PR - Stories in Media	<b>17%</b>	14%	11%

RESEARCH NOTE: It is not unusual for someone to recall media that Tillamook Coast did not use. Past DCG Research studies show that people tend to recall the media they use the most, not necessarily the one Tillamook uses. Therefore, media recall is someone questionable. But this data can be very useful in planning future media buys, since it does reflect media habits.

## **MEASUREMENT #3 – BRAND ATTRIBUTES**

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The next key measurement is the consumers' ability to identify iconic attributes of the Tillamook Coast as defined by the initial 2014 marketing plan and strategy proposed by Total Destination Marketing. Are people aware that there is whale watching, kayaking, amazing hikes, and waterfalls in the area? DCG Research looked at both aided and unaided recall of attributes.

**UNAIDED – Q8 What specific attractions and/or activities do you think of first when considering a vacation to the Tillamook Coast (County) area?**

### **TOP RECALL IN 2018**

- Cheese (36%)
- Tillamook (21%)
- Beach - coast, ocean (18%)
- Walking (4%)
- Museum (2%)

All 2% activities: Hiking, Fishing, Ice Cream, Dairy, Crabbing, Camping

### **TOP RECALL IN 2016**

- Cheese (47%)
- Beach - coast, ocean (24%)
- Tillamook (24%)
- Dairy (4%)
- Museum (4%)
- Walking (4%)

### **TOP RECALL IN 2014\*\***

- Beach – coast, ocean
- Cheese
- Camping
- Tillamook Cheese Factory
- Fishing
- Hiking
- Ocean

\*\* RESEARCH NOTE: Open ended response percentages were not calculated in the original study.

The challenge with an open-ended question in a quantitative research instrument is that it is difficult to make any statistically relevant conclusions with more than 1,991 different responses (2018).

**AIDED – Q9 How familiar are you with the following Tillamook area activities and attractions?** The goal of aided awareness is to see 30% or more for VERY FAMILIAR and above 50% for the total of VERY AND SOMEWHAT FAMILIAR.

<b>AWARENESS OF ATTRIBUTES</b>		<b>Very familiar</b>	<b>Somewhat familiar</b>	<b>TOTAL</b>
<b>Tillamook Cheese Factory</b>	<b>2018</b>	<b>50%</b>	<b>31%</b>	<b>81%</b>
	2016	50%	28%	78%
	2014	51%	28%	79%
<b>Roadside viewing – forests and beaches</b>	<b>2018</b>	<b>27%</b>	<b>35%</b>	<b>62%</b>
	2016	23%	35%	58%
	2014	22%	37%	59%
<b>Whale watching</b>	<b>2018</b>	<b>22%</b>	<b>35%</b>	<b>57%</b>
	2016	15%	34%	49%
	2014	11%	23%	41%
<b>Highway 6 in Tillamook County</b>	<b>2018</b>	<b>19%</b>	<b>23%</b>	<b>42%</b>
	2016	11%	21%	32%
	2014	10%	20%	30%
<b>Wildlife viewing</b>	<b>2018</b>	<b>18%</b>	<b>31%</b>	<b>49%</b>
	2016	11%	32%	43%
	2014	11%	29%	40%
<b>Cape Kiwanda</b>	<b>2018</b>	<b>19%</b>	<b>23%</b>	<b>42%</b>
	2016	12%	20%	32%
	2014	N.A.	N.A.	N.A.
<b>Oregon Coast Scenic Railroad</b>	<b>2018</b>	<b>15%</b>	<b>25%</b>	<b>40%</b>
	2016	8%	21%	29%
	2014	7%	19%	26%
<b>Three Capes Scenic Loop</b>	<b>2018</b>	<b>16%</b>	<b>21%</b>	<b>37%</b>
	2016	10%	17%	27%
	2014	11%	18%	29%
<b>Tillamook Forest Center</b>	<b>2018</b>	<b>15%</b>	<b>19%</b>	<b>34%</b>
	2016	7%	16%	23%
	2014	6%	12%	18%
<b>Tillamook County Pioneer Museum</b>	<b>2018</b>	<b>15%</b>	<b>19%</b>	<b>34%</b>
	2016	5%	16%	21%
	2014	5%	14%	19%
<b>Oregon Coast Railriders</b>	<b>2018</b>	<b>14%</b>	<b>15%</b>	<b>29%</b>
	2016	4%	12%	16%
	2014	N.A.	N.A.	N.A.
<b>Salmonberry Trail</b>	<b>2018</b>	<b>11%</b>	<b>14%</b>	<b>25%</b>
	2016	3%	10%	13%
	2014	2%	6%	8%
<b>Latimer Quilt and Textile Center</b>	<b>2018</b>	<b>10%</b>	<b>13%</b>	<b>23%</b>
	2016	3%	9%	12%
	2014	2%	5%	7%
<b>Kilchis Point Reserve</b>	<b>2018</b>	<b>11%</b>	<b>13%</b>	<b>24%</b>
	2016	3%	8%	11%
	2014	2%	7%	9%
<b>NEW - North Coast Food Trail</b>	<b>2018</b>	<b>11%</b>	<b>16%</b>	<b>36%</b>
<b>NEW – Trees to Sea Scenic Byway</b>	<b>2018</b>	<b>13%</b>	<b>18%</b>	<b>31%</b>
<b>NEW – Oswald West State Park</b>	<b>2018</b>	<b>16%</b>	<b>20%</b>	<b>36%</b>

**AIDED** – Q10 Looking at activities you could enjoy on "The Tillamook Coast," please indicate the activities you most associate with vacationing in the Tillamook area. **CHECK ALL THAT APPLY.**

**ALL ACTIVITIES WITH MORE THAN 10% MENTION**

<b>ACTIVITIES MOST ASSOCIATED WITH TILLAMOOK AREA (10% OR MORE)</b>	<b>2018</b>	<b>2016</b>	<b>2014</b>
Beachcombing	49%	45%	59%
Walking trails	45%	42%	45%
Hiking	34%	37%	38%
Camping	37%	36%	38%
Whale watching	37%	35%	33%
Wildlife viewing	33%	33%	36%
Tidal pool viewing	30%	28%	34%
Storm watching	26%	25%	30%
Crabbing, clamming	24%	24%	26%
Bird watching	17%	17%	16%
Fishing – river and lake	19%	16%	16%
Stargazing	19%	16%	17%
Fishing – deep sea	19%	13%	13%
Boating	17%	12%	9%
Railroad excursions	15%	12%	11%
Cycling	14%	11%	12%
Dune buggies	N.A.	11%	9%
Horseback riding	Less than 10%	11%	8%
Running in natural settings	11%	11%	9%
Kayaking	12%	10%	6%
Sea kayaking	10%	Less than 10%	Less than 10%
Surfing	10%	Less than 10%	Less than 10%



## THE TILLAMOOK DESTINATION PROMISE

As outlined in Tillamook's brand strategy, the Brand Promise is:

*For those needing to escape the stresses of everyday life and seek the transformative power of nature, the untamed and unspoiled beauty of the Tillamook Coast's natural wonders are the perfect prescription for body and soul. Only here will they find the enriching, revitalizing and adventure-filled encounters of Oregon's most diverse and varied marine and rain forest environments, all in close proximity to low-key beachfront villages that have not been over developed – and within 90 minutes of Portland.*

BRAND ATTRIBUTES (BRAND PROMISE)	Study Year	Strongly Agree	Somewhat Agree	TOTAL Strongly Somewhat	Neutral Don't Know
It is the best place to unwind and experience the unspoiled natural beauty of the Oregon Coast.	<b>2018</b>	<b>28%</b>	<b>35%</b>	<b>63%</b>	<b>32%</b>
	2016	18%	37%	55%	40%
	2014	14%	35%	49%	41%
It is where you'll find numerous opportunities to pursue your favorite nature based recreational and cultural interests.	<b>2018</b>	<b>26%</b>	<b>39%</b>	<b>65%</b>	<b>32%</b>
	2016	20%	41%	61%	36%
	2014	18%	35%	53%	41%
It is the best place to experience the untamed natural beauty of the Oregon coast.	<b>2018</b>	<b>25%</b>	<b>35%</b>	<b>60%</b>	<b>32%</b>
	2016	19%	34%	53%	41%
	2014	14%	34%	48%	41%

As Tillamook executes its marketing effort, it should be delivering this promise in all communications via USPs (Unique Selling Propositions). Therefore, it is important in a benchmark study to evaluate current awareness of the USPs that are the cornerstone of a Destination Promise.

The decrease in **NEUTRAL AND DON'T KNOW** and the increase in **STRONGLY AGREE** reflects that Tillamook is doing a good job of communicating brand attributes.

## MEASUREMENT #4 – PERCEIVED QUALITY AND BRAND LOYALTY

DCG Research looked at two measurements for quality and loyalty:

1. **INTENT TO VISIT** – Key question: How many people have visited the Tillamook Coast area in the past and how many are considering visiting in the future?

A change in these measurements will not only show Tillamook growth opportunity, but will provide some insight into the quality of Tillamook’s offering (i.e. if more people plan to visit in the future than in the past, they have a positive opinion of the quality of Tillamook’s vacation offerings).

### INTENTION TO VISIT

How many people have visited the Tillamook Coast area in the past and how many are considering visiting in the future.	<b>STUDY YEAR</b>	<b>IN THE PAST</b> <i>Have you visited Tillamook County area in the last 12 months?</i>	<b>IN THE FUTURE</b> <i>Are you considering visiting the Tillamook County area over the next 12 months?</i>
	<b>2018</b>	<b>43%</b>	<b>54%</b>
	2016	35%	49%
	2014	29%	40%

2. **WILLINGNESS TO RECOMMEND** - This question builds on a popular research tool, *The Net Promoter Score*, or *NPS®*, which is based on the fundamental perspective that every company’s customers can be divided into three categories: Promoters, Passives, and Detractors. By asking one simple question — “*How likely would you be to recommend the Tillamook Coast to a friend or colleague?*” — you can track these groups and get a simple measurement of Tillamook’s performance through your visitors’ eyes.

**A score above 50% (VERY LIKELY) is the goal of a net promoter measurement.**

How likely would you to be to recommend visiting the Tillamook Coast to friends and relatives?	<b>STUDY YEAR</b>	<b>Very Likely (Promoters)</b>	<b>Somewhat Likely (Passives)</b>
	<b>2018</b>	<b>39%</b>	<b>31%</b>
	2016	31%	33%
	2014	24%	32%

## MEASUREMENT #5 – ECONOMIC IMPACT

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Like the original 2014 study, this research was not intended to be an economic impact study. It is assumed that Tillamook will continue to work with other firms to provide definitive measurements to evaluate the economic impact of its marketing effort.

However, DCG Research did look at some economic data that Tillamook should be able to compare with other research. The money spent on vacation and the number of nights someone stays in the area can provide insight into the consumers' perceived quality and brand loyalty to the Tillamook Coast.

	<b>2018 STUDY PERCENT</b>	<b>2016 STUDY PERCENT</b>	<b>2014 STUDY PERCENT</b>
<b>DAILY AMOUNT SPENT ON VACATION</b>			
Under 100 per day	<b>35%</b>	40%	39%
\$100 to \$149 per day	<b>23%</b>	30%	21%
\$150 to \$174 per day	<b>15%</b>	14%	10%
\$175 to \$199 per day	<b>13%</b>	8%	3%
\$200 to \$299 per day	<b>9%</b>	6%	4%
\$300 or more	<b>5%</b>	2%	2%
<b>NUMBER OF NIGHTS SPENT IN THE AREA</b>			
1 Night	<b>33%</b>	41%	43%
2 Nights	<b>25%</b>	31%	32%
3 Nights	<b>18%</b>	16%	13%
4 Nights	<b>11%</b>	5%	5%
5 Nights	<b>8%</b>	3%	2%
6 Nights	<b>3%</b>	1%	2%
7+ Nights	<b>3%</b>	3%	3%

## V. RAW DATA SETS AND TABLES

### Q2 – UNAIDED - OPEN ENDED When you think of vacationing on the Oregon coast, what locations come to mind first?

<b>2018 UNAIDED RECALL - DESTINATIONS</b>		
<b>TOTAL SURVEYS 2018</b>	<b>n<sub>1</sub> = 1991</b>	
<b>CITY</b>	<b>COUNT</b>	<b>PERCENT</b>
Astoria	205	10%
Bandon	53	3%
Brookings	24	1%
Cannon Beach	359	18%
Coos Bay	54	3%
Depoe Bay	55	3%
Florence	87	4%
Gold Beach	35	2%
Lincoln City	254	13%
Manzanita	58	3%
Newport	245	12%
Pacific City	43	2%
Portland	55	3%
Seaside	307	15%
Tillamook	113	6%
Yachats	36	2%

\*note: n<sub>1</sub> = number of response mentions; n<sub>2</sub> = 982, number of those who answered question

**Q3 – UNAIDED - OPEN ENDED**  
**Over the past year, what Oregon coast locations/destinations**  
**do you recall having seen or heard advertised**  
**(social media, internet, TV, magazines, radio, billboards, etc.)?**

<b>2018 - UNAIDED RECALL - ADS</b>		<b>n<sub>1</sub> = 665</b>	<b>n<sub>2</sub> = 619</b>
<b>CITIES</b>	<b>COUNT</b>	<b>PERCENTAGE</b>	<b>PERCENTAGE</b>
Astoria	79	12%	13%
Bandon	14	2%	2%
Cannon Beach	120	18%	19%
Coos Bay	15	2%	2%
Florence	30	5%	5%
Lincoln City	103	15%	17%
Newport	89	13%	14%
Pacific City	8	1%	1%
Portland	31	5%	5%
Seaside	139	21%	22%
Tillamook	37	6%	6%

\*note: n<sub>1</sub> = number of response mentions; n<sub>2</sub> = number of those who answered question

**Q4 AIDED - Which Oregon coast location/destinations have you visited?**  
**CHECK ALL THAT APPLY**

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
Have not visited	149	14%
Tillamook Coast	632	60%
Seaside	708	67%
Lincoln City	652	62%
Astoria-Warrenton	581	55%
Newport	599	57%
Waldport	271	26%
Coos Bay-North Bend	358	34%
Bandon	269	25%
Gold Beach	294	28%
Brookings	194	18%

**Q5 – AIDED – How familiar are you with the term “The Tillamook Coast”  
as a brand for Oregon’s Tillamook County area?**

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
Very familiar	313	29%
Somewhat familiar	350	33%
Not very familiar	249	23%
Not at all familiar	159	15%
Total	1071	100%

**Q6 – Thinking back to marketing you may have seen or heard  
for "The Tillamook Coast" (aka Tillamook County),  
what media do you recall Tillamook using?  
CHECK ALL THAT APPLY.**

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
Social Media	293	36%
Broadcast	255	32%
Billboards	172	21%
Radio	198	25%
Magazines	236	29%
Newspaper	158	20%
Stories in the media	136	17%
Online – internet	213	26%

**Q7 - Now I am going to list a few coastal destination areas that use slogans, and I would like you to match the slogan to the destination.**

**Tillamook Coast – It’s the Natural Choice/What Can Nature Do For You**

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
It’s Easy to Seaside	129	12%
It’s the Natural Choice	195	19%
Seven Miles of Smiles	112	11%
The Coast You Remember	125	12%
What Can Nature Do for You	77	7%
Not Sure / Can’t Recall	592	56%

**Seaside – It’s Easy to Seaside**

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
It’s Easy to Seaside	466	44%
It’s the Natural Choice	127	12%
Seven Miles of Smiles	91	9%
The Coast You Remember	86	8%
What Can Nature Do for You	40	4%
Not Sure / Can’t Recall	402	38%

**Lincoln City – Seven Miles of Smiles**

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
It’s Easy to Seaside	76	7%
It’s the Natural Choice	118	11%
Seven Miles of Smiles	214	21%
The Coast You Remember	105	10%
What Can Nature Do for You	60	6%
Not Sure / Can’t Recall	605	58%

## Newport – The Coast You Remember

2018 Study	Frequency	Percent
It's Easy to Seaside	126	12%
It's the Natural Choice	101	10%
Seven Miles of Smiles	95	9%
The Coast You Remember	142	14%
What Can Nature Do For You	69	7%
Not Sure / Can't Recall	659	63%

### Q8 – UNAIDED – OPEN ENDED

What specific attractions and/or activities do you think of first when considering a vacation to the Tillamook Coast (County) area?

2018 - ATTRACTIONS – UNAIDED RECALL	n <sub>1</sub> = 1059 Count	Percentage
Cheese	381	36%
Tillamook	224	21%
Beach (coast, ocean)	194	18%
Walking	43	4%
Museum	26	2%
Hiking	25	2%
Fishing	23	2%
Ice cream	21	2%
Dairy	20	2%
Crabbing	17	2%
Camping	17	2%
Shopping	13	1%
Lighthouse	12	1%
Kite flying	9	1%
Casinos	8	1%
Clamming	6	1%
Whale watching	6	1%

\*note: n<sub>1</sub> = number of response mentions; n<sub>2</sub> = 867, number of those who answered question



**Q9 – AIDED – How familiar are you with the following  
Tillamook area activities and attractions?**

**VERY FAMILIAR  
SOMEWHAT FAMILIAR  
NOT VERY FAMILIAR  
NOT AT ALL FAMILIAR**

	Very	Somewhat	Not very	Not at all	Total
Cape Kiwanda	19% 198	23% 236	18% 184	41% 426	1033
Highway 6 in Tillamook County	19% 198	23% 242	18% 193	40% 421	1046
Kilchis Point Reserve	11% 116	13% 138	20% 205	56% 582	1034
Latimer Quilt and Textile Center	10% 106	13% 132	17% 173	61% 637	1039
Oregon Coast Scenic Railroad	15% 157	25% 261	21% 221	39% 412	1044
Oregon Coast Railriders	14% 141	15% 160	19% 202	52% 542	1037
Roadside viewing – forests/beaches	27% 280	35% 362	16% 170	23% 235	1038
Salmonberry Trail	11% 111	14% 141	20% 211	56% 576	1031
Three Capes Scenic Loop	16% 168	21% 214	21% 219	43% 443	1035
Tillamook Cheese Factory	50% 523	31% 322	10% 106	11% 120	1050
Tillamook County Pioneer Museum	15% 157	19% 193	20% 209	48% 494	1040
Tillamook Forest Center	15% 153	19% 199	19% 201	47% 482	1034
Whale watching	22% 225	35% 365	23% 239	22% 231	1044
Wildlife viewing	18% 186	3% 326	23% 234	29% 301	1037
North Coast Food Trail	11% 112	16% 168	18% 184	56% 581	1033
Trees to Sea Scenic Byway	13% 132	18% 181	22% 223	49% 504	1032
Oswald West State Park	16% 168	20% 203	18% 190	47% 485	1039

**Q10 – AIDED – Looking at activities you could enjoy on the coast,  
which activities would you most associate with the Tillamook area?  
CHECK ALL THAT APPLY.**

<b>2018 Answer Choices</b>	<b>Responses</b>	
All-terrain vehicles	9%	91
Beachcombing	49%	508
Bird watching	17%	174
Boating	17%	181
Camping	37%	379
Crabbing, clamming	24%	249
Cycling	14%	145
Diving	7%	75
Fishing (deep sea, river, lakes)	19%	199
Geocaching	8%	79
Hang gliding	6%	58
Hiking	34%	352
Horseback riding	10%	103
House boating	7%	75
Hunting	6%	63
Jet boating	6%	66
Kayaking	12%	127
Mountain biking	9%	95
Orienteering	4%	46
Parasailing	5%	54
Railroad excursions	15%	155
Running in natural settings	11%	117
Sandboarding	6%	67
Sea kayaking	10%	104
Speed boating	6%	65
Stand-up paddle board	6%	67
Star gazing	19%	196
Storm watching	26%	271
Surfing	10%	105
Tidal pool viewing	30%	312
Wakeboarding	6%	61
Walking trails	45%	464
Whale watching	37%	380
Wildlife viewing	33%	340
	<b>Answered</b>	<b>1035</b>

**Q11 - How much do you agree with following statements about The Tillamook Coast area?**

It is where you'll find numerous opportunities to pursue your favorite nature based, recreational and cultural interests.

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
Strongly agree	273	26%
Somewhat agree	407	39%
Neutral - don't know	339	32%
Somewhat disagree	24	2%
Strongly disagree	6	1%
Total	1049	100%

It is the best place to experience the untamed natural beauty of the Oregon coast.

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
Strongly agree	295	28%
Somewhat agree	368	35%
Neutral - don't know	332	32%
Somewhat disagree	42	4%
Strongly disagree	10	1%
Total	1049	100%

It is the best place to experience the untamed natural beauty of the Oregon coast.

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
Strongly agree	264	25%
Somewhat agree	370	35%
Neutral - don't know	333	32%
Somewhat disagree	72	7%
Strongly disagree	10	1%
Total	1049	100%

**Q12 - Have you visited the Tillamook Coast area over the past 12 months?**

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
Yes	446	43%
No	602	57%
Total	1048	100%

**Q13 – Are you considering visiting the Tillamook Coast area over the next 12 months?**

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
Yes	562	54%
No	195	19%
Not sure	291	27%
Total	1,048	100%

**Q14 –If you have visited Tillamook County in the past, what do you estimate you spent per day for your party (total amount each day for you and others traveling with you)?**

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
Under \$100 per day	325	35%
\$100 to \$149 per day	218	23%
\$150 to \$174 per day	138	15%
\$175 to \$199 per day	117	13%
\$200 to \$299 per day	83	9%
\$300 or more per day	49	5%
Total	930	100%

**Q15 – If you have visited Tillamook County in the past,  
how many nights did you stay in the area?**

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
1 night	285	33%
2 nights	212	25%
3 nights	151	18%
4 nights	92	11%
5 nights	70	8%
6 nights	22	2%
7+ nights	30	3%
Total	862	100%

**Q16 – How likely would you be to recommend visiting the  
Tillamook Coast area to friends and relatives for a vacation?**

<b>2018 Study</b>	<b>Frequency</b>	<b>Percent</b>
Very likely	403	39%
Somewhat likely	324	31%
Not sure - don't know	256	25%
Not very likely	28	3%
Not at all likely	21	2%
Total	1032	100%