

DMO WEBSITE VISITOR STUDY 2022 FINAL REPORT (JAN-DEC 2022)



DCG RESEARCH

FINAL REPORT — TILLAMOOK/FOOD TRAIL

Building on a study conducted for Travel Southern Oregon (2006-2008), DCG Research has developed an online research study that collects visitor profile data from visitors to DMO websites. Started in 2013, this is the largest, longest continuous study of Destination Marketing Organization (DMO) websites in Oregon.

Launched in January 2022, Study #9 had five research partners. This final report shares all culminative data and specific data for Tillamook Coast and North Coast Food Trail. It also compares, where applicable, current data to data from the oldest study so trends can be explored.



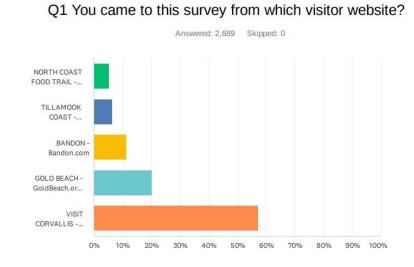








FINAL DATA JAN-DEC 2022



ANSWER CHOICES	RESPONSES	
NORTH COAST FOOD TRAIL - northcoastfoodtrail.com	5%	139
TILLAMOOK COAST - Tillamookcoast.com	6%	174
BANDON - Bandon.com	11%	302
GOLD BEACH - GoldBeach.org, GoldBeachOregon.gov or VisitGoldBeach.com	20%	538
VISIT CORVALLIS - VisitCorvallis.com	57%	1,536
TOTAL		2,689





STUDY #9 - FINAL REPORT (12 MONTHS) JANUARY TO DECEMBER 2022

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SEPARATE FILES (ATTACHED WITH REPORT)

Raw Data Tables (PDF)
All Zip Codes (Excel)

I. INTRODUCTION

CURRENT STUDY - Study #9 – 2022 (January Through December 2022) Research participants: Bandon Chamber of Commerce, City of Gold Beach, Tillamook County, North Coast Food Trail, and Visit Corvallis.

ORIGINAL STUDY - FOR TREND ANALYSIS - Study #1 – 2012/2013 (July 2012 to June 2013). Research participants: Travel Medford, Roseburg Area Chamber of Commerce and Visitor Center, Discover Klamath Visitors and Convention Bureau, Bandon Chamber of Commerce, City of Gold Beach, and Coos Bay - North Bend Visitor & Convention Bureau.

The objective of each study was to provide:

- 1. A confidential and reliable visitor profile to participating research partners.
- 2. An industry overview that allows participants to compare their data sets with data collected from all DMOs and other industry studies.

- 3. Analytics that provide data on how and why consumers visit DMO websites.
- 4. Insights into how consumers use DMO websites and what elements (features) they believe have the most value.

II. RESEARCH METHODS

Participating DMOs placed a visual link on their website that allowed web visitors to go to a special landing page to complete a brief survey to qualify for a \$500 cash incentive.

STUDY #9 MARGIN OF ERROR – The research goal continues to be a syndicated study with a Margin of Error of +/-6.0% with a 95% confidence interval. Like all previous studies, the 2022 study far exceeded this goal. In fact, the overall study had less than a +/- 2% Margin of Error.

	CORVALLIS	BANDON	GOLD BEACH	FOOD TRAIL	TILLAMOOK	
	Total Sessions					
January	13,117	8,010	4,099	1,165	21,579	
February	11,403	8,594	4,307	1,220	17,562	
March	17,007	9,783	4,228	1,465	20,667	
April	18,736	11,549	4,783	1,668	18,200	
May	20,270	11,179	5,126	2,069	5,102	
June	22,292	12,387	4,870	2,386	6,393	
July	37,531	17,980	6,092	2,113	30,886	
August	28,047	14,317	5,656	2,076	28,128	
September	31,354	16,956	5,119	1,762	20,623	
October	39,358	6,829	4,132	1,336	15,892	
November	26,354	7,042	2,876	933	10,400	
December	25,274	6,333	3,123	843	9,974	TOTAL ALL LOCATIONS
TOTAL POPULATION	290,743	130,959	54,411	19,036	205,406	700,555
TOTAL SURVEYS COLLECTED	1,536	302	538	139	174	2,689
Margin of Error	+/- 2.5%	+/- 6%	+/- 4%	+/- 8%	+/- 8%	+/- 2%

In exploring local DMO data, three DMOs met the Margin of Error goal (+/-6%). The Tillamook Coast and North Coast Food Trail were slightly above the research goal; therefore, your data should be used primarily for conceptual clarification and comparison.

Because Corvallis collected 57% of all surveys, DCG did a statistical analysis of the four other locations to ensure the overall results were consistent with the total sample population. Overall Study Data (OSD) was compared to local data to provide an industry wide view. Raw data files (PDF) have been provided to each participant. DCG also provided a response summary of open-ended questions, plus an Excel file for zip codes for future analysis.

Thank you for participating in our 2022 study.

DCG Research

Dr. Nick Lougee and Mark Dennett

III. RESEARCH SUMMARY

TILLAMOOK COAST + NORTH COAST FOOD TRAIL

SEARCH, SOCIAL MEDIA, AND PROMOTIONS DRIVE YOUR WEBSITE TRAFFIC

- Search engines (Google, Bing, etc.) remain the most popular way (70%) for potential visitors to find the Tillamook website. People use a search engine, even if they are aware of the Tillamook Coast.
- ❖ Although referrals from social media increased to 22% in 2021 (from 7% in 2012), it declined in 2022 to 12%. This decline may reflect a "stuck at home bump" i.e. more people were active on social media during Covid. Tillamook Coast only had 4% come from social media, significantly lower than the overall study.
- ❖ 20% of website visitors saw the Tillamook Coast website advertised or promoted. This was similar to the overall study (21%).

NORTH COAST FOOD TRAIL – Contrary to Tillamook data, the majority of people that visited the North Coast Food Trail website (52%) saw the website promoted. Only 28% came from a search engine. The website also had twice as many social media referrals (4%). This certainly reflects positively on the marketing effort for this campaign.

- ❖ Mobile device access is more than three times greater than in 2012 (22% compared to 72% for Tillamook Coast now). The top three sources of information for selecting a destination are:
 - 1. Websites viewed by mobile devices.
 - 2. Websites viewed by computers.
 - 3. Recommendations from friends and relatives.

NORTH COAST FOOD TRAIL – **Mobile access was 65%.** The top three sources of information for selecting a destination were the same as Tillamook.

YOUR WEBSITE IS CRITICAL TO ATTRACTING VISITORS

The vast majority of Tillamook Coast website respondents (91%) plan to visit, and 81% will visit within the next 12 months; 45% in the next 30 days.

NORTH COAST FOOD TRAIL – Virtually all respondents (95%) plan to visit and 77% will visit within the next 12 months; 38% in the next 30 days.

- Most Tillamook Coast respondents (76%) say that DMO websites are their top resource for comparing and choosing a destination. DCG tracks ten different website categories (such as travel review sites, social media, online travel agencies, etc.) and DMO websites remain the most important.
- ❖ The Tillamook Coast website is very influential in making people want to visit. Its very influential rate of 45% was higher than the overall study (34%).

NORTH COAST FOOD TRAIL - Respondents thought this site was slightly less influential in making them want to visit, compared to Tillamook (37% vs. 45%).

WHAT DO PEOPLE WANT TO DO WHEN VISITING?

- ❖ A majority of Tillamook Coast website respondents (67%) are looking forward to visiting natural attractions. This was above the 50% for the overall study. Top three Tillamook Coast activities respondents are looking forward to:
 - 1. Visiting natural attractions.
 - 2. Visiting friends and relatives.
 - 3. Outdoor sports.

Interestingly, Tillamook Coast respondents are less willing to stay (lodging) with friends and relatives, 10% compared to 23% for the overall study.

NORTH COAST FOOD TRAIL – While the majority of respondents agreed with Tillamook Coast respondents that they were looking forward to visiting natural attractions, culinary/dining was ranked second (22%), significantly higher than the overall study (14%). Top three North Coast Food Trail activities:

- 1. Visiting natural attractions.
- 2. Culinary/dining.
- 3. Visiting friends and relatives.

WEBSITE VISITOR CONCERNS

While Covid is still a concern, 83% of Tillamook Coast respondents say they are now very comfortable visiting in the current Covid situation. Most (90%) have not changed their lodging choice due to Covid.

NORTH COAST FOOD TRAIL -

Respondents appear to be a bit more concerned with Covid. Only 69% of respondents said they were very comfortable visiting; however, most (81%) have also not changed their lodging choice due to Covid.

Desire to be safe and concerns over fires and smoke remain important to Tillamook Coast respondents. Pet-friendly accommodations were slightly less important to Tillamook Coast respondents than the overall study data.



PLEASE INDICATE HOW IMPORTANT THE FOLLOWING ITEMS ARE IN INFLUENCING YOU TO VISIT THIS DESTINATION	VERY AND SOMEWHAT IMPORTANT TILLAMOOK	VERY AND SOMEWHAT IMPORTANT
Media stories about forest fires and smoke	54%	65%
Negative media stories about the Portland area	31%	34%
Desire for pet-friendly activities and accommodations	39%	46%
Desire for kid-friendly activities and accommodations	32%	33%
Desire to be safe	55%	67%

NORTH COAST FOOD TRAIL – Interestingly, these respondents were much more concerned about being safe and the negative stories about Portland. Kid and pet friendly were also less important.

PLEASE INDICATE HOW IMPORTANT THE FOLLOWING ITEMS ARE IN INFLUENCING YOU TO VISIT THIS DESTINATION	VERY AND SOMEWHAT IMPORTANT FOOD TRAIL	VERY AND SOMEWHAT IMPORTANT
Media stories about forest fires and smoke	64%	65%
Negative media stories about the Portland area	41%	34%
Desire for pet-friendly activities and accommodations	33%	46%
Desire for kid-friendly activities and accommodations	26%	33%
Desire to be safe	76%	67%

CHARACTERISTICS OF DMO WEBSITE VISITORS

- ❖ A slight majority (51%) of Tillamook Coast respondents have visited in the past. Tillamook Coast had significantly more new website visitors than the overall study (49% vs. 33%).
- ❖ Local Tillamook Coast residents are less likely to use the Tillamook website as a resource tool. Only 3% of Tillamook Coast website users say they live in the area; this compares to 12% for the overall study.

NORTH COAST FOOD TRAIL – While the majority of respondents were returning visitors (59%), the website also had a higher number of new visits (41%) than the overall study (33%).

- Three website features on the Tillamook Coast website are the most influential in encouraging visits. Since 2012 DCG has tracked nine different features of DMO websites. Three features are considered very influential on the Tillamook Coast website:
 - 1. Interactive maps.
 - 2. Consumer ratings and reviews.
 - 3. Professional photos of the destination.

NORTH COAST FOOD TRAIL – Top three influential features were different than Tillamook:

- 1. Consumer ratings and reviews.
- 2. Interactive maps.
- 3. Company info / promos on social media.

OTHER FINDINGS

- ❖ Tillamook Coast remains a drive market (76%). Virtually all website visitors state that they would travel by car (private, rentals, or RVs).
- ❖ Overall, 44% of Tillamook Coast respondents say they plan to stay in motels or hotels. This is slightly lower than the overall study rate of 46%. Many visitors now prefer staying in rentals (Air B&B, VRBO, etc.). This category has increased to 47% for Tillamook respondents, the highest in this current study of all DMO locations. Overall figure in the original study (2012) was 4%.
- The demographic profile of people that visit DMO websites has remained consistent in this nine-year study.

❖ Women are almost twice as likely to take this survey than men. This may reflect that they are more involved in vacation planning. This is supported by other studies. For example, it is estimated that women make 80% of all travel decisions, according to Mary Bond, author of *The Gutsy Traveler*.

NORTH COAST FOOD TRAIL - Women are almost four times more likely to take the survey.

- ❖ Most visitors have middle class incomes (\$50,000 to \$100,000). In looking specifically at Tillamook Coast respondents:
 - ✓ Tillamook Coast visitors are slightly more educated, than the overall study.
 - ✓ Generation X (45%) and Millennials (32%) make up the majority of Tillamook Coast respondents. Overall, Tillamook respondents were significantly younger than the overall study. For example, Seniors and Baby Boomers account for only 20% of visitors, compared to 44% for the overall study.

NORTH COAST FOOD TRAIL

- √ 80% are planning on traveling by car, but commercial air (17%) was significantly higher than the overall study (9%).
- ✓ Staying in motel or hotel (59%) was the preferred lodging choice; however, 45% were planning to use Air B&B, VRBO, etc.
- ✓ Compared to the overall study, North Coast Food Trail respondents plan to stay longer, are primarily couples (63%), and were more highly educated (62% had college or advanced degrees).





IV. DATA TABLES - TILLAMOOK

HOW DID YOU DISCOVER THE DESTINATION WEBSITE YOU ARE VISITING? (SELECT ALL THAT APPLY)	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Saw the website advertised/promoted	20%	21%	17%
Didn't know about the site, used search engine	19%	22%	23%
Knew about destination, used search engine	51%	41%	38%
Website was recommended by someone	8%	9%	6%
Came from a social media website	4%	12%	7%

WHAT IS YOUR PRIMARY REASON FOR VISITING THIS DESTINATION WEBSITE? (PLEASE SELECT ONE)	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Planning a trip within the next 30 days	45%	42%	34%
Planning a trip within the next 3 months	20%	15%	17%
Planning a trip within the next 12 months	16%	10%	12%
Researching a trip, no immediate plans	8%	6%	8%
Researching relocating to the area	3%	14%	Did not Ask
Just daydreaming, exploring ideas	9%	14%	26%

HAVE YOU VISITED THIS DESTINATION AREA IN THE PAST?	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Yes (Returning Visitor)	51%	67%	57%
No (New Visitor)	49%	33%	43%

WHEN VISITING A DESTINATION WEBSITE, HOW INFLUENTIAL ARE THE FOLLOWING FEATURES TO YOU?	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
VERY INFLUENTIAL ONLY	VERY INFLUENTIAL	VERY INFLUENTIAL	VERY INFLUENTIAL
Interactive maps	61%	46%	31%
Consumer ratings and reviews	48%	47%	44%
Professional ratings and reviews	40%	30%	25%
Consumer submitted photos	41%	36%	25%
Social media comments & posts	23%	21%	17%
Professional videos	32%	25%	15%
Consumer submitted videos	23%	23%	13%
Company info / promos on social media	34%	31%	17%
Professional photos of the destination	48%	42%	35%

IS THE WEBSITE YOU ARE USING INFLUENTIAL IN MAKING YOU WANT TO VISIT?	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Very Influential	45%	34%	Did Not Ask
Somewhat Influential	43%	54%	Did Not Ask
Neutral/No Opinion	8%	6%	Did Not Ask
Not Very Influential	3%	2%	Did Not Ask
Not at All Influential	6%	5%	Did Not Ask



PLEASE RANK THE TOP FIVE ACTIVITIES (FROM 1 TO 5), YOU ARE MOST LOOKING FORWARD TO DOING.	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA
#1 RANKING ONLY	#1 RANKING	#1 RANKING
Visiting friends and relatives	17%	44%
Retail shopping	11%	20%
Culinary/Dining	9%	14%
Attending a sporting event	0%	15%
Visiting museums	3%	6%
Visiting natural attractions	67%	50%
Visiting historic attractions	5%	7%
Visiting local wineries	9%	14%
Visiting local breweries and/or distilleries	10%	10%
Visiting cultural or art events	3%	13%
Outdoor sports	13%	19%
Visiting Farmer's Markets and/or farms	8%	12%
Local tours	9%	9%

Q10 Please rank the top five activities (from 1 to 5) you are most looking forward to doing when you visit.

Answered: 118 Skipped: 33

	#1 RANKED	#2 RANKED	#3 RANKED	#4 RANKED	#5 RANKED	NOT IN TOP FIVE	TOTAL
Visiting friends and relatives	17% 6	3% 1	14% 5	17% 6	14% 5	34% 12	35
Retail shopping	11% 4	8% 3	16% 6	22% 8	30% 11	14% 5	37
Culinary/Dining (i.e. local dining, Food Trails)	9% 7	32% 24	26% 20	20% 15	12% 9	1% 1	76
Attending a sporting event	0% 0	4% 1	7% 2	7% 2	15% 4	67% 18	27
Visiting museums	3% 1	10%	21% 6	24% 7	28% 8	14%	29
Visiting natural attractions (I.e. beaches, mountains, lakes, etc.)	67% 68	16% 16	9%	3% 3	6% 6	0%	102
Visiting historic attractions	5% 3	21% 12	21% 12	26% 15	17% 10	10% 6	58
Visiting local wineries	9% 2	14% 3	18% 4	27% 6	14% 3	18%	22
Visiting local breweries and/or distilleries	10%	12% 5	29% 12	24% 10	20%	5% 2	41
Visiting cultural or art events (art galleries, live shows, festivals, etc.)	3% 1	24% 7	31% 9	34% 10	7% 2	0%	29
Outdoor sports (fishing, hiking, cycling, mountain biking, golf, etc)	13% 9	37% 25	15% 10	13% 9	18% 12	3% 2	67
Visiting Farmer's Markets and/or farms	8% 4	6% 3	21% 10	29% 14	31% 15	4% 2	48
Local tours (i.e. organized tours of the area by a local firm)	9%	18%	27%	5% 1	32% 7	9%	22

THINKING OF YOUR LAST LEISURE TRIP, WHAT SOURCE(S) OF INFORMATION DID YOU USE TO SELECT THE DESTINATION YOU VISITED? (SELECT ALL THAT APPLY)	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Websites via computer (laptop, desktop)	57%	60%	71%
Websites via mobile device (tablet, smartphone)	72%	60%	22%
Recommendations from friends and relatives	45%	48%	37%
Online advertising email promotions	13%	14%	10%
Printed publications, articles or brochures	19%	20%	20%
Travel guidebooks (such as AAA & Frommer's)	21%	20%	13%
Print advertising	7%	9%	4%
Programs on TV/radio	3%	5%	5%
Others, please specify	11%	9%	12%

WHAT CATEGORY OF WEBSITE(S) DO YOU TYPICALLY VISIT WHEN COMPARING AND CHOOSING A LEISURE DESTINATION? (SELECT ALL THAT APPLY)	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Destination websites, like the site you are visiting	76%	71%	75%
Online travel agency site (Priceline, Expedia, etc.)	35%	27%	26%
General search engines (Yahoo, Google, etc.)	72%	66%	68%
Travel provider websites(united.com, hyatt.com, etc.)	4%	4%	8%
Traveler review sites (Trip Advisor, etc.)	32%	30%	32%
Deal newsletters/websites (Travelzoo, etc.)	9%	5%	9%
Travel guide websites (Lonely Planet, Frommer's, etc.)	13%	14%	12%
Social media (Facebook, Twitter, Instagram, etc.)	18%	19%	10%
Magazine/TV/newspaper websites	17%	16%	17%
Membership websites (Jetsetter, Angie, etc.)	1%	1%	1%
No specific website	3%	8%	9%

COVID RELATED QUESTIONS

GIVEN THE CURRENT COVID SITUATION, HOW COMFORTABLE ARE YOU WITH TRAVELING TO THIS DESTINATION?	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA
Very Comfortable	83%	75%
Somewhat Uncomfortable	14%	21%
Very Uncomfortable	2%	2%
Not Sure	2%	2%

HAS YOUR CHOICE IN VACATION LODGING CHANGED BECAUSE OF COVID CONCERNS?	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA
Yes	10%	22%
No	90%	78%

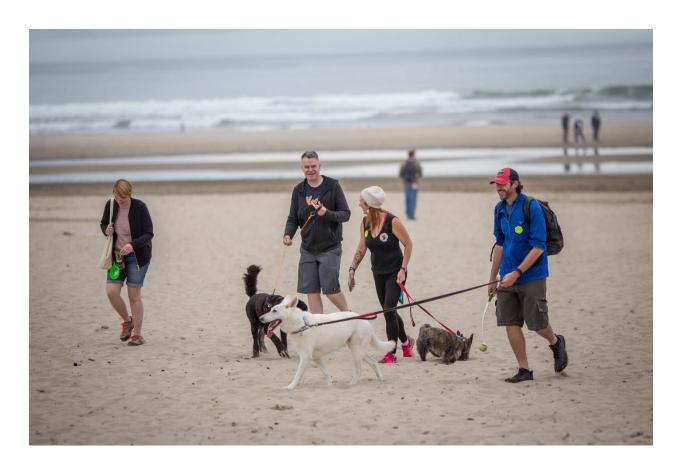
ARE YOU PLANNING TO EVENTUALLY VISIT THIS DESTINATION?	2022 STUDY #8 LOCAL DATA TILLAMOOK	2022 STUDY #8 ALL DATA
Yes	91%	85%
No	0%	1%
Not Sure at this point	5%	3%
I live in the area – not applicable	3%	12%

WHAT MODES OF TRANSPORTATION WILL YOU BE USING? (SELECT ALL THAT APPLY)	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Personal car/truck	76%	82%	76%
Rental car	22%	17%	24%
Camper or RV (personal or rented)	9%	8%	12%
Motorcycle	1%	1%	9%
Commercial air flight	9%	9%	5%
Train	4%	4%	Did Not Ask
Tour Group	1%	1%	Did Not Ask
Bicycle	7%	8%	Did Not Ask
Other	4%	3%	3%

WHERE ARE YOU PLANNING ON STAYING DURING YOUR VISIT? (SELECT ALL THAT APPLY)	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Motel or Hotel	44%	46%	53%
Campground/RV Park	25%	17%	24%
Friends/Relatives	10%	23%	12%
Resort or Lodge	20%	14%	5%
Bed and Breakfast	16%	11%	3%
Vacation/Condo Rental – Including AirB&B, VRBO, etc.)	47%	27%	4%
Country Inn	4%	3%	Did Not Ask
My own Vacation Home	4%	13%	4%

HOW MANY NIGHTS ARE YOU THINKING OF SPENDING HERE?	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Traveling Through/Day Trip	4%	8%	Did Not Ask
1 Night	12%	9%	9%
2 Nights	19%	19%	25%
3 Nights	24%	19%	21%
4 Nights	9%	10%	12%
5 Nights	7%	6%	9%
6 Nights or More	22%	14%	11%
Not Applicable - Relocating	3%	16%	Did Not Ask.

COUNTING YOURSELF, HOW MANY PEOPLE WILL BE TRAVELING?	2022 STUDY #9 LOCAL DATA TILLAMOOK	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
1 Person (Myself)	7%	15%	9%
2 People	46%	54%	53%
3-4 People	38%	23%	25%
5-6 People	10%	5%	8%
7 or More People	10%	3%	4%



The following question changes each year, depending on current situations and concerns.

PLEASE INDICATE HOW IMPORTANT THE FOLLOWING ITEMS ARE IN INFLUENCING YOU TO VISIT THIS DESTINATION	VERY AND SOMEWHAT IMPORTANT TILLAMOOK	VERY AND SOMEWHAT IMPORTANT
Media stories about forest fires and smoke	54%	65%
Negative media stories about the Portland area	31%	34%
Desire for pet-friendly activities and accommodations	39%	46%
Desire for kid-friendly activities and accommodations	32%	33%
Desire to be safe	55%	67%

Q18 Please indicate how important the following items are in influencing you to visit this destination.

Answered: 115 Skipped: 36

	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	NOT AT ALL IMPORTANT	TOTAL
Media stories about forest fires and	27%	27%	30%	17%	
smoke	31	31	34	19	115
Negative media stories about the	12%	19%	32%	36%	
Portland area	14	22	36	41	113
Desire for pet-friendly activities and	20%	19%	15%	46%	
accommodations	23	21	17	52	113
Desire for kid-friendly activities and	21%	11%	17%	51%	
accommodations	24	12	19	58	113
Desire to be safe from covid	21%	34%	24%	21%	
	24	38	27	24	113

	2022	2022	2012
STUDY	STUDY #9	STUDY #9	FIRST STUDY
DEMOGRAPHICS	LOCAL	ALL DATA	ALL DATA TREND ANALYSIS
	DATA TILLAMOOK		TREND ANAL 1313
	TILLAWOOK		
EDUCATION (Q22)			
Some High School	2%	1%	1%
High School Graduate	11%	7%	9%
Some College	21%	23%	29%
Junior College Graduate	11%	8%	12%
Four Year College Graduate	34%	34%	29%
Professional or Doctorate Degree	21%	26%	20%
AGE (Q23)			
YOUNGER (born after 1999)	4%	4%	4%
MILLENNIALS (between 1984 & 1998)	32%	26%	14%
GENERATION X (between 1965 & 1983)	45%	36%	28%
BABY BOOMERS (between 1946 & 1964)	19%	40%	49%
SENIORS (born 1945 or before)	1%	4%	12%
NEW GENDER QUESTION 2021 (Q24)			
Female	65%	74%	72%
Male	34%	24%	28%
Non-Binary/Third Gender	1%	2%	Did Not Ask
NEW MARITAL QUESTION 2018 (Q25)			
Single (divorced/widowed never married)	18%	26%	Did Not Ask
Couple (married or domestic partner)	41%	44%	Did Not Ask
Family (more than 2 living in household)	42%	30%	Did Not Ask
INCOME (Q26)			
Under \$25,000	8%	8%	12%
\$25-49,999	12%	14%	22%
\$50-74,999	23%	16%	27%
\$75-99,999	19%	15%	17%
\$100-149,999	17%	17%	16%
\$150,000 or More	14%	11%	6%
Prefer Not to Answer	17%	20%	Did Not Ask

IV. DATA TABLES - NORTH COAST FOOD TRAIL

HOW DID YOU DISCOVER THE DESTINATION WEBSITE YOU ARE VISITING? (SELECT ALL THAT APPLY)	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Saw the website advertised/promoted	53%	21%	17%
Didn't know about the site, used search engine	12%	22%	23%
Knew about destination, used search engine	16%	41%	38%
Website was recommended by someone	16%	9%	6%
Came from a social media website	8%	12%	7%

WHAT IS YOUR PRIMARY REASON FOR VISITING THIS DESTINATION WEBSITE? (PLEASE SELECT ONE)	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Planning a trip within the next 30 days	38%	42%	34%
Planning a trip within the next 3 months	27%	15%	17%
Planning a trip within the next 12 months	12%	10%	12%
Researching a trip, no immediate plans	12%	6%	8%
Researching relocating to the area	4%	14%	Did not Ask
Just daydreaming, exploring ideas	7%	14%	26%

HAVE YOU VISITED THIS DESTINATION AREA IN THE PAST?	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Yes (Returning Visitor)	59%	67%	57%
No (New Visitor)	41%	33%	43%

WHEN VISITING A DESTINATION WEBSITE, HOW INFLUENTIAL ARE THE FOLLOWING FEATURES TO YOU?	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
VERY INFLUENTIAL ONLY	VERY INFLUENTIAL	VERY INFLUENTIAL	VERY INFLUENTIAL
Interactive maps	48%	46%	31%
Consumer ratings and reviews	51%	47%	44%
Professional ratings and reviews	26%	30%	25%
Consumer submitted photos	35%	36%	25%
Social media comments & posts	19%	21%	17%
Professional videos	17%	25%	15%
Consumer submitted videos	21%	23%	13%
Company info / promos on social media	41%	31%	17%
Professional photos of the destination	39%	42%	35%

IS THE WEBSITE YOU ARE USING INFLUENTIAL IN MAKING YOU WANT TO VISIT?	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Very Influential	37%	34%	Did Not Ask
Somewhat Influential	58%	54%	Did Not Ask
Neutral/No Opinion	2%	6%	Did Not Ask
Not Very Influential	1%	2%	Did Not Ask
Not at All Influential	2%	5%	Did Not Ask



PLEASE RANK THE TOP FIVE ACTIVITIES (FROM 1 TO 5), YOU ARE MOST LOOKING FORWARD TO DOING.	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA
#1 RANKING ONLY	#1 RANKING	#1 RANKING
Visiting friends and relatives	20%	44%
Retail shopping	9%	20%
Culinary/Dining	22%	14%
Attending a sporting event	6%	15%
Visiting museums	0%	6%
Visiting natural attractions	64%	50%
Visiting historic attractions	7%	7%
Visiting local wineries	11%	14%
Visiting local breweries and/or distilleries	9%	10%
Visiting cultural or art events	7%	13%
Outdoor sports	9%	19%
Visiting Farmer's Markets and/or farms	9%	12%
Local tours	8%	9%

Q10 Please rank the top five activities (from 1 to 5) you are most looking forward to doing when you visit.

Answered: 126 Skipped: 17

	#1 RANKED	#2 RANKED	#3 RANKED	#4 RANKED	#5 RANKED	NOT IN TOP FIVE	TOTAL
Visiting friends and relatives	20% 4	20% 4	15% 3	15% 3	15% 3	15% 3	20
Retail shopping	9% 3	13% 4	22% 7	16% 5	34% 11	6% 2	32
Culinary/Dining (i.e. local dining, Food Trails)	22% 22	36% 36	22% 22	12% 12	8% 8	1% 1	101
Attending a sporting event	6% 1	6% 1	6% 1	6% 1	6% 1	71% 12	17
Visiting museums	0% 0	10% 3	13% 4	47% 14	20%	10%	30
Visiting natural attractions (I.e. beaches, mountains, lakes, etc.)	64% 63	14% 14	10% 10	10% 10	0%	2%	99
Visiting historic attractions	7% 3	19% 8	26% 11	14% 6	28% 12	7% 3	43
Visiting local wineries	11% 4	8%	16% 6	30% 11	22%	14% 5	37
Visiting local breweries and/or distilleries	9% 5	28% 15	17% 9	23% 12	17% 9	6% 3	53
Visiting cultural or art events (art galleries, live shows, festivals, etc.)	7% 3	16% 7	27% 12	18% 8	29% 13	4% 2	45
Outdoor sports (fishing, hiking, cycling, mountain biking, golf, etc)	9% 5	17% 9	23% 12	26% 14	19% 10	6% 3	53
Visiting Farmer's Markets and/or farms	9% 5	20% 11	25% 14	18% 10	20% 11	9% 5	56
Local tours (i.e. organized tours of the area by a local firm)	8%	15% 4	27% 7	15% 4	23%	12%	26

THINKING OF YOUR LAST LEISURE TRIP, WHAT SOURCE(S) OF INFORMATION DID YOU USE TO SELECT THE DESTINATION YOU VISITED? (SELECT ALL THAT APPLY)	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Websites via computer (laptop, desktop)	61%	60%	71%
Websites via mobile device (tablet, smartphone)	65%	60%	22%
Recommendations from friends and relatives	42%	48%	37%
Online advertising email promotions	24%	14%	10%
Printed publications, articles or brochures	27%	20%	20%
Travel guidebooks (such as AAA & Frommer's)	35%	20%	13%
Print advertising	16%	9%	4%
Programs on TV/radio	8%	5%	5%
Others	10%	9%	12%

WHAT CATEGORY OF WEBSITE(S) DO YOU TYPICALLY VISIT WHEN COMPARING AND CHOOSING A LEISURE DESTINATION? (SELECT ALL THAT APPLY)	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Destination websites, like the site you are visiting	73%	71%	75%
Online travel agency site (Priceline, Expedia, etc.)	27%	27%	26%
General search engines (Yahoo, Google, etc.)	65%	66%	68%
Travel provider websites(united.com, hyatt.com, etc.)	3%	4%	8%
Traveler review sites (Trip Advisor, etc.)	32%	30%	32%
Deal newsletters/websites (Travelzoo, etc.)	6%	5%	9%
Travel guide websites (Lonely Planet, Frommer's, etc.)	19%	14%	12%
Social media (Facebook, Twitter, Instagram, etc.)	20%	19%	10%
Magazine/TV/newspaper websites	19%	16%	17%
Membership websites (Jetsetter, Angie, etc.)	1%	1%	1%
No specific website	7%	8%	9%

COVID RELATED QUESTIONS

GIVEN THE CURRENT COVID SITUATION, HOW COMFORTABLE ARE YOU WITH TRAVELING TO THIS DESTINATION?	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA
Very Comfortable	69%	75%
Somewhat Uncomfortable	26%	21%
Very Uncomfortable	2%	2%
Not Sure	2%	2%

HAS YOUR CHOICE IN VACATION LODGING CHANGED BECAUSE OF COVID CONCERNS?	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA
Yes	19%	22%
No	81%	78%

ARE YOU PLANNING TO EVENTUALLY VISIT THIS DESTINATION?	2022 STUDY #8 LOCAL DATA FOOD TRAIL	2022 STUDY #8 ALL DATA
Yes	95%	85%
No	2%	1%
Not Sure at this point	2%	3%
I live in the area – not applicable	2%	12%

WHAT MODES OF TRANSPORTATION WILL YOU BE USING? (SELECT ALL THAT APPLY)	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Personal car/truck	80%	82%	76%
Rental car	20%	17%	24%
Camper or RV (personal or rented)	11%	8%	12%
Motorcycle	3%	1%	9%
Commercial air flight	17%	9%	5%
Train	7%	4%	Did Not Ask
Tour Group	2%	1%	Did Not Ask
Bicycle	8%	8%	Did Not Ask
Other	3%	3%	3%

WHERE ARE YOU PLANNING ON STAYING DURING YOUR VISIT? (SELECT ALL THAT APPLY)	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Motel or Hotel	59%	46%	53%
Campground/RV Park	19%	17%	24%
Friends/Relatives	7%	23%	12%
Resort or Lodge	28%	14%	5%
Bed and Breakfast	17%	11%	3%
Vacation/Condo Rental – Including AirB&B, VRBO, etc.)	45%	27%	4%
Country Inn	7%	3%	Did Not Ask
My own Vacation Home	2%	13%	4%

HOW MANY NIGHTS ARE YOU THINKING OF SPENDING HERE?	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
Traveling Through/Day Trip	2%	8%	Did Not Ask
1 Night	8%	9%	9%
2 Nights	21%	19%	25%
3 Nights	24%	19%	21%
4 Nights	11%	10%	12%
5 Nights	11%	6%	9%
6 Nights or More	20%	14%	11%
Not Applicable - Relocating	4%	16%	Did Not Ask.

COUNTING YOURSELF, HOW MANY PEOPLE WILL BE TRAVELING?	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
1 Person (Myself)	7%	15%	9%
2 People	63%	54%	53%
3-4 People	21%	23%	25%
5-6 People	2%	5%	8%
7 or More People	8%	3%	4%

The following question changes each year, depending on current situations and concerns.

PLEASE INDICATE HOW IMPORTANT THE FOLLOWING ITEMS ARE IN INFLUENCING YOU TO VISIT THIS DESTINATION	VERY AND SOMEWHAT IMPORTANT FOOD TRAIL	VERY AND SOMEWHAT IMPORTANT
Media stories about forest fires and smoke	64%	65%
Negative media stories about the Portland area	41%	34%
Desire for pet-friendly activities and accommodations	33%	46%
Desire for kid-friendly activities and accommodations	26%	33%
Desire to be safe	76%	67%

Q18 Please indicate how important the following items are in influencing you to visit this destination.

Answered: 122 Skipped: 21

	VERY IMPORTANT	SOMEWHAT IMPORTANT	NOT VERY IMPORTANT	NOT AT ALL IMPORTANT	TOTAL
Media stories about forest fires and smoke	26% 31	38%	23% 27	13% 16	120
SITIONE	31	46		10	120
Negative media stories about the	14%	27%	27%	31%	
Portland area	17	33	33	38	121
Desire for pet-friendly activities and	20%	13%	14%	53%	
accommodations	24	16	17	63	120
Desire for kid-friendly activities and	15%	11%	13%	61%	
accommodations	18	13	16	73	120
Desire to be safe from covid	33%	43%	13%	12%	
	39	51	16	14	120

STUDY DEMOGRAPHICS	2022 STUDY #9 LOCAL DATA FOOD TRAIL	2022 STUDY #9 ALL DATA	2012 FIRST STUDY ALL DATA TREND ANALYSIS
EDUCATION (Q22)			
Some High School	0%	1%	1%
High School Graduate	6%	7%	9%
Some College	23%	23%	29%
Junior College Graduate	6%	8%	12%
Four Year College Graduate	32%	34%	29%
Professional or Doctorate Degree	32%	26%	20%
AGE (Q23)			
YOUNGER (born after 1999)	1%	4%	4%
MILLENNIALS (between 1984 & 1998)	18%	26%	14%
GENERATION X (between 1965 & 1983)	38%	36%	28%
BABY BOOMERS (between 1946 & 1964)	39%	40%	49%
SENIORS (born 1945 or before)	4%	4%	12%
NEW GENDER QUESTION 2021 (Q24)			
Female	79%	74%	72%
Male	20%	24%	28%
Non-Binary/Third Gender	3%	2%	Did Not Ask
NEW MARITAL QUESTION 2018 (Q25)			
Single (divorced/widowed never married)	24%	26%	Did Not Ask
Couple (married or domestic partner)	52%	44%	Did Not Ask
Family (more than 2 living in household)	25%	30%	Did Not Ask
INCOME (Q26)			
Under \$25,000	4%	8%	12%
\$25-49,999	12%	14%	22%
\$50-74,999	18%	16%	27%
\$75-99,999	11%	15%	17%
\$100-149,999	18%	17%	16%
\$150,000 or More	12%	11%	6%
Prefer Not to Answer	27%	20%	Did Not Ask

OPEN ENDED QUESTION Q9 – TILLAMOOK AND FOOD TRAIL

TILLAMOOK

2022 – 4TH QUARTER TILLAMOOK

- Easy access to local food stores, restaurants, gas stations, etc
- Offerings on what a weekend trip and what we should see.
- Specific RV related travel info.
- Pet friendly? If it's not already there and I just missed it.
- Current rates of the hotels nearby.
- I think your website already offers everything I need!
- Seasonal information, weather, road conditions, restaurant information and an activities guide. Senior citizen discounts would be helpful, also.

2022 – 3rd QUARTER TILLAMOOK

- It would be nice to have a weather guide for each month.
- An interactive map showing where each of these events are. While including the address on each
 individual page is helpful, being able to see where certain events & locations are in relation to each
 other would be extremely beneficial for planning purposes. For instance, consider placing a map
 detailing the train route & depot locations for the Scenic Train Rides.
- It is an excellent website already.
- A map with food locations.
- Option to see availability of each room to see dates available for each room.
- Showing more camping facilities in the area.
- Interactive map.
- More maps of places to visit.
- I've just started exploring the site, and so far, it's great!
- Add the amp to "Where to go" section, not just "What to do." Feels unintuitive to me personally.
- interactive map with hotels / local restaurants / bars / cafes included.
- I would love to see an interactive map of destinations/things to do while visiting.
- Trying to book a camp spot is difficult.

- The site is good as is, but I grew up in the Northwest and am planning to return; and this is the area I want to return as a final destination.
- Local In formation.
- I would love to have a calendar of events that are happening in the area at the time that I will be traveling.
- I would like to see more reviews and more updated information for all the shops/restaurants.
- A category for dog friendly things to do and places to eat.
- If the events page looked like a calendar with labeled events rather than a scroll down option.

2022 - 2rd QUARTER TILLAMOOK

- Some of the elements are difficult to view on my laptop screen. For example, the interactive map is really nice! But it is almost twice as tall as my laptop screen, so looking around is a little weird. This is a really great site with great information.
- More videos of local events.
- Updated articles, lists, photos each year. Much of the info is indeed the same each of the last several
 years. Even a sort of post with a new title and just a little more information would be great to discover.
 All in all, this is a tremendous resource; I merely recommend an update or two to keep things fresh.
- I think it's so useful when websites insert hyperlinks to other websites. This makes it so nice to have a recommended trusted website that can continue the research.
- Recreational opportunities (golf), places to visit, historical info.
- Maps.
- A way to filter seafood restaurants in the engine if I'm on the coast I'm looking for seafood!
- Camping options and more organized way of getting to the website.
- Links to read more about the area.
- Hotel, air b&b, beach house deals and discounts.
- Blogs about what to do for one day in the area or a weekend in the area.
- Time and give dates on train rides.
- Top ten things to do.

2022 - 1st QUARTER TILLAMOOK

• If I had more ways to filter the dining options. Right now, I had the options of mealtimes, but not cuisine. Often, I am in the mood for a specific cuisine.

- More common people's photos and information. Makes it seem more like a heart to heart recommendation verses a paid ad from someone who has never really been there, posting pictures that have been photoshopped.
- With covid being in the rearview mirror maybe a section that promotes rediscovering the Coast, or something like a gas gift card scavenger hunt that encourages visitors to return to our beautiful coast!
- A mobile friendly interactive map
- A free trip to said destination.
- Nothing comes to mind. It's a beautiful website.
- More information about accessible services and areas
- Road trip day trips plans
- Videos
- Hotel accommodations
- Show a plan for a perfect day, like a place to spend morning, afternoon, and night. Like a restaurant, then a destination, then a place to wrap up the day.
- Listing all local hotspots with a cost for each one.
- This is a great website!
- Came to look for a calendar of events to plan a girls trip to the coast.
- Not sure this is my first time visiting the website.
- I would be more influenced if I knew if places were wheelchair accessible. Maybe there isn't specifically an ADA compliant location, but it would be nice to know if there were lookout to park etc.

NORTH COAST FOOD TRAIL

2022 4th QUARTER FOOD TRAIL

- More choices.
- Maps, photos.
- Specific seasonal recommendations for planning. I enjoy visiting the Oregon Coast during the winter season when many establishments have limited hours. The ability to enter the dates of my visit and see which restaurants will be open during my stay would reduce the time I spend developing an itinerary for the trip!
- Up to date costs.
- User friendly for less tech savvy people.
- Current & future events schedule with links. History of those events photo gallery review options.
- Area food reviews and site links for menu and music.
- Coupons are lovely.
- Area closures notices.
- Live cam feeds and traffic feeds.
- Tide schedules would be nice.
- I'm having a little bit of a hard time finding links to the actual businesses without having to leave the actual site and I don't want to keep having to go back and forth, I don't want to lose the main information.

2022 3rd QUARTER FOOD TRAIL

- Add promotional offers.
- Personal ratings, unknown spots and destinations, and great pictures/videos.
- Lists with integrated maps showing locations of highlighted points.
- More professional photos. Info on where to buy fresh seafood.
- Simple maps.
- Search by date/time to see what will be open on days visiting.
- Maybe a few example day agendas that are like a schedule of a fun day for kids; agenda schedule fun
 day for adults; include a breakfast place @ 8:00, 9:00 walk to (name place or activity happening) 10:30
 drive to Etc include current events or markets or art shows in the day.
- Hotel and restaurant recommendations
- In hotel rooms, actual pamphlet.

None...I found what I was looking for easily under "Culinary Travel Map."

2022 2nd QUARTER FOOD TRAIL

- More info on puffin's.
- Written details, specifics.
- Price ranges.
- Maybe best times to go.
- Historical information
- See a bit more diverse representation in the marketing assets and businesses with regard to ownership.
- Attractions more strongly categorized by interest. A "secret gems" section.
- Add more things to do and food places.
- We need the time; our days are full right now.
- More real customer experience videos.
- Alternatives and pet friendly info.
- I won't know until I use it during the visit to the coast.
- Costs reference lodging and food.
- Frankly, the website isn't very good. It comes across like one of those tourist brochures where a few
 vendors buy ads and get to be on a map. It's just ads when it comes down to it. The north coast is a
 great place to visit but the website makes it seem cheesy. I know of two better ways to do a website for
 this purpose.

2022 1ST QUARTER FOOD TRAIL

- Not sure i just landed on the site and clicked on the survey.
- Website is organized well already.
- Choice of vacation rentals
- Hmm, need to think about that, and further visit the website.
- Would like to see more consumer ratings, pics, videos.
- It looks amazing.
- A list of all the restaurants on the food trail
- I'm just searching for great spots to dine on my upcoming trip to Seaside. I am vegan and I eat clean
 as well, so what I "fuel up" with is pretty important!
- Trip was already planned. Looking for new restaurants to try.
- Looks great as it is.
- Knowing more about the people behind the destinations
- Trial offers, tours of local businesses and farms. Just spent a month in Hawaii and having opportunities to explore sites, hike trails and take tours (some self-guided) made the visit fun and enjoyable. From active, to relaxing options like massages, to wonderful places to eat were all enjoyable.
- Honest descriptions and distance estimates for finding historic or scenic places as well as mention of affordable lodging and food.
- Include campgrounds.
- Put everything on an interactive map, an app even better!
- So far, I'm impressed with what I see.