

TOURISM STRATEGY

PHASE 3: Strategy and Implementation

CITY OF GLADSTONE OREGON

06.01.20 - Prepared by the Artists, Designers and Strategists of ROTATOR Creative.

CONTACTS:

Lance Kagey
OWNER/PARTNER
 253.861.1056

Kendon Shaw
CREATIVE STRATEGIST
 206.354.7883

Adam Auter
DESIGNER
 253.753.6482

ADDRESS:

ROTATOR CREATIVE
 703 Pacific Avenue
 Tacoma, WA 98402

ROTATOR is a studio of artists, designers and strategists, specializing in building communities. We believe that the creative mindset has the ability to transform trajectories and community outcomes. We have a strong track record of applying our problem-solving skillset to the most complex challenges and we're looking for people we can help.

Let's recap...

GLADSTONE OREGON - Tourism Brand

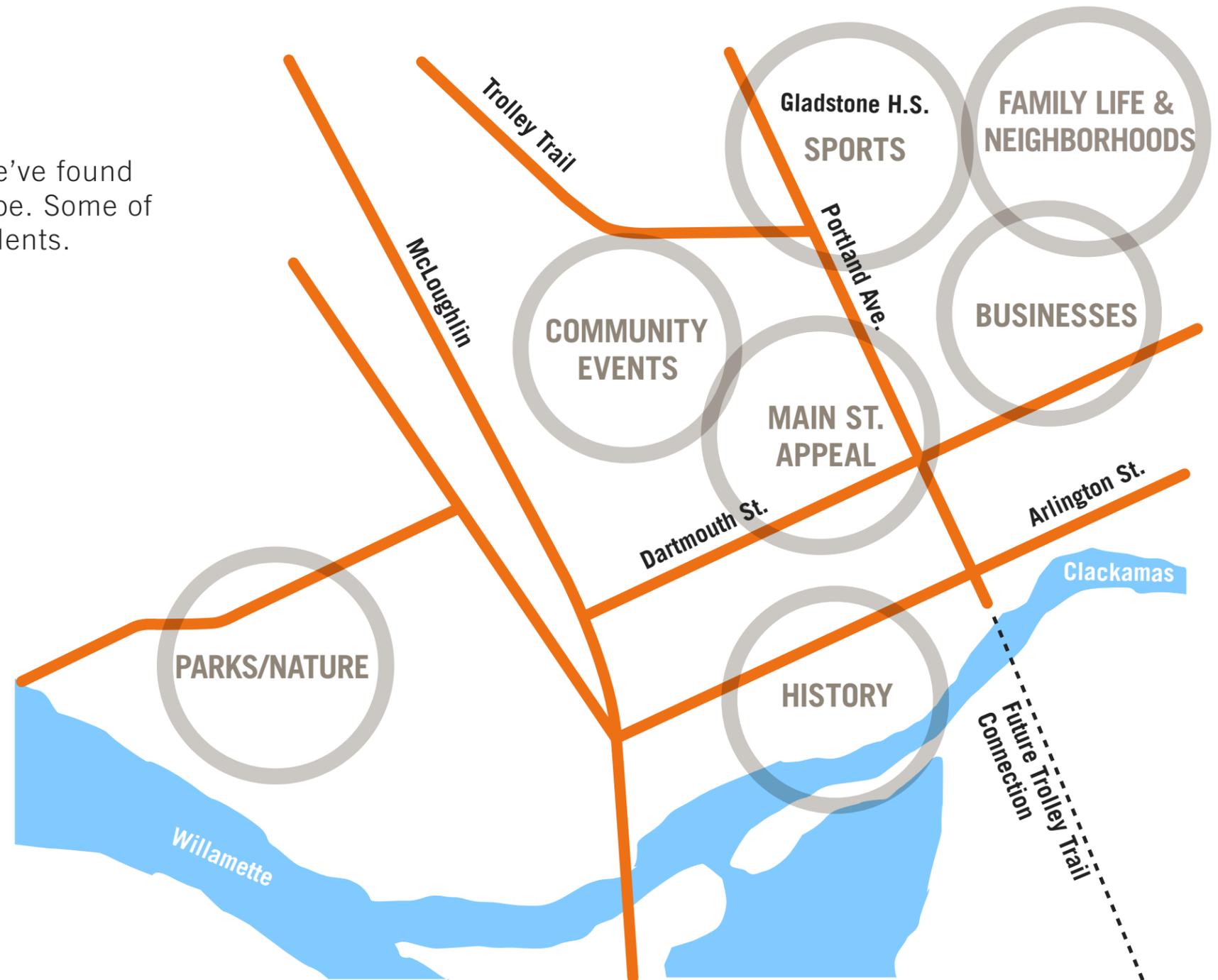
THE BIG PICTURE

WHY PEOPLE LOVE GLADSTONE

Through our work with the people of Gladstone, we've found myriad reasons why Gladstone is a great place to be. Some of these translate to visitors, some apply only to residents.

THESE CATEGORIES ARE:

- Community Events
- Parks & Nature Access
- Sports
- Main Street Appeal
- Businesses
- Family Life & Neighborhoods
- History



GLADSTONE OREGON - Tourism Brand

THE BIG PICTURE—*Examples*



SPORTS

- Gladstone High School
- Friday night lights
- Pickleball

People visit for this.

MAIN ST. APPEAL

- Portland Ave.
- Shops and eats
- Visual elements, wayfinding, public art

People visit for this.

PARKS & NATURE

- River Access
- Trolley Trail and new bridge
- 14 Parks within city

People visit for this.

FAMILY LIFE & NEIGHBORHOODS

- Liveability
- Affordability
- Generational Legacy

People don't generally visit for this.

Gladstone tourism is about discovery.

(Discovery > Destination)

We believe the greatest impact comes from visitors discovering what's going on in Gladstone. At this point, overselling Gladstone as a destination with marketing hype would undermine its authentic charm. We want visitors to discover it for themselves, tell their friends, and come back for more.

GLADSTONE OREGON - Tourism Strategy

DISCOVERY > DESTINATION

During the COVID-19 shutdown, this is an opportunity to showcase a new paint job, and generate excitement and momentum.



WHAT THIS MEANS

- We are “setting the table” now as Gladstone continues to grow and build out more structure and features.
- We strive to create **surprise and delight** when people visit.
- We are not positioning Gladstone as a tourism destination (at this time), instead communicating what happens in and around Gladstone and “setting the table” for surprise and delight when people visit.
- We are focusing on drawing in locals from surrounding areas. We anticipate a surge of local travel as COVID lockdowns wane.
- We surprise and delight by directing and informing visitors of features of Gladstone.
- We aim for visitors to leave with a pleasant feeling and excitement to return.

GLADSTONE OREGON - Tourism Brand

FOUR THEMES FOR GLADSTONE VISITORS



MAIN ST. APPEAL



PARKS & NATURE



**COMMUNITY
EVENTS**



SPORTS

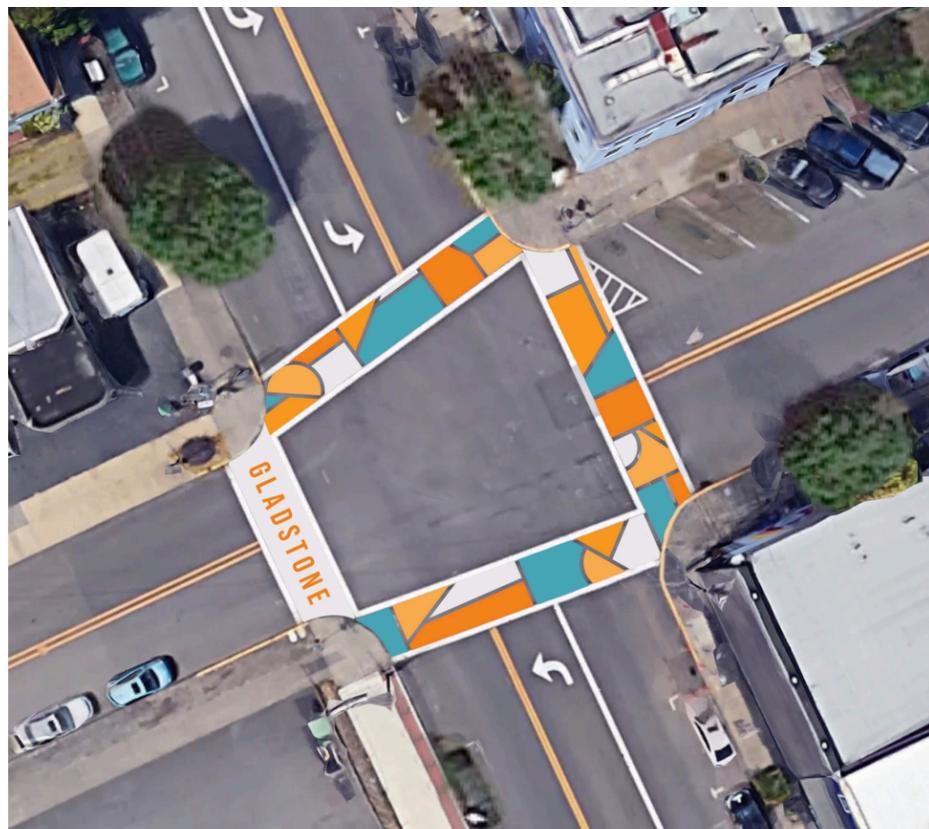
GLADSTONE OREGON - Tourism Strategy

MAIN ST. APPEAL

We are setting the stage for Gladstone's growth and applying a new coat of paint using the new brand to create a positive first impression.

87%

of Gladstone employers are small businesses (< 20 employees)



START WITH THESE

- Street banners with city Branding
- Crosswalk mural (possibly as a community project)
- Wayfinding signs and indicators
- Building murals
- Public art
- Flowers and planters downtown, on river front, and along Trolley Trail
- Micro-grants for downtown business storefronts to improve curb-appeal
- Archway or other large monument sign
- Use city Brand Guidelines to help with small design decisions (street signs, paint colors, official vehicles)
- License plate frames

GLADSTONE OREGON - Tourism Strategy

MAIN ST. APPEAL

Continue building Gladstone's identity and the appeal of Main St through programs and features of Portland Ave.

72k

number of visitors per year to Toyota dealership alone



BUILD TO THESE

- Trolley Trail decorations and wayfinding on trail through downtown
- Wayfinding from McLoughlin to Portland Ave.
- Food cart pod (start with special events, build to regular food cart rhythms)
- Form a downtown association
- Additional public art commissions
- Incentivize new downtown businesses (city code, subsidize build out costs, defer taxes)

GLADSTONE OREGON - Tourism Strategy

PARKS & NATURE

Most people who use Gladstone's parks and nature features are from outside the city. We anticipate this will continue to be a big draw for outside visitors.

80%

of Meldrum Bar Park visitors are from outside Gladstone



START WITH THESE

- Wayfinding into Meldrum Bar park
- Wayfinding out of Meldrum Bar park to Portland Ave
- Decorate bike and pedestrian paths (flowers, signage, art, markers)
- Update and add riverfront access signage — designate where to go and what's allowed
- Watercraft rentals

GLADSTONE OREGON - Tourism Strategy

PARKS & NATURE

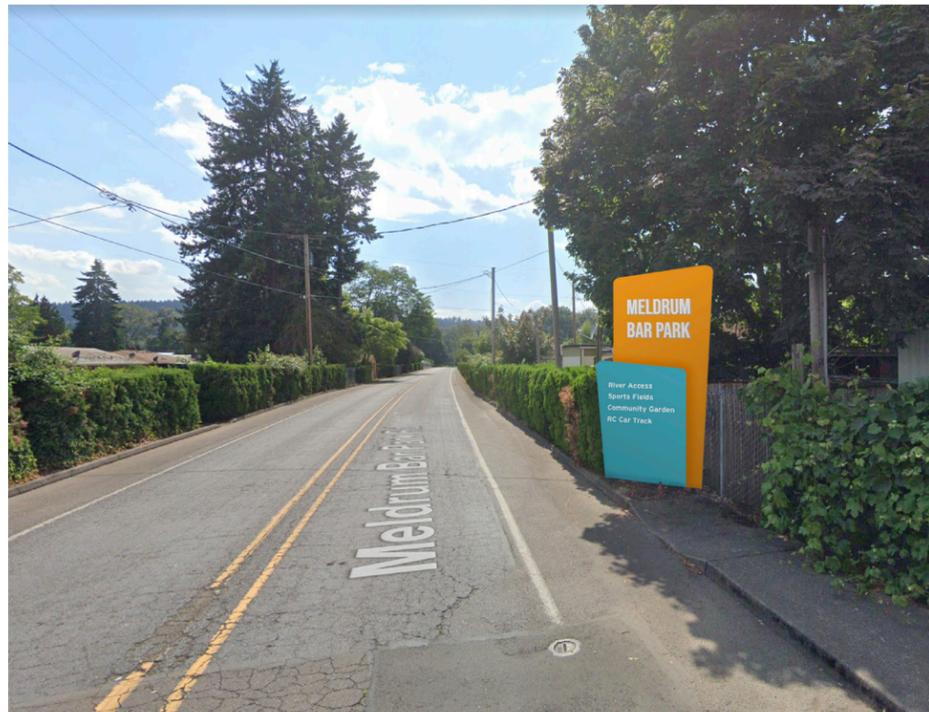
Increasing features and amenities in parks benefits residents and will attract return visitors.

Oregon Outdoor Recreation Demand

58% Trail and pathway walking

51% Beach and water activities

49% Outdoor festivals & concerts



BUILD TO THESE

- Wayfinding from hotel to downtown
- Increase features & amenities in parks (playgrounds, outdoor exercise equipment, nature features etc.)
- Increase access to parks (parking, paths, signage)
- Connect all 5 riverfront parks
- Public art commissions for waterfront and Meldrum Bar Park
- Explore parking permit system for Meldrum
- Enable more watercraft and sports recreation and rentals
- Build out pickleball facilities and other sports courts and fields

GLADSTONE OREGON - Tourism Strategy

COMMUNITY EVENTS

Gladstone can be known for great community events if events are developed and supported.

60%

of Gladstone residents want to see more special events and teen activities



START WITH THESE

- Invest in Gladstone Community Festival (support and staff, food and drink, booths, family activities, promotion, giveaways, and more)
- Invest in existing smaller events like Easter Egg Hunt, Pancake Breakfast, Classic Car Show, Harley gathering, Halloween.
- Support for Rotary Club and other community organizations to take ownership of events
- Support event peripheral needs such as street closures, space accommodations, parking, security, setup and cleanup, portable bathrooms, food and drink needs, logistics etc.
- Recruit social-distance event coordinator to oversee event plans to adhere to COVID-19 guidelines
- Explore events that are easier to socially distance (car shows, fun runs, bike rides)

GLADSTONE OREGON - Tourism Strategy

COMMUNITY EVENTS

Invest in building the infrastructure to support events, making them easier to put on, broader in scope and variety.

74%

of Gladstone residents willing to pay \$4/mo for improved recreational opportunities*



*See appendix for further details

BUILD TO THESE

- Family-friendly fishing tournament to bring locals from outside Gladstone
- Invest in fishing recreation infrastructure in Gladstone (bait shop, pole rentals, etc.)
- Food cart pod downtown and near Meldrum Bar and Max Patterson
- Fun runs/rides & obstacle course races
- Micro-grants for resident-led small local events and festivals
- Farmers Market
- Event ideas that are unique to Gladstone that can't be anywhere else (Shad fishing, pickleball competition in the street, RC Car tournament)
- Develop and expand events that draw from Gladstone 'exurb' (pancake breakfast, fishing, community festival)
- Multi-day events that draw visitors who will stay the night (Cars, obstacle course, music, fishing)

GLADSTONE OREGON - Tourism Strategy

SPORTS

Sports already bring in repeat visitors — built-in tourism. Increase support and amenities for activities that already draw people to Gladstone.

Holiday Inn Express management expressed their most consistent guest segment is traveling sports teams

**START WITH THESE**

- Pickleball facilities, equipment and infrastructure
- Gladstone High School sports (football of course — also focus on other sports that can bring visitors)
- Friday Night Lights — increase and improve amenities like parking designation, tailgating on Portland Ave, food carts, etc.

BUILD TO THESE

- Fishing infrastructure and recreation
- First Tee and other youth sports programs for the greater Gladstone area
- Sports fields and facilities in parks like Max Patterson and other facilities to host tournaments that attract overnight teams
- Community fun runs/rides and family obstacle course race

GLADSTONE OREGON - Tourism Strategy

IMPLEMENTATION**START WITH THESE**

- Main St. Appeal upgrades can be started during COVID-19
- Parks & Nature can be started during COVID-19
- Street banners, Meldrum sign, crosswalk murals (concepts by Rotator)
- Save 75% of funds until bulk of COVID-19 impact passes
- Develop citywide signage strategic plan and guidelines (city signage, banners, wayfinding)
- Develop curb appeal plan and guidelines (storefront guidelines, plant and flower installations, bench and rest area guides)
- Help visitors visit safely during social distancing with ideas such as converting some downtown street parking to distanced outdoor seating for restaurants and shops
- Considers improvements that appeal to safety such as street lights, decorated corners and crossings, directional signs, and bike lanes

~75%

of funds should be saved until the bulk of COVID-19 impact passes



GLADSTONE OREGON - Tourism Strategy

IMPLEMENTATION

BUILD TO THESE

- Create programs and guidelines for micro-grants to help fund:
 - beautifying storefronts
 - street lighting
 - public art and murals
 - local events
- Create and update city code to support 4 themes and make it easier for:
 - food cart pods
 - mixed use developments
 - event tailgating on Portland Ave or other streets
 - attracting new businesses and promoting growth
- Hire a tourism coordinator/concierge to support the 4 main themes as well as act as concierge for large group visits (e.g. meet with visiting sports team leader staying at hotel, guide them to attractions in the town as well as downtown eats and shops, provide group resources)
- Create 2–4 keystone seasonal events including Gladstone Community Festival that would bring regional visitors into city
- Create operating budget for tourism support, programs, and promotions



GLADSTONE OREGON - Tourism Strategy

PROMOTION STRATEGY

- Work on 4 areas of focus in partnership with regional orgs like Mt. Hood Territory, Travel Oregon, nearby cities like Oregon City or West Linn
- Create a 4 themes section on website to provide resources and ideas for someone's visit to Gladstone
- Connect and work with local sports groups, youth programs, nature and wildlife groups, special interest groups (e.g. RC Car) to bring in more visitors and provide support for their activities (budget, catering, space, facilities use, security, etc.)
- Use Social Media Guide to start social media presence (Rotator provided guide, can create basic assets)
- Develop unique plan and assets for Gladstone social media strategy (Discovery > Destination)

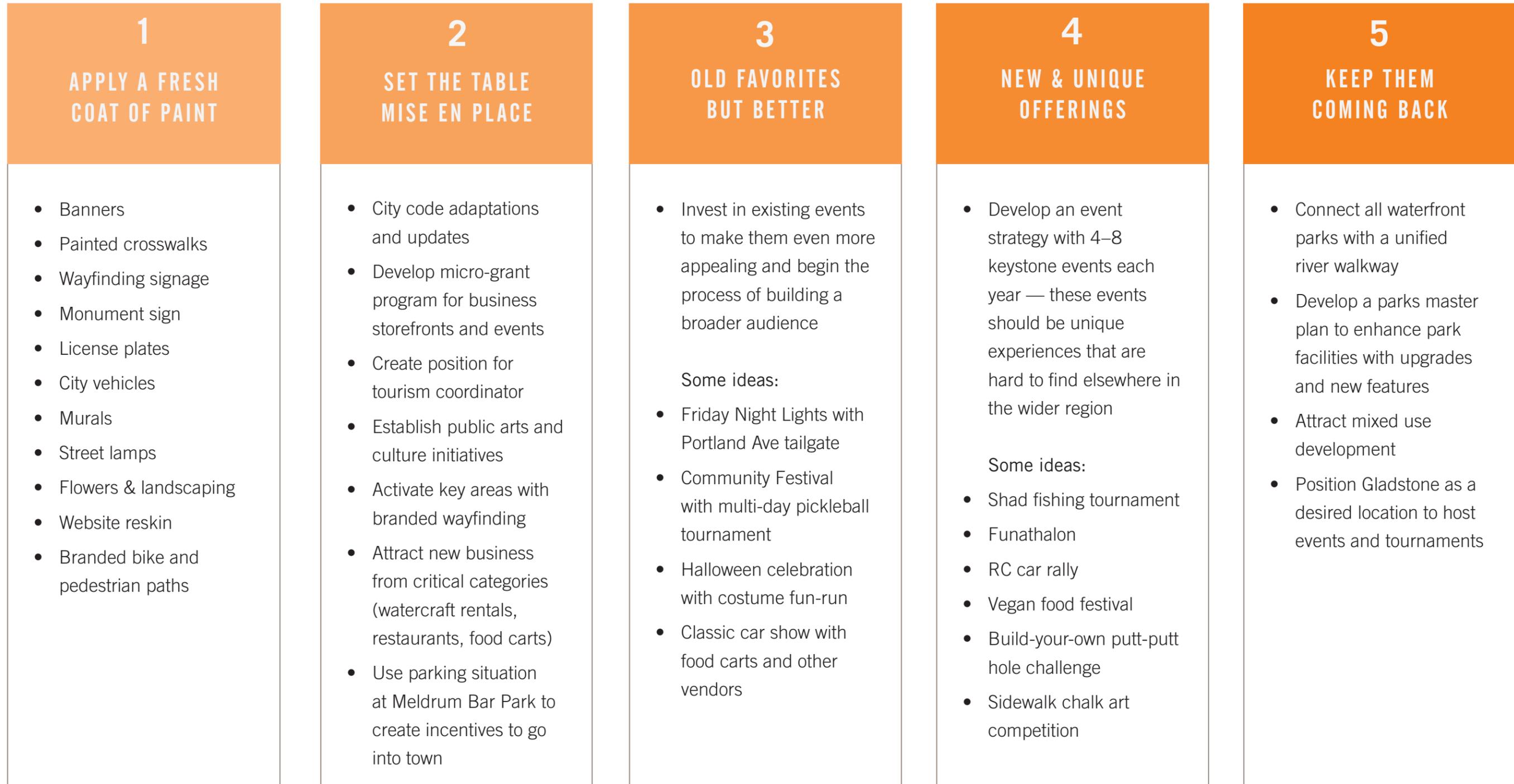
Discovery > Destination

Content and voice should be centered on discovering what's going on in Gladstone and less of a "come to Gladstone" message. It's a subtle difference, but we need to start with building and improving an authentic image of Gladstone instead of overselling through marketing hype.



GLADSTONE OREGON - Tourism Strategy

STRATEGY STEP BY STEP



Thank you

Appendix

Gladstone Brand Theme Research

Mary Bosch

mary@marketekinc.com

503 504 6770



What follows....

- General Visitor Trends & Demographics
- Sports
- Main Street Appeal
- Parks & Nature
- ...emphasis on water-based recreation*
- Community Events

Interviews

- Jacque Betz, City Manager, Gladstone
- Lori Bell, Economic Development Consultant, Gladstone
- David Elder, GM, Toyota Gladstone
- Jim Austin, Mt. Hood Territory
- Jim Whynot, Public Works, Gladstone
- Amy Jauron, Greater Portland Inc.
- Joe Loomis, Sports Mgr, N. Clackamas Recreation District
- Joel La Follette, Royal Treatment Fly Fishing Shop
- Chris Hager, Association of NW Steelheaders
- Holly Pfortmiller, Best Western Rivershore, OC
- Maureen Gurney, Holiday Inn Express, Gladstone
- Tami Bannick, Events admin, City of Gladstone
- Linda Neace, City Council, City of Gladstone
- Bill Preble, Parks & Rec Board
- Tom Mersereau, Car Show event

General Trends & Demographics



Travel Industry – State of Oregon

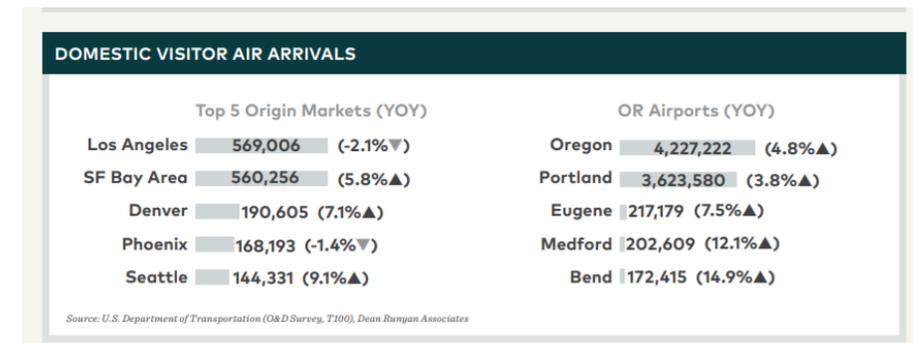
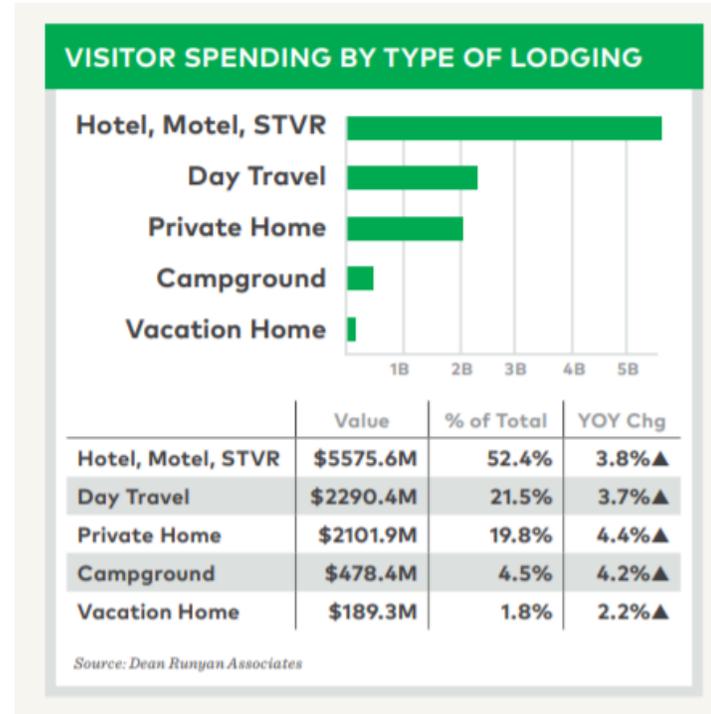
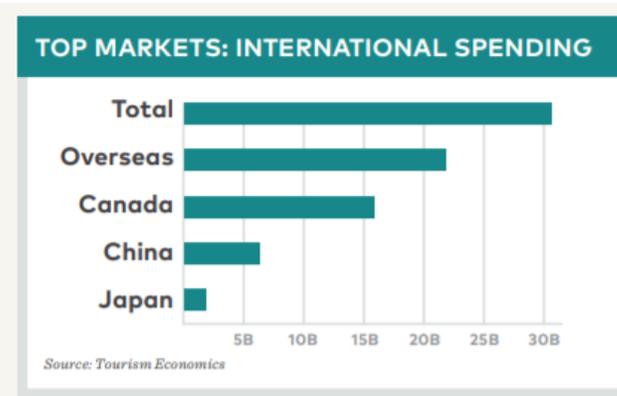
Oregon has \$12.3B tourism industry

Industry employs more than 115K Oregonians

3 travel motivators for visitors to Oregon

1. Cruising/driving, 2. Outdoor rec, 3. Culinary Food/Bev

Travel Oregon’s focus: “Share the stories of Oregon’s people and places, deliver world-class experiences, strengthen the industry, work to ensure all travelers feel welcome and preserve Oregon’s way of life and its natural places.”



Travel Industry – Regional

Mt. Hood Territory

- Top regions (beyond Oregon) driving web traffic to Mt. Hood Territory website are Washington, Arizona and California
- Top activities generating clicks on social (Facebook and Instagram) are *Farms/Harvest Festivals, History, and Lodging* – indicating high interest activities with audiences wanting to learn more

Mount Hood Area Survey in 2018

- About half of visitors were “day trip” visitors from nearby areas
- About 80% of visitors from Portland area – they are local
- 45% travel in duos (with a partner), 33% with children, 30% with friends, and 12% are alone
- Overnight visitors tend to stay by RV/camping/tent, followed by hotel/motel
- Not surprisingly – Outdoor Rec is the mega draw – could Gladstone/Trolley Trail connect to bikers/hikers?

Learnings/takeaways

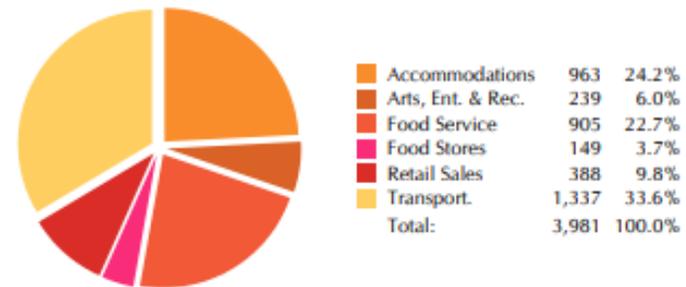
- Partner with Mt Hood Territory when possible
- Use social media to drive to a landing site with more information
- Use Mt. Hood Territory factoids/marketing themes *including biking/hiking/outdoor rec?*

Visitor Trends – Greater Portland Area

In the last 10 years, Greater Portland Area travel spending has grown 52% to \$5.6B*

- Recently launched a new tourism brand themselves – color scheme, look and feel, etc.
- Heavily relies on Google Search and google maps for businesses and locations to ‘join in’ – can Gladstone be “found”?

Visitor Spending by Type of Commodity
(Millions)



Spending. Nearly one-third of all visitor spending was on air and ground transportation (including gas service) in 2018. The leisure and hospitality sector (lodging; food services; and arts, entertainment and recreation) accounted for more than one-half of all visitor spending.

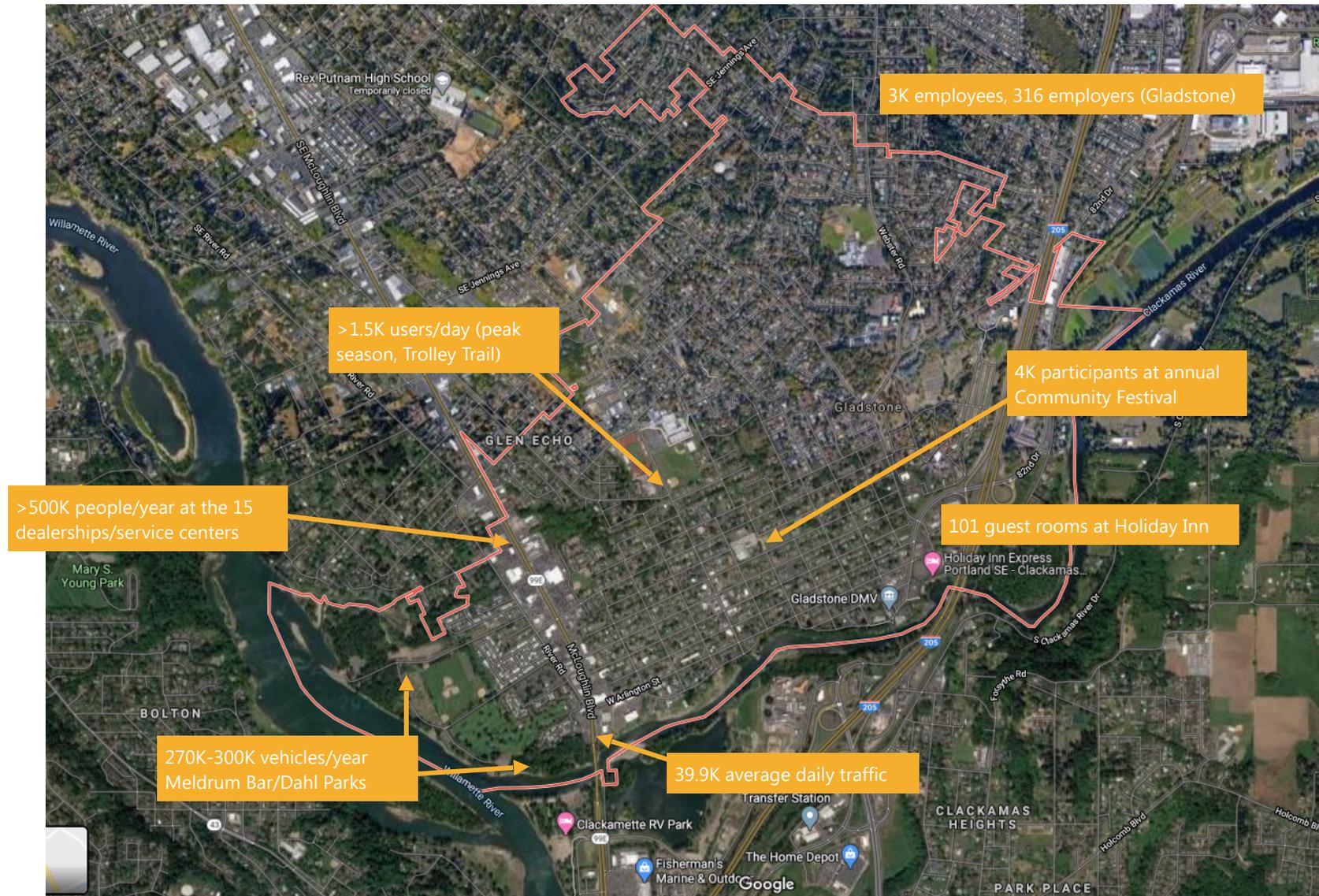
Demographics– Portland Metro Area residents- top target for Gladstone

- Metro population (7 counties) is approx. 2.5M
- Median age is 38.4, slightly less than Oregon (39.6)
- Median HH income is \$75,599, about 20% higher than Oregon (\$63,426)
- 40% of population holds Bachelor's degree or higher
- Poverty rate is about 11% (about same as Gladstone's)
- Avg HH size is 2.6
- 62% owner occupied, median home value is \$397,500

Visitors– Local Gladstone Draws

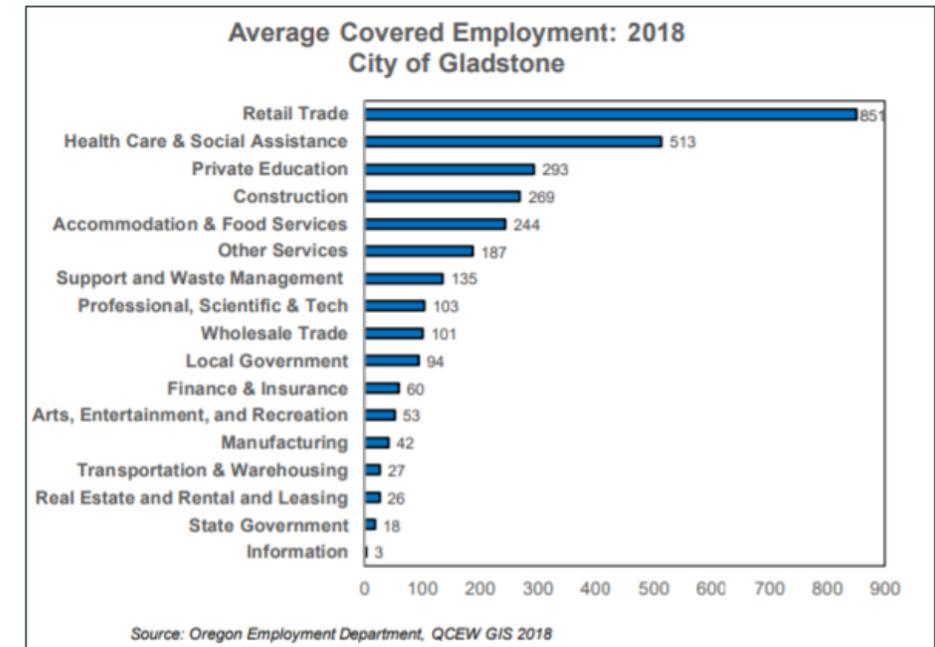
- Gladstone's top regional visitor draws/differentiators:
 1. Meldrum/Dahl Parks (270k-300k vehicles parked/yr)
 2. Vehicle dealerships/services– over 15 concentrated in 1-mile radius; e.g., Toyota alone attracts >72,000pp/yr
- Trolley Trail (6 mi total; Abernathy Lane Trail- 2.42 miles in Gladstone) users – (modest today....will expand with new bridge across Clackamas)
- The trail now connects with existing bike lanes in Milwaukie and Gladstone to complete an essential link in Metro's regional trails system. Ultimately, the trail will be part of a continuous 20-mile loop connecting Portland, Milwaukie, Gladstone, Oregon City and Gresham.

Top Gladstone Attractions and Draws



Gladstone Demographics – Local

- Population remained relatively flat over last 20 years (YoY growth at 0.6%)
 - Est. Population: **12,045**
 - Has more older ages (65+) at 19.1%, and middle-range ages (20-39) at 26% compared to greater Clackamas County
 - Education levels are lower than both county and state (22% with bachelor's degree or higher)
- Median HH income in 2017 was about \$57K, and with a poverty rate of 11.6%, --2.6% higher than Clackamas County
- 61% owner-occupied/40% renter-occupied
- 316 employers, providing 3,000 local jobs
 - Small businesses (less than 20 employees) make up 87% of all employers in the City
- Those who work in Gladstone don't tend to live there, and those who live there don't tend to work there.



Gladstone - Top 5 Tapestry Segments (89.4% hh)

Segment	Median HH Income	Median Age	Description
Front Porches 21.0%	\$43,700	34.9	This segment is more diverse than the U.S., and draws a mix of household types, including young families and singles. Front porches have a large blue-collar work force and slightly higher unemployment than average at 7.1%. Friends' and families' opinions are important influences to purchase decisions, and price is more important than brand name or style. They prefer to eat at home than dine out, and they seek adventure in their hobbies.
Home Improvement 19.2%	\$72,100	37.7	Home Improvement segments draw a typical education and diversity mix as the U.S. as a whole. They are constantly on the go, so they eat out regularly. In fact, they spend heavily on eating out at both fast-food and family restaurants. At home on the weekend they are consumed with home improvement and remodeling projects. They tend to be cautious consumers who research before buying.
Parks and Rec 17.1%	\$60,000	40.9	These financially shrewd consumers are careful to research their big-ticket purchases. They are practical, and shop discounted or warehouse clubs when possible. Many are two-income couples approaching retirement, budget wisely, and yet do not plan on retiring soon. They draw a diverse range of professions, and over half are college educated. They also tend to take advantage of local parks and community facilities.
Comfortable Empty Nesters 16.5%	\$75,000	48.0	Residents in this segment are older, with half of all 55 or older. Many are professionals still working, earning a comfortable living and benefitting from years of prudent investing and saving. Their net worth is well above average, and they value their health and financial well-being. They prefer to eat at home, and home maintenance is a priority.
Old and Newcomers 15.6%	\$44,900	39.4	This segment features singles' lifestyles, on a budget, focusing more on convenience than consumerism, economy over acquisition. They support charity causes and are environmentally conscious; they have a strong sense of community. They are price aware, but open to impulse buys. Dining out is not a large draw as much as convenience, including frozen or fast food. Further, they are very comfortable with the latest technology.

Gladstone - High affinity for sports and leisure, family activities

Gladstone residents have high participations in outdoor sports and leisure activities and purchases compared to the U.S. population average.

Sports

In the last 12 months...	MPI
Fishing (salt water)	123
Horseback riding	119
Ice skating	114
Yoga	113
Backpacking	112
Frisbee	112
Bowling	111
Target Shooting	111
Weightlifting	111
Boating (power)	110
Canoeing/Kayaking	110
Motorcycling	110
Softball	110
Swimming	110

Other Leisure

In the last 12 months...	MPI
Gambled at a casino	120
Played computer game (online)	114
Played billiards/pool	113
Attended dance performance	113
Participated in word games	112
Spent \$500+ on toys/games for child	112
Did crossword puzzle	111
Attended horse races	111
Played video games	111
Spent \$50-99 on toys/games for child	111

Activities with MPIs higher than 100 are shown

An MPI (Market Potential Index) measures the relative likelihood of the adults or households in the specified trade area to exhibit certain consumer behavior or purchasing patterns compared to the U.S. An MPI of 100 represents the U.S. average.

Travel Industry – Local Hotel Trends and Facts

Holiday Inn – 101 rooms

- Hotel info/interview (this is not a big leisure destination-except summer)
 - Weekday – 80% business, Weekend – leisure, Summer occupancy – usually good – but last 2 years--- down due to changing tournament locations....
- The river view is HUGE!!
- Walking along the river. Very desirable. High Rocks Park connecting to Cross Park and Memorial
- Visitors want SOMETHING NOT A CHAIN....mom and pop, pizza, High Rocks Restaurant.....
- Highway 99 through Gladstone: at McLoughlin Bridge at Clackamas River ADT – 39,900 – (south city limits of Gladstone (2018))

Best Western Rivershore – 114 rooms

- Weekends: Draws weddings, events, etc. from Abernathy Center – asset being on the river; Tournament goes from youth/HS sports and CCC – though Associations call themselves, hotels are doing any major marketing on their own
- Weekdays: Proactively filling with corporate clients of all varieties – a lot of people who don't want to be in PDX proper but want to be near; Many who are getting car serviced nearby; Ag-related businesses (ranchers, vets)
- A few customers from river guides/fishing trips and some come from long distances to get car serviced
- Perceptions of Gladstone as “sleepy little town, no attraction, nothing for kids”

Tourism Industry and Trends Sources

- Travel Oregon

<https://industry.traveloregon.com/wp-content/uploads/2019/08/Mt-Hood-Area-Visitor-Study-Final-Report-1.pdf>

- Travel Portland

<https://www.travelportland.com/about-us/market-research-and-statistics/>

- Doing biz in Gladstone pdf (from City)
- US Census Data
- Dean Runyan & Associates

Sports



Sports – Gladstone Assets

- Meldrum Bar consists of 5 softball/baseball fields; Diericks Field has two softball/baseball fields – fields used every week day for games or practices – a couple of tournaments on weekends throughout the summer; Meldrum Bar has one permanent soccer field, however, up to 6 soccer fields are utilized week days for practices and up to 6 soccer fields utilized for games on Saturdays;
- Out of town groups: ball/soccer teams from other cities; Church groups; car club; Portland Ultimate Frisbee; fishermen, BMX bike trail and RC car enthusiasts; people who utilize the park trails
- 6 Pickle Ball courts – could potentially host tournament
- Children's Course/First Tee Golf Course – (not answering phone)

Sports – Existing Events in/around Gladstone

Youth

- Youth Leagues including Meldrum/Gladstone Junior Baseball Association games, Gladstone Girls Softball, Gladstone Soccer Associations
 - Weekend tournaments occur April – July typically
- High school sports draw athletes and their family spectators (very local)
- **Hood View Park** in N. Clackamas draws tournaments *every weekend year-round due to artificial turf* (with 4 large ones where folks come from Midwest listed below) * Opp to get more heads in beds
 - The Valley Invite (Est. 2,500 people) – run by Triple Crown of Colorado
 - Premier Girls Fastpitch PGF-western championship (Est. 1,500-2,500 people)
 - 14B Girls State Championship, (Est. 1,500-2,500 people, about half or more are from out of town)
 - Triple Crown National Tournament (Est. 2,500 people)

Adults

- **Hood View Park** also hosts St. Paddy’s Day Classic, and a few other adult-centered tournaments, bringing bigger spenders. “they play hard and party hard”
- Adult Slowpitch Softball “summer nights league” – partner with local eatery/drinkery evenings of games closer to Gladstone/along corridor?
- Portland Ultimate Frisbee Tournament – 150 participants
- Adult Rec league (young adults draw, cross with food/drinks)
 - Look at Portland’s 5k brewery runs as example, offer weekly/monthly partnerships with eateries/drinking spots for after games gatherings?)

Largest scale area events are also listed on key events calendar

Sports – Sources

- North Clackamas Recreation District Plan and Reports
- School Calendars
- Clackamas Community College Athletics –noted in calendar there are estimated seasons of events – but can't nail down exact dates since calendar is down on site (covid related)

Historic Main Street



Main Street – Top Visitor Attraction Tips

- Visitors want *unique* food, retail, and experiences
- Table stakes: Easy, comfortable, safe and positive experience (*from access and signage to parking to hospitality*)
- Bonus: *Things to do* – DO, not look at; activities, experiences
- Bonus: *Unique* fun, lunch, dinner, drinks, coffee...
- *What do you have that I can't get/see/experience at home? What are the lures?*
 - Ex: Destination Downtown
 - Ex: History
 - Ex: Food

Main Street – Considerations

Opportunities

- New Civic Center and Library will inject new energy and sense of vitality and provide the beginning of a refreshed image for a tired downtown
- Trolley Trail bridge design is underway!
- Key entrepreneurs: Happy Rock, Antique shop and Two Girls Catering
- Historic asset – the “pow wow tree”
- Food cart pod / Farmer’s Market – proposed but never had ‘liftoff’

Barriers

- No local chamber or business association. No Main Street organization for downtown.
- No private investment incentives (no \$)
- No way finding signage planned (no \$)– ie, no connection from Hwy 99 to Main Street
- Curb appeal – tired, disjointed appearance
- “Too many chiefs; very parochial attitude”

Main Street Sources

- Downtown Revitalization Plan (2017) + several earlier versions
- Oregon Main Street Program
- City of Gladstone Strategic Plan

Parks/Nature



Parks/Nature – Assets

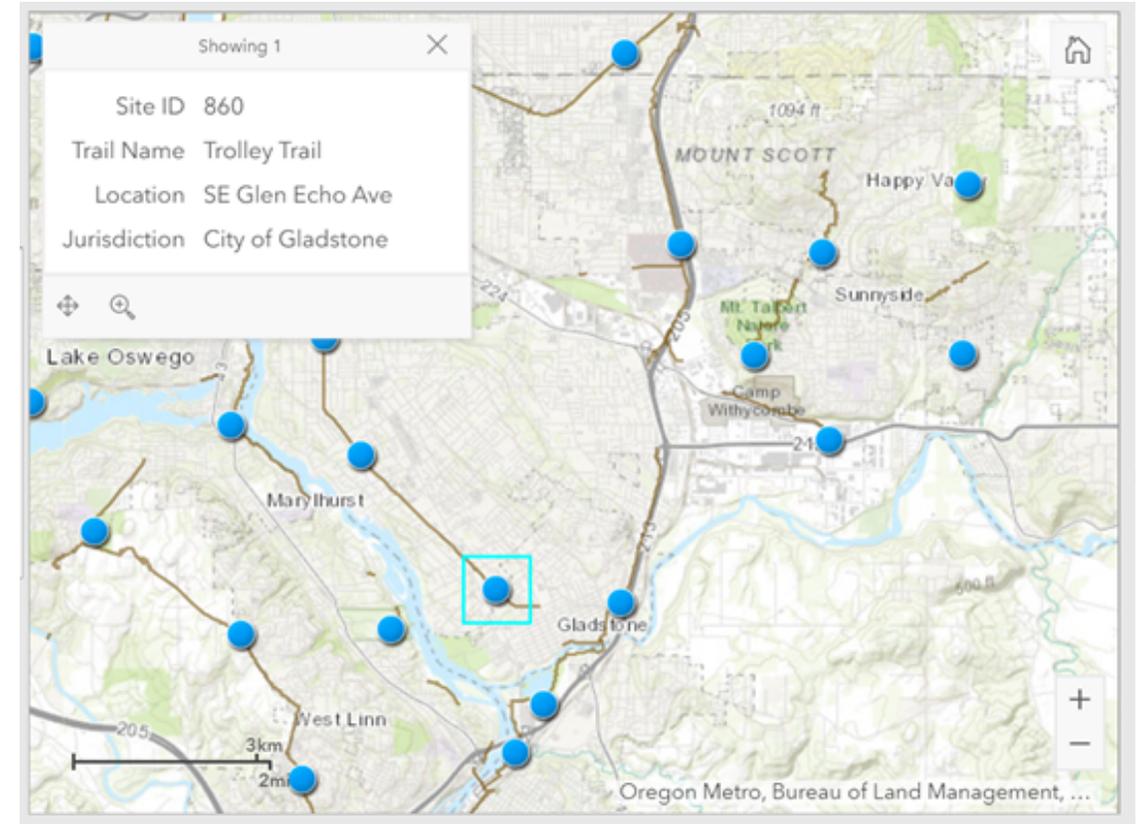
A total of 11 parks and several undeveloped natural areas.

Main ‘calling cards’ for regional users are string of riverfront parks calling out for a cohesive master plan

- Meldrum Bar (87.4 ac) - over 80% of users are ‘not from Gladstone’ *according to casual intercept survey a few years back; close proximity to Willamette Falls is big leverage point*
- Dahl Beach (12.31 ac) – popular and somewhat unique sandy beach on Willamette
- High Rocks Park (1.5 ac) 100s of users daily during hot summer days
- Trolley Trail (see next slide)
- Oregon Outdoor Recreation Demand Analysis shows that top activities in Clackamas County are: *Walking on sidewalks or trails (58%), Beach activities (51%), Attending outdoor concerts and festivals (49%)*

Parks/Nature – Trolley Trail Visitors

- The Trolley Trail at Glen Echo Ave is moderately used (*about 142 users per/two-hour segments*)
 - Nearly equal use weekday and weekend
 - Slightly more pedestrians (55%) than bikers (43%)
 - Trail use has slightly declined over time (over last 5-ish years)



Parks/Nature – Potential Business Ideas Links

- *Note some crossover with Water-based tourism section (next)*
- Food carts at Meldrum Bar for fishing, boating, swimming season
- Businesses leveraging water asset: food, convenience goods, kayak rentals (Oregon Kayak Rentals reached out in past), fish supplies/gear, fish guides, boat show, classes, repair/service
- Partner with water retailer like Scappoose Bay Marina/Paddling Center did with *Next Adventure*—significantly increased their exposure and traffic
- RV Park at Meldrum Bar – v. good potential demand/fee generation
- Recruit car dealers and Fisherman's Supply to sponsor events

Parks/Nature – Top Priority Actions or Investments

- Excellent Parks Master Plan with strategic and operational list of actions. Funding for implementation = challenge and could be enhanced by fees at Meldrum Bar (EcoNW study)
- A top priority park project for City is Meldrum Bar/waterfront site plan
- Invest in water-related events and experiences– fishing derby/boating/kayaking festivals; music on water; swimming
- Low-hanging fruit. Sponsor the annual Salmon Quest competition that brings in 100-300 people– raises \$ for Clackamas and Willamette restoration. Goal get 100k salmon over Willamette Falls....
- Have a promotional deal w/ NW Steelheaders Assoc. Host an after-tournament party—Celebrate!!

Parks/Nature – Sources

- See TO's recreation tourism
- Gladstone Parks Master Plan
- EcoNW Meldrum Bar User Fee Study
- Metro regional government, Trolley Trail
- North Clackamas Recreation District Plan
- Oregon Outdoor Recreation Study

Chief Asset: Water-Based Recreation & Tourism



Water Tourism Facts/Trends – 2017 Water Recreation Study

- Oregon's **favorite water recreation activity is clearly fishing**. Fly fishing is 3x more popular than next water-based sport, kayaking.
- Oregon's has world renowned fishing resources, but it appears that Oregon's angler market potential may be bigger than what they are currently attracting. On the other hand, Oregon ranks 7th in the nation in generating revenue from fishing. This means that **those who do come to Oregon are willing to spend a disproportionately higher amount** of money to do so. Willingness to spend angling tourism dollars is an indication that Oregon has a high-quality product and that it is worth the trip for non-resident anglers to visit the state
- Kayakers/Paddlers make up the most out of state visitors of the three groups with **25%**. Anglers are not far behind with **23%**.
 - Flat water and whitewater kayaking nearly doubled in the last 10 years
 - Paddlers however, don't travel from very far. Ninety percent of the out of state paddlers are from Washington and the remaining are from neighboring states. Out of state anglers, on the other hand, travel farther. While most are still from neighboring states, anglers come from nearly every state in country.
- **Gap/Opportunity**: About **15% of the water recreation market visits Clackamas County frequently** (more than 6 times per year). For those visiting the Clackamas River, approximately **284,000 of them pay for accommodations**, with camping preferred slightly more than hotels. So, while water-based recreation generated about 12 million dollars in lodging reservations in Oregon in 2016, Clackamas County captured only **about 2% of this amount**. This is disproportionately low after considering that Clackamas County has world-class fisheries, some of the most exciting whitewater in the State, stunning flatwater paddling locations, the Willamette Falls, easy access to all these waters, and close proximity to Oregon's largest population center.

Meldrum Bar Visitors/River Park Users



Meldrum Bar brings an estimated **292K - 328K** vehicles per year

The Park spans over 85 acres and has amenities in addition to river access including baseball and soccer fields, picnic tables, a walking path, community gardens, and a wetland area. Entrance to Dahl Beach, a 15.33-acre riverfront park on the Clackamas River, is accessed via Meldrum Bar Park Road.

BMX and radio controlled cars enthusiasts also use Meldrum Bar



Estimated **26.3K** recreational boaters per year at Meldrum Bar Park



265.7K - 301.7K vehicles per year drawing other activities including fishing, day trips, picnics, kayaks, rafters, etc.

Water-Based Recreation/Tourism Interview

Advice from NW Steelheaders Exec Director on how Gladstone can be more friendly/attractive to anglers

- Infrastructure! Food, hotels, experience. Be friendly (from signs to welcoming), Habitat restoration...
- Partner with McLoughlin Chapter - 100 people are members;
- Willamette and Clackamas - to Falls..... -- one of hot spot destinations for spring salmon - King or Chinook
- Spring! Peak time in April....but also other seasons on Clackamas River chinook, king, steelhead
- Positives - Dahl Park Boat ramp is easy access!!
- Opportunities - more Guided Trips! --
- **How to generate overnight visits?** This is difficult. The state is big draw for anglers and salmon fishers but they don't want an 'urban fishing experience.' They want Oregon's wild and beautiful settings and that is why Deschutes is at top of list and Columbia, etc. Holiday Inn also commented they don't get fishers/boaters.
- Fishing guides—get them to recommend coming to and staying in Gladstone! *Access..... Show all the referral sources some love*

Water-Based Recreation/Tourism - Interview

Interview with Joel La Follette, Royal Treatment Fly Fishing Shop, West Linn

- The Clackamas is used extensively year-round, more use of McIver Park and down, and generally is steelhead
- Anglers are starting to also fish in kayaks (newer trend)
- Clackamas needs better care to attract more fishermen – keep in clean, anglers care deeply about ecological impact and habitat restoration to protect the wild fish
- About half a dozen fishing guides work the river that he knows about, they host trips, host classes on the river, and Joel himself hosts fly tying nights at his shop, drawing a dozen folks or so at a time, at least monthly
- Beyond the Spey Clave (Sandy River) event – other regional draws: Joel hosts the “fly fishing symposium” drawing 250-300 people, free event with clinics. More recently moved to Willamette Park in West Linn, potential for 1K participant capacity (though admits this year will be unlikely to go through, and was difficult to find time in West Linn because of softball in Spring) **Joel wants to expand this event he runs, and make it an annual event locally.**
- Note – Joel’s biz circulates a newsletter to about 2k local fishermen - may be opps to leverage for relevant events/news
- Also note – Joel is **vocal about his eagerness in helping to organize a larger river and outdoor recreation event locally**, he’s done this several times over, serves on the River Studio, and would be a great asset for any river-based event drawing outdoor rec, biking/hiking/ kayaks, food, fishing, and habitat/eco-groups all together

Water-Based Recreation/Tourism – Top Actions/ Strategies

- ‘Friends of the Clackamas at Gladstone’ sort of monthly event – a la Friends of the Columbia Gorge, where volunteers are passionate about keeping land clean and preserved and built in advocates? (there’s already a strong base of volunteers for Clackamas River Basin Council– per River Studio)
- Shuttle service is a huge amenity to have in a river rec destination (right now only temp and informal shuttles from Barton to Carver in summer)
- Family oriented, nature-based travel that promotes the environment as the ideal medium for families to escape and reconnect with each other – a “family friendly river spot near the city”
- Emphasize water-based recreation, especially fishing instructions, natural history, floating and boating, as activities that help families bond.
- Multiple Improvements at Willamette River Greenway
- A Gladstone Riverwalk
- An outdoor rec/river-oriented community event (fishing, biking, eco tourism, paddlers, etc.)
- 5 Action Categories and 45 recommendations in Water Tourism Strategy Plan (Mt Hood Territory)

Water-Based Recreation/Tourism – Top Actions/Strategies (Fisher/Paddler Specific)

- Clackamas County can capitalize on this untapped opportunity by marketing new destinations, new products, and to new demographics. Non-residents are aware of the Deschutes, Rogue, Columbia and other famous rivers, but know little about Clackamas County's rivers and lakes. The Clackamas, Sandy, and Willamette, are excellent fisheries that can be used to create new experiences and new fishing products for the visiting angler. Increasing water-based tourism in Clackamas County should start with marketing to an expanded angler market. Detailed review of national and local data shows that there are two general target markets that Clackamas County should focus on attracting: Paddlers and Fishers
- Given the major gap in accommodation spending in Clackamas County, *look for opportunities to market camping and hotels alike to water tourists.*

Segmented recommendations from report:

- Paddlers can be reached in Washington, California, southwestern Idaho, and Oregon.
- Any communication to motor boaters should be limited to those in the northwest part of the state.
- Marketing efforts in areas beyond Washington and California should be limited to only anglers. *Anglers are the largest and most established market in Oregon's water recreation market. They are responsible for 83% of all overnight stays from water recreationists.* Their market size is 2.5 times greater than motor boaters and 3 times larger than paddlers.

Water Tourism - Sources

- Water Recreation Studio/ Water Tourism - Travel Oregon studies industry.traveloregon.com/willametteors
- Meldrum Bar/ECO NW Study
- Water Based Tourism Strategic Plan – Mt. Hood Territory

Water Tourism - Interviews

- Joel La Follette, Royal Treatment Fly Fishing Shop
- Mt. Hood Territory – Water Based Tourism Strategic Plan (2018)
- EcoNW Study of Meldrum Bar
- Chris Hager, NW Steelheaders Assoc

Community Events



Community Events - Sample Assets/Existing Events

2017 Parks Master Plan revealed that of 554 resident respondents to survey, 74% are willing to pay \$4/mo to fund improved recreational opportunities; 60% want to see more special events/teen activities.

- Community Festival (4k participants)
- Friends of Gladstone Nature Park – Arbor Day Event (local)
- Cavalry Chapel Southeast Church in the Park – About 400 participants
- UBC Pathway to God (annual water baptism) – Up to 300 participants (local)
- Bike Nites Downtown (put on by Harley Davidson) May – Sept, 1 night per month, about 20 vendors, close down part of Portland Ave (*well attended*)

Gladstone Community Festival



Up to 4K total participants

Sherry Hildress Ovarian Cancer Shock Run – 700 participants

All Festival proceeds benefit the Gladstone/Oak Lodge Rotary Foundation, a non-profit that supports scholarships, Gladstone schools, the Gladstone Food Pantry, the Gladstone Kids Clothes Closet, and other community projects.



Draws diverse audience--events for families during the day and evening (movie in the park with food card dinner)

Adults come for Beer Garden, a fun run and vendor marketplace

Gladstone Community Festival – Annual Drive In

This Cruise-in is not the biggest, but is one of the largest and draws **several hundred spectators**

2020 will be year 8 of the show (pending cancellation)

Draws **200+ cars & motorcycles**

The entries come from California through Canada, though **most are local, Oregon & Washington**

The original thoughts were to get the Gladstone restaurants & businesses involved but there hasn't been a coordinated effort toward that end to date

More general Cruise-in attendees generally start their plans in the spring and continue until fall. Several go to various events weekly, others pick a few specific venues locally, around the State or wherever around the Country. The entries generally have several hundred hours, and many thousands of dollars invested (\$10,000 - \$250K+)

The Associated Fords of 50's hosts this Cruise-in and returns 100% of the money, 50% to the Gladstone Center for Children & Families (GCCF) and 50% to the Gladstone & Oak Grove Rotary Club, for Sponsoring the venue.



Interview information from
Tom Mersereau
Associated Ford's of the 50's Treasurer
Gladstone City Councilor

Community Events – Business links

- Introduce more food and drink!
- Steelhead Festival (introduce) with Fish Fry, fishing and boating vendors, tournament, etc.
- Link car show to car dealers– bring the latest and greatest models to Main Street

Community Events – Low hanging fruit actions or investments– put Gladstone on mental map!

- Double up promotion of car show– reportedly, very low key
- Make the car show and other events *Multi-day* augmenting with entertainment, etc to keep out of towners overnight and in hotels
- FUN-Athelon.....done last year—*family-oriented*.... River, bike, run; mini-Tri-Athelon. Jim Austin through this together on the river one day last year and 100 people showed up. Repeat. Promote. Grow!
- Sunday Parkway/walkway (happens in Milwaukie– Gladstone can do)
- Fishing festival for kids and families– Shad Festival/Fishing derby. It's a non-native, no catch limit. Prizes and games. First person to catch 30 in an hour, etc.

Area Event Calendar

Sample Events Drawing Out-of-Town Visitors

<p>JAN</p>	<p>FEB</p>	<p>MAR <i>Mid Mar: St Paddy's Day Class Adult Softball Tourney (Hood View Park)</i></p>	<p>APRIL 24: Friends of Gladstone Nature Park Arbor Day Events <i>Various Horse and 4H events at Clackamas Fairgrounds</i></p>
<p>MAY <i>(early May) Sandy River Spey Clave (in Sandy but opp to draw in visiting anglers to Gladstone/lodging?)</i> 16: annual living history day (Camp Withycombe in Clackamas) - <i>crossover opp?</i> 25: Up the Lazy River 10k Run/Walk (West Linn) 29-30: Clackamas County Taste & Tunes Festival (Clackamas Fairgrounds) <i>Various Horse and 4H events at Clackamas Fairgrounds</i></p>	<p>JUN 6-7, 13-14: Annual Oregon Renaissance Faire (Clackamas Fairgrounds) 19-21: The Valley Invite Youth Softball (Hood View Park) 20-21: Kennel Club Dog Show (Clackamas Fairgrounds)</p>	<p>JULY 3-5: 14B Oregon State Girls Softball Championships (Hood View Park) 12-18: 4-H Horse Fair (Clackamas Fairgrounds) 13-16: Triple Crown National Tournament (Hood View Park and beyond) 17-19: West Linn Old Time Fair 20: Tee it up Golf Tournament 25: NW Youth Rodeo (Clackamas Fairgrounds) 30-Aug 2: Pickathon Music Festival in Happy Valley 31-Aug 2: Gladstone Community Festival</p>	<p>AUG 2: Annual Car Show 7-9: NW Youth Rodeo (Clackamas Fairgrounds) 18-22: Clackamas County Fair and Canby Rodeo</p>
<p>SEPT 4-7: Willamette Valley Gem Show (Clackamas Fairgrounds) 18-20: Celtic Festival (Clackamas Fairgrounds)</p>	<p>OCT</p>	<p>NOV <i>CCC Basketball Jamboree Scrimmage (16 Teams)</i> <i>CCC Women's Basketball Thanksgiving Invitational</i> Nov 2: CCC Cross Country Southern Region Championships</p>	<p>DEC <i>CCC Basketball Tournaments</i></p>

Top Steps to Get “Heads in Beds”

- Work with the tournament circuit in and near Gladstone – pulling regional visitors
- Work with the dozen or more events at Clackamas Fair Grounds (down Hwy 99 in Canby) that attract out-of-area participants.
- Build more events/Create new events (ex: River & Fish-based ones)
- Promote Gladstone as a close to Portland alternative for day trips
- Self-image building campaigns....”I believe in Gladstone!” for community members and local businesses, including car dealers... could lead to business development campaigns

About the Study

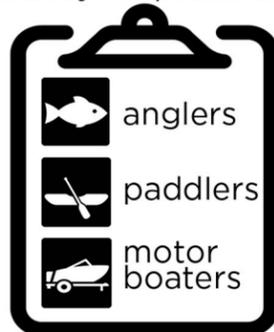
-  Comparative Research
-  Market Research
-  4 Months On-the-Ground Fieldwork
-  Strategy Sessions with Stakeholders

Survey of Water Recreators

This survey was designed to understand where water recreation enthusiasts like to go to recreate, what they like to do on the water, and their general preferences, concerns, and behaviors on the water. This comprehensive study included a large sample and yielded statistically significant results.

1,700

Survey Respondents



Michael Crane is an environmental economist with over 20 years of national and international experience. He identifies untapped economic development potential for regions, cities, and companies through tourism growth strategies. His pursuit of happiness is helping societies find their unique balance in creating a healthy economy, environment, and community. He has a BA in International Studies and Environmental Policy from Marlboro College and the School for International Training and an MS from the University of Vermont where he wrote a thesis on the environmental economic valuation of rivers. When he is not working, you'll find him on a river or in the mountains.



Michael D. Crane, AICP
Founder/Principal
www.craneassociates.us

Next Steps

The Water Tourism Strategic Plan findings are intended to bring a sustainable tourism perspective to economic development, community projects and water asset management throughout the county. The study engaged with nearly two thousand stakeholders. Now we want to hear from you. What are your thoughts on the water tourism potential in the county? What should Tourism take into consideration as we engage with projects and set priorities? What projects and processes are happening in your community that Tourism should know about? Give us a call, send us an email or set up a meeting. The Tourism Development Team looks forward to hearing from you.

For more information and to view the full report:

Samara Phelps
Development Lead
Clackamas County Tourism
samara@mthoodterritory.com
503-742-5910

Jeannie Panchal
Development Specialist
Clackamas County Tourism
jeannie@mthoodterritory.com
503-742-5915

Visit MtHoodTerritory.com/water-tourism-strategic-plan



Finding the Water Tourism Opportunities in Clackamas County

Clackamas County Tourism's Water Tourism Strategic Plan 2018 - Highlights



Clackamas County's Water Tourism

From wading into the Sandy River to paddling at Willamette Falls, rivers, lakes and streams throughout the county offer fantastic water-based recreation. More than a float on the Molalla on a hot summer day, there are fishing, floating and paddling opportunities in all four seasons. Gifted with these natural features, communities and local businesses have the opportunity to create meaningful experiences for visitors and economic impact. Converting these natural resources into sustainable tourism assets requires strategic planning, coordination and collaboration across a wide range of groups and agencies. To better understand both the potential for tourism in the county and how to better leverage these opportunities, Clackamas County Tourism & Cultural Affairs (CCTCA) hired Crane Associates to conduct a further in-depth analysis of this topic. Here is a summary of key findings.

Quality Experiences



83% of recreators say that Clackamas County water bodies are "as good" as their favorite.

The study finds water bodies in Clackamas County are as good or better than the state average for recreational value based on a survey of water recreation enthusiasts, the opinion of local guides, professional evaluation and national and international comparisons. Quality is defined by access, diversity of activities, water body types and the user experience.

Economic Potential

Oregon attracts 4% of national visiting anglers but only 2% of the nation's visiting angler days. Based on non-resident expenditures, visiting anglers are willing to spend more in Oregon than in neighboring states. There is the potential to double current overnight stays.

-  **Anglers** are the largest contributor to overnight stays.
-  **Paddlers** and  **motor boaters** are key to creating new products and "buzz".

1.5 mil visitors



284,000 overnight stays



Anglers visit from across the nation. **Paddlers** come from Oregon's neighboring states. **Motor boaters** are local guests.

Recommendations from the Study

The study identifies 48 opportunities for improving water tourism in several categories. A number of the suggested improvements align with existing community efforts where tourism is one of many benefits from the project. Below are a few sample recommendations with county-wide impacts. Review the complete study to find the specific recommendations for your local water bodies.



Physical Improvements

Make improvements to infrastructure to increase capacity, improve access and enhance user experience.



Increase Campsites

All water recreation user groups (anglers, paddlers and motor boaters) identified camping as their most preferred lodging type. The current demand for camping in Clackamas County exceeds assets. Developing more camping in the County would likely yield high returns as there is a demonstrated demand for this product.



Improve the Experience

Develop unique and engaging experiences for all skill levels and budgets, and create tools to easily provide quality information.

Create Packages

By working together, local businesses have the opportunity to develop visitor experiences unique to our area and overnight packages that attract a diverse audience from first-time paddlers to experienced anglers.



Coordination of Community

Coordinate communities to optimize management of current water assets, improve data collection, and connect cities to the water.

Develop the "Urban-River Interface"

The "Urban-River Interface" describes the relationship between a community and its water body, both in terms of infrastructural and intangible connections. Communities should view their water bodies as an asset for recreation, business, industry, tourism and leisure. The opportunity to design and create this connection lies within each community.



Put Clackamas County on the Map

Increase awareness of Clackamas County's water assets on a regional and national scale through marketing, PR and special events.

Promote the Experience

People fish to spend time with loved ones and in nature. Rebranding water experiences to align with visitor motivations would be a strategic advantage for the county and local businesses. For example, instead of promoting fishing with a photo of a fish caught, show a family having fun.



Building on a Strong Foundation

- Established guides and outfitters offer a range of experiences.
- Existing parks and sites provide access to a variety of water-based activities
- Recreation is an identified pillar of tourism within the county's Tourism Master Plan.
- Maps and informational material for the established water trails on the Willamette and Sandy Rivers are among the best in the nation.

WILLAMETTE RIVER



Water Trail



Willamette Falls & the Locks

Willamette Falls is the center of the greatest water-based tourism potential in the county. Waterfront redevelopments are underway in both Oregon City and West Linn to provide access to the falls. Reopening the locks would be a regional attraction. Based on a survey of recreational boaters, the study estimated 15,708 recreational lockages a year with an upper bound estimate of 32,574. This excludes any commercial operations. Private businesses testified to the Willamette Falls Locks Commission that operators are ready to put commercial tours on the Willamette.

Clackamas County Water Tourism Study

Purpose:

In spring of 2017 Clackamas County Tourism initiated a comprehensive study to determine if its water recreation assets are being used to their greatest economic potential.

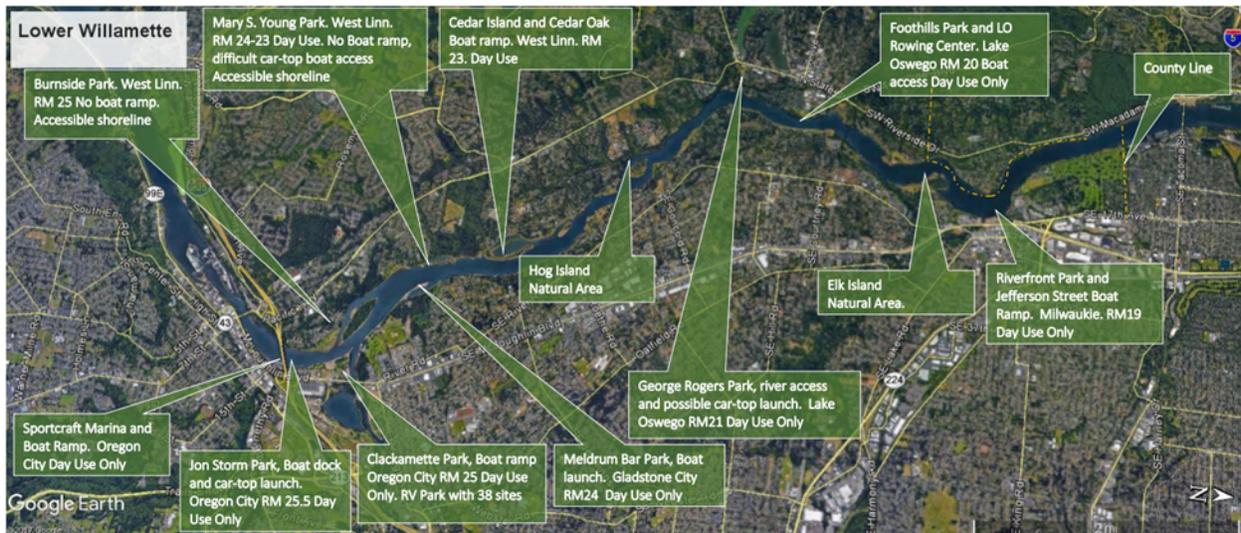
Method:

The study included over 3 months of site visits to the County's water bodies and surveyed 1700 statewide respondents. The results represent the interests of 1.6 million water recreation enthusiasts and a detailed inventory of the County's recreational assets.

Overall Key Findings:

- Oregon's recreational waters are visited 80 million times annually by people looking to recreate.
- Clackamas County's recreational waters attract 1.5 million visitors annually, which result in 240,000 overnight stays.
- Clackamas County's water bodies are equally good or better than the State average for recreational value.
- The public's concern for water quality, habitat quality, public access, information, safety, user conflicts, and crowds are not significantly different in the County than the rest of the state.
- Water-based recreation generated about 12 million dollars in lodging reservations in Oregon in 2016, but Clackamas County captured only about 2% of this amount. Despite above average water assets, the County is attracting below average visitation to these waters due to a combination of physical access, water-recreation management, lack of awareness, and niche product development.

Lower Willamette River Corridor



Location:

The Willamette River offers diverse water tourism opportunities in Clackamas County and consequently the greatest potential for total visitation. The Willamette River flows from the Boones Ferry Boat Launch in the southern end of the county to the Milwaukie/Portland line on the north. These 22 river miles afford the recreationist the greatest diversity of water-based entertainment in the county. From motor boating and water skiing, to fishing and primitive camping on secluded islands the river provides abundant natural and cultural history. The location provides a unique opportunity to connect the river experience with the amenities like restaurant, lodging, and public transport.

Recommendations:

1. Improvements in Infrastructure

- a. Multiple Improvements at Willamette River Greenway - The proposed trail would help create the Urban-River Interface by connecting Oregon City's downtown to the river and the River's assets to each other. The proposed, yet uncompleted, work through Oregon City and Gladstone was studied for this report and it is recommended here that these planned improvements be implemented. It would also help connect Oregon City with Gladstone.
- b. Gladstone Riverwalk - The City already has High Rocks, Cross, and Charles Ames Parks along the Clackamas River, plus Dahl and Meldrum Bar park along the Willamette. Connecting these parks with a riverfront walk would create a spectacular 4-mile multi-use and fully accessible riverfront trail.

2. Coordination of Community

- a. Foster and promote the connection between the city of Wilsonville and the Willamette River through infrastructure, policy, programs, and events.

3. Improve the Experience

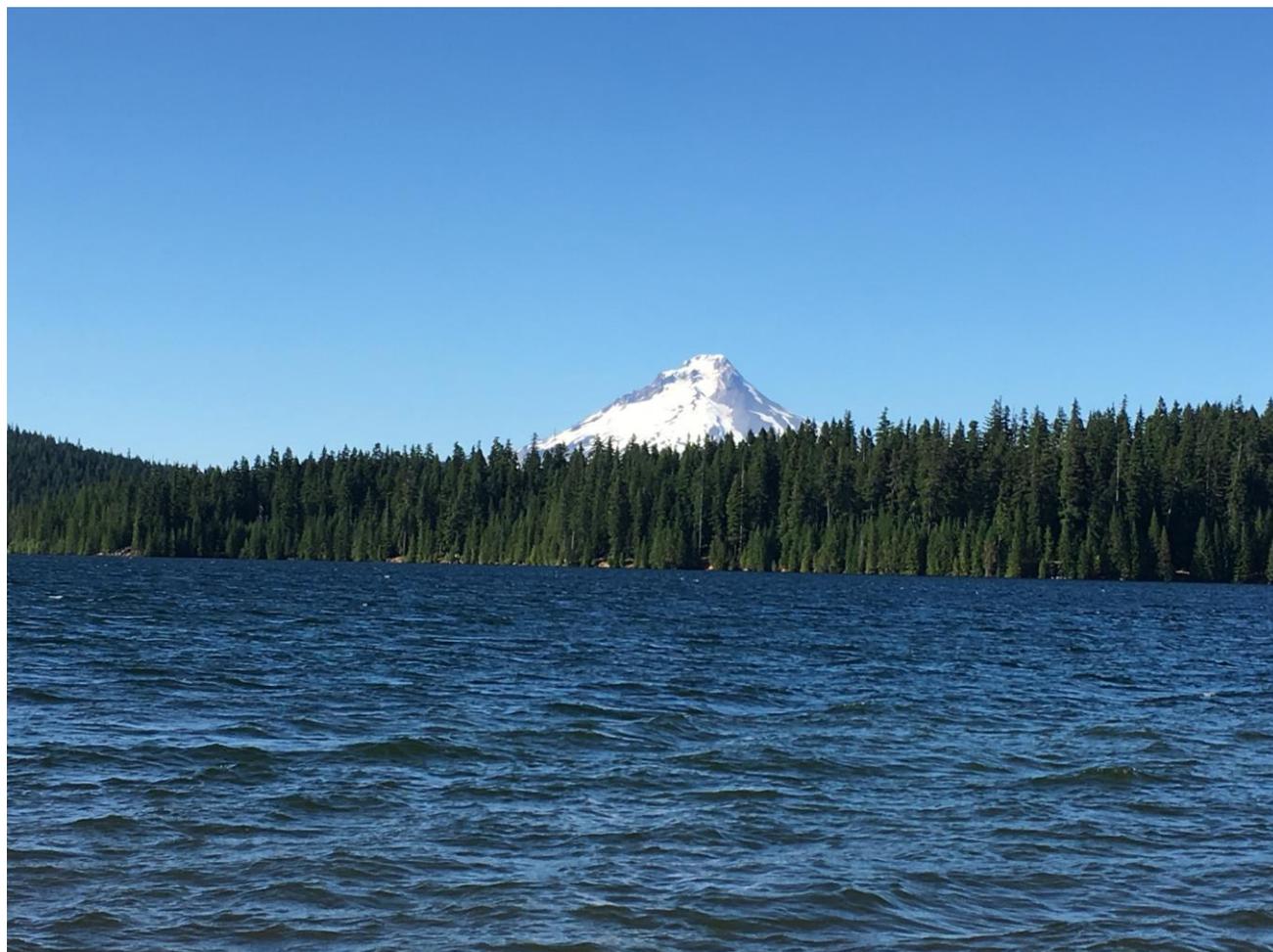
- a. Expand Tour Products - Offer packages including a variety of price points and abilities increasing the accessibility of water-based recreation. Examples include fishing gear rental, family friendly tours, and increased soft adventure offerings.
- b. Focus on the Experience - Promote time spent bonding and creating memories while engaging in water recreation.
- c. Develop a Primitive Camping Paddling Trail on Willamette River from Wilsonville to Milwaukie - This 20 river mile stretch has 13 potential locations that could offer excellent camping opportunities accessible only by boat.

Next Steps:



View the full 156-page report from Crane and Associates <https://www.dropbox.com/s/122hp73833fpsog/Clackamas%20County%20Water%20Tourism%20Report%20F.pdf?dl=0>

To discuss the Water Tourism Strategic Plan, Development Grants, or relevant projects contact Samara Phelps 503-742-5910 or email samara@mthoodterritory.com.



A STRATEGIC PLAN FOR IMPROVING
WATER-BASED TOURISM
IN
OREGON'S MT HOOD TERRITORY

submitted to



The Destination Marketing Organization for Clackamas County
150 Beaver Creek Rd, Oregon City, OR
www.mthoodterritory.com

submitted by



Burlington Vermont 05408
802-657-3720
www.craneassociates.us

MARCH 20TH 2018

EXECUTIVE SUMMARY

Water is fun. Nearly everyone has experienced the pleasure of a refreshing dip on a hot summer day, the mist of a waterfall, or the thrill of a cliff jump. Some seek solitude by the edge of a lonely stream, others find excitement in extreme whitewater. Youth splash, teens jump, adults wade, but we all look to water for reprieve from our daily routine. Water recreation gives us a chance to see life differently. We test our skills with a fishing rod or a paddle, we relax on a float, and we use water as a medium to gather family and friends. Oregon's recreational waters are visited 80 million times annually by people looking to swim, fish, surf, sail, paddle or simply sit by the beach. It seems that water is not only essential to life, but to our happiness. People migrate towards water for fun and Clackamas County has a lot of it.

Mt Hood Territory, Clackamas County's tourism marketing organization, initiated this comprehensive study to determine if its water recreation assets are being used to their greatest economic potential. Are the county's rivers and lakes attracting visitors and maximizing their enjoyment? Are they being managed and marketed in a sustainable manner to increase water-based recreation? Do they generate overnight stays without degrading the environment or the experience? To answer these questions, the county hired Crane Associates of Burlington Vermont, a consulting firm with 20 years of international and domestic experience in environmental economics and sustainable economic development with a specialty in water-based recreation. Crane Associates worked with Mt Hood Territory and dozens of stakeholders from the public, private, and non-profit sectors to fully understand their water assets, analyze the market demand for water-based recreation in all its forms, identify any untapped market opportunities, and create strategies to capitalize on them. The role that water-based recreation plays, and the opportunities it presents, within the County's larger economy was not fully understood prior to this report.



The study started with over three months of site visits and a detailed inventory of Clackamas County's recreational water bodies. The county has hundreds of miles of recreational rivers and acres of lakes and ponds that range from remote mountain ponds to 20 miles of the Willamette River, one of Oregon's largest and most popular rivers. The county has pristine trout streams, stunning lakes, and the most voluminous waterfall west of Niagara, ground zero in the founding of Oregon. Clackamas County's recreational waters also generates 191 million kilowatts of hydroelectricity for the state, supplies millions of gallons of drinking water, and attracts 1.5 million visitors, which result in 240,000 overnight stays, from anglers and paddlers. After a thorough analysis of the county's water assets, the researchers ask if they are being leveraged most efficiently to sustainably maximize water-based tourism.

The analysis of tourism potential starts with directly asking user's opinions. A large statewide sample of Oregon's recreation enthusiast was collected and surveyed to determine the water recreation market demand, preferences, and opportunities for growth in Clackamas County. The sample of over 1700 respondents, representing 1.6 million water

recreation enthusiasts, is 4 ½ times larger than necessary to gain a statistically significant sample with a 95% confidence level at +/- 5%. Therefore, these results provide reliable and valuable information for the purposes of creating strategies to attract more water-based tourism. This survey is the first of its kind in Oregon, focusing specifically on all forms of water recreation in the State and resulting in detailed preferences on water recreation management, access, water recreation behaviors, and demand for Clackamas County's rivers, lakes, and the Willamette Falls.

The survey results show the most people believe the recreational quality of Clackamas County's waterbodies is equally good or better than the State's average. The public's concern for water quality, habitat quality, public access, information, safety, user conflicts, and crowds are not significantly different in Clackamas County than the rest of the state. In addition to the survey, the author's professional experience and months of sites visits also confirm that Clackamas County's water resources are high quality recreation and tourism assets. Nonetheless, while the county's water resources are equal or better than the state average, the county is attracting below average visitation to these waters. The reason for this is not singular or obvious, rather it is found in a combination of subtle, nuanced actions related to reputation, marketing, physical access, water-recreation management, competing locations, and niche product development.

Oregon's favorite water body is by far the Deschutes River. It is 30% more popular than the second favorite, Columbia River, and nearly twice as popular as the third favorite, the Rogue River. The Deschutes is visited 4 times more frequently than the most visited river in Clackamas County, the Clackamas River. None of Oregon's top 10 favorite waterbodies lie solely in Clackamas County. The Willamette River, ranked #4, is partially in the county. If the Willamette is counted as a Clackamas County water body, 16% of Oregon's water recreationists will have a favorite water body in Clackamas County. If the Willamette is not included as a Clackamas water body, then only about 5% do. Data analysis shows that Oregon's preferred waterbody is not influenced by age, sex, household income, or favorite water sport. The Deschutes is Oregon's preferred river even after controlling for all these variables. About 15% of the water recreation market visits Clackamas County frequently (more than 6 times per year). For those visiting the Clackamas River, approximately 284,000 of them pay for accommodations, with camping preferred slightly more than hotels. So, while water-based recreation generated about 12 million dollars in lodging reservations in Oregon in 2016, Clackamas County captured only about 2% of this amount. This is disproportionately low after considering that Clackamas County has world-class fisheries, some of the most exciting whitewater in the State, stunning flatwater paddling locations, the Willamette Falls, easy access to all these waters, and close proximity to Oregon's largest population center.



The survey briefly examined the market demand for locks usage by recreational boaters. Respondents were asked two questions to indicate how frequently they might use the locks. First, a full description of the locks was provided, and they were asked if they might use the locks at least once per year at no cost. Second, they were asked how frequently they might use the locks at 5 different prices (\$0, \$5, \$10, \$15, \$20). Approximately 166,668 water recreation enthusiasts, or 16% of the State's total water recreation population would use the locks at no cost. Almost twice as many total respondents (29%) said they would not use the locks at no cost. Another 55% or 589,000 water recreation enthusiasts were undecided. Total revenue was calculated by multiplying the willingness-to-pay times the estimated demand for lockage, based on a total boater population of 166,668, and an average party size of 2.7 per trip. Generally, as cost per trip rises the total revenue decreases, except for \$10 per trip which generates the most revenue. Total trips paid at \$5 per trip will generate \$162,872 annually.

After the survey analysis, the report shifts from Oregon's market preferences to the Nation's. Chapter 4 includes a wide range of past research and secondary data to understand the national and regional water-recreation markets. These studies were analyzed for their applicability to Clackamas County. The results of this work are combined with the primary survey data to provide Mt. Hood Territory with target market profiles and their locations. This chapter also identifies the untapped market potential and gives reasonable target market goals.

The number of out-of-state visitors for water-based recreation will vary depending on the primary activity. Paddlers make up the most out of state visitors of the three groups with 25%. Anglers are not far behind with 23%. Paddlers however, don't travel from very far. Ninety percent of the out of state paddlers are from Washington and the remaining are from neighboring states. Out of state anglers, on the other hand, travel farther. While most are still from neighboring states, anglers come from nearly every state in country. Water-based tourism marketing will require a segmented approach. Marketing efforts in areas beyond Washington and California should be limited to only anglers. Paddlers can be reached in Washington, California, southwestern Idaho, and Oregon. Any communication to motor boaters should be limited to those in the northwest part of the state. Anglers are the largest and most established market in Oregon's water recreation market. They are responsible for 83% of all overnight stays from water recreationists. Their market size is 2.5 times greater than motor boaters and 3 times larger than paddlers.

A Proportional Share Analysis on all 50 states was completed to determine which states were receiving a greater proportional share of out-of-state anglers than other states. The results show which states are winning the competition for attracting out-of-state anglers. Oregon attracts 4% of the national visiting anglers but only 2% of the nation's visiting angler/days. The neighboring states of California, and Washington are doing better than Oregon by at least breaking even on a relative scale. Idaho and Wyoming, two competing states with excellent western fisheries, are generating twice as many visitor/days than their proportional share. Oregon is the only state west of Colorado that has a negative



proportional share. Oregon's has world renowned fishing resources, but it appears that Oregon's angler market potential may be bigger than what they are currently attracting. On the other hand, Oregon ranks 7th in the nation in generating revenue from fishing. This means that those who do come to Oregon are willing to spend a disproportionately higher amount of money to do so. Willingness to spend angling tourism dollars is an indication that Oregon has a high-quality product and that it is worth the trip for non-resident anglers to visit the state. This information, combined with the Proportional Share Analysis, leads to a reasonable conclusion that Oregon has a high-quality product but is not maximizing its potential. There is untapped tourism potential in Oregon's angler market.

Clackamas County can capitalize on this untapped opportunity by marketing new destinations, new products, and to new demographics. Non-residents are aware of the Deschutes, Rogue, Columbia and other famous rivers, but know little about Clackamas County's rivers and lakes. The Clackamas, Sandy, and Willamette, are excellent fisheries that can be used to create new experiences and new fishing products for the visiting angler. Increasing water-based tourism in Clackamas County should start with marketing to an expanded angler market. Detailed review of national and local data shows that there are two general target markets that Clackamas County should focus on attracting. First, family oriented, nature-based travel that promotes the environment as the ideal medium for families to escape and reconnect with each other. The marketing strategy should emphasize water-based recreation, especially fishing instructions, natural history, floating and boating, as activities that help families bond. This report provides 3039 different zip codes across the country that contained the highest probability target markets for family oriented, water-based tourism. The second general target market includes empty nesters travelling without children. They are older than 45 years, have a passion for the outdoors. They are represented by three target market segments and live in 3461 zip codes in the northeast, north central and west coast regions of the United States.



Among non-motorized boaters, flatwater appears to be slightly preferable than whitewater, but not by much. Households own more flatwater boats than whitewater boats and they are used more often. Clackamas County has several of the most popular flatwater sites in the northwest Oregon region. The Willamette River between the Columbia and Canby is the second most popular flatwater river in the region and the third most popular in the entire state. Trillium and Timothy Lakes are also highly popular ranking third and fourth in the state, and second and third in the region. These visitation data provide solid evidence that Clackamas County has valuable water recreation locations to market to the nation. A marketing campaign that targets only paddlers for overnight stays must attempt to attract Oregon residents that are over 90 miles away, and less than 300 miles. Marketing campaigns that are trying to sell only paddling trips will not be successful for paddlers beyond these distances. Many studies documenting travel patterns of paddlers show a resistance to travelling long distances for only one sport. Non-resident paddlers beyond these distances will still be attracted to Oregon, and they will be demanding overnight accommodations, but they will be here for multiple reasons.

The largest flatwater paddling market in Multnomah County with 30% of the state's paddlers and Clackamas County is 8.7%. The largest whitewater market is in Deschutes and Wasco Counties with 48% of the states total but

Clackamas County receives only 9%. There are 2.4 million paddlers in Multnomah County alone and they are physically connected to Clackamas County by water. Both markets are between three and four times as large as the County's current paddler market. There is untapped paddler potential within proximity to Clackamas County. With strategic planning, targeted marketing, and a concerted effort between local, county, state, federal and non-governmental stakeholders, Clackamas County can grow its paddler visitation rates.

There are numerous opportunities for Clackamas County to capture additional market share due to the large amounts of untapped potential in the angler and paddler markets. To capture them, this report provides 49 recommendations within 5 overarching action groups called:

1. **Physical Improvements:** a list of capital improvements that would help advance water-based tourism. The report suggests 27 capital improvements that range from increasing the county's supply of camp sites, upgrading boat ramps, and improving the physical connections between municipal downtowns and the water. The report recognizes that many of these recommendations are presented without thorough vetting from the community. Therefore, an action group called Community Involvement recommends facilitating an extensive planning workshops at the municipal level.

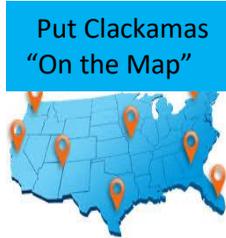
Physical Improvements



2. **Community Involvement:** building community support at the municipal level. The greatest opportunities for increasing water-based tourism throughout the county is at the municipal level. Visitors want to see small towns. Water-based tourists, like most tourists, enjoy stopping in small towns for a meal, shopping, or some nighttime entertainment. This report recommends a series of community-level water tourism workshops in each municipality to identify their greatest water tourism opportunities and to strategize on how to use them to their advantage. These workshops should be designed as a series of 4 to 7 public meetings that go from understanding the facts on the status of today's tourism market, to identification of assets and visioning the future, to goals and objectives, to strategies, and finally implementation actions, responsibilities and evaluations. The data in this report on water tourism demand and untapped markets, can be used to help the public align their unique water tourism assets with the potential opportunities.



3. **Putting “Clackamas on the Map”:** is a call for more targeted marketing. A focused and carefully crafted strategy should be created to make the Clackamas, Willamette, and Sandy Rivers’ household names. The group of actions to implement this recommendation include: media campaigns, targeted marketing in high potential zip codes, niche marketing and product development, river celebrations, competitions, events and another similar public awareness raising activities.



4. **Improving the Experience:** discusses how to open new markets in water-based tourism by expanding into new products and services. Clackamas County is competing against famous water destinations like the Columbia Deschutes, and Rogue within Oregon and in rivers in Idaho and Wyoming. This action group recommends creating new types of water-based recreation products and services, increasing the quality of the experience, and rebranding existing activities. Expanding the market size for Clackamas County also requires capturing a percentage of recreationist who are visiting other destinations by attracting them here through targeted marketing campaigns.



5. **Institutional and Organizational:** the management and administrative structures necessary to support all these actions. This project was funded and directed by the Mt Hood Territory DMO but only a minority of the recommendations can be implemented by them alone. Therefore, this entire report is at risk of not being fully implemented because the other relevant and responsible entities may not be wholly committed to these outcomes. Therefore, creating organizational and intuitional cooperation is necessary and highly recommended. The report states that the first step in implementing this entire report is the create the Water Tourism and Economic Resiliency (WaTER) Advisory Board, comprised of all relevant entities that would be involved in these recommendations. Each recommendation will include many steps and participants. The entity to take the lead on each action will vary depending on the action but in all cases teamwork and collaboration among stakeholders will be required. The organizational structure should be formed within the political climate and institutional culture of Clackamas County. Whatever the county leaders deem most appropriate to effect this plan is the structure that should be created. Without some leadership guidance, implementation of this plan will be challenged.



The author would like to remind the County of the many successful and effective actions that have already taken place and to continue to build on them.

- Comprehensive marketing and branding efforts are excellent. A search for fishing in Oregon will result in the Mt Hood Territory web site rising to the top. While this report recommends targeting specific markets, the efforts to date show that the organization has the internal capacity and skills to complete the job.
- Physical Improvements at Boones Ferry, Hebb Park, Riverside Park, Milwaukie riverfront, and several parks. These improvements have undoubtedly increased visitation and access to the water. The work is high quality.
- The planned improvements at various stages of discussion at Oregon City, West Linn, along the Greenway Trail, and in smaller cities throughout the county are encouraging and should be supported.
- Camping facilities at Barton Park are excellent and should set the standards for future expansions. Camping is in high demand in the county and additional sites would increase visitation. The county has the internal capacity and skills to expand this model to meet additional demand.
- PGE, Oregon State Parks, the BLM and Forest Services are valuable partners in meeting camping demand. Cooperation through knowledge sharing, visitor data, physical developments, and camping services are invaluable and should continue.
- Water trail guides and information for the Willamette, Sandy and Tualatin excellent. They set the standards and exceed the quality of many guides in the county

Before moving on the author would like to thank the Mt Hood Territory for its active involvement and friendly staff. Guidance and assistance from: Danielle Cowan; Samara Phelps; Casey Knopik; Janice Nilson Jim Austin; Dan Gering; and Jeannine Breshears was especially appreciated while all staff were helpful and courteous. Thanks to you I leave Oregon with a camper full of great memories. Sincerely, Michael Crane.

 *Crane Associates, Inc.*
Sustainable Economic Development
Burlington Vermont 05408
802-657-3720
www.craneassociates.us

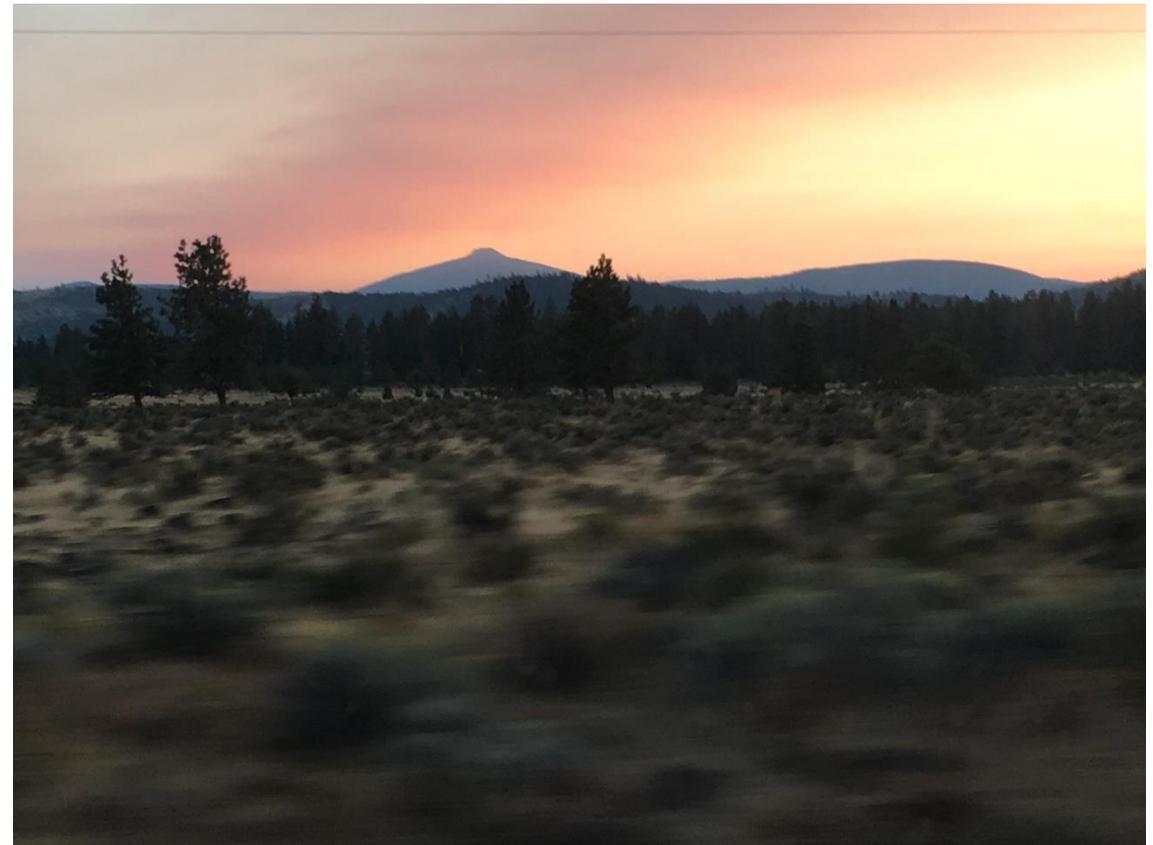


TABLE OF CONTENTS

EXECUTIVE SUMMARY	1
CHAPTER 2 INTRODUCTION	2-1
Acknowledgements	2-3
CHAPTER 3 THE WATER	3-1
Clackamas River	3-1
The Upper Clackamas	3-1
Timothy Lake	3-2
Campgrounds	3-2
General Shoreline Access and Day Use Areas at Timothy Lake	3-3
Boat Launches	3-3
Trails	3-4
Lake Harriet	3-4
Middle Clackamas	3-6
Promontory Park and North Fork Reservoir	3-6
Faraday Lake	3-6
Estacada Lake at Timber Park	3-6
Estacada Lake at Milo McIver State Park	3-7
Milo McIver State Park	3-7
Barton Park	3-7
Lower Clackamas	3-8
Molalla River	3-11
Willamette River	3-15
Wilsonville	3-16
Canby	3-16
Unincorporated County Land	3-18
West Linn	3-19
Oregon City	3-21

Gladstone	3-21
Milwaukie	3-23
Lake Oswego	3-23
CHAPTER 4 THE PEOPLE	4-1
Survey Objectives	4-1
Sampling Methodology	4-2
The Questionnaire	4-2
Confidence Level	4-3
Representation	4-4
Analytical Methods	4-5
Survey Results	4-7
Oregon's most favorite water-based sports	4-7
Favorite and Most Frequently Visited Water Bodies	4-9
Summary of Overnight Stays	4-14
Concerns and Preferences in Water-based Recreation	4-16
Clackamas County	4-17
Visitation to Clackamas County Waterbodies and Overnight Stays	4-18
	4-21
Years of Experience	4-23
Regression Analysis	4-25
Willamette Falls Locks	4-27
Summary	4-30
CHAPTER 5 THE MARKET	5-33
The Market Area	5-33
Anglers	5-35



Proportional Share Analysis of the National Angler Market _____	5-39
The Angler Profile: _____	5-42
Two Target Markets for Clackamas County Anglers _____	5-46
Paddlers and Motor Boaters _____	5-54
Paddlers _____	5-54
Paddler Market Summary _____	5-59
CHAPTER 6 THE OPPORTUNITIES _____	6-1
Molalla River Corridor _____	6-2
Recommendation 1: Upgrades at Wagon Wheel Park _____	6-3
Recommendation 2: Increase Camping in Corridor _____	6-3
Recommendation 3: Improve River Safety _____	6-3
_____	6-4
Willamette River Corridor _____	6-4
Recommendation 4: Wilsonville Memorial Park Improve Day Use Area & Access _____	6-5
Recommendation 5: Improve Boat Ramp at Molalla River SP Canby _____	6-5
Recommendation 6: Provide camping at Molalla River SP Canby _____	6-5
Recommendation 7: Hiking Trails connecting Canby with the River _____	6-5
Recommendation 8: Connect West Linn Downtown with Willamette Park _____	6-5
Willamette River Corridor _____	6-5
Recommendation 9: Provide Camping at Willamette Park, West Linn _____	6-6
Recommendation 10: Remove (or improve safety at) low head Dam on Tualatin _____	6-6
Willamette River Corridor _____	6-6
Willamette River Corridor _____	6-7
Corridor _____	6-7
Recommendation 11: Provide Public Viewing access for water ski club, West Linn _____	6-8
Recommendation 12: Upgrade Clackamette Park, Oregon City _____	6-8
Recommendation 13: Multiple Improvements at Willamette River Greenway _____	6-8
Recommendation 14: Gladstone Riverwalk _____	6-8
Recommendation 15: Improve small boat access at Mary S. Young Park, West Linn _____	6-8
Willamette River Corridor _____	6-8



Recommendation 16: Car Top boat portage at West Linn Paper _____	6-9
Recommendation 17: Pedestrian improvements Riverfront Park, Milwaukie _____	6-9
Willamette River Corridor _____	6-9
Upper Clackamas River Corridor _____	6-10
Recommendation 18: Expand Camping Opportunities _____	6-11
Recommendation 19: Parking and Facility Improvements at Put-Ins _____	6-11
Upper Clackamas River Corridor _____	6-11
Middle Clackamas River Corridor _____	6-12
Lower Clackamas River Corridor _____	6-13
Middle and Lower Clackamas River Corridor _____	6-14
Recommendation 20: Pedestrian Bridge Connecting Milo McIver State Park to Estacada _____	6-14
Recommendation 21: Improve Feldhiemer Boat Launch _____	6-14
Recommendation 22: Promote Mass Transit Use with Bus Stops at Barton and Carver Parks _____	6-14
Sandy River Corridor _____	6-15
Recommendation 23: Provide Access at RM38 (Salmon River) _____	6-16
Recommendation 24: Improve day Use Area & Access at Marmot _____	6-16
Recommendation 25: Access Upgrades and Camping Ed LaTourette Park _____	6-16
Recommendation 26: Improvements, Parking and Access at Sandy River Park _____	6-16
Recommendation 27: Upgrade Camping Facilities at Dodge Park _____	6-16
Sandy River Corridor _____	6-16
Improving the Experience _____	6-17
Recommendation 28: Improve the Fishing Experience _____	6-17
Recommendation 29: Develop Fishing Packages with Lodging Business _____	6-18
Recommendation 30: Create more Family Friendly Fishing Experiences _____	6-19
Recommendation 31: Expand Fishing Tour Products _____	6-19
Recommendation 32: “Promote the Experience not the Kill” _____	6-20
Recommendation 33: Improve the Paddling Experience _____	6-21
Recommendation 34: Move from Information to Inspiration _____	6-21
Recommendation 35: Create Water Trail Map for Clackamas River _____	6-22



Recommendation 36: Develop a Primitive Camping Paddling Trail on Willamette River from Wilsonville to Milwaukie _____	6-22
_____	6-23
Put Clackamas County “On the Map” _____	6-23
Recommendation 37: Increase marketing efforts in high potential zip codes _____	6-23
Recommendation 38: Attract Niche Markets _____	6-25
Recommendation 39: Hold Annual Fishing Tournaments. _____	6-26
Recommendation 40: Create the Oregon River Celebration _____	6-27
Recommendation 41: River Days Celebrations _____	6-28
Community Involvement Recommendations _____	6-29
Recommendation 42: Promote the Urban-River Interface _____	6-29
Recommendation 43: Community-level water tourism workshops _____	6-29
Estacada _____	6-30
West Linn: _____	6-31
Oregon City _____	6-32
Organizational and Institutional Recommendations _____	6-33
Recommendation 44: Complete a Competitvity Analysis for Angling _____	6-33
Recommendation 45: Create a Robust, County-wide Marketing Database _____	6-33
Recommendation 46: Create the Water Tourism and Economic Resiliency (WaTER) Advisory Board for Clackamas County _____	6-34
Recommendation 47: Molalla River Management Structure _____	6-34
Recommendation 48: Lower Clackamas River Management Plan _____	6-35
Recommendation 49: Navigable River Study for Clackamas River _____	6-35
CHAPTER 7 IMPLEMENTATION, MONITORING AND EVALUATION _____	7-1
Organizational and Institutional Recommendations _____	7-2
Improving the Experience _____	7-2
Put Clackamas County “On the Map” _____	7-2
Community Involvement Recommendations _____	7-2
Physical Improvements _____	7-2



TABLE OF TABLES

Table 4-1 Demographics, Sample vs. Oregon _____	4-2
Table 4-2 Age of respondent _____	4-2
Table 4-3 Representative Weights _____	4-4
Table 4-4 Unweighted vs Weighted Responses for Favorite Water Recreation _____	4-5
Table 4-5 Non-motorized Boaters' Favorite Activity by Top Eight Favorite Waterbody _____	4-7
Table 4-6 Motor Boaters' Favorite Activity by Top Eight Favorite Waterbody _____	4-8
Table 4-7 Anglers' Favorite Activity by Top Eight Favorite Waterbody _____	4-8
Table 4-8 Favorite Waterbody by Age Group _____	4-10
Table 4-9 Favorite waterbody by Household Income _____	4-10
Table 4-10 Visitation to Most Frequented Water Body _____	4-11
Table 4-11 Accommodation by Type _____	4-13
Table 4-12 Estimation of Overnight Stays Generated by Water-based Recreation, Statewide in 2016 _____	4-14
Table 4-13 Accommodation Preferences at Most Frequented Waterbody _____	4-15
Table 4-14 Accommodation Preferences by Water Body _____	4-16
Table 4-15 Visitation and Overnight Stays from Water-based Tourism in Clackamas County _____	4-18
Table 4-16 Favorite and Frequent Waterbody by Residence _____	4-20
Table 4-17 Frequently Visited Waterbodies by Residency _____	4-20
Table 4-18 Favorite Water Bodies by Residence _____	4-20
Table 4-19 River Management Concerns by Residence _____	4-21
Table 4-20 Distance to Most Frequent River _____	4-23
Table 4-21 Years of Experience _____	4-23
Table 4-22 Years of Experience by Favorite Activity _____	4-24
Table 4-23 Frequency of Overnight Stays _____	4-24
Table 4-24 Estimated Market Participation in the Locks (at least once per year at no cost) _____	4-27
Table 4-25 Estimated Market Demand for and Revenues from Willamette Falls Locks _____	4-28
Table 5-1 Residence of Visitor to PGE Campground Sites. _____	5-33
Table 5-2 Market Size and location for In-State and Out-of-State Water Recreationists _____	5-34
Table 5-3 Purchases and Cost of Fishing Licenses in 2015 _____	5-36
Table 5-4 Proportional Share Analysis of Anglers for Selected States: Anglers by Anglers Days , 2011 _____	5-39
Table 5-5 Top 10 Non-Resident Fishing Destinations and Expenditures, 2011 _____	5-39
Table 5-6 ESRI's Tapestry Market Segments for Anglers _____	5-42
Table 5-7 Description of Market Profiles for Water-based Recreation _____	5-43
Table 5-8 Family Oriented Target Markets _____	5-46
Table 5-9 Top Ten States for each of the Four Family Oriented Market Segments _____	5-46
Table 5-10 Empty Nester Target Markets _____	5-49
Table 5-11 Top Ten States for each of the Empty Nester Market Segments _____	5-49
Table 5-12 Non-motorized Water-based and Beach Activities _____	5-55

Table 5-13 SCORP estimates of 2011 user occasions and participation _____	5-57
Table 5-14 Other Activities Commonly Enjoyed by Paddlers _____	5-58
Table 5-15 Boat ownership by type _____	5-58
Table 5-16 Most Visited Rivers and Lakes in Oregon's Region 2 _____	5-60

Chapter 2 INTRODUCTION



Water is fun. Nearly everyone has experienced the pleasure of a refreshing dip on a hot summer day, the mist of a waterfall, or the thrill of a cliff jump. Some seek solitude by the edge of a lonely stream, others find excitement in extreme whitewater. Youth splash, teens jump, adults wade, but we all look to water for reprieve from our daily routine. Water recreation gives us a chance to see life differently. We test our skills with a fish rod or a paddle, we relax on a float, and we use water as a medium to gather family and friends. Oregon's recreational waters are visited 80 million times annually by people looking to swim, fish, surf, sail, paddle or simply sit by the beach. It seems that water is not only essential to life, but to our happiness. People migrate towards water for fun and Clackamas County has a lot of it.

Clackamas County has hundreds of miles of recreational rivers and acres of lakes and ponds. The County's range of water-based recreation options span from remote mountain ponds to 20 miles of the Willamette River, one of Oregon's largest and most popular rivers. The County has pristine trout streams, stunning lakes, and the most voluminous waterfall west of Niagara, ground zero in the founding of Oregon. Clackamas County's recreational waters also generates 191 million kilowatts of hydroelectricity for the state, millions of gallons of drinking water for Portland City, and 1.5 million visits, which result in 240,000 overnight stays, from anglers and paddlers. The role that water-based recreation plays, and the opportunities it presents, within the County's larger economy was not fully understood prior to this report. Mt Hood Territory, Clackamas County's tourism marketing organization, wanted to fully understand the water recreation assets in the county and how they can be used in a sustainable manner to increase water-based recreation and generate more overnight stays without degrading the environment or the experience. For this, they hired Crane Associates of Burlington Vermont, a consulting firm with 20 years of international and domestic experience in environmental economics and sustainable economic development with a specialty in water-based recreation. Crane Associates worked with Mt Hood Territory and dozens of stakeholders from the public, private, and non-profit sectors to fully understand their water assets, analyze the market demand for water-based recreation in all its forms, identify any untapped market opportunities, and create strategies to capitalize on them.

The work that this study is based on includes: a statewide survey of 1700 water-recreation enthusiasts; analysis of national, regional and state recreation markets; visitation data from a range of sources; 3 ½ months of field visits and tours; one-on-one interviews and focus group work sessions with stakeholders; and market research on the feasibility of new endeavors in water-based recreation. This report is comprised of the following 6 chapters:

Chapter 1: Introduction.

Chapter 2: The Water. This is a detailed inventory of the top-tier water recreation assets in the county. These are the assets that have the highest level of opportunity for generating water-recreation tourism and overnight stays. These assets were visited and experienced by the author on several occasions including related accommodations and travel services.

Chapter 3: The People. This chapter describes the statewide survey of 1700 water recreationist in Oregon. These data result in a statistically robust set of conclusions on: Oregon's favorite and more frequently visited water bodies; water recreation travel patterns; preferences of activities; demand for services; frequency of visitation, length of stay and distance travelled; and various demographic factors that influence preferences. Regression analysis was applied to these data to determine statistical significance on the factors that influence overnight stays, and visitation to Clackamas County.

Chapter 4: The Market. This chapter relies on a wide range of past research and secondary data to understand the national and regional water-recreation markets. These studies were analyzed for their applicability to Clackamas County. The results of this work are combined with the primary data from Chapter 3 to provide Mt Hood Territory with target market profiles and their locations. This chapter also identifies the untapped market potential and gives reasonable target market goals.

Chapter 5: The Opportunities. This Chapter provides detailed recommendations on how to capture additional market share that the county is currently missing. There are 49 recommendations within 5 overarching groups called Physical Improvements; Improving the Experience; Putting Clackamas County on the Map; Community Involvement; and Institutional and Organizational recommendations.

Chapter 6: Chapter 6 gives a recommended implementation, monitoring and evaluation framework through which the implementation actions should follow. The framework suggests a lead entity for the recommendation, a budget with resources, and a timeline with performance indicators to monitor progress. Many of the recommendations have not be vetted by the responsible parties, therefore, these are only preliminary. While the recommendations are well researched and solid in terms of their market feasibility and potential for capturing additional share, the implementation of the recommendation requires buy-in and cooperation from the responsible parties. Unfortunately, building up this level of extensive interagency cooperation was beyond the scope of this work and therefore it becomes the first-step recommendation of next phase of this project.

The results from this study show that Clackamas County has a long way to go before maximizing its market potential from its water assets. The county is not receiving its proportional share of visitors relative to the quantity and quality of its recreational waters. The County has a potential world class fishing destination but national fishing guide books don't mention it; it has some of the best whitewater in the state but receives only 9% of the market while its neighbor gets 48%; its flatwater is paddled by only 8% of the state while its neighbor receives 30%; it has the single most important waterfall to the history of Oregon, and the 2nd largest in the country, but most people in neighboring Portland have never seen it. The county receives only 2% of Oregon's total overnight stays that are generated by water tourism. The difference between the county's current revenue from water recreation and its potential is immense. Capturing this revenue is possible through strategic marketing, unique product development, interagency coordination, municipal cooperation, and some physical improvements.

"The results from this study show that Clackamas County has a long way to go before maximizing its market potential from its water assets. The county is not receiving its proportional share of visitors relative to the quantity and quality of its recreational waters."

Acknowledgements

This study would not be possible without the contributions of time, knowledge, and logistical support from many people. The importance of this study was made apparent by the numbers of people who participated. The author would like to thank:

<p>The entire Mt Hood Territory Staff with special recognition to:</p> <ul style="list-style-type: none"> • Danielle Cowan • Samara Phelps • Casey Knopik • Janice Nilson • Jim Austin • Dan Gering • Jeannine Breshears 	<p>Government Partners</p> <ul style="list-style-type: none"> • Dan Davis, BLM • Brian Moore, Metro • Brian Vaughn, Metro • Kelly Reid, Metro/Oregon City • David Snider, Sandy City • Guy Rodrigue, Milo McIver State park • Rick Gruen, Clackamas County Parks and Forests • Matt Lorenzen, City of Estacada • Ryan Sparks, Oregon State Parks • Andy Cotugno, Willamette Falls Heritage • Scott Bricker, Travel Oregon • John Morgan, West Linn • Mark Ottenad, Wilsonville • Leigh Anne Hogue, Oregon City • Rick Timm, ODFW • Shaanette Frederickson, ODFW • David Lane, ODFW • Sean Drinkwine, Mayor of Estadaca • Nate Fletcher, US Forest Service • Jody Carson, West Linn 	<p>Recreation Experts</p> <ul style="list-style-type: none"> • Todd Gilstrap, Oregon River Adventures • Bob Crandall, Water Time Outfitters • Joel LaFollette, Royal Treatment Fly Fishing • Sam Drevo, eNRG Kayaking • Luke Spencer, Clackamas River Outfitters • Craig Wright, Oregon River Experiences • Kathy Shenk, River Drifters • Pete Giordano, Blue Sky Whitewater • Jack Hagen, Northwest Fly Fishing • Bob Toman, Guide Service • Ron Lauzon, Fly Fishing Instructor • Zack Collier, Northwest Rafting • Ted Neely, River Guide • Corev Koff, River Guide <p>Other Contributors</p> <ul style="list-style-type: none"> • Constance J. Sylvester, Fortrose Group • Jeff Crane, Crane Associates • Tim Crane, Fly Fishing Bum • Charles Savage, Camper Dealer • Kathern Luscher, River Keepers • David Conner, PhD, Statistician • Kevin Broecker, GIS specialist 	<p>Non-Governmental Organizations</p> <ul style="list-style-type: none"> • Penny Machinski, West Linn Paper • Brian Konen, West Linn Paper • Sandra Jordan, Sandy Historical Society • John Atkins, Molalla River Alliance • Phil Lingelbach, Estacada Development Association • Will Levenson, Human Access Project • Tony Dentel, Portland General Electric • Bob Mosher, Clackamas River
--	---	--	--

And the 1700 people who completed my survey.

THANK YOU!

MICHAEL CRANE



Burlington Vermont 05408
802-657-3720
www.craneassociates.us

Chapter 3 THE WATER

Clackamas River

The Clackamas River drains a watershed that is almost entirely within Clackamas County. The river originates in a group of mountain lakes and creeks, primarily First Lake, about 5 miles north of Mount Jefferson at 5,000 feet in altitude. Within a half mile the river enters Clackamas County and flows 56 miles to the Willamette River draining 937 square miles of watershed along the way. The Clackamas River merges with the Willamette River in the city of Gladstone, just 12 miles south of Portland via Hwy 99E. The upper Clackamas is accessed via state and county highways (99E & 224) and is 54 miles southeast of Portland, taking about 1.5 hours to reach the town of Ripplebrook, an unincorporated community just south of the Three Lynx put-in for kayakers and rafters. In a 53-mile stretch, there are 20 places to put in, averaging a put-in every 2.6 miles.

The upper half of the Clackamas River has steep slopes and flows through deeply incised valleys. The lower portion below Estacada, (RM25), has a more moderate slope of 10 feet per mile. Nearly all the tributaries have sizeable falls near their entry into the Clackamas River; including where Rock Creek which enters with a 12-foot falls only .6 of a mile from its mouth.

The Upper Clackamas

The Upper Clackamas is designated within the National Wild and Scenic River System as “Scenic” or “Recreational” for 47 miles from the Big Springs area, a few miles south of Ripplebrook in its headwaters to Big Cliff on highway 224 just upstream from Promontory Park before the river becomes part of the impounded North Fork reservoir waters. According to the designation the “Clackamas River is home to the last significant run of wild late-winter Coho salmon in the Columbia Basin, which generally spawn on the main stem of the Clackamas above the North Fork Reservoir. The watershed also has one of only two remaining runs of spring chinook in the Willamette basin and supports a significant population of winter steelhead, cutthroat trout and native lamprey.” This section of river in the “offers breathtaking mountain views, replete with native wildflowers and wildlife, as well as direct access for fishing, boating and hiking. The area is most recognizable by the green Pratt truss bridge at Memaloose Road, now closed to vehicular traffic, which sits atop the river and connects walkers to the day-use area on the river's south side.” This entire section of river is within the US Forest Service domain. Properties offering public access and camping are managed by the Forest Service and PGE or their contractors.

The Upper Clackamas has an exciting whitewater run that attracts many private boaters, commercial outfitters, anglers, campers and visitors. The most popular section is 13 miles of class 3 and 4 whitewater from Sandstone Bridge to Memaloose, although the river runs along the road and numerous put-ins and take-outs along the way. The rapids present the best whitewater opportunities in the County and rivals any whitewater run Oregon. The undeveloped corridor, easy access, and world class rapids make for a highly marketable experience. The Forest Service and PGE, through their recreation management company Northwest Land Management, are slowly and steadily making improvements along the river for public access, parking, facilities, and camping.

This section is home to the Upper Clackamas Whitewater Festival. For the last 34 years river lovers from across the western United States meet here to compete, collaborate, celebrate, and share. The festival became an independent Non-Profit organization in 2013 and is “dedicated to promoting river education, safety, competition, camaraderie, and stewardship.” The event attracts approximately 125 registrants and 800 spectators over two days.

Timothy Lake

Timothy Lake is a stunning 2.1 square mile lake on the eastern edge of Clackamas County. The lake was formed in 1956 by the Timothy Lake Dam at Portland General Electric (PGE) Oak Grove – Clackamas River Hydroelectric Project #2195, located on the Oak Grove Fork of the Clackamas River. Timothy Lake is the most upstream storage reservoir with gross storage capacity of 69,000 acre-feet. It does not generate power rather is used to regulate flow to Harriet Lake approximately 8.4 miles downstream.

The following inventory and capacity utilization rates were obtained from PGE reports¹. Timothy Lake has seven developed campgrounds: Pine Point, Cove, Hoodview, Gone Creek, Oak Fork, North Arm and Meditation Point. There are five day-use areas: West Shore and Pine Point, Hoodview, Gone Creek and Oak Fork. There are also dispersed camping opportunities surrounding the entire lake. Users of the dispersed sites typically hike or boat in, but some sites are accessible by vehicle. There is a 12-mile trail that goes around the entire lake and accommodates hikers, bikers and equestrians. Most of the campgrounds have dedicated on-site staff during the summer season. Park staff also patrols day use areas and monitors the trails. There is a fee associated with parking and using the day use areas. Facilities are typically open from mid-May to late September.

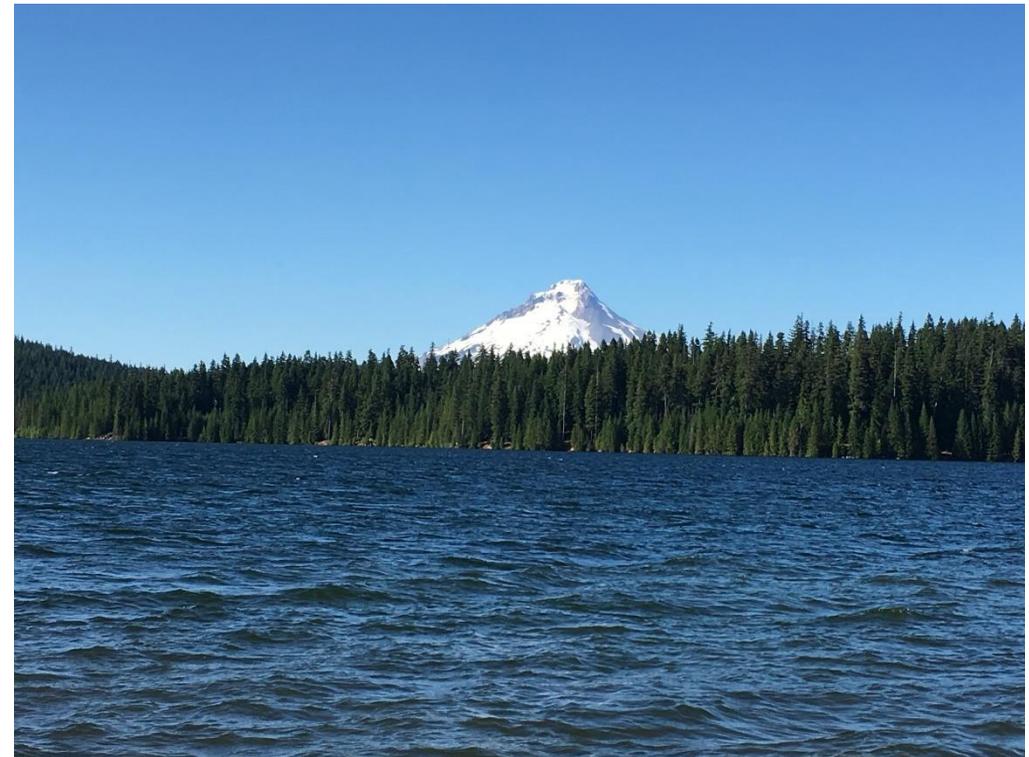
Campgrounds

The following campground data and capacity estimations are provided by PGE and taken from the FERC license reporting requirements, (form 80 report):

Pine Point Campground: 24 sites available each night. The average number of sites occupied during non-peak weekends was 15. This yields a capacity utilization of 61%.

Cove Campground: 10 sites available each night. The average number of sites occupied was 4, yielding a capacity utilization of 35%.

Hoodview Campground: 41 sites available each night and the average number of sites occupied was 35. This yields a capacity utilization of 86%.



Gone Creek Campground: 48 sites available each night. The average number of sites occupied was 37. This yields a capacity utilization of 78%.

Oak Fork Campground: 47 sites available each night and the average number of sites occupied was 37. This yields a capacity utilization of 79%.

North Arm Campground: 8 sites available each night. The average number of sites occupied was 5, yielding a capacity utilization of 65%.

Meditation Point: 4 sites available each night. The average number of sites occupied during non-peak weekends was 3. This yields a capacity utilization of 67%.

Combining all campgrounds yields a total capacity utilization of 68%.

Dispersed Camping: There are 60 dispersed campsites around Timothy Lake available each night. The average number of sites occupied during non-peak weekends was 20. This yields a capacity utilization of 33%.

General Shoreline Access and Day Use Areas at Timothy Lake

There are 5-day use areas along the shores of Timothy Lake with a combined total of 32 picnic tables. Recent studies conducted by PGE estimate the utilization rates of these areas as:

West Shore Day Use: 7 picnic tables available for use at one time. On average, the most picnic tables occupied was 7. This yields a capacity utilization of 100%. At the West Shore Day Use are three viewing area that consists of 3 benches. On average, the most benches being used at one time were 2. This yields a capacity utilization of 67%.

Pine Point Day Use: 12 tables available. On average, the most tables occupied at one time were 8. This yields a capacity utilization of 67%.

Hoodview Day Use: 4 tables available. The most tables occupied at one time were 3. This yields a capacity utilization of 75%.

Gone Creek Day Use: 5 tables available and the most seen used at one time was 5. This yields a capacity utilization of 60%.

Oak Fork Day Use: 4 tables available for use. On average the most tables occupied at one time were 4. This yields a capacity utilization of 100%.

Combining all picnic areas yields a total capacity utilization of 81%.”

There is also about 200’ feet of shoreline in West Shore Day Use that is an available access point for visitors. PGE estimates the capacity of this area to be about 101 people at any one time. If people spread out about 20 feet apart, 10 people at one time can access here. Based on their observations, the average use at one time was 9 people which yields a capacity utilization of 90%. Counts were aggregated by type of use (picnicking and fishing) during sample days. These counts provided the average number of people viewed using each amenity at any one time during non-peak weekends. In addition to the shoreline and day use areas, Timothy Lake has a fishing dock. The fishing dock at Pine Point Day Use can accommodate 10 people fishing and PGE estimates that the dock is utilized 50% of the time.

Boat Launches

To determine the capacity for the boat launches, the number of boat trailer parking spaces available was used.

The parking at Pine Point can accommodate 13 boat trailers and 5 overflow spaces, totaling 18 parking spaces for boat trailers. The average number of boats at one time during non-peak weekends was 17. This yields a capacity utilization of 95%.

Hoodview boat launch parking area can accommodate 10 boat trailers. The average number of boats at one time was 3, yielding a capacity utilization of 30%.

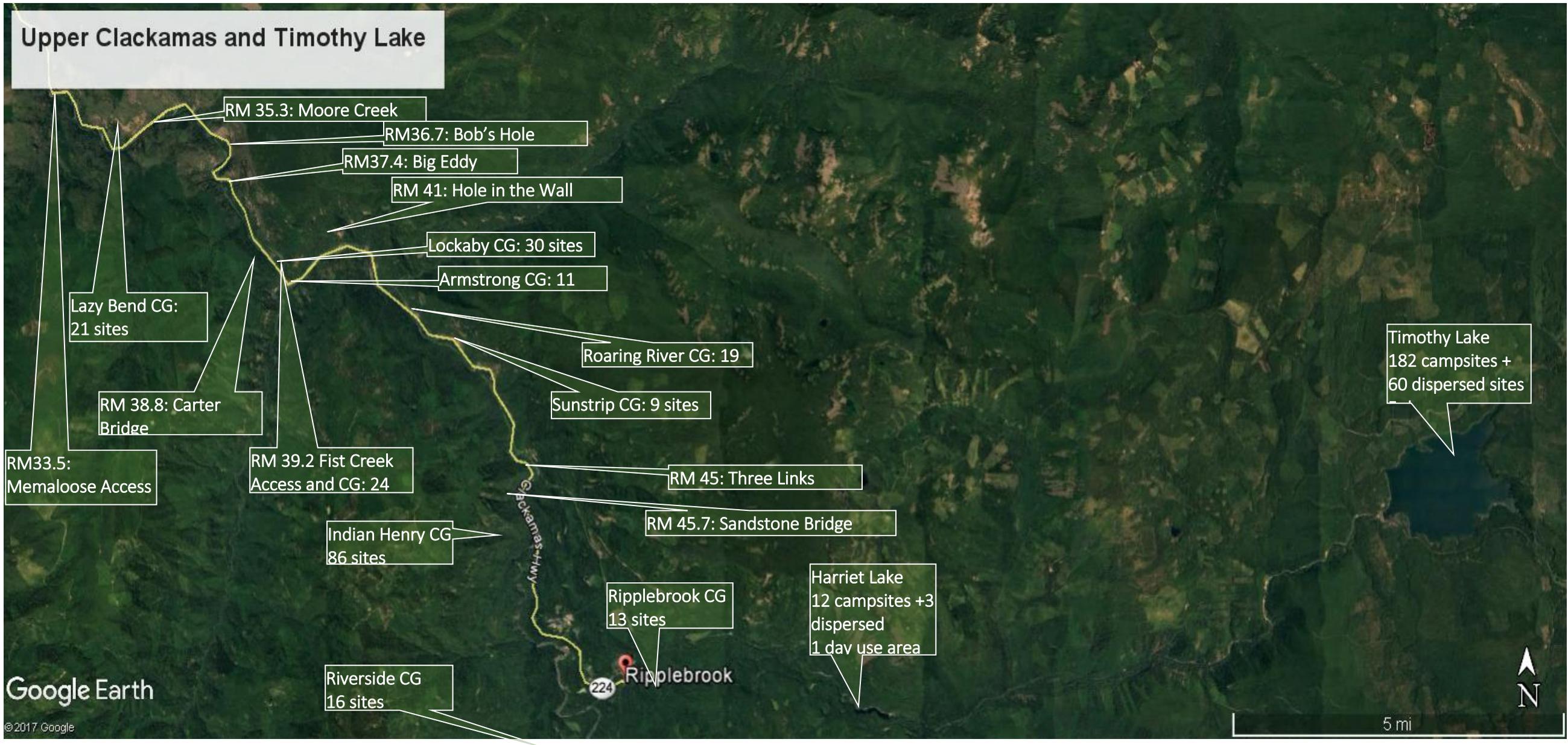
Gone Creek, an informal parking area that can accommodate 8 boat trailers at one time. On average there were 6 boat trailers parked. This yields a capacity utilization of 75%. **Oak Fork** boat launch parking area can accommodate 6 boat trailers. The average number of boats at one time was 6. This yields a capacity utilization of 100%. **North Arm** is a small boat launch area that can accommodate 4 boat trailers. The average number of boats at one was 1, yielding a capacity utilization of 25%. **West Shore** is a non-motorized boat launch. The parking lot can accommodate 38 vehicles; however, these parking spaces are shared with visitors using other amenities. The average number of vehicles with boat carriers at one time was 7. There are 10 spaces allocated for boat launch parking, yielding a capacity utilization of 70%. Combining all boat launches yields a total capacity utilization of 66%.

Trails

Managerial and resource factors were considered in determining how many people the trail can accommodate in a day while maintaining acceptable conditions. During peak weekend use, when the camera recorded over 200 people per day, there was increased litter, trampled vegetation, and trail degradation. Continual use at this level would lead to unacceptable trail conditions and detract from the visitor's experience. It would also be a challenge for staff to feasibly maintain the trail on a regular basis at this rate of use. Therefore, we have determined a capacity of 200 people per day for the Timothy Lake Trail. On average, 169 people used the trail during non-peak weekends. This yields a capacity utilization of 85%

Lake Harriet

Lake Harriet is a small lake popular for fishing and is stocked with trout during the recreation season. There is a 12-site campground and day use area that has tables for picnicking, a small accessible fishing platform and 400' of shoreline available for fishing within the day use area. There is also an informal boat launch at this site. A user fee is charged for use at the picnic area. The campground is open from mid-May through mid-September. One campsite is reserved for park staff to live onsite during the summer season. There are three dispersed camping sites within the area which received minimal use. For several weeks in 2014 during late July and into August, the access road used to travel to these sites was closed due to non-project related construction, which limited public access. The campground has 11 sites available each night for public use. The average number of sites occupied during non-peak weekends was 7. This yields a capacity utilization of 64%.



Middle Clackamas

River Mill Dam



The Middle Clackamas River is primarily two reservoirs created by two PGE hydroelectric impoundments: North Fork Dam creating the North Fork Reservoir and the River Mill Dam in Estacada creating Estacada Lake on the shores of which lie Milo McIver State Park (river left) and Timber Park (river right). These two reservoirs expand the water-based tourism market from the upper section's whitewater enthusiasts and trout anglers to family friendly flatwater paddlers, floaters, swimmers, and general fishing. After River Mill Dam the river flows unimpeded until the confluence with the Willamette. Middle Clackamas will continue to Barton Park where there is a well-maintained county owned campground and boat ramp. The City of Estacada (pop 2800) is the largest town along the river and sits in the middle of the lakes. It has a small but vibrant main street, enjoys waterfront access at Timber Park and is the last stop before travelers enter the remote sections of the upper Clackamas.

Promontory Park and North Fork Reservoir

Promontory Park, is a popular campground located only 5 miles from Estacada. The Park is owned and managed by PGE and includes 50 campsites, a marina, camp store, boat and paddleboard rentals, and a public boat launch. Park staff live onsite and campsites are available through a reservation system. There is a non-fee day use area at the park where families can fish a small pond. Recent evaluation of the campground, as part of the FERC reporting requirements, is that it serves at an average capacity of 75%. The North Fork Boat Launch served as a second launch site for the North Fork reservoir. No day use fee is required at this site. Park staff are present during the weekends to help direct boat launch traffic and to ease congestion at this site during the summer weekends. This site is only open during the summer season. The boat launch is highly popular. Its utilization capacity was measured at 87%.

Faraday Lake

Faraday Lake is a 26-acre reservoir that is stocked with trout to provide year-round fishing. No boats or swimming is allowed on the lake. The day use area has picnic tables and a long walkway provided for fishing. This is a non-fee area and park staff regularly monitors the site during the summer season. Use can be high when the lake has been stocked with fish, which occurs a few times throughout the summer season.

Estacada Lake at Timber Park

Timber Park is a well-maintained park on the north end of Estacada City and served as a community park as well as an attraction for out of town visitors. There are two picnic shelters and a large active recreation area that consists of a disc golf course, playground, soccer field, baseball field, and basketball court. There is a dock launch area for non-motorized car-top boats and fishing access.



This non-fee park is open year-round. Park staff lives onsite and manages the area during the summer season. Use at the park decreases during the off-season but disc golf remains a popular activity. During this time, one seasonal employee maintains the park. The city's Fourth of July celebrations are held here. The day use and fishing activities at this park are estimated to be at 70% utilization capacity.

Estacada Lake at Milo McIver State Park

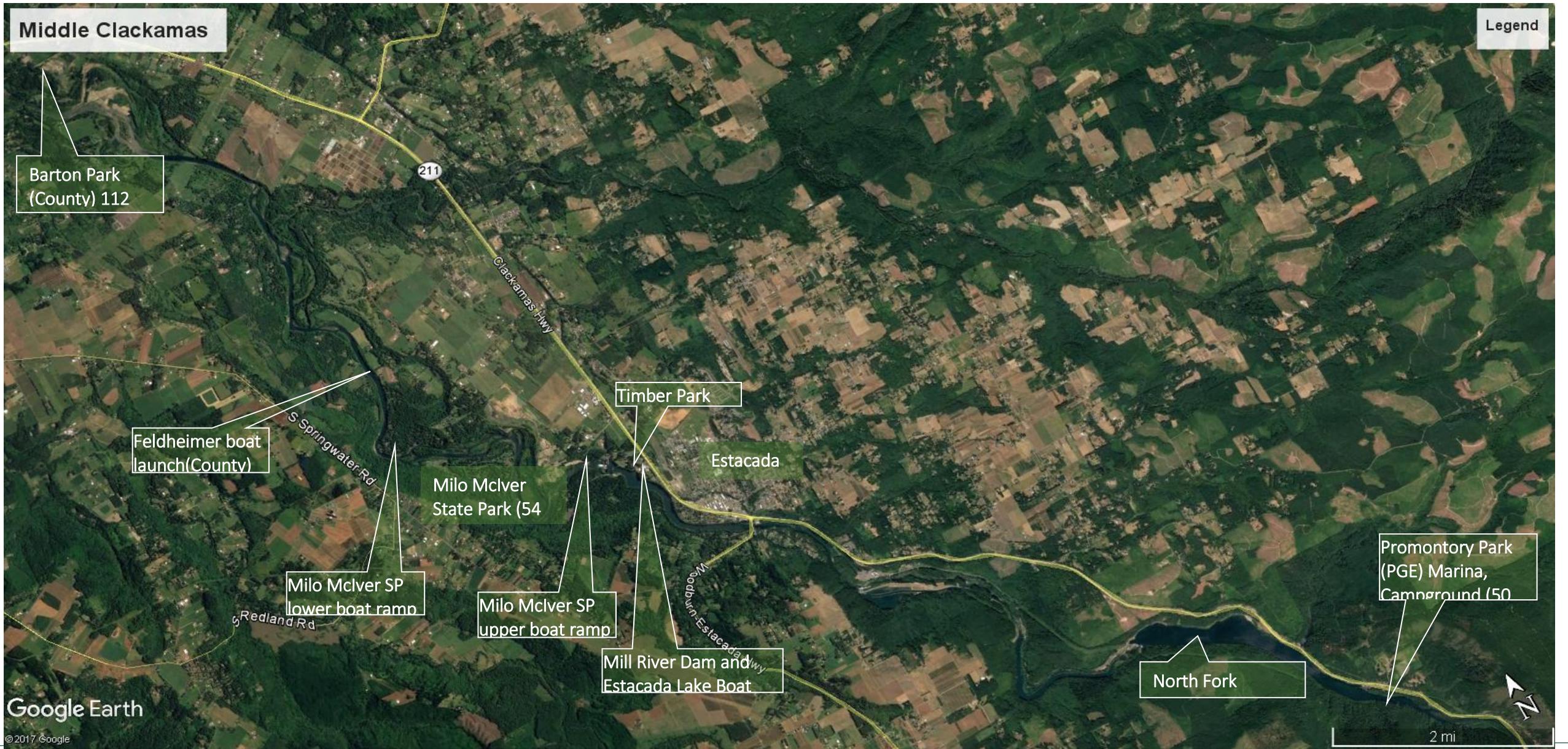
Estacada Lake is accessible in Milo McIver State Park at the park's boat launch. This site is owned and operated by PGE. The facility is a one-lane boat launch open to both motorized and non-motorized use. Onsite hosts monitor the boat launch during the summer season. This launch tends to be more popular since it accommodates motorized use and campers staying within the park use it to access Estacada Lake. This is a very popular launch site with an estimated utilization capacity of 82%.

Milo McIver State Park

Milo McIver state Park provides fishing, hiking, camping, horseback riding, picnicking and boating with two launch points with about 5 river miles in between on the Clackamas River. It is located only 23 miles or 45 minutes from Portland and has a dedicated following among visitors seeking quiet, quality natural areas close to home. Park includes 951 acres of open areas and wooded forest; 14 miles of pedestrian trails; 6 miles of equestrian trails; 27-hole disk golf course; 44 camp sites for campers, RVs, and 9 tent only camp sites; ADA fishing access. Upper McIver Ramp to Lower McIver Ramp is a 45 minute entirely within McIver Park. It includes one or two easy class II+ rapids and then a mellow float with some easy class I rapids. It is very popular for those who are staying in the park overnight or want to do several laps. This shuttle is so short that it can be done with a bicycle. The park is also used to launch guided fishing trips starting from here and ending in Barton. The Park also offers "Let's Go Kayaking" events that provides kayaking lessons and natural history tours in the Park.

Barton Park

Barton Park is owned and managed by Clackamas County. It is regarded at the gem of Clackamas County's park system. The park has 112 camping sites; a bunkhouse; 3-day use areas; 1.6 miles of hiking trails; fishing opportunities in several locations and a single lane boat ramp.



Lower Clackamas

The Lower Clackamas River is generally considered to be the section from Barton Park to the confluence of the Willamette River in Oregon City and Gladstone. This section of river is flat, warm, clean and friendly. The shorelines are gently sloping with many beach areas and natural areas to relax on and enjoy. The water is safe with few or no hydraulic hazards. The water quality is good to excellent. The scenery is beautiful. Certain sections of the river are secluded from any visual signs or noises of human development. Eagles and hawks can be seen flying overhead and on quite days the fishing can be excellent. There are several public access points including Barton Park, Carver Park and Riverside Park, as well as several roadside access points that may or may not be legal for general public use. This section is also one of the closest and more accessible water recreation areas to the greater Portland metro area. In fact, anyone wanting to spend a day on water can pack an inner tube, take public transit to Barton Park, float to Carver Park, have lunch at a local restaurant, and take the transit back home. The accessibility of the river and the excellent recreation quality of the river is likely the reason that so many people use the river. Recreation planners, river guides, park managers and county officials will cite this section of river as having the most user conflicts. On hot summer days parking lots are full, and the river can look like a parade. During these times any chance of enjoying solitude, or catching fish, is eliminated. For some, this defeats the purpose of going to the river; for others, it's exactly why they go.





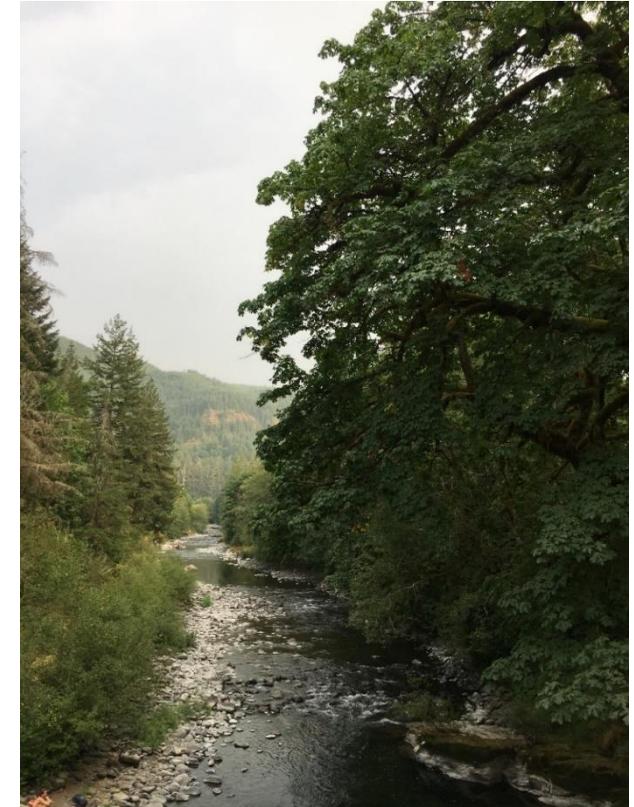
Molalla River

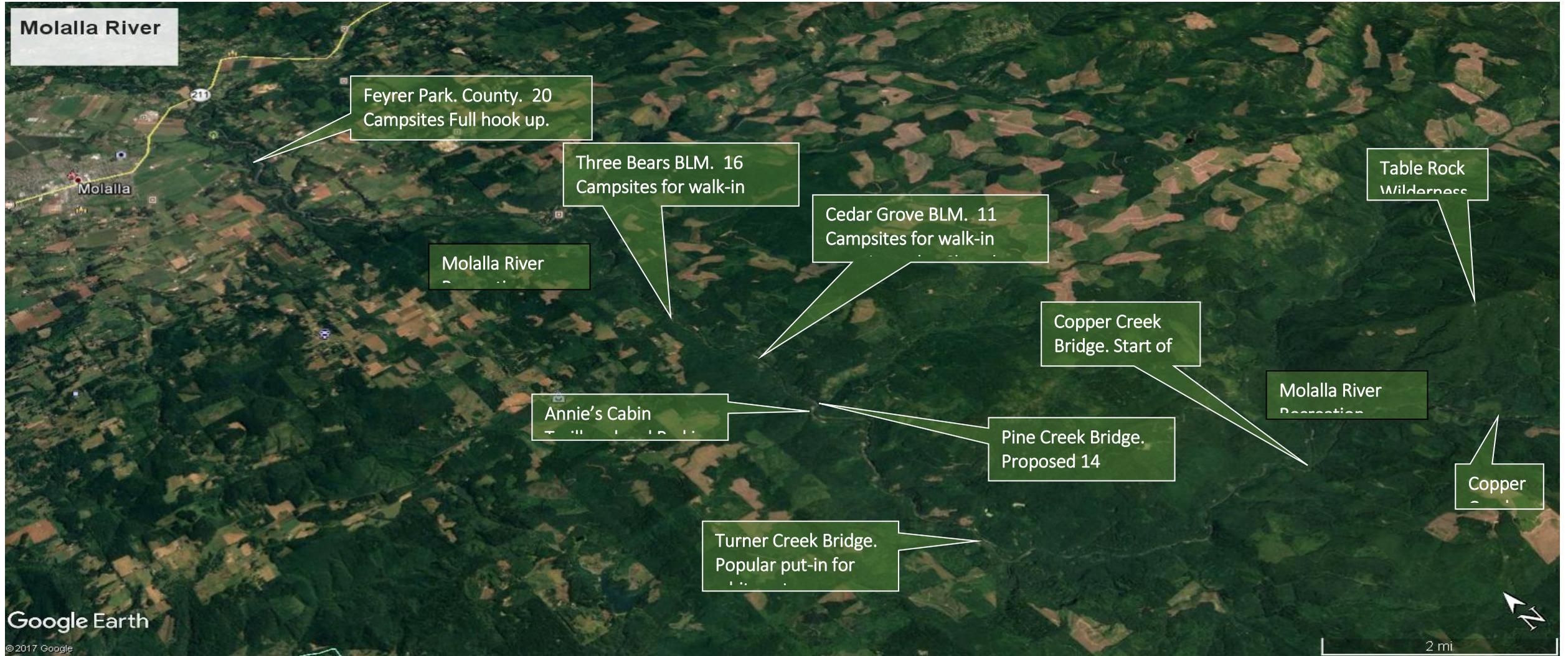


The Molalla River flows freely for its entire 51 miles from its headwaters in the Table Rock Wilderness to the Willamette River at the Molalla River State Park in Canby. The Molalla River Recreation Corridor, which is approximately the first 15 miles, is recognized by the State of Oregon as being “highly suitable for inclusion into the Scenic Waterways Program” due to its outstanding fishing, boating, swimming, picnicking, and camping experiences in a wilderness settingⁱⁱ. Molalla River Alliance promotes the Molalla River as a prime example of a wild Cascadian stream and is home to some of largest runs of wild winter steelhead. The BLM estimates that 50,000 annual visitors recreate in the Molalla River Recreation Corridor, participating in rafting, kayaking, hiking, picnicking, swimming, tubing, mountain biking, horseback riding, camping, hunting and fishing activities. The upper section of the river is managed by the BLM and referred to as Molalla River-Table Rock Special Recreation Management Area (SRMA). It

includes 27,405 acres of public lands, 5,700-acres of which is the Table Rock Wilderness. They also manage 25 miles of shared use trails. Three Bears and Cedar Grove campgrounds were built in 2012 and 2013 and are located on a forested river terrace above the river. Each campground provides parking and walk-in campsites with tent pads, picnic tables, fire rings, BBQ grills, potable water, and vault toilets.

Three Bears has sixteen sites and Cedar Grove has eleven. At the time of this writing, the campgrounds were only open Friday to Sunday on a first come, first served basis between May and October. There is ample demand for full time operations but not enough volunteer hosts to keep the operations open. A third proposed campground in the Molalla River Corridor is Pine Creek and would offer 14 back-in or pull-through RV/trailer campsites located near the Pine Creek Bridge. Pine Creek would offer similar amenities as Three Bears and Cedar Grove, yet with an ability to accommodate RVs and trailers. The BLM estimates that this would cost \$400,000 to construct. The closure of campgrounds during the week places the managing agency in a difficult position. Closures do not prevent visitors from using the site, therefore enforcement is still required. Yet closures do prevent any additional revenue from being generated so enforcement becomes costlier. The BLM has been working with two local non-profit stakeholders, Molalla River Watch and the Molalla River Alliance, in helping to manage the SRMA. The BLM has engaged these groups to help find volunteers, work on projects, and clean up the corridor. This cooperation occurred over the last 10 years and has resulted in notably reduced illicit activity in the area. Due to federal cutbacks in recreation management, the BLM will need additional stakeholder support to keep their existing campgrounds open all season and to build new ones.





Sandy River

The Sandy River, according to some fishing guides, has the potential to be a world class fishing river. It gets its name after the Mt Hood glacier that consistently feeds it with cold and nutrient-rich water all year. From the ceiling of Clackamas County, the glacier's melt will collect sediment and minerals and flow unimpeded 40.5 miles to the County line, 2 miles downstream of Dodge Park and the confluence of the Bull Run. From the Multnomah County line, the river will flow another 16.5 miles and empty into the Columbia River at Troutdale. The river welcomes most of its Clackamas County visitors between the Salmon River confluence in Mt Hood Village and Dodge Park, or between river miles 38 and 18.5. Clackamas County has 20 miles of superb fishing, exciting whitewater, inviting flatwater, and remote riparian wilderness all within an hour's drive from the Portland metropolitan area.

The Sandy River has a long tradition as a popular fishing destination. On warm summer days in the early 1900s, the railroad would bring hundreds of visitors from Portland to the river shores near Dodge Park to picnic, fish and relaxⁱⁱⁱ. The tradition of the Sandy River as a recreation destination is almost as old as Oregon. The river is known for its Salmon and Steelhead runs. Historically, the runs were as high as 15,000 coho, 20,000 winter steelhead, 10,000 fall chinook and 8,000 to 10,000 spring chinook^{iv}. These fish still return to the river, but the runs are far below historic levels. Historic hatchery records, along with recent spawning surveys in the Salmon and Zigzag watersheds, suggest that current spawning returns are only 10-25 percent of 1890s levels^v. In October 2007, the Marmot Dam (RM30.5) was removed, and many fishing guides and river managers are hopeful for a return of the glory days of the Sandy River.



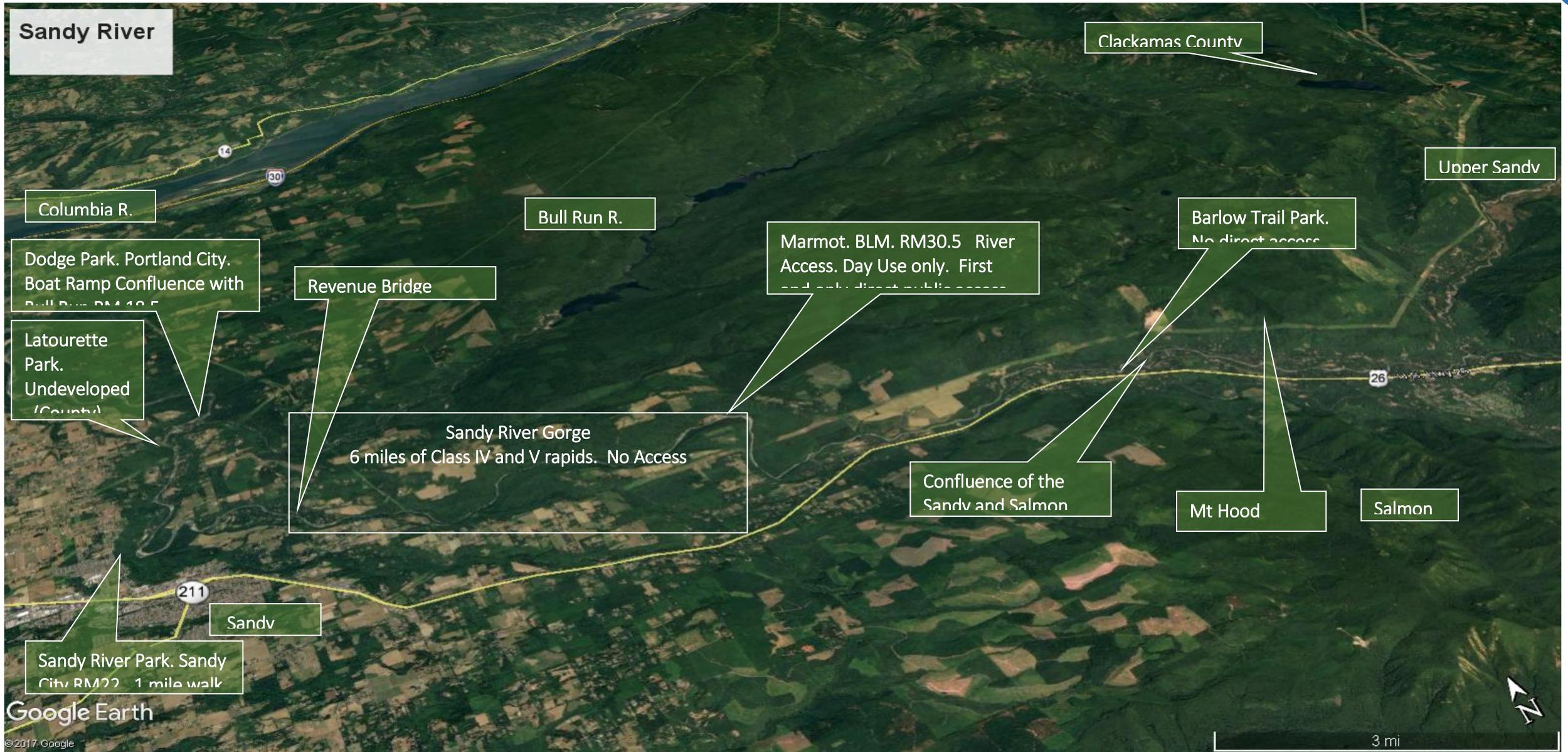
In addition to world class fishing, the Sandy is renowned for its challenging whitewater section. The Sandy River gorge offers 6 miles of some of the most difficult whitewater in Oregon and Pacific Northwest. Once a boater floats past Marmot Park (RM 30.5) the canyon becomes so steep and inaccessible that the only option to get off the river is to navigate (and survive) several Class 4 and 5 rapids¹ until the river is accessible by road again at LaTourette Park (RM19.5). While this level of challenge limits the market size to a small minority of users, it still creates a highly unique experience. River outfitters specializing in whitewater runs have a great opportunity to open a new market. BLM managed Marmot Park offers excellent put-in access and take out could occur at the underutilized LaTourette Park managed by the County.



Although the fishing, paddling, camping, picnicking and hiking opportunities are superb in this stretch of river, visitors are challenged with significant limitation to access. Other than Marmot Park and Dodge Park there are very few opportunities to get on the water. Dodge Park is 14 acres on the confluence of Sandy and the Bull Run. Here, there are 20 camping sites on shady grass and a boat launch. Marmot Park is a wide open grassy day use area with bathrooms, parking and walking trails. The BLM has identified the area at the confluence of the Sandy and Salmon rivers as a future river access site, however, there are no published plans or budget for this today. In this vicinity, there

¹ Based on an International Scale of River Difficulty established by the American Whitewater Association Class level reflects the technical difficulty and skill level required with Class 1 being the easiest and Class 5 being the most difficult.

is a parking area at the Barlow Trail and Sandy Ridge trailhead, where visitors can park and walk through an unguided woods trail to the river. The remaining corridor is primarily privately owned. The exception is Sandy River Park owned and managed by City of Sandy and the LaTourette Park managed by Clackamas County. Both these sites are greatly underutilized, but since access is severely limited they are also positioned as valuable assets to promote river tourism.



Willamette River

The Willamette River is Clackamas County's largest water-based tourism asset. It offers the most diverse water-tourism opportunities in Clackamas County and consequently the greatest potential for total visitation. The Willamette River flows from the Boones Ferry Boat Launch in the southern end of the county to the Milwaukie/Portland line on the north. These 22 river miles affords the recreationist the greatest diversity of water-based entertainment in the county. From motor boating and water skiing, to quiet water fishing and primitive camping on secluded islands. Along this stretch, a boater can tour the natural and cultural history of Oregon while floating the same waters that form the rights of passage for young Native American men, that carved the most voluminous waterfall in the west, that powered Oregon's industrial revolution, and which ends in the one of the nation's most progressive cities just over the county line. The lower section of the Willamette is also the most urban river in the County. Urban rivers provide interesting opportunities for economic development and tourism. They are by definition, in close proximity to large number of people. They can take advantage of public infrastructure and other resources, offer a wide range of activities, and promote convenient interactions with other urban activities such as dining, shopping, retail, nightlife, and other land-based entertainment. Promoting the urban/river interface results in mutually beneficial development between rivers and downtowns and will become an important theme within this plan.

More details about this stretch of the Willamette are provided here.

Wilsonville

Wilsonville has the furthest upstream launching point for water-based tourism in the county. Boones Ferry Boat Launch and Marina is managed by Clackamas County (through a private concessionaire) and includes a well-constructed boat ramp, ample parking and slips for approximately 108 boats. Oregon's settlers established a ferry boat (Boones Ferry) more than 100 years ago at this site and played an important role in the transportation of goods moving east and west. The Willamette River Greenway is a protected area that traverses the city. The Greenway is protected by local ordinances and state law which require adjacent properties and riparian areas to be designated "Greenway". Development within the Willamette River Greenway is reviewed by the Oregon Parks and Recreation Department and the City to ensure that the Willamette River and its vegetated banks are impacted to the least extent possible and that uses on the river are regulated. Wilsonville's Memorial Park is 126 acres and has ½ mile of river frontage with a boat dock. The city is currently planning modifications to the park with more connection to the water.

The Willamette Meridian Landing is also located in Wilsonville just downstream of Memorial Park. The landing is a free walk-in site owned and operated by the Oregon Parks and Recreation Department. This is a muddy, steep and densely vegetated landing for car top boats. Access here is difficult and considering that boaters have many other and better nearby options, this access is hardly used.

Canby

Canby City is embraced by two rivers: the Willamette River on the north and the Molalla River on the west. Both streams help delineate the city's urban growth boundary. The Molalla flows into the Willamette less 3.5 river miles downstream of Boones Ferry Boat Launch in the Molalla River State Park on the northern edge of the city. Canby recently

completed a downtown master plan and a Parks Acquisition Plan to implement the city's Parks and Recreation Master Plan. Throughout the planning processes the public clearly articulated a goal to connect existing parks and trails to a perimeter trail system roughly paralleling the urban growth boundary at these two rivers. Future visitors would enjoy a connection between downtown Canby and the Willamette River via the interconnected trail system.

Downstream of the MR State Park is the Canby Ferry. The ferry, the M.J. Lee, is owned and operated by Clackamas County and connects Holly Street in Canby to Mountain Road in Wilsonville. It operates all year, seven days per week, (weather permitting). The toll is currently \$5 per vehicle and it holds 9 cars. This ferry site is the only Willamette crossing in

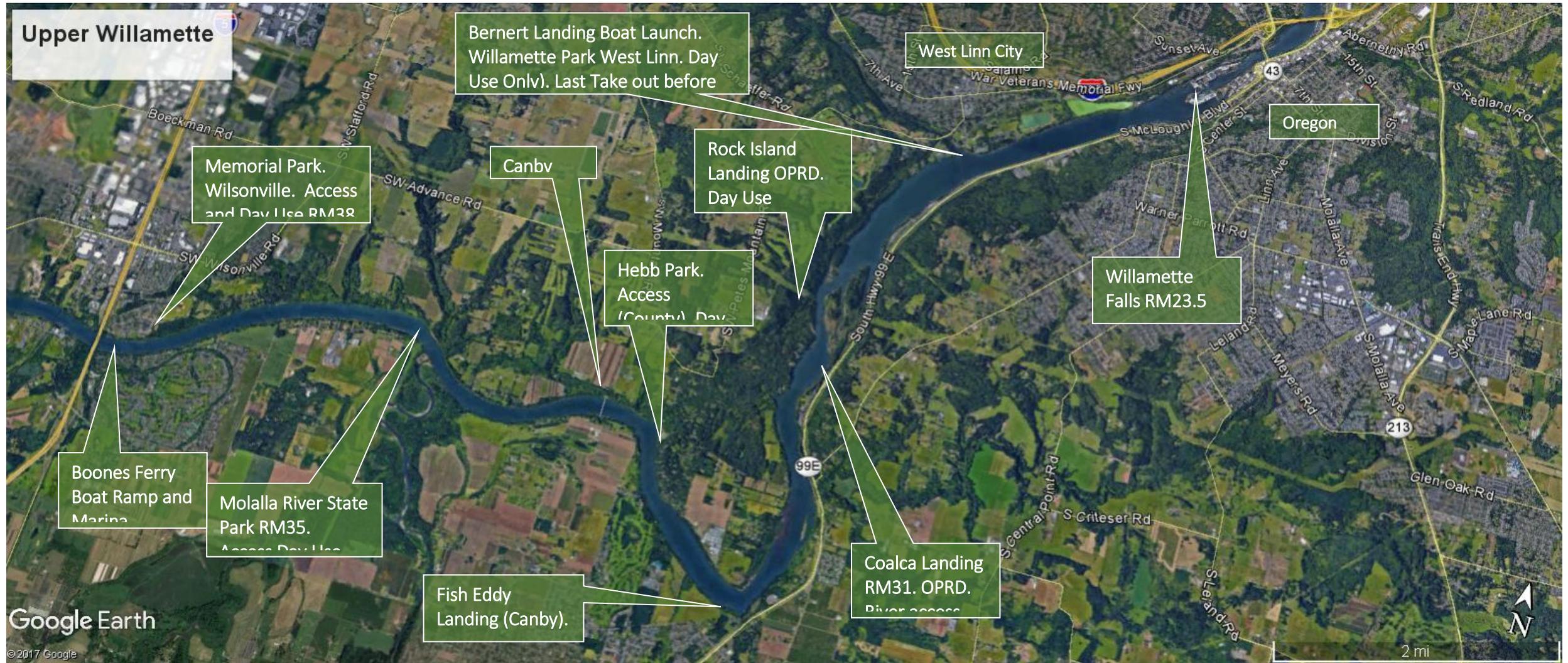
Clackamas County except for the Oregon City Bridge and highway I-205, also in Oregon City. The ferry provided service for 217,210 vehicles in 2003.



The first ferry was purchased in July 1914 by Canby Mayor W.H. Bair and businessman Harry B. Evans. It was propelled by a splashboard driven by the river current and held on course by a cable. A second ferry was built in 1917 by Canby builder Frank E. Dodge and it operated continuously until 1946. In 1952, the Canby Chamber and Lions Club presented the Clackamas County Court with 8,000 signatures seeking restoration of ferry service and has since operated continuously. In November 1952, a new ferry was launched at and christened by Ora Lee Cattley, daughter of Canby's first mayor, and was named Millard Jerome Lee after the first child born in the 1870-platted town of Canby. The characteristics of the M.J. LEE are:

- Length Overall: 55'8"
- Length at Waterline: 53'2"
- Beam Overall: 36'
- Cruising Speed: 6.4 mph
- Passenger Capacity: 49
- Vehicle Capacity: 9 autos or 25 tons
- Propulsion: Two 75 HP Z-Drives

Fish Eddy Landing is another river access owned and managed by the City of Canby located one mile downstream of the Canby Ferry. This is an undeveloped natural area with access to the river but is rarely used.



Unincorporated County Land

For approximately 4 miles downstream of the Canby Ferry, the river flows through a quiet and seemingly remote section of Clackamas County. It offers the boater a glimpse of native landscape and beckons images of settler-era river transportation while modern day boat launches, and residential homes occasionally blink into view. Hebb Park is one of these new boat launches. It is managed by Clackamas County as a boat launch park, picnic area with hiking and biking opportunities. From there, a boater can float past the remote Fish Eddy Landing on river right, and visit the pair of Willow Islands, two small undeveloped areas owned by the State of Oregon and left in the natural state. Two miles after Willow Islands the boater would arrive at Coalca Landing. This is a primitive boat launch managed by Oregon Park and Recreation Department. Recently, the road to this area has been closed and therefore the only access to this site is by boat or on foot. While this prevents car top boats from launching and taking out here, it does increase the opportunities for remote camping (not permitted today), fishing, nature viewing, and picnicking.

Across the river from Coalca Landing is Rock Island and Rock Island Landing. These two natural areas give boaters and tourists the best lessons in natural history of the Willamette River. Madrone, rare white Larkspur, and Camas cover the hillsides. The river leverages geologic time to carve basalt rock, and a diversity of birds, mammals and fish call this home. There are 469 acres on Rock Island Landing owned by the State of Oregon and Metro. The Islands are owned by Metro and The Nature Conservancy.

West Linn

One mile downstream of Rock Island is the mouth of the Tualatin River and West Linn City. The Willamette River follows West Linn's eastern border for nearly 6 ½ miles. This stretch gives West Linn residents a source of pride, pleasure, and prosperity as the City balances recreation and industry. The river is used extensively for recreation and commerce, especially during peak season for used for swimming, boating, water-skiing, and fishing. All lands within West Linn's Willamette River Greenway are either developed or committed to urban uses. In addition to the Greenway, the City has several parks along the river. Of the 6 ½ miles of shoreline along the Willamette within West Linn, about two miles are currently zoned for industrial use and are primarily occupied the by the West Linn paper mill and PGE's Hydroelectric facility. Seven West Linn park sites have frontage on the Willamette River, making approximately 2.1 miles of shoreline directly accessible to the public. They include:

1. The combined Willamette Park and Bernert Landing Boat Ramp measure 22.5 acres and include a boat ramp and dock.
2. The Cedar Oak Boat Ramp is located in a 16.5-acre park below the Locks that includes a boat ramp, river access, and hiking trails.
3. Mary S. Young Park is a large forest park located just upstream of the Cedar Oak Boat Ramp. This park does not have a boat ramp but does offer Willamette River shoreline that is accessible by foot.



4. Cedar Island Park is a 14-acre island in the Willamette River that is accessed via a bridge from Mary S. Young Park or by boat from the river.
5. Burnside Park is a 10-acre wilderness park located midway between the Locks and Mary S. Young Park that provides hiking trails, river access, but no boating facilities.

The primary community visions for the Willamette River are to provide riverfront accessibility coupled with preservation by: the creation of a Willamette River Greenway trail paralleling the river, including numerous vistas and access points; and coordination with the U.S. Army Corps of Engineers, West Linn Paper Company, PGE's T.W. Sullivan Hydroelectric Power Plant, and other industrial properties to ensure future use and development of such properties, while encouraging and assisting in the preservation of permanent natural areas for fish and wildlife habitat and scientific/ecological areas.

A separate focus is that of economic and tourism development around Willamette Falls. The City adopted the West Linn Parks, Recreation, and Open Space Master Plan in 1998 that lays the groundwork for property acquisitions and a riverfront trail through the industrial property above Willamette Falls. A subsequent bond measure was passed later that year, which provides funding for this trail. The City was bequeathed seven acres of riverfront property that is currently in a public planning process for the design and development of trails, access, and interpretation. Also, a community group has created the Willamette Falls Cultural Heritage Committee for the purpose of establishing a riverfront museum and other interpretive opportunities near the Falls.

Oregon City

Located adjacent to the confluence of the Willamette and Clackamas rivers and the Willamette Falls, Oregon City's waterfront area is arguably the center of the greatest water-based tourism potential in the county. Oregon City bursts with history in a most spectacular natural setting. For early settlers, it was the last stop on the Oregon Trail. In 1844 it became the first incorporated City west of the Rockies, the Capital of the Oregon Territory and site of the mint for the territory's independent currency, the Beaver Coins. Dr. John McLoughlin, "Father of Oregon" founded the city because of the power of the Falls, which was the source of the nation's first long distance power transmission travelling 14 miles to Portland. The original hydroelectric structure and associated components are still intact. The Willamette Falls powered many mills at this site, the last being the Blue Heron Paper Mill that was shuttered in 2011.

Tourism and recreation opportunities are provided along the river at several locations:

1. Sportcraft Marina: Owned by Oregon City provides excellent river access and is the closest to the Falls.
2. Jon Storm Park: A linear park adjacent and downstream to the Marina and extends to Clackamette Park.
3. Clackamette Park: a city owned park at the confluence of the Clackamas and Willamette Rivers that provides RV camping, boat access, fishing, and day use recreation.
4. Willamette River Promenade: gives visitors the best view of the Falls from any perspective except from a boat.

Oregon City is also the site of the only Willamette River crossing outside the Canby Ferry and I-5 in Wilsonville. The Oregon City Bridge is a historic and architectural marvel that connects West Linn to downtown Oregon City. The I-205 George Abernethy Bridge gives large volumes of traffic immediate access to the City's marina and the two river side parks. The Willamette Falls Legacy Project is a new planning effort to revitalize the waterfront at the falls and provide public access along the river, honor historic and cultural values, improve economic redevelopment opportunities, and ensure a healthy natural habitat.

Gladstone

Gladstone is primarily a residential city with 12,000 residents with a commercial strip on McLaughlin Boulevard running through town. The city sits at the confluence of the Clackamas River and Willamette River just downstream of Oregon City. Gladstone's Dahl Park is exactly on the confluence and is a popular fishing location. Half a mile downstream is Meldrum Bar Park that provides boat access and a popular day use area.





Milwaukie

The City of Milwaukie is the northern most municipality of the Clackamas County on the eastern shore of the Willamette River before entering Portland. The City has made a concerted effort to connect its waterfront with the adjacent downtown area only a few blocks away. McLoughlin Boulevard is the eastern edge of the waterfront and effectively separates it from the downtown area. The Milwaukie Downtown Riverfront Framework Plan created Jefferson Street Boat Ramp and Riverfront Park. This framework plan is a blueprint to make Milwaukie and its downtown a vital, livable and sustainable community. A primary focus of the City's economic revitalization is the removal of the Kellogg Sewage Treatment Plant on the southern border of the city's waterfront. The property currently occupied by the plant was identified in the framework plan as a prime opportunity for a "catalyst" project such as a hotel and marina complex. The Trimet mass transit system provides convenient access to the boat ramp and Riverfront Park and was used by this author to complete a shuttle after a river trip from Oregon City to Milwaukie. It is a unique feature for water-based tourism that can be used to attract Portland residents and out of state visitors.

Lake Oswego



Until the mid-1800s, Lake Oswego was a sleepy assembly of homesteads and farms between the Willamette and Tualatin Rivers in Oregon. Residential development around the perimeter of Oswego Lake in the 1940s and '50s combined with the annexation of Lake Grove in the 1960, the name of the city was changed to Lake Oswego. Lake Oswego is now considered one of the finest residential communities in Oregon.

In both 1998 and 2002, citizens passed park bonds to purchase open space and initiate capital improvements to park facilities. Development of parks along the Willamette River has been central focus of this effort and has resulted in the following public access points on the Willamette:

1. Foothills Park, a new 10-acre riverside site features excellent views, hiking trails, day use areas, and event space. This is also the home of the Lake Oswego Community Rowing Center at the Charles Brown Boathouse. The LOCR Center is the only boathouse in the Portland area to offer Learn-to-Row, Experienced, and Competitive programs for both Youth (Junior) and Masters.
2. George Rogers Park has 26 acres of riverfront, including an accessible pathway and boardwalk, natural areas, view corridors and picnic/barbeque area.
3. Roehr City Park has a small amphitheater and viewing dolphin that allows excellent views of and access to the river. It is very popular for private events



Chapter 4 THE PEOPLE

If Clackamas County wants to leverage its water recreation resources to increase visitation and overnights stays, we must understand Oregonian’s preferences, behaviors, and motivations for getting on the water. Why are people choosing water recreation over other types? How often do they go and what do they like to do when they get there? What motivates them to stay overnight? How far are they willing to travel and with how many people? Of all the water recreation play spots in Oregon, where are their favorite places and why? What are Clackamas County’s strengths and weaknesses in attracting water recreationists? What is the overall demand for water recreation in Oregon and how well does Clackamas County supply that demand? This

Chapter describes the process and results of a statewide random sample survey of water recreationists in Oregon. This survey is the first of its kind in Oregon, focusing specifically on all forms of water recreation in the State and resulting in detailed preferences on water recreation management, access, water recreation behaviors, and demand for Clackamas County’s rivers, lakes and water features.

“This survey is the first of its kind in Oregon, focusing specifically on all forms of water recreation in the State and resulting in detailed preferences on water recreation management, access, water recreation behaviors, and demand for Clackamas County’s rivers, lakes and Willamette Falls.”

Survey Objectives

The main objectives of this survey were to collect information from Oregon’s water recreation enthusiasts that would support a strategic plan for increasing water tourism in Clackamas County. A water recreation enthusiast is simply someone who likes to play on the water. Regardless of their years of experience, skill level, frequency in which they play on the water, or the type of activity, a water recreation enthusiast, for the purposes of this study, is someone who enjoys water-based recreation. They essentially represent the market for water-based tourism in Clackamas County.

The survey questionnaire was designed to understand: where water recreation enthusiasts like to go to recreate; what they like to do on the water; their general preferences, concerns, and behaviors on the water; their travel patterns such as distance, length of stay and accommodations; how knowledge and experience may affect their preferences; and who they are demographically. The survey was also designed to understand how Clackamas County waterbodies compared to others in Oregon and if they have some type of comparative advantage that may be leveraged in a strategic plan to increase visitation.

Sampling Methodology

To contact water recreation enthusiasts, the total market of potential water enthusiasts was broken down into three groups: anglers, motor boaters, and non-motorized boaters, also referred to as paddlers. Three individual mailing lists were used to contact each of these groups. For Group 1, anglers, the most current and complete database was fishing licenses issued by and purchased in the State of Oregon, Department of Fish and Wildlife in 2016. The total population of fishing licenses holders is 847,219². For group 2, motor boaters, the most current boat registration database was obtained from the Oregon State Marine Board. There were 174,808 motor boaters in this database. Finally, Group 3, paddlers, were contacted by using the database from invasive species permits. There were 19,842 paddlers in this database.

Emails were extracted from each of these databases and those with valid email addresses received a survey link by email. The email described the purposes of the survey, a description of the survey, and by whom it was being administered. The emails were sent on September 7th, 2017 and the survey was closed on October 4th, 2017. The respondents received one follow up reminder to complete the survey on September 20th, 2017. The survey was taken by 959 anglers, 358 motor boaters and 391 paddlers.

Total population that this survey represents is therefore 1,068,869 people. The population of Oregon is 4,093,000 million people. However, compared to all Oregon residents (US Census data), the sample is decidedly more male, and has more income and is older than the state average.

The Questionnaire

The questionnaire included 31 questions. Three of these questions had a total of 49 sub-questions that listed issues, concerns or importance factors, where the respondent was asked to rank each one on a 5-point Likert scale. Therefore, there were a total of 80 data points that collected the respondents’ opinion. The respondent was provided a chance to win \$50 as small incentive to finish the survey. The results show slight signs of respondent fatigue but not to an unacceptable degree. Several of the questions required an answer to move forward and in nearly all cases they did so. Several of the questions provided open ended responses that gave the respondent an opportunity to comment on the survey or provide clarifications. On less than 10 surveys did the respondent complain about the length of the questionnaire. In addition, only approximately 50% of the

² Total population of 847,219 licenses holders is taken from the 2015 ODFW records. This quantity is consistent with the 3 previous years of fishing license holders (825,274; 824,977; 865,197). However, the 2016 mailing list received by the consultant included only 715,582 records and the reason approximately 100,000 records are missing is unknown after several inquiries. This study uses the responses from the 2016 database, however, relies on the 2015 population as the total population of anglers.

Age Group	Percentage
1-18	0%
19-25	1%
26-39	10%
40-55	25%
56-65	22%
over 65	21%
(blank)	22%
Total	100%

	Sample	Census
Male	81%	50.5
Female	19%	49.5
Median Age	40-55	39.1
Median Income (\$K)	\$65-\$99	\$51



respondents who completed the entire survey entered the drawing to win the \$50. This indicates that they cared more about the survey than the money and the incentive was not too high to create biased results. Other open-ended responses also showed that they were generally interested in providing the information and cared enough to clarify their opinions.

The same questionnaire was distributed to all three groups. The average time to complete the questionnaire was between 14 and 16 minutes and the completion rate was between 75% and 82% (depending on the group). Since several questions were designed to be skipped when they didn't apply, and other questions were optional, a 100% completion rate would be impossible.

Confidence Level

The confidence level determines how sure we can be with the results we gather. It is expressed as a percentage and represents how often the true percentage of the population who would pick the same if the survey was administered to all of them. The answer lies within a confidence interval. The confidence interval is commonly referred to as the margin of error and in opinion poll results commonly stated as plus-or-minus X percent. It is the researcher who chooses these levels of error and the choice depends on the type of work being performed. A 95% confidence level with an interval of 5% is industry standard for many public opinion polls and social survey research. This means that if 40% of the sample responded "yes" to a question, then we can be 95% sure that if we asked the entire population the same question, then the response would lie between 35% and 45% (40% +/- 5). This is theoretically true based on the assumption that the sample was randomly selected.



Total population that this survey represents is 1,068,869 people. As described above, they represent 2016 fishing license holders, registered motor boat owners, and invasive species permit holders. Because they actively made purchases to lawfully engage in their sport, they are considered "water recreation enthusiasts." If we assume that Oregon has approximately 1,068,869 water sport enthusiasts, then this survey captured the opinions of 1708 of this population³. To gain a confidence Level of 95% with an interval of %5 we need only 385 respondents. The results here use 4 ½ times the required level of respondents. However, the respondents were self-selected through a web-based survey only, which typically results in random sampling error. The overly large sample helps adjust and correct for sampling errors that likely exist, yet are difficult to quantify, in this study.

³ Undoubtedly, there are many who would consider themselves water recreation enthusiasts but who are not on any of these three mailing lists.

Representation

Each of the three groups returned a different number of completed questionnaires. Also, each group represents a different size population. Since different groups represents different size populations, each with a unique number of respondents, these data were weighted to determine if, and to what degree, the results under or over represent each group. We asked the question “Are the responses from each group under or over representing their total population?” To answer this question, one survey question was tested to create an accurate comparison. Responses to the question “your favorite water-based recreation?” were weighted accordingly, and new frequencies calculated for comparison with sample frequencies. The results show that anglers and to a lesser extent motor boaters are underrepresented in the sample of respondents while paddlers are over represented. One angler respondent represents 912 anglers in the total population. Each sample motor boater represents 488 motor boaters in the population and each paddler respondent represents 51 paddlers. Representative weights are shown in table 3-3 below and calculated as:

$$W=N/n$$

Table 4-3: Representative Weights			
	Group 1 (Anglers)	Group 2 (Motor Boaters)	Group 3 (Paddlers)
Total Pop (N)	847,219	174,808	19,842
Respondents (n)	959	358	391
Weight	912	488	51
% Weight	0.11%	0.20%	1.97%

Favorite activity was chosen as the test question because this is one of the most important questions for the purposes of this project. The comparison between weighted and unweighted responses are shown in table 3-4. The total number of weighted respondents are calculated by multiplying the number of original respondents by the weight. Then a percentage response is calculated from these products. Generally, the difference is greater as the number of responses increases, (note fly fishing). So, while fishing, especially fly fishing, is clearly the favorite water-based recreation activity in Oregon (unweighted), the

actual preference for fishing (weighted) is even stronger than the results indicate because anglers are underrepresented.

“...the number of completed surveys is over 4 times the number needed to complete a statistically representative sample. Therefore, for the purposes of creating strategies to attract more water-based tourism in Clackamas County, these data provide reliable, robust results and valuable information.”

Table 4-4: Unweighted vs Weighted Responses for Favorite Water Recreation

	Unweighted Responses				Weighted Responses			
	Angler	Motor	Paddler	All	Angler	Motor	Paddler	All
Fly Fish	313	21	50	37%	285,329	10,254	2,537	43%
Other Fish	64	43	32	13%	58,342	20,996	1,624	12%
Flat Water Kayak	82	15	59	15%	74,751	7,324	2,994	12%
Bass Fish	48	18	8	7%	43,757	8,789	406	8%
Sea Fish	55	28	15	9%	50,138	13,672	761	9%
Whitewater Raft	24	8	24	5%	21,878	3,906	1,218	4%
Motor Boat	40	43	19	10%	36,464	20,996	964	8%
Swim Wade	22	14	3	4%	20,055	6,836	152	4%
Sum Valid	648	190	210	100%	590,713	92,775	10,657	100%

Only this question was weighted. All other results presented in this report are in the unweighted form because it is statistically inaccurate to conduct bivariate and multivariate analysis on weighted data. The reader must keep in mind that these results under or over represent certain populations and an estimation on the degree to which this occurs is provided here. Nonetheless, the number of completed surveys is over 4 times the number needed to complete a statistically representative sample. Therefore, for the purposes of creating strategies to attract more water-based tourism in Clackamas County, this data provide reliable, robust results and valuable information.

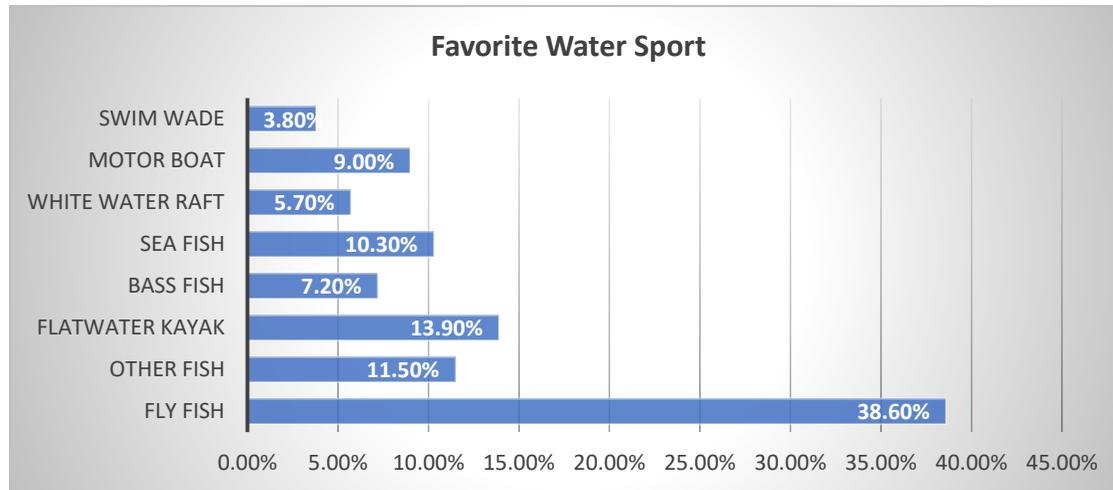
Analytical Methods

Survey data were re-coded as needed and were entered into an SPSS statistical software package. Three main types of analysis were done:

- Bivariate. How does one variable (e.g., the response to one question or membership in a demographic group) influence the response to another variable (question.) For example, how do anglers, motor boaters and paddlers differ in their favorite water bodies?
- Multivariate. How do two variables (1-anglers, motor boaters and paddlers) and (2-what county do you live in) influence a response to a question (e.g.: what is your favorite water body)?
- Regression. How do a set of variables influence another variable (e.g.: how does gender, income, age, location and favorite sports influence the favorite water body)?

For each analysis, a test of statistical significance was done (Chi Square and ANOVA for bivariate and multivariate, F- and T-tests for regression) on the null hypothesis. In this study, the null hypothesis is that one variable has no influence on another. A relationship is said to be statistically significant (SS) if the survey was repeated, we would very likely find the same relationships. Significance is measured by the p-value, which is the probability that the null hypothesis would be true, given the distribution of data. Standard





convention is that any $p > .10$ is thought to be not significant and one cannot reject the null in these cases. If $p > .10$, we conclude there is no real relationship. If $p < .10$ there is a statistically significant relationship.

Some of the variables used in this analysis include

- Demographics: respondents' age, gender, income
- Geography: where respondents live, where they recreate
- Attitudes: concerns and preferences for recreation and accommodation
- Activities: Type of license held (fishing, motorboat registration or invasive species: (referred here as anglers, motor boaters and paddlers, respectively), favorite sports, favorite waterbodies, most frequent waterbodies, overnight trips, miles traveled.

Several questions had an "other" category. One notable question was favorite activity in which anglers wrote in several types of fishing activities. Any "other" response that mentioned fishing (e.g., "all types of fishing" or "just plain fishing") were combined into a new variable called "other fish"; this was the second most frequent answer to favorite sport, trailing only to fly fishing. Data were compiled into tables, often by percentage of response by group (or parameter estimates in regressions). Significance is denoted by p-values were applicable (when $p < .10$).

Survey Results

Oregon’s most favorite water-based sports

Fishing is by far Oregon’s favorite water-based recreation activity^{vi}. Fly fishing alone is the most popular water-based sport, exceeding the second most popular sport, flat water kayaking, by twice as much. However, when combining all fishing types, fly, sea, bass and general fishing, this activity comprises four of the top eight categories of favorite sports and was represented by 67.6% of the unweighted respondents (fig 1). Furthermore, when the same data are weighted to reflect the true population, 72% of Oregon’s water enthusiasts would choose one of the four types of fishing activities as their favorite sport, with fly fishing alone comprising 43%. The second most favorite sport, flatwater kayaking at 14%, doesn’t come close to this level of interest.

After breaking down the data by respondent group and rivers, fishing still rises to the top as either the most, or nearly the most, popular sport. Remarkably, non-motorized boaters prefer fishing over paddling. When combining all fishing activities into one group and all non-motorized boating activities, fishing is the top activity at 46.8% versus paddling at 41.4%. Without combining any categories, fly fishing is the top favorite activity among non-motorized boaters. When digging deeper, the preference is even more pronounced for certain rivers. On the Deschutes for example, fly fishing was more than twice as popular as the second and third ranked activities, flat-water kayaking and whitewater rafting. On the Columbia, 57% prefer some type of fishing over flatwater kayaking at 35.7%.

Among the motor boater respondents, it appears that motor boating is only a means for performing their favorite activity, fishing. On only one river and one section of coast line, was motor boating the respondent’s favorite activity. On all other waterbodies some type of fishing was either the most preferred activity or it was tied with whitewater rafting. Naturally, when reviewing only angler respondent data, fishing of some type was the preferred activity 75% of the time with fly fishing taking 49% of that amount (tables 3-5 to 3-7).

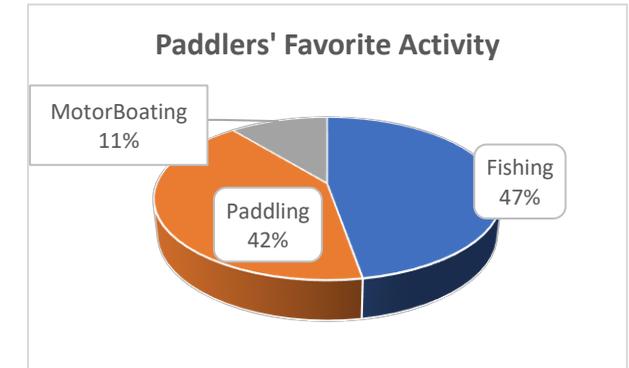


Table 4-5 Non-motorized Boaters' Favorite Activity by Top Eight Favorite Waterbody

Favorite Water Bodies	Fly Fish	Other Fish	Flat Water Kayak	Bass Fish	Sea Fish	White Water Raft	Motor Boat	Swim Wade	Total
Deschutes R	41.90%		19.40%		6.50%	19.40%	12.90%		100.00%
Columbia R	28.60%	21.40%	35.70%		7.10%		7.10%		100.00%
Rogue R	17.40%	13.00%	8.70%	4.30%	8.70%	34.80%	13.00%		100.00%
Willamette R	16.70%	25.00%	50.00%					8.30%	100.00%
OR Coast North	22.20%	22.20%	22.20%	22.20%	11.10%				100.00%
Owyhee R	20.00%		20.00%			60.00%			100.00%
OR Coast South	25.00%	25.00%	25.00%				25.00%		100.00%
Umpqua R	14.30%		57.10%		14.30%	14.30%			100.00%
John Day R	16.70%	16.70%	16.70%				50.00%		100.00%
Total	26.10%	11.70%	25.20%	2.70%	6.30%	16.20%	10.80%	0.90%	100.00%

Table 4-6 Motor Boaters' Favorite Activity by Top Eight Favorite Waterbody

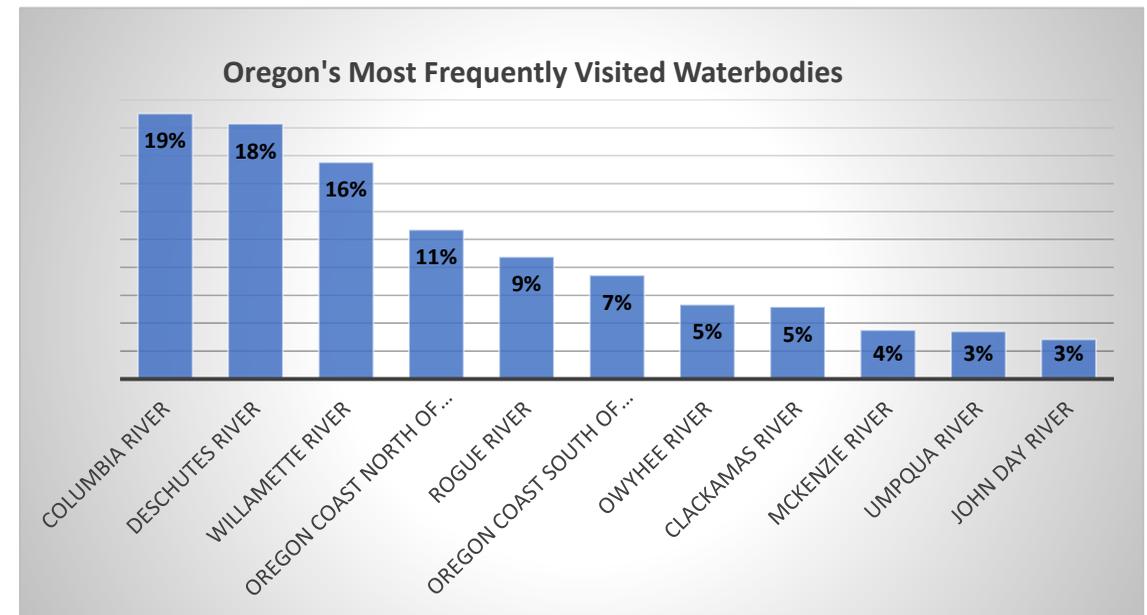
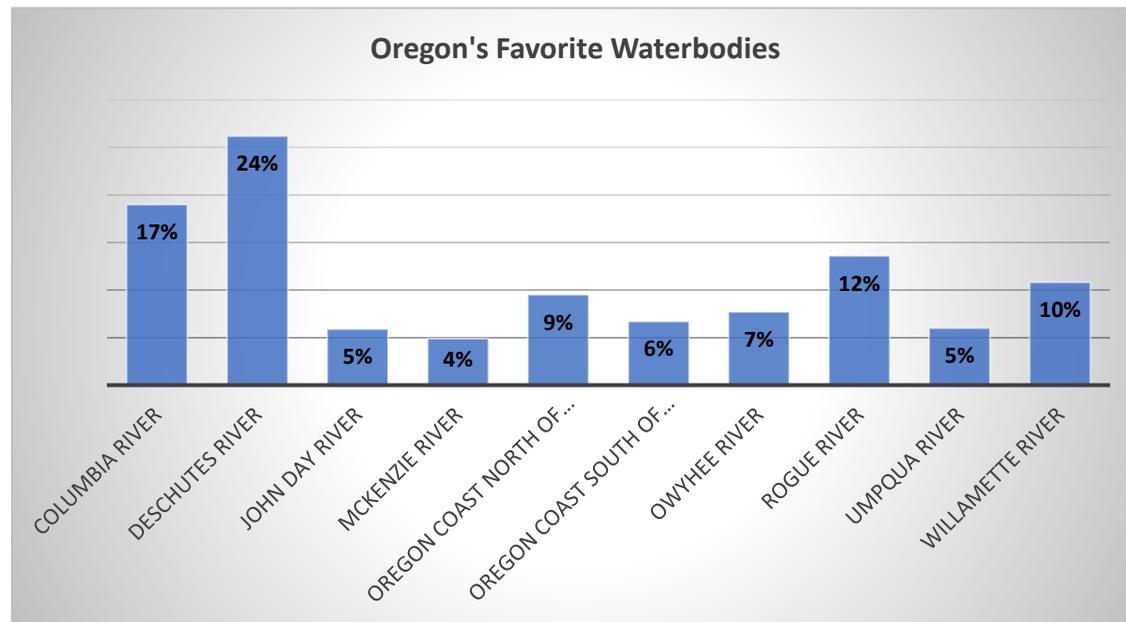
Favorite Water Bodies	Fly Fish	Other Fish	Flat Water Kayak	Bass Fish	Sea Fish	White Water Raft	Motor Boat	Swim Wade	Total
Deschutes R	7.70%	7.70%		7.70%	30.80%		23.10%	23.10%	100.00%
Columbia R	14.80%	22.20%	14.80%	7.40%	14.80%		18.50%	7.40%	100.00%
Rogue R	25.00%	16.70%	8.30%		8.30%	25.00%	8.30%	8.30%	100.00%
Willamette R	11.50%	15.40%	11.50%	11.50%	11.50%		26.90%	11.50%	100.00%
OR Coast North	15.40%	38.50%	15.40%		7.70%		7.70%	15.40%	100.00%
Owyhee R					33.30%	33.30%	33.30%		100.00%
OR Coast South	10.00%	20.00%	10.00%	10.00%	20.00%		30.00%		100.00%
Umpqua R		33.30%			66.70%				100.00%
John Day R		40.00%		20.00%	40.00%				100.00%
Total	12.50%	20.50%	9.80%	7.10%	17.90%	3.60%	18.80%	9.80%	100.00%

Table 4-7 Anglers' Favorite Activity by Top Eight Favorite Waterbody

Favorite Water Bodies	Fly Fish	Other Fish	Flat Water Kayak	Bass Fish	Sea Fish	White Water Raft	Motor Boat	Swim Wade	Total
Deschutes R	52.80%	1.90%	5.70%	10.40%	14.20%	3.80%	7.50%	3.80%	100.00%
Columbia R	36.10%	25.30%	15.70%	8.40%	4.80%	2.40%	2.40%	4.80%	100.00%
Rogue R	38.60%	7.00%	19.30%	8.80%	7.00%	7.00%	10.50%	1.80%	100.00%
Willamette R	61.50%	15.40%	3.80%	11.50%	7.70%	0	0	0	100.00%
OR Coast North	53.80%	7.70%	17.90%	2.60%	10.30%	0	5.10%	2.60%	100.00%
Owyhee R	53.20%	2.10%	8.50%	10.60%	14.90%	4.30%	2.10%	4.30%	100.00%
OR Coast South	56.50%		17.40%	4.30%	4.30%	0	13.00%	4.30%	100.00%
Umpqua R	46.90%	6.30%	18.80%	3.10%	12.50%	3.10%	9.40%	0	100.00%
John Day R	65.20%		4.30%	13.00%	0	8.70%	8.70%	0	100.00%
Total	48.90%	8.50%	12.20%	8.50%	9.40%	3.40%	6.20%	3.00%	100.00%

Favorite and Most Frequently Visited Water Bodies

The survey explored which waterbodies are the favorites in all of Oregon. This information was gathered to compare Clackamas County water bodies to the rest of the state. From a simple multiple-choice question “your favorite water body for water-based recreation?” Respondents were asked to pick only one of 30 selections, or write in an “other” option, or answer “I don’t know.” The list was randomized for each respondent. All waterbodies that received a response greater than 2% were included, resulting in ten water bodies. These data show that the Deschutes River is clearly Oregon’s favorite water body. It is 30% more popular than the second favorite, Columbia River and nearly twice as popular as the third favorite, the Rogue River.



A variety of factors, including age, household income, and sex, were used to test if they influenced favorite water bodies. The Deschutes was preferred by all age categories over any other river. The youngest category of users (age 19-25) is more likely than average to prefer the Deschutes, or the John Day (tied at 27.3%) followed by the Owyhee at 18%. The next oldest group (26-39) were more likely to name the Deschutes, Rogue, North Coast, and John Day than the sample average. The oldest group (<65 years) is more likely to choose the Deschutes. When combining all ages, the most preferred water bodies are the Deschutes, Columbia, Rogue and Willamette in that order. The overall table is significant (p=.025).

Table 4-8 Favorite Waterbody by Age Group

Age	Deschutes	Colombia	Rogue	Willamette	OR Coast North	Owyhee	OR Coast South	Umpqua	John Day
19-25	27.3%	9.1%		9.1%		18.2%	9.1%		27.3%
26-39	27.8%	15.5%	15.5%	8.2%	12.4%	6.2%	4.1%	2.1%	8.2%
40-55	24.3%	17.5%	11.2%	13.1%	10.1%	6.7%	6.3%	4.1%	6.7%
56-65	26.8%	21.2%	11.7%	6.9%	7.4%	4.8%	7.8%	9.5%	3.9%
over 65	23.0%	14.4%	18.0%	8.6%	7.7%	10.4%	6.3%	5.0%	6.8%
Total	24.9%	18.0%	13.1%	10.2%	9.0%	7.3%	6.3%	5.7%	5.6%

Table 4-9 Favorite waterbody by Household Income

	Deschutes	Colombia	Rogue	Willamette	North Coast	Owyhee	South Coast	Umpqua	John Day
Less than \$10,000	20.0%		40.0%			20.0%			20.0%
\$10,000 - \$19,999	24.3%	15.2%	16.2%	9.0%	8.1%	7.1%	6.7%	5.7%	7.6%
\$20,000 - \$39,999	20.3%	17.2%	10.9%	13.3%	8.6%	8.6%	3.9%	10.2%	7.0%
\$40,000 - \$64,999	17.9%	14.3%	17.9%	10.7%	14.3%	10.7%	7.1%	3.6%	3.6%
\$65,000 - \$99,999	21.5%	21.5%	15.1%	10.8%	4.3%	7.5%	7.5%	4.3%	7.5%
\$100,000 - \$149,999	19.5%	20.1%	10.7%	8.3%	12.4%	7.7%	10.7%	4.1%	6.5%
\$150,000 - \$200,000	28.6%		14.3%	14.3%	14.3%	14.3%	14.3%		
over \$200,000	36.9%	17.4%	12.8%	8.1%	8.7%	4.7%	2.0%	5.4%	4.0%
Total	24.9%	18.0%	13.1%	10.2%	9.0%	7.3%	6.3%	5.7%	5.6%

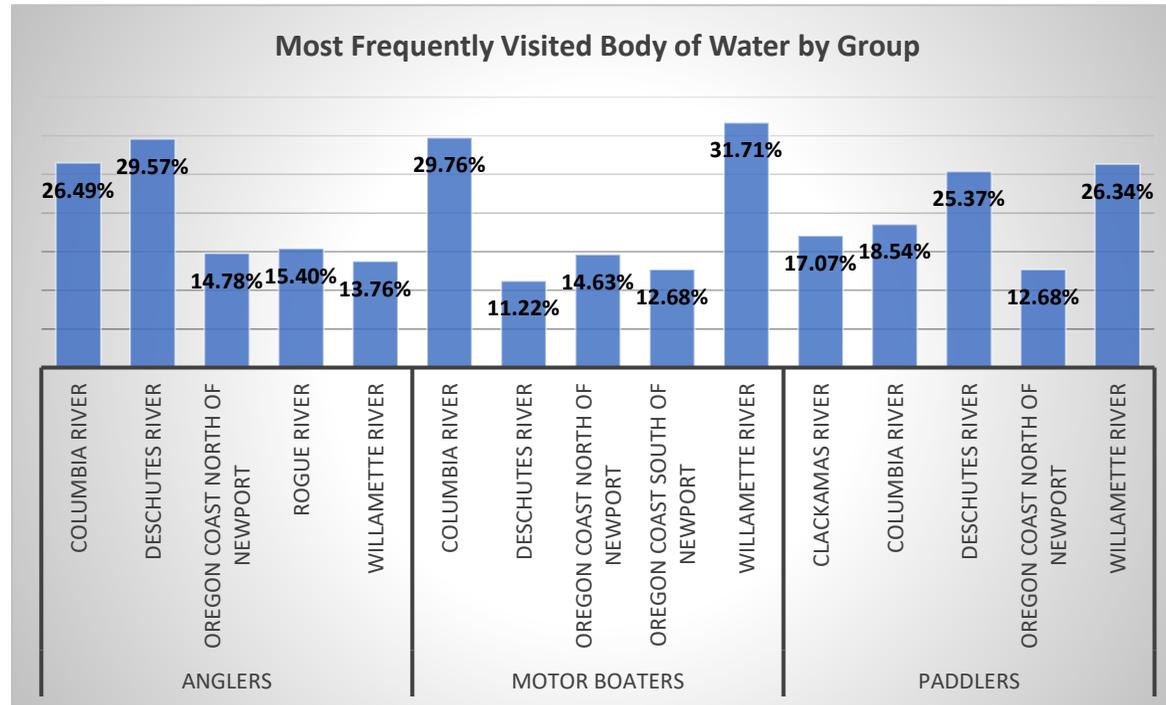
Household income shows a little more variability than age for determining favorite waterbody but not by much. Respondents in six out of eight income categories prefer the Deschutes as their favorite waterbody. It is interesting to note that those in the lowest income category and those in the highest both prefer the Deschutes, so income doesn't appear to influence preferences for waterbody. For those earning between \$10,000 and \$20,000, the favorite waterbody was the Rogue with the Deschutes, Willamette, Owyhee and John Day tied for second. For those in the \$65,000 to \$100,000 income category, the Columbia was the first choice but only by .6% followed by the Deschutes. The data generally show that as household income rises, so does the probability of the Deschutes being the favorite water body in Oregon. A person's gender did not affect the preference for favorite water body with the Deschutes being the preferred followed by the Columbia.

Favorite water-based activities also did little to influence the preference for rivers unless the respondent was a motor boater. For anglers and paddlers, their preferred water body was the Deschutes River, followed by the Columbia and Rogue respectively. Motor boaters prefer the Columbia and Willamette. However, motors are prohibited on many sections of the Deschutes, and where it is allowed, there is limited access with activities and boat speeds being regulated^{vii}. Similar restrictions are not present on the Columbia or Willamette, so the comparison is not entirely valid.

Of the top nine favorite waterbodies on the survey, none lie solely in Clackamas County and only one (Willamette River) partially does. If the Willamette is counted as a Clackamas County water body, 273 respondents or 16% of the sample will have a favorite water body in Clackamas County, if

the Willamette is not included as a Clackamas water body, then only about 5% do. Since most of the Willamette is not in Clackamas, the true number is likely closer to 5%.





Oregon’s most frequently visited river is the Columbia closely followed by the Deschutes and the Willamette. When we change the question from favorite water body to most frequently visited water body, the Deschutes drops from 24% to 18% and the Columbia increases from 17% to 19%. Willamette’s ranking increases from fourth place to third while the Rogue drops to fifth place after the Willamette and North Coast. It appears that distance from Portland has some influence on the frequency of visitation. However, there is not a direct correlation, otherwise the Willamette, Sandy, and Clackamas would have higher rankings than they do currently.

Each of the three user groups have similar but not identical sets of responses for most frequently visited water body. Anglers tend to frequent the Deschutes and Columbia most; motor boaters, frequent the Columbia and Willamette, and paddlers visit Deschutes and Willamette most frequently. Paddlers are the only group that includes a Clackamas County waterbody in their top-five list.

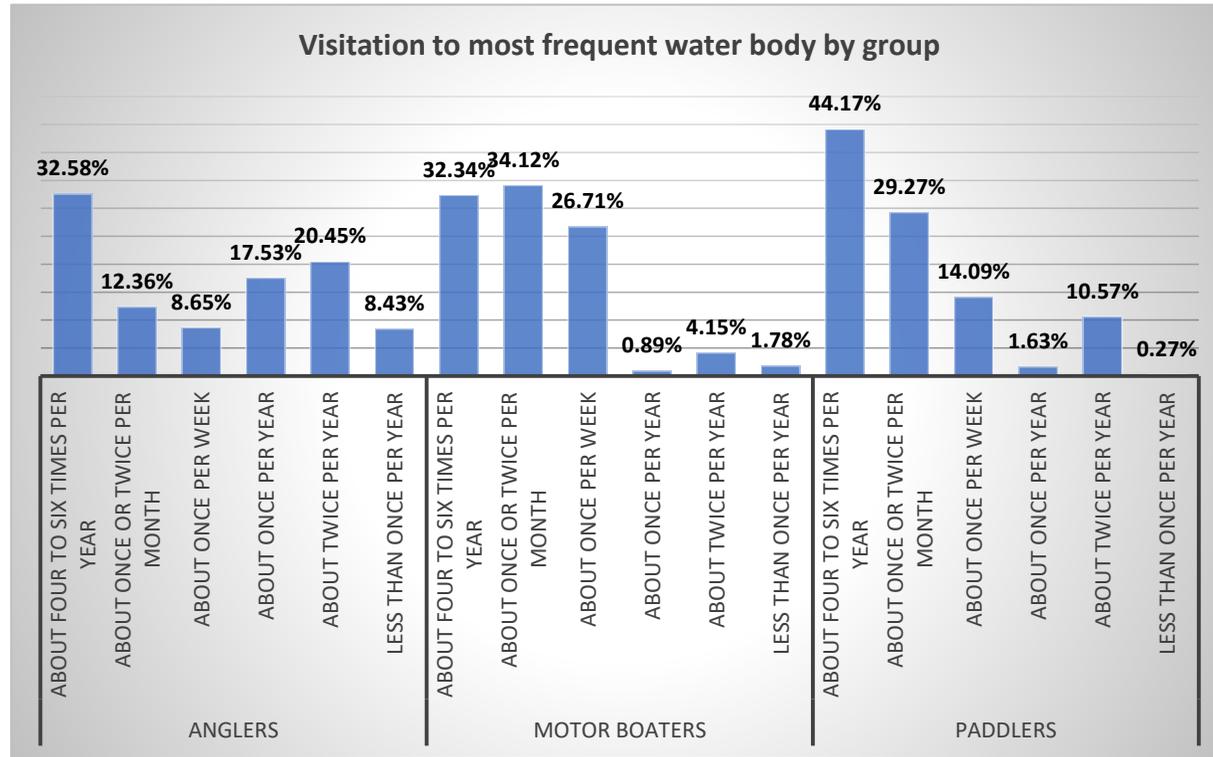
About half of the respondents said that their favorite river is the same as the one they visited most frequently. This is especially true for anglers (57%) but less so for paddlers (43%)

Frequency of Visitation

Table 4-10 Visitation to Most Frequent Water Body

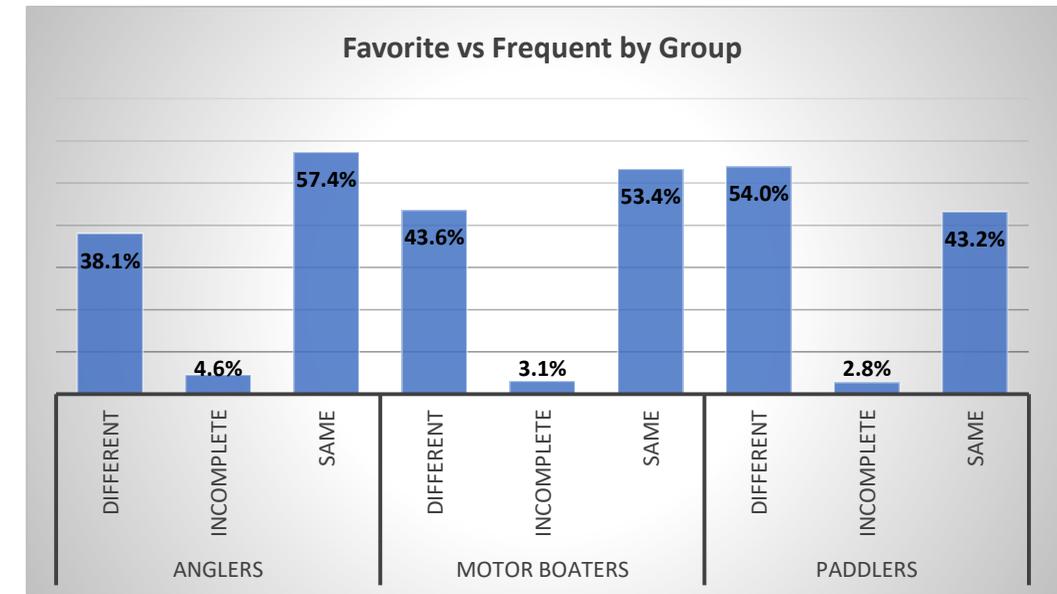
Group	4-52 times per year
Motor boaters	93%
Paddlers	87%
Anglers	53%

Respondents were asked how often they visited their most frequently visited waterbody. Motor boaters visit their most frequented waterbody most often among the three groups. The data was analyzed by combining the three most frequented responses (from about 4-6 times per year to once per week). This results in a combined rating of 4 to 52 times per year and allows us to compare total frequency by group. The results show that motor boaters go to the water most often, followed by paddlers and then anglers. The results show that 93% of motor boaters go to the water 4 or more times per year, followed by paddlers at 87% and anglers at only 53%.



Preferences for Overnight Stays

The survey provides several indicators of the respondents' preferences for staying overnight while recreating on the water. Anglers and paddlers are more likely to stay overnight and for longer durations. These two groups stay overnight about 4 to 6 times per year. The second most common response was two times per year. When asked how often they visit their most frequented waterbody the answers were similar. Anglers were most likely to visit 4-6 times per year and to stay overnight about this often. Paddlers, in general, go to their waterbody more often and stay overnight less often than anglers. In general, paddlers will visit 4 to 12 times per year but stay overnight 2 to 6 times, or about half of their trips. Motor boaters will engage in their activity the most frequently among the three groups and stay overnight the least.

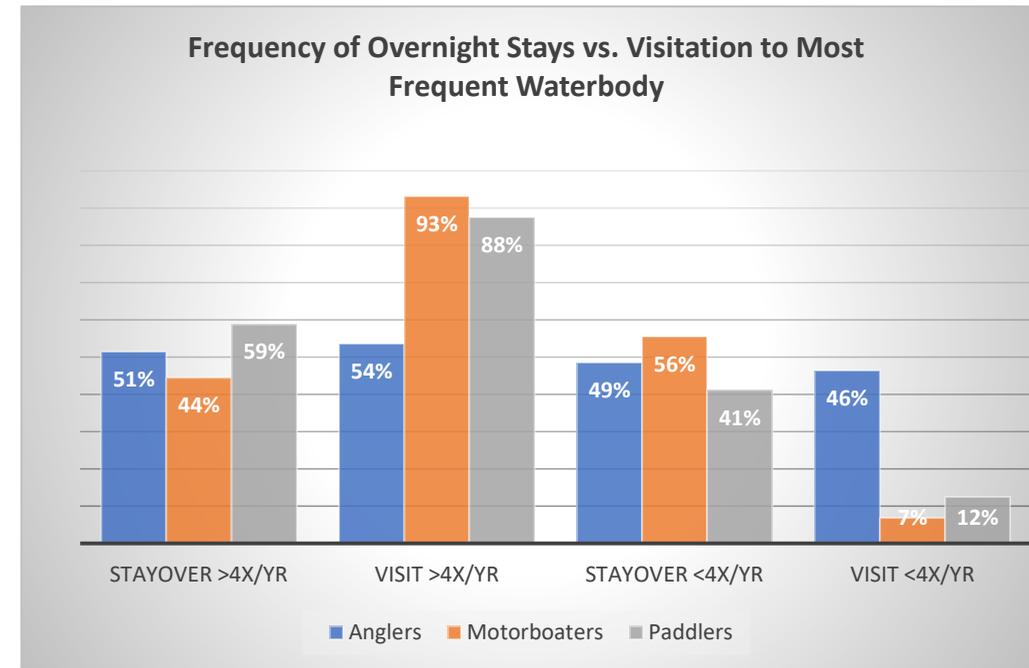
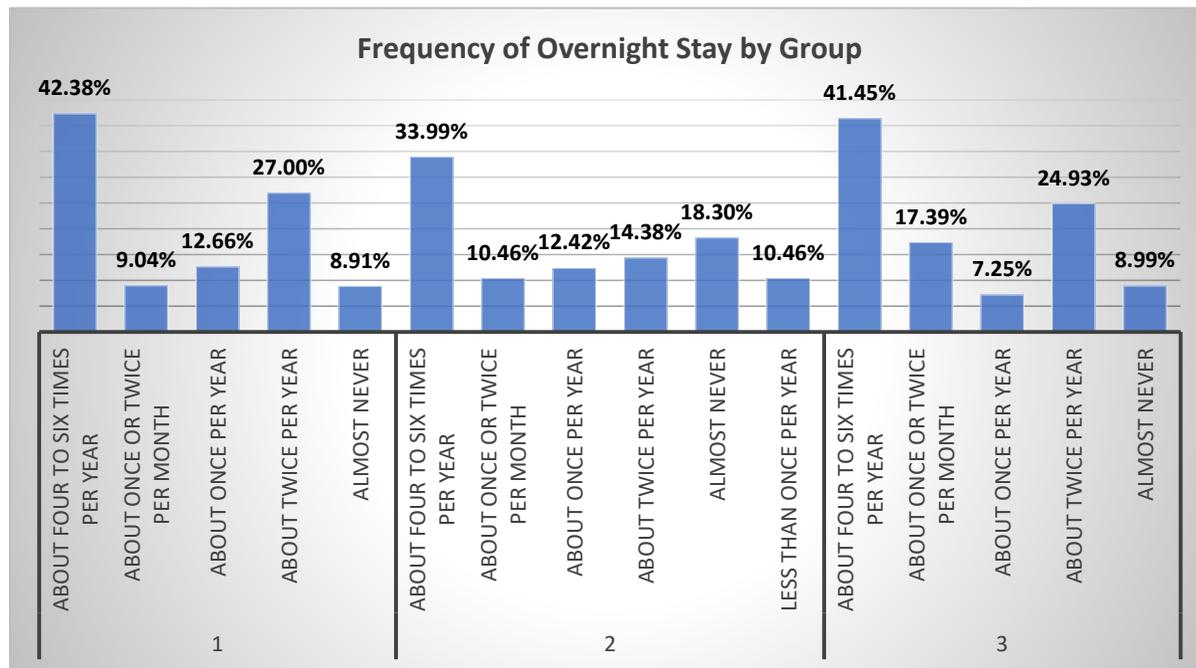


Accommodation Type

Anglers are the most likely among the three groups to stay in structured lodging (hotels and motels). Approximately 21% of the visiting anglers who chose to stay overnight will stay in structured lodging. Another 44% of the anglers prefer to camp. About 13% of the motor boaters will stay in hotels when they do stay overnight, however, they don't stay overnight very often. Only a small percentage of paddlers will stay in structured lodging, while most (66%) prefer to camp.

Table 4-11 Accommodation by Type

	Prefer Hotels	Prefer Camping	Total Paid Accommodations	Total Paid Stays	% of Total
Anglers	21%	44%	65%	6,675,012	86.6%
Motorboat	13%	42%	55%	819,426	10.6%
Paddlers	7%	66%	73%	174,613	2.8%



Summary of Overnight Stays

There are several methods for calculating the number of annual overnight stays that water-based recreation might generate. The method presented here is one of the most straightforward procedures. Annual overnight stays are calculated by creating an average annual number of stays based on the survey response. For example, “about once or twice per month is averaged at 1.5 times per month or 18 times per year. The average annual number of stays is multiplied by the total population that the group represents, and then multiplied by the percentage of respondents who stay over that number of times.

$$Os_y = (N * Aave) * (n/100)$$

Table 4-12 Estimation of Overnight Stays Generated by Water-based Recreation, Statewide in 2016

Overnight Stay Estimation	Population	% of Population	Ave Response	Annual Average	Overnight Stays	Total Stays
Anglers	847,219					
About four to six times per year		42%	5	5	1,852,350	
About once or twice per month		9%	1.5	18	1,423,147	
About once per year		13%	1	12	1,328,271	
About twice per year		27%	2	24	5,665,481	
Almost never		9%	0	0	-	10,269,250
Motor Boaters	174,808					
About four to six times per year		34%	5	5	297,059	
About once or twice per month		10%	1.5	18	329,050	
About once per year		12%	1	12	260,498	
About twice per year		14%	2	24	603,259	
Almost never		18%	0	0	-	
Less than once per year		10%	0	0	-	1,489,867
Paddlers	19,842					
About four to six times per year		41%	5	5	41,122	
About once or twice per month		17%	1.5	18	62,114	
About once per year		7%	1	12	17,254	
About twice per year		25%	2	24	118,707	
Almost never		9%	0	0	-	239,197
Total						11,998,313



The results are shown in table 3-12. Anglers produce the most overnight stays by a clear majority. This is because there are more anglers and because anglers stay over most frequently. Paddlers stay over almost as frequently as anglers but because there are fewer of them they produce much less overnight stays compared to anglers. The total number of annual overnight stays generated by water-based recreation in Oregon is estimated at 12 million and anglers are responsible for approximately 85% of them or 10.2 million.

The calculation of overnight stays includes all types of accommodation. The survey asked respondents to select their preferred choice of accommodation when they visit their most frequented water body from the following list:

- Modern Hotel (3 stars or more)
- Low Cost hotel/motel
- Campground/RV Park with facilities (hot water showers, electricity, etc.)
- Campground with limited or no facilities
- Dispersed (free) camping
- A friend or relative’s home
- The respondent was also allowed an open ended “other” category

Camping	Hotels	Other
33%	16%	52%

While any overnight stay generally imports revenue from outside the county through spending in a wide range of travel related expenses, only paid accommodations generate revenue for tourism promotion in Clackamas County. Therefore, the analysis investigates which type of accommodations generates revenue. Table 3-13 combines all accommodation types into three groups: paid camping; paid accommodations, and all others. Paid camping accommodates about 33% of the overnight stays, hotels/motels accommodate about 16% of the overnight stays while 52% of the overnight stays are hosted by some other type of venue including, friends and relatives, free camping, second homes and others.

“...The total number of annual overnight stays generated by water-based recreation in Oregon is estimated at 12 million and anglers are responsible for approximately 85% of them or 10.2 million...”

For those who frequent the Clackamas River approximately 10% of them pay for accommodations with camping preferred slightly more than hotels. These results are statistically significant...”

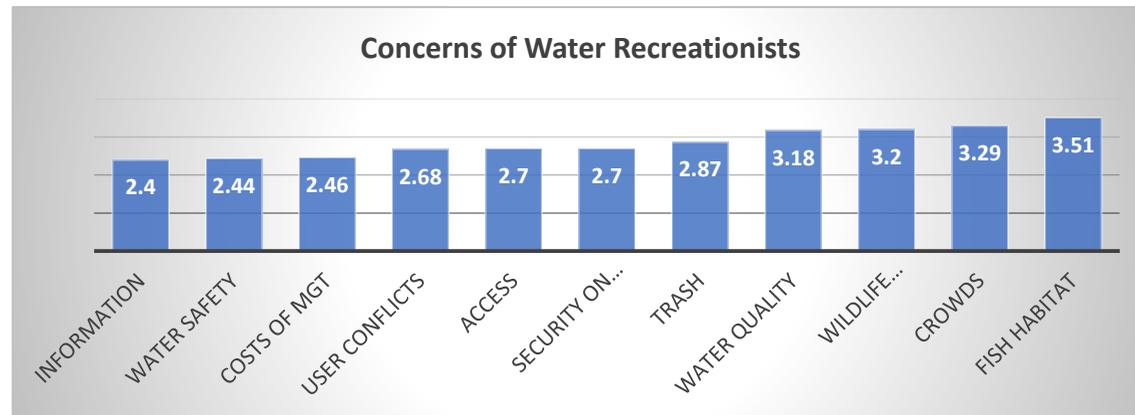
This analysis is further broken down by waterbody. Table 3-14 shows that the Columbia River generates the most paid overnight stays. Approximately 38% of those who frequent the Columbia, stay overnight in purchased accommodations. The Deschutes and the Willamette follow with 32% and 29% respectively. In almost all cases, camping is preferred over hotels, except at the Owyhee, Umpqua, and John Day Rivers. For those who frequent the Clackamas River approximately 10% of them pay for accommodations with camping preferred slightly more than hotels. These results are statistically significant at p=.052.

Table 4-14 Accommodation Preferences by Water Body

	Columbia River	Deschutes River	Willamette River	Oregon Coast North	Rogue River	Oregon Coast South	Owyhee River	Clackamas River	McKenzie River	Umpqua River	John Day River
Hotel	18.30%	14.10%	14.10%	9.90%	8.40%	7.30%	8.40%	4.70%	5.20%	4.20%	5.20%
Camping	20.00%	18.30%	14.90%	10.80%	9.00%	8.60%	3.90%	5.60%	3.20%	3.70%	2.00%
Total	38.30%	32.40%	29.00%	20.70%	17.40%	15.90%	12.30%	10.30%	8.40%	7.90%	7.20%

Concerns and Preferences in Water-based Recreation

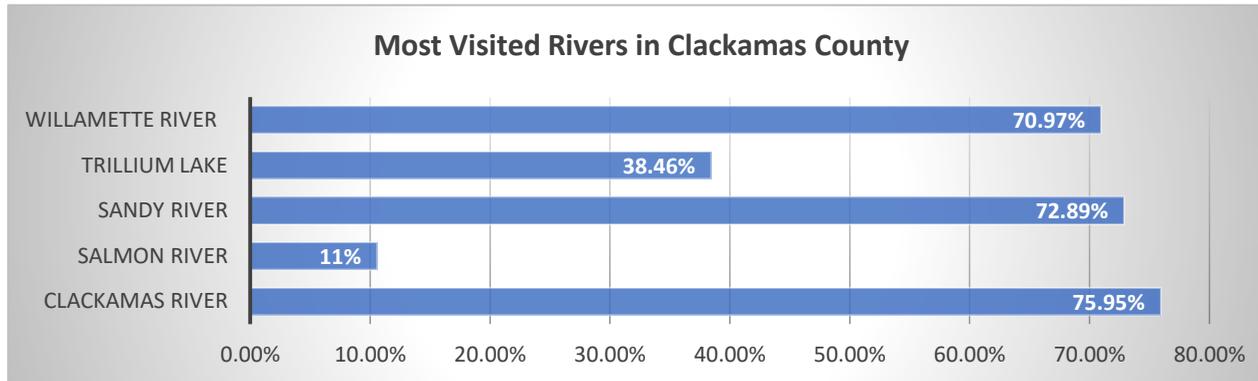
The survey asked respondents a series of question about what is concerning and what is important to them in terms of water recreation. The questionnaire included a list of 11 potential concerns plus an open-ended “other” category and were asked to rank them on a 5-point Likert scale with 1 indicating little concern and 5 meaning highly concerned (See appendix 1, Question 16). To review all concerns on a comparative scale, the responses are weighted 1 to 5 and multiplied by the percentage of respondents. The top concerns were fish habitat (mean of 3.51), crowdedness (3.29), wildlife habitat (3.20) water quality (3.18).



The top four most important factors regarding where to recreate were public access (mean 3.94), information available online (3.37), having restrooms (3.31) and secure parking lots (3.23). Of those, Clackamas County residents were more interested than average in on-line information, security and restrooms. These differences are statistically significant (See Appendix 1).

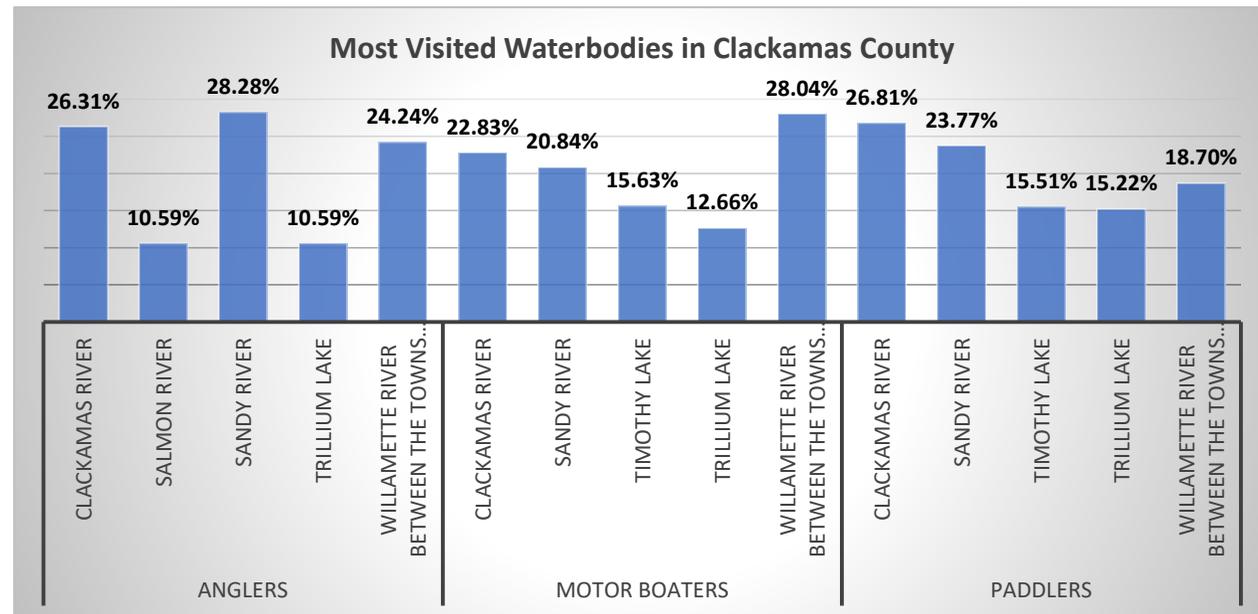
Clackamas County

The survey asked several questions about Clackamas County to understand its unique assets, its potential market, and opportunities for tourism growth. The most visited waterbody in Clackamas County is the Clackamas River. Nearly 76% of those who come to recreate on Clackamas County waterbodies have chosen the Clackamas River as their destination. The Sandy and the Willamette River (between the Towns of Wilsonville and Milwaukie) are nearly as popular, being visited by 73% and 71% of water recreationists.

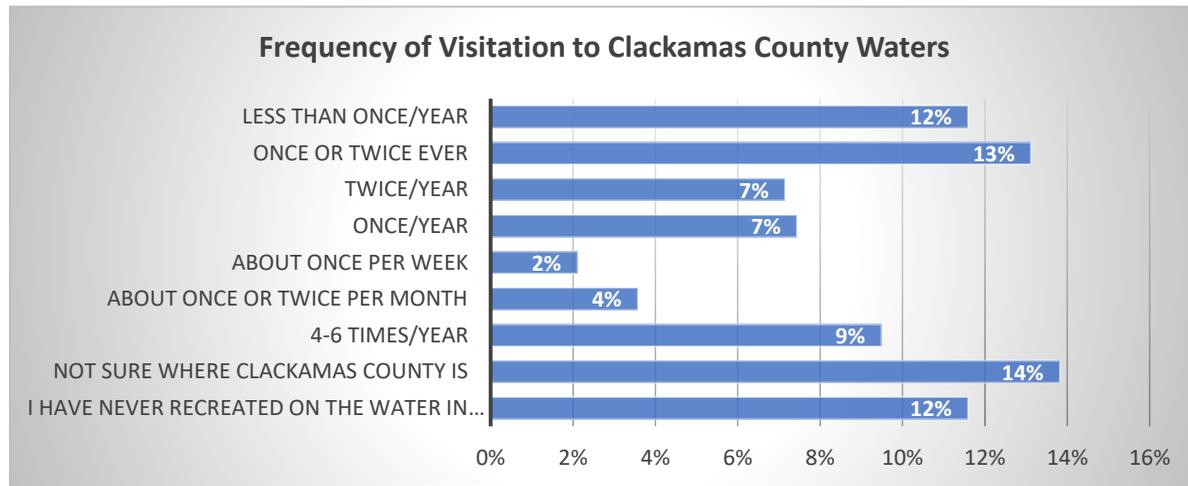


Different groups show different preferences for waterbodies in the County. For anglers, the Sandy River is the favorite, followed by the Clackamas; for motor boaters, the preference is the Willamette followed by the Clackamas; most paddlers prefer the Clackamas first and then the Sandy.

While the Clackamas, Sandy and Willamette are popular waterbodies in the County, in relative terms they are rarely visited by most of Oregon’s residents. About 12% of Oregon’s water recreation enthusiasts have never been to Clackamas County and another 14% are unsure if they were there. For the purposes of strategic planning to increase tourism, these two groups are considered as one. Therefore, 26% of the potential market is considered to have never visited Clackamas County. For those who have visited the county, 25% of them visit less than once per year (includes once or twice in a lifetime). This is the most common visitation frequency. Another 14% come once or twice per year. Frequent visitation is considered between once per week and 4-6 times per year. Only 15% of the market visits Clackamas County water frequently.



To put this in relative terms, we compare Clackamas County’s favorite waterbody (Clackamas River) to the State’s favorite waterbody (Deschutes River). To create an equitable comparison, the total market of river enthusiasts is analyzed by their visitation frequency to each river.



Again, frequent visitation is considered between once per week and 4-6 times per year, while infrequent visitation is defined as anything less often. The Deschutes is visited frequently by 7.1% of the market, versus 3.1% in Clackamas River or 4 times more frequently than the Clackamas. The average distance visitors travel to Clackamas County waters is 183 miles. Deschutes visitors travel an average of 405 miles⁴. It should be noted that the distance between the two rivers is only 84 miles, or a 90-minute drive. Also, the Clackamas is closer to the state’s largest urban population, so location of the river is not likely a factor that affects visitation.

“...the entire water-based tourism market in Oregon is generating 12 million overnight stays per year while Clackamas County is capturing only about 2% of that total.”

Table 4-15 Visitation and Overnight Stays from Water-based Tourism in Clackamas County

Frequency	Frequency x % of Market	Total Visiting Parties	Overnight Stays (10%)
4-6x/yr (9%)	96,198	480,991	48,099
2x/mo (4%)	42,755	1,026,114	102,611
1x/wk (2%)	21,377	1,111,624	111,162
1x/yr (7%)	74,821	74,821	7,482
2x/yr (7%)	74,821	149,642	14,964
Total		2,843,192	284,319

Visitation to Clackamas County Waterbodies and Overnight Stays

Total visitation to Clackamas County is estimated by multiplying the frequency of visitation by the percent of the market. This results in total number of visiting parties, not people. Party size will vary depending on the type of activity and type of accommodation. Total number of visiting parties is then multiplied by 10% to estimate total overnight stays generated in each frequency. Ten percent is the multiplier used because this is the number of overnight stays generated by visitation to Clackamas River (table 3-15).

Results show that water-based tourism generates about 2.8 million visiting parties and nearly 284,000 paid overnight stays in hotels and campgrounds in

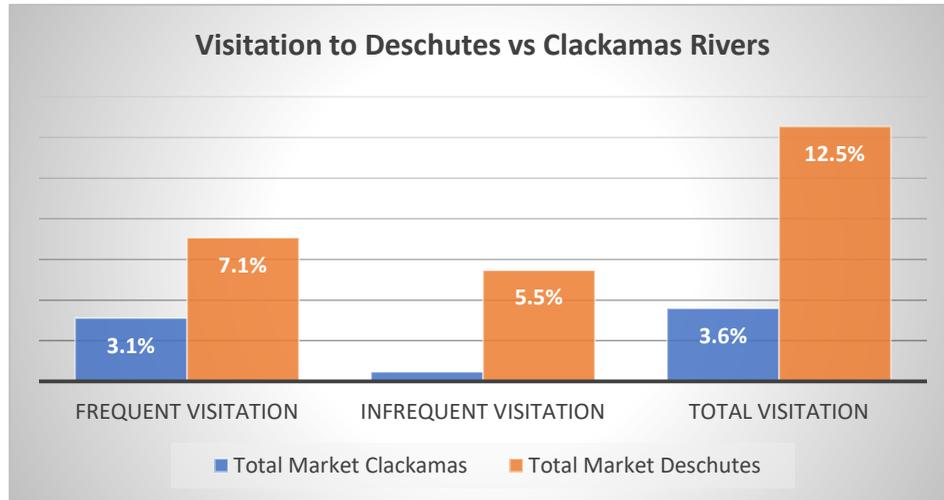
Clackamas County. However, since the Clackamas River is the most visited water body in the County, the number of overnight stays estimated here is likely an upper bound

⁴ this is after excluding an anomaly of 10,000 miles



number. The true number overnight stays generated by water-based tourism in Clackamas County is likely between 5% and 10%. The entire water-based tourism market in Oregon is generating 12 million overnight stays per year while Clackamas County is capturing only about 2% of that total.

Why are water enthusiasts visiting Clackamas County water less than other rivers in Oregon? When respondents were asked if the quality of the waterbodies in Clackamas County were better or worse than the rest of Oregon only 10% said it was lower quality. Approximately 50% thought the waters in Clackamas County were about the same or even better than the rest of Oregon’s. So, it is difficult to place the reason for low visitation on a poor-quality recreation experience.



“...Multnomah County residents are more likely than Clackamas County residents, and the state as a whole, to choose the Clackamas River as their most frequently visited waterbody... [this] provides more supporting evidence that the quality of the recreation experience is not preventing the potential market from visiting Clackamas County...”



Table 4-16 Favorite and Frequent Waterbody by Residence

Respondent Residence	Favorite Waterbody in Clackamas Co	Most Frequent Waterbody in Clackamas Co
Clackamas	5.20%	21.60%
Multnomah	6.00%	22.40%
Other OR	6.30%	18.20%
Non-OR	3.50%	12.20%
Total	4.70%	15.70%

Only 4.7% of the respondents say their *favorite* waterbody is in Clackamas County. However, over three times that many say that their most *frequently* visited river is in the county. Curiously, there are more people who live outside of Clackamas County that claim a favorite waterbody is in the county than do Clackamas County residents. Also, there are more Multnomah County residents who have a most frequent river in Clackamas County than do Clackamas County residents.

Table 4-17 Frequently Visited Waterbodies by Residency

	Columbia River	Deschutes River	Willamette River	Oregon Coast N.	Rogue River	Oregon Coast S.	Owyhee River	Clackamas River
Non-OR	18.50%	20.70%	10.00%	10.40%	11.00%	7.70%	8.80%	2.50%
Other OR	22.30%	12.40%	26.40%	12.10%	5.00%	8.80%	1.10%	5.00%
Clack Cty	13.40%	19.50%	15.90%	9.80%	8.50%	4.90%	0.00%	15.90%
Mult Cty	11.90%	20.90%	14.90%	6.00%	10.40%	1.50%	0.00%	20.90%
Total	18.90%	18.10%	15.70%	10.60%	9.00%	7.50%	5.30%	5.20%

Multnomah County residents are more likely than Clackamas County residents, and the state as a whole, to choose the Clackamas River as their most frequently visited waterbody. These findings are statistically significant (p=.00). This is quite remarkable considering that Clackamas County residents have less to travel and distance is an influencing factor on where they chose to recreate. This might be explained by the need to “get away” when one recreates on the water and perhaps Clackamas is too close and too familiar. Nonetheless, Multnomah residents’ propensity to visit, provides more supporting evidence that the quality of the recreation experience is not preventing the potential market from visiting Clackamas County.

Of the top 9 favorite visited water bodies in Oregon, Clackamas County residents are more likely to prefer the Willamette, Deschutes and Columbia Rivers compared to total preferences (table 3-18). This is statistically significant (p=.000) compared to both non-Oregon residents and all user groups.

Table 4-18 Favorite Water Bodies by Residence

	Deschutes	Columbia	Rogue	Willamette	North Coast	Owyhee	South Coast	Umpqua	John Day
Non-OR	26.7%	17.2%	13.6%	5.9%	8.3%	11.1%	4.9%	7.4%	4.9%
Other OR	23.5%	14.7%	16.0%	11.8%	11.1%	2.6%	10.8%	4.2%	5.2%
Clack Co	17.2%	25.0%	6.3%	29.7%	9.4%		1.6%		10.9%
Mult Co	22.4%	31.6%	2.6%	22.4%	5.3%	1.3%	3.9%	2.6%	7.9%
Total	24.9%	18.0%	13.1%	10.2%	9.0%	7.3%	6.3%	5.7%	5.6%

There are several other factors that may reveal why water recreation enthusiasts are not choosing Clackamas County even though its recreation quality is equal or better than the rest of Oregon. It is practically impossible to ask all non-Clackamas residents why they are not choosing Clackamas County as a destination because many of them don’t come in the first place. Instead we can ask Clackamas County residents a series of questions about the quality of the

recreation to see if their local knowledge on their closest water bodies can shed some light on why. The questions address issues like access, trash, water quality, fish habitat, wildlife habitat, cost of management, crowdedness, user conflicts, information on conditions, personal safety on the water, and security of personal possessions on land.

Table 4-19 River Management Concerns by Residence

	Trash	Water Quality	Access	Fish Habitat	Wildlife Habitat	Cost of Management	Crowds	User Conflicts	Conditions Info	Water Safety	Security of Possessions
Non-OR	2.78	3.22	2.79	3.7	3.28	2.44	3.34	2.69	2.48	2.42	2.68
Other OR	2.8	3.03	2.63	3.24	3	2.44	3.15	2.59	2.35	2.44	2.65
Clack Co	3.27	3.35	2.62	3.49	3.35	2.72	3.65	3.03	2.31	2.59	2.88
Mult Co	3.37	3.38	2.56	3.7	3.52	2.48	3.23	2.68	2.3	2.48	2.89
Total	2.87	3.18	2.7	3.51	3.2	2.46	3.29	2.68	2.4	2.44	2.7
sig	*	**		***	***		***	**			

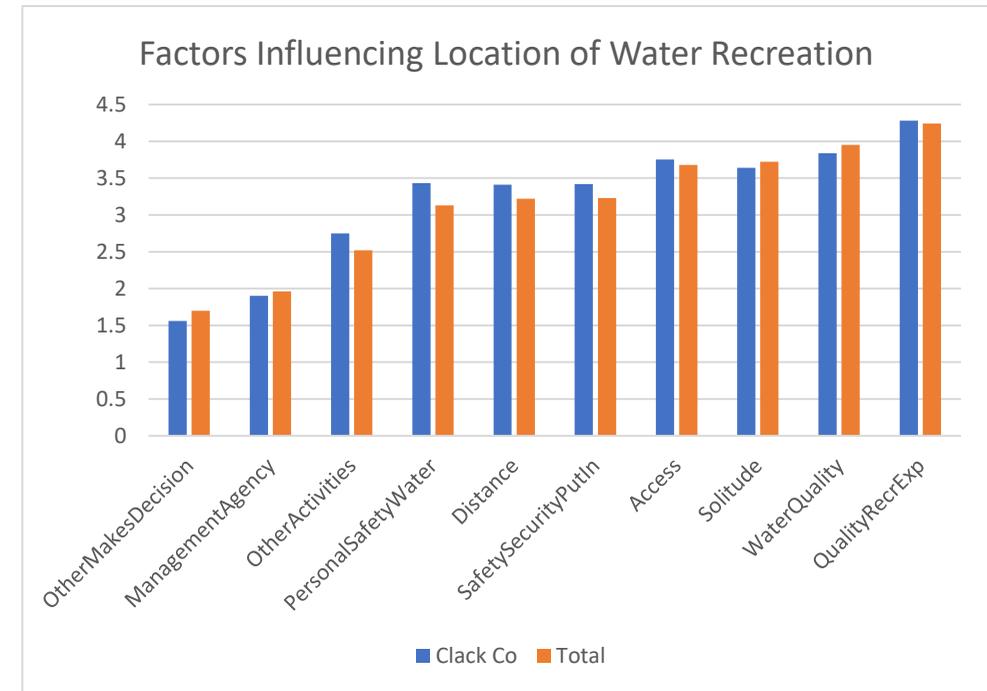
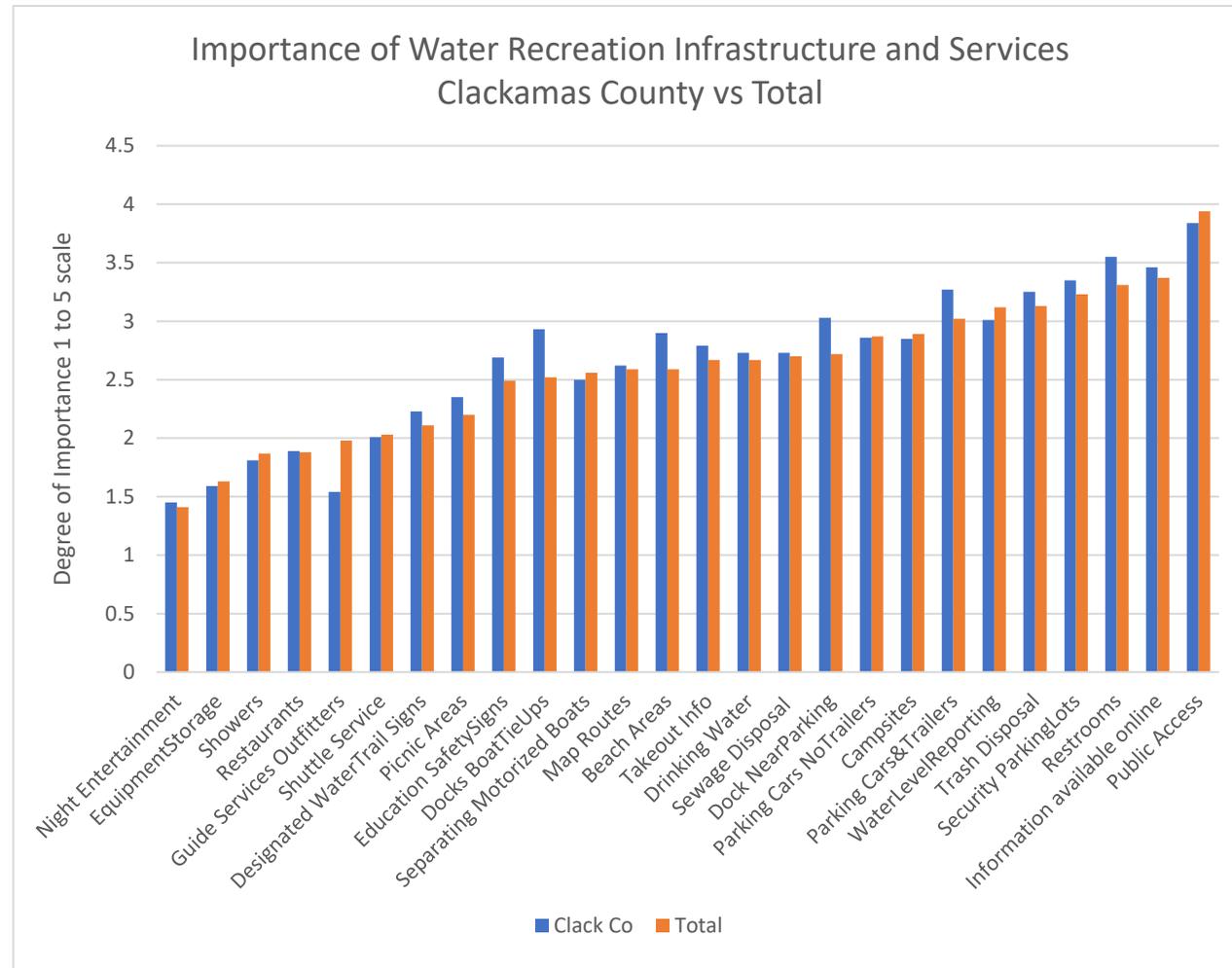
One, two and three asterisks denote statistical significance at the .10, .05 and .01 levels respectively

Clackamas County residents are slightly less concerned than others about access to the water, but it is no significant difference. Access to water recreation in Clackamas County appears to not be any more difficult than other locations in the state⁵. This issue received a modest 2.7 rating meaning there is a slight to moderate concern (table 3-19).

Clackamas County residents are significantly more concerned about trash, water quality, wildlife habitat, crowds and user conflicts than the average

respondent. These issues may provide a hint as to why Clackamas County waters are not visited as often as others in the state. User conflicts and trash are the two issues with the highest differences between the total average and Clackamas County, indicating that these may be the issues most closely associated with Clackamas County. Both are also statically significant.

⁵ Although the author’s personal experience shows that the Sandy, Tualatin, and to some degree the Molalla Rivers are very challenging to access. This level of detail may not appear in a statewide survey in which few respondents come to Clackamas County.



Anglers who often need solitude and space may have difficulty finding that on a Clackamas County waterbody and since fishing is very popular a majority of Oregon’s water enthusiasts may be heading to other waterbodies. Finally, water quality is another notable issue that sets Clackamas County apart. Further research into what this means and if this prevents visitation is necessary. While the answer is not clear, these survey results indicate that Clackamas County may increase visitation by addressing a few river management issues especially trash, user conflicts, and water quality.

The survey asked about specific improvements to infrastructure and services that might improve to water recreation. Clackamas County respondents showed several differences compared the state. Both Clackamas County respondents and all respondents believe access is the most important element of water recreation, however, Clackamas County respondents rated it lower than the state. Clackamas County residents placed a greater importance on features that occur at the put in and take out sites while statewide respondents placed more emphasis on the water experience. Clackamas County residents wanted improvements at parking, docks, safety signage like water trail maps, put-in and

take-out information, as well as, trash disposal, security, restrooms, and picnic or beach areas. Statewide respondents placed more importance on access, guides and outfitter services, water level reporting, showers, and equipment storage. Most of these differences are statistically significant. In terms of choosing where to go for water recreation, we asked respondents to select from ten common factors that typically influence their decision. Quality of the recreation experience is the most important factor for both the county and Oregon residents followed by water quality and solitude. However, Clackamas County residents are significantly more influenced than the average by several factors, especially issues related to safety, access, distance and the opportunities to do other activities.

Clackamas County residents travel the least distance to their more frequent river. They travel on average 115 miles one-way. Their neighbors to the north, Multnomah County residents, travel an average of 58 miles farther to their most frequent water body. On average, Multnomah County residents travel the farthest in Oregon. This difference is not statistically significant, however.

Years of Experience

Table 4-20 Distance to Most Frequent River	
Group	Mean Miles Traveled
Non-OR	310.33
Clack.Co	114.97
Other OR	118.33
Mult.Co	172.39
Total	225.36

The data were analyzed to determine if years of experience in their favorite activity had any effect on frequency of visitation, overnight stays, and participation in other recreation activities. The sample is clearly dominated by experienced participants. About ¾ of all respondents had over 10 years of experience. This is likely the result of the sampling method. The sample was selected from those people with fishing licenses, motor boat registrations and invasive species permits. Individuals who purchase licenses, registrations and permits likely have more experience at their activity than those who don't. There is no way to test this with the present database. Nonetheless, 14% of the sample has less than 5 years of experience and this is adequate to conduct statistical tests for correlations. The sample was divided into those with five or less years of experience (inexperienced) and those with ten or more years of experience (experienced,) with the middle group (between 5-10) omitted.

Results show that there was no statistical relationship between years of experience and favorite activity. Inexperienced water enthusiasts were just as likely to pick the same range of top 8 favorite activities as experienced enthusiasts. However, of these top 8 activities, less experienced are more likely to choose whitewater rafting and general fishing than the average of all respondents.

Table 4-21: Years of Experience	
Beginner (<5 yrs)	14%
Intermediate (5-10 yrs)	10%
Experienced (>10yrs)	76%

	Fly Fish	Other Fish	Flat Water Kayak	Bass Fish	Sea Fish	White Water Raft	Motor Boat	Swim Wade
Exp <5	30.30%	17.40%	11.90%	7.30%	8.30%	10.10%	11.90%	2.80%
Exp>10	36.90%	13.20%	14.70%	7.30%	9.10%	5.10%	10.00%	3.60%
Total	36.00%	13.80%	14.40%	7.30%	9.00%	5.80%	10.20%	3.50%

The analysis also tested the loyalty of the inexperienced participants to their favorite water sport. This was done to determine if this market segment is participating in more activities than the whole or if they can be swayed to do so. There is no statistical significance between inexperience and experienced respondents on their loyalty to their sport. If anything, the inexperienced showed slightly more dedication to focusing on only one water-based activity than the experienced or the total average.



There was also no correlation between years of experience and the frequency of overnight stays or the type of accommodations. Inexperienced and experienced participants both stayed overnight approximately equally as often and they both preferred camping first followed by structured accommodations.

	About four to six times per year	About once or twice per month	About once per week	About once per year	About twice per year	Almost never	Less than once per year
Exp <10	32.40%	8.90%	3.20%	9.70%	20.30%	9.70%	5.90%
Exp>10	33.50%	9.60%	2.40%	9.00%	19.00%	8.60%	6.10%
Total	33.30%	9.40%	2.60%	9.20%	19.30%	8.90%	6.10%

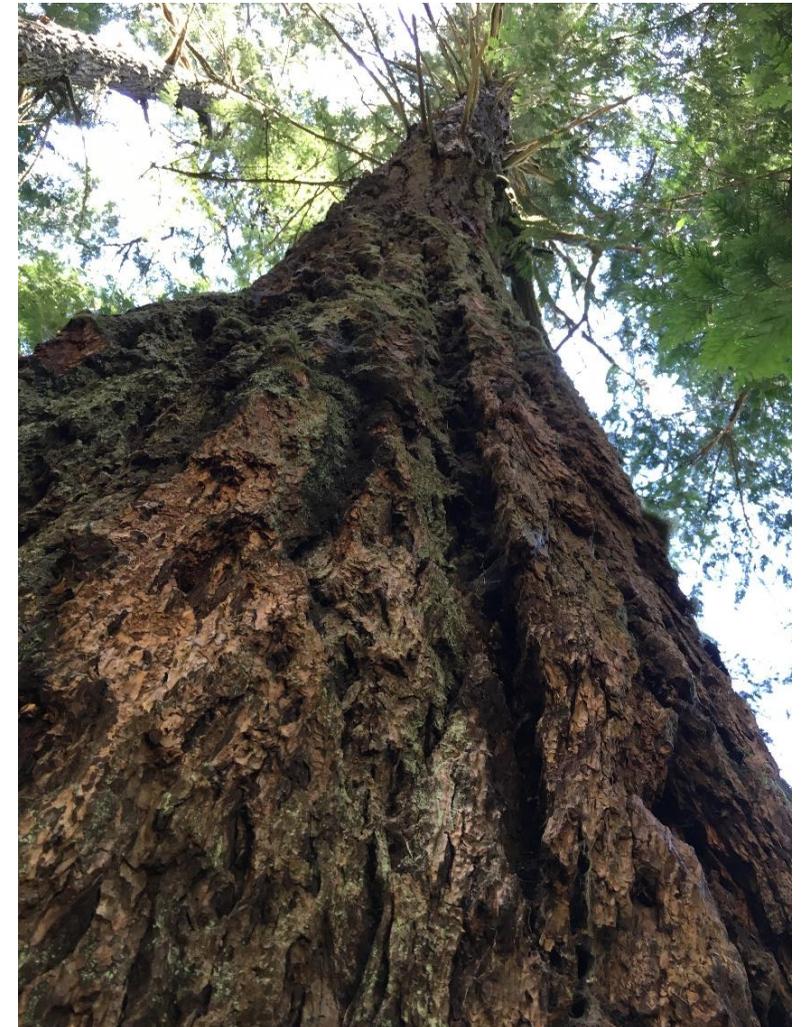
Regression Analysis

Regression analysis was used to determine which factors made a respondent more likely to say that their most frequented water body is in Clackamas County. This is done to help identify Clackamas County's unique assets and strengths. Regression analysis is a statistical tool that is used to isolate the effects of individual variables when several factors are causing a respondent to answer in a certain way. It asks the question, if all other factors are held constant, what is the isolated effect of a single variable.

The five most frequently visited water bodies in Clackamas County are: Clackamas River; Timothy Lake; Willamette River; Molalla River; and Sandy River. Two sets of regression analysis were used to answer the following questions:
1) What factors lead respondents to say that their most frequently visited water body is in Clackamas County?
2) What factors lead to more frequent overnight trips?

The Willamette River is the only waterbody in this analysis that is in more than one county. Therefore, regression was performed twice, with and without the Willamette River. Results with Willamette River data show the following:

- There is no statistically significant relationship between those whose most frequent water body is in Clackamas County and their favorite sport. In other words, certain people are not attracted to Clackamas County more often based on the water sports they prefer.
- Anglers are less likely to have a "most frequent" waterbody in Clackamas County than the average respondent. While there are many excellent fishing destinations in the county, especially on the Sandy, Salmon, and Clackamas, they are not frequented by a majority of the angler market.
- Clackamas County does not attract many flatwater paddlers today. This includes kayakers, canoeists, paddle boarders, and rowers. Although flat water paddling can be enjoyed at many locations in the county, especially Timothy Lake, Estacada Lake, Harriet Lake, the Willamette River and elsewhere, the county is not attracting these types of water enthusiasts.
- Those with a favorite waterbody in Clackamas County are less likely to prefer either hotels or camping than the sample average, both are statistically significant ($p=.079$ and $.081$ respectively). In other words, Clackamas County attracts less water enthusiasts spending money on accommodations than the market average.



By removing the Willamette River from the analysis, we get a more accurate picture of Clackamas County. When Willamette is not included, the following variables are significant.

Age: younger respondents are more likely to have a most frequent waterbody in Clackamas County. As age increases, the probability of a frequent waterbody in Clackamas County decreases. Age also influences overnight stays. Older respondents tend to stay overnight more often than the rest of the respondents.

Anglers: compared to the other groups, anglers are less likely to have a most frequent waterbody in Clackamas County. No change from when the Willamette was included.

Multnomah County: those who live in Multnomah County are more likely to have a most frequent body in Clackamas County than people in all other locations, including Clackamas County.

Number of sports enjoyed: those who enjoy a smaller number of sports are more likely to have most frequent waterbody in Clackamas County. The county attracts those with a less diversity of sports preferences or those who are more loyal to their preferred sport. Those who enjoy a wider diversity of water sports tend to stay overnight more often than the rest of the respondents.

Overnight stays: Only two variables, age, and the number of water sport enjoyed, were found to be significant when testing for frequency of overnight stays. All other variables tested have no effect on whether the respondent is likely to stay overnight. The variables that have no influence on whether water tourist stays overnight include: favorite waterbody; favorite sport; accommodation type; experience; zip code; household income, and sex.

“...Only two variables, age, and the number of water sport enjoyed, were found to be significant when testing for frequency of overnight stays. All other variables tested have no effect on whether the respondent is likely to stay overnight. The variables that have no influence on whether water tourist stays overnight include: favorite waterbody; favorite sport; accommodation type; years of experience; zip code; household income, and sex.”

Willamette Falls Locks

The survey briefly examined the market demand for locks usage by recreational boaters. Respondents were asked two questions to indicate how frequently they might use the Locks. First, a full description of the Locks was provided, and they were asked if they might use the Locks at least once per year at no cost. Second, they were asked how frequently they might use the Locks at 5 different prices (\$0, \$5, \$10, \$15, \$20).

In the first question, respondents were asked “If the Locks were open and allowed upstream and downstream traffic, would you use it at least once per year at no cost to you?” The respondents were asked to select one of the four following choices:

1. I don’t even know about the Locks, so I can’t say
2. I know about the Locks, but I am not sure if I would use it
3. I probably would not use the Locks at least once per year at no cost to me
4. I probably would use the Locks at least once per year at no cost to me

Responses 1 and 2 are combined and considered “maybe.” Responses 3 and 4 are no and yes respectively. The results are show in table 3-24.

Approximately 166,668 water recreation enthusiasts, or 16% of the State’s total water recreation population would use the Locks at no cost. Most of them are motor boaters. Nearly 30% of the state’s motor boaters or about 51,302 of them would use the locks at least once per year at no cost. Anglers represent the smallest percentage of all groups (13%) but because of their large population, they amount to 110,750 users. Approximately 4,600 paddlers would use the locks or 23% of the total paddler population in the State of Oregon. Almost twice as many total respondents (29%) said they would not use the Locks at no cost. Another 55% or 589,000 water recreation enthusiasts were undecided.



Table 4-24 Estimated Market Participation in the Locks (at least once per year at no cost)

	Yes	%	No	%	Maybe	%
Anglers	110,750	13%	255,668	29%	507,801	58%
Motor Boaters	51,302	29%	50,036	29%	73,470	42%
Paddlers	4,616	23%	7,373	37%	7,853	40%
Total	166,668	16%	313,077	29%	589,124	55%

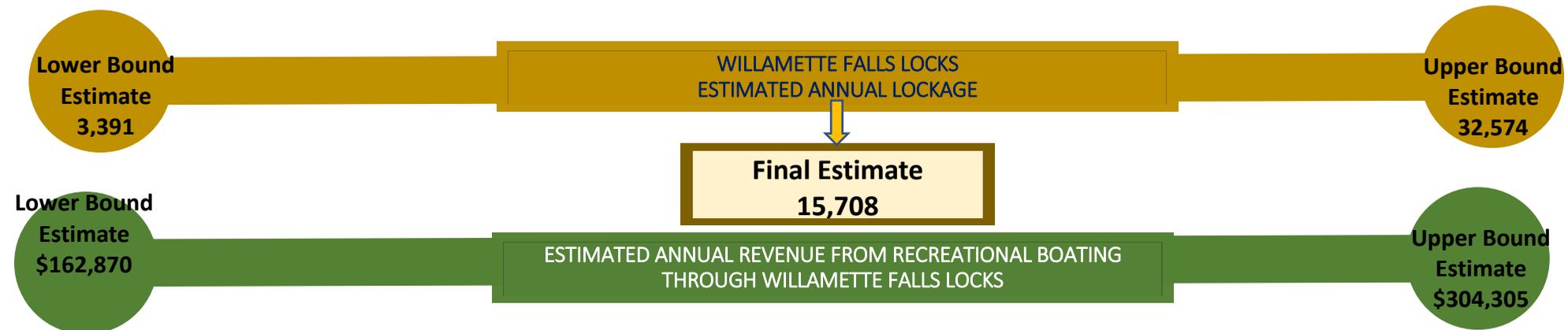
the cost were \$0.

The second question estimates the market demand for the number of trips taken through the Locks. Respondents were asked to write the number trips they would expect to take in one year at five different price ranges, including free. Respondents indicate that they would take a total of approximately 2130 trips per year at different price ranges. About half of those trips would be taken if the price was free. In the previous question, 317 respondents (in all three groups) said they would use the Locks at least once at no cost. Dividing the total number of free trips demanded (1006) by the number of respondents indicating they would use it at no cost (317), results in an average of three trips per party if

WTP	Respondent trips	Market Representation	Market Size	Average Party Size	Estimated Demand for Lockage	Estimated Revenue
\$0	1006	47%	166,668	2.70	29,155	\$ -
\$5	542	25%	166,668	2.70	15,708	\$ 78,538
\$10	305	14%	166,668	2.70	8,839	\$ 88,391
\$15	160	8%	166,668	2.70	4,637	\$ 69,554
\$20	117	5%	166,668	2.70	3,391	\$ 67,815
Total Paid Trips	1124	52%	166,668	2.70	32,574	\$ 304,298
Total Paid Trips at \$5 only	1124	52%	166,668	2.70	32,574	\$ 162,872
Total Annual participation (including free trips)	2130	100%	166,668	2.70		

Estimating the total number of trips at a cost to the participant is more complicated. The respondent was allowed to enter the number of trips for each of the price categories. It is assumed that a person willing to pay \$20 for a trip is also willing to pay \$5 for the same trip, but a person willing to pay \$5 per trip is not willing to pay any more. There is an unknown amount of double counting incorporated into the results which cannot be accounted for and removed. For example, if a respondent stated a willingness to take one trip at \$5, one trip at \$10, one trip at \$15 and one trip at \$20, there is no way to be sure that this means the person would take only one trip during the year and pay any amount up to \$20 or if the person would take 4 trips and pay 4 different prices amounting to \$50 dollars spent⁶. To address this issue, the trip estimation is

calculated at the upper and lower bounds to provide a range. The most conservative estimate would be to eliminate all double counting by calculating the number of trips at \$20 only. This provides the lower bound estimate. The most generous estimation, the upper bound, would be to calculate all trips assuming there is no double counting.



⁶ A more robust market study would have resolved this unknown, but the survey questions on lock usage were inserted into an already large questionnaire to provide a general introduction to the topic. This survey was not intended as complete a detailed market analysis of the demand for lockage.

The most conservative estimation is approximately 3,391 trips, or lockage, per year. This represents only 5% of the market who responded affirmatively to taking at least one trip at no cost. The upper bound estimation of trips is 32,574 or 53% of the market size. Neither of these are likely scenarios. The estimation of 3,391 at \$20 is not probable because the actual cost would likely be lower than that. Total trips paid at 32,574 trips is likely an overestimation due to double counting. The actual market demand lies between these two bounds. The middle between these boundaries is 17,981 trips. Using the estimation 15,708 trips at \$5 is close to the middle and a reasonable estimation. Table 3-25 shows the results. Since 32,574 trips seems unreasonable to the author based on professional experience, an estimated lockage slightly less than 15,000 is advisable for planning purposes. The estimations were based on a total boater population of 166,668 and an average party size of 2.7 per trip. The total revenue was calculated by multiplying the Willingness to Pay by the estimated demand for lockage. Generally, as cost per trip rises the total revenue decreases, except for \$10 per trip which generates the most revenue. Total trips paid is calculated at \$5 per trip and generates a maximum of \$162,872 annually.

The results here show a general estimation of the market demand for recreational use of the locks. It is beyond the scope of this project to conduct a complete market study for lock usage. Such a study would involve more detailed primary data collection from likely users, focus groups to determine market behaviors and preferences, estimation of market area, and analysis to improve marketing effectiveness.

There are two known past studies on the potential market for recreational locks usage. The first study was completed in 2005 using data from 1998 on actual usage. This showed recreation trips between 1192 and 2716^{viii}. If water-based recreation participation has increased about 3% per year, then these usage estimations would be closer to 5,400 today. This is still much lower than the 15,000 estimated here. A second study was prepared in 2014 and relies on historic usage from 2000 to 2011^{ix}. Lock usage after the year 2000 “dropped precipitously” due to the Army Corps of Engineers lack of funding. In 2005 the locks fell to caretaker status and in 2011 the locks closed completely. Usage data from this period is not a reasonable estimate of market demand and should not be compared to the estimates provided here.



While the results here estimate a potential usage between 10,000 and 15,000, the estimation is calculated using only those respondents who were affirmative in use. It should be remembered that there is another 55% of the market who said that they might use it but were unsure. If the locks were open and operational these 55%, or 589,124 recreationists would no longer be unsure; they would either use the locks or not. So, some additional positive demand is still unknown.

Summary

A large sample of Oregon's recreation enthusiast was collected and surveyed to determine the water recreation market demand, preferences, and opportunities for growth in Clackamas County. The sample of over 1700 respondents, representing 1.6 million water recreation enthusiasts, is 4 ½ times larger than necessary to gain a statistically significant sample with a 95% confidence level at +/- 5%.

The survey results show the recreational quality of Clackamas County's waterbodies is equally good or better than the State's average. The public's concern for water quality, habitat quality, public access, information, safety, user conflicts, and crowds are not significantly different in Clackamas County than the rest of the state. In addition to the survey, the author's professional experience and months of sites visits also confirm that Clackamas County's water resources are high quality recreation and tourism assets. Nonetheless, while the county's water resources are equal or better than the state average, the county is attracting below average visitation to these waters. The reason for this is vague but not a complete mystery and is due to a combination of external factors.

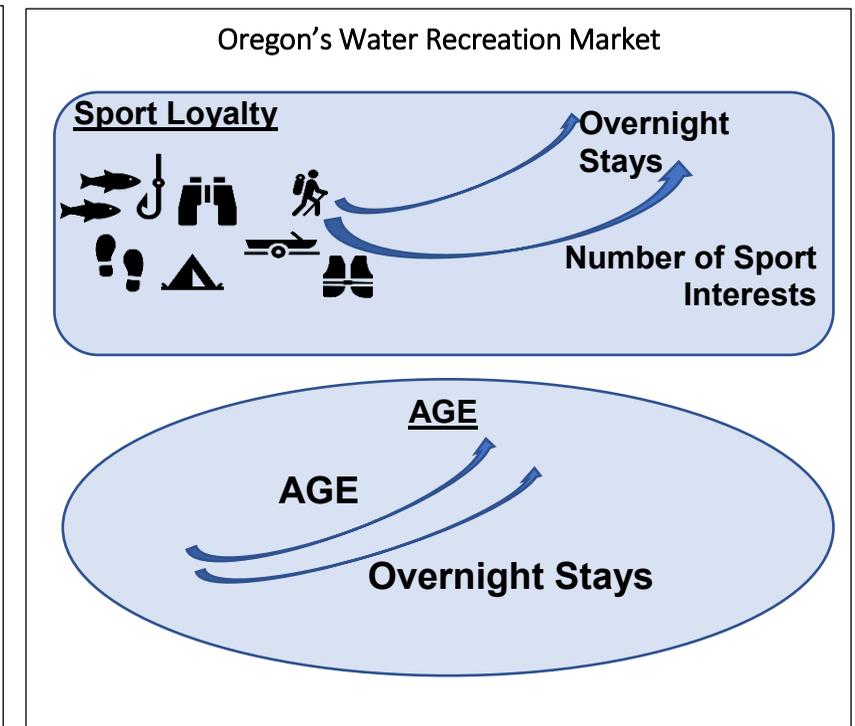
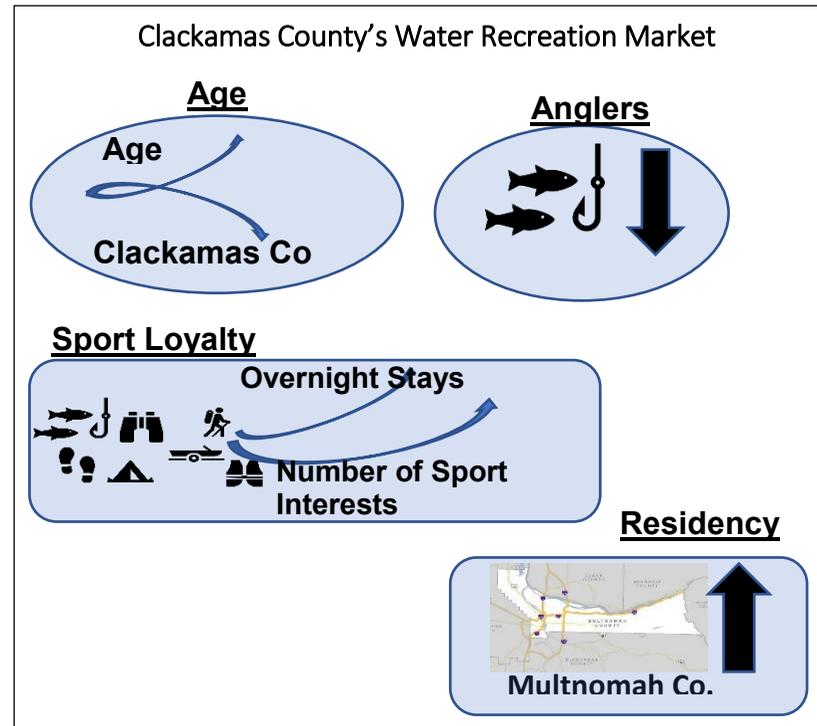
Oregon's favorite water recreation activity is clearly fishing. No matter how one divides the data or reviews them from a different perspective, fishing is by far Oregon's favorite water-based recreation activity. Fly fishing alone is the most popular water-based sport, exceeding the second most popular sport, flat water kayaking, by three times as much. However, when combining all fishing types, (fly, sea, bass and general fishing), this activity comprises four of the top eight categories of favorite water sports and was represented by 67.6% of the unweighted respondents. Furthermore, when the same data are weighted to reflect the true population, 72% of Oregon's water enthusiasts would choose one of the four types of fishing activities as their favorite sport, with fly fishing alone comprising 43%. After fishing Oregon's next favorite water-based sport is flat water kayaking with 14% popularity. Even if you biased the survey responses toward paddling and away from fishing by using only fly fishing, and didn't correctly weight the responses, then fishing would still be three times more popular than paddling.

Oregon's favorite water body is by far the Deschutes River. It is 30% more popular than the second favorite, Columbia River, and nearly twice as popular as the third favorite, the Rogue River. The Deschutes is visited 4 times more frequently than the Clackamas River. The average distance visitors travel to Clackamas County waters is 183 miles, while Deschutes visitors are willing to travel an average of 405 miles. However, the distance between the two rivers is only 84 miles or a 90-minute drive.

Survey data show that Oregon's preferred waterbody is not influenced by age, sex, household income, or favorite water sport. The Deschutes is Oregon's preferred river even after controlling for all these variables. The most frequently visited river in Oregon is the Columbia but the Deschutes is ranked second by only 1%. One's favorite waterbody and most frequently visited waterbody is the same for nearly half of all respondents. Oregon's attraction to fishing and the Deschutes may be a cause for the low visitation to Clackamas County. Even though the Sandy, Molalla and Clackamas Rivers offer excellent fishing opportunities the draw toward the Deschutes is still stronger.

Years of experience at one’s favorite sport also does not affect market preferences. Those with less than 5 years of experience and those with more than 10 years are equally likely to choose the same range of water sports, maintain the same level of dedication to that sport, stay overnight about as often, and prefer the same types of accommodations. Therefore, there is little advantage to focusing marketing campaigns exclusively toward beginners or the experienced.

Of the favorite waterbodies in the survey, none lie solely in Clackamas County and only one (Willamette River) partially does. If the Willamette is counted as a Clackamas County water body, 273 respondents or 16% of the sample will have a favorite water body in Clackamas County, if the Willamette is not included as a Clackamas water body, then only about 5% do.



About 15% of the market, or approximately 160,330 water-based recreationists, visit Clackamas County water frequently (more than 6 times per year). For those visiting the Clackamas River, approximately 284,000 of them pay for accommodations, with camping preferred slightly more than hotels. So, while water-based recreation generated about 12 million lodging reservations in Oregon in 2016, Clackamas County captured only about 2% of them.

Clackamas County attracts less water-based recreationists who spend money on accommodations than the market average. Water recreationists who are older than the average, and those who have a wider interest in more water sports than the market average, are statistically significantly more likely to stay overnight. Unfortunately, Clackamas County attracts more young water recreationists and attracts those from Multnomah County more than the average. Clackamas County also attracts those with a less diversity of sports preferences, or those who are more loyal to their preferred sport, than the market average.

Only two variables, age and diversity of water sport preferences, were found to be significant when testing for frequency of overnight stays. All other variables tested have no effect on whether the respondent is likely to stay overnight including: favorite water body, favorite sport, accommodation type, experience, zip code, household income, and sex. So, while attraction to the Deschutes River and fishing activities was first thought to reduce the demand in Clackamas County for overnight stays, detailed regression analysis showed that this was not the case. The reason water recreationists don't stay overnight in Clackamas County is subtler than the obvious.

Anglers spend the most overnight stays of all groups, and they are the least likely to choose a Clackamas County water body as their most frequent. Those who have a wider diversity of sports, (less loyal to their favorite) are most likely to stay overnight more often. The visitors to Clackamas County have more loyalty than the average respondent. Older visitors are more likely to stay overnight more often, and Clackamas County attracts more young visitors than the average. Increasing overnight stays from water recreation visitors would require attracting older visitors, those who prefer fishing, and those who perform more diversity of water sports.

The adage "if you build it they will come" is not true for water sports enthusiasts in Clackamas County. Data indicates that, under existing market conditions, if additional hotels are added to the stock they will not attract more water-based tourists. This statement should not be interpreted as no market demand for additional hotels. The analysis does not show if other travelers will be sufficient in size to make a new hotel financially sustainable. The results only say that water tourism is not likely to generate additional room nights than what is being generated today. Camping and campsite demand is a different story. Camping is in high demand especially on the summer weekends, and additional campsites in the county are likely to be filled. This statement is not shown in the survey results specifically but instead by market research, site visits, and interviews. These data do show that camping is preferred over hotels by twice as much across the entire market, so hotel demand cannot be used as a proxy for campsite demand.



The financial viability of additional camping and hotel accommodations is dependent on the entire market, not just water-based tourism. While water-based tourists would likely benefit from additional accommodations, an independent, and site specific, financial feasibility study on the accommodation in question is necessary to determine if it will be successful.

Chapter 5 THE MARKET

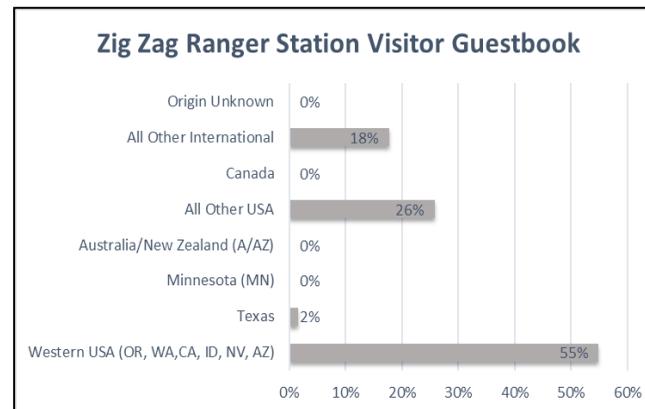
The Market Area

The market area for water-based tourism in Clackamas County is the geography from which most existing visitors, and potentially new visitors, reside. There is no single source of information from which to determine the market area. Water-based visitors come for different reasons and visit a wide range of places within the county. They may purchase campground reservations, visit a museum, or register at an information center. Collecting the residence of visitors is a challenging endeavor since each source has its internal biases. For example, people who stop at visitor centers are primarily out-of-state, or at least, out-of-town guests, who are looking for information and usually have a flexible schedule. On the other hand, frequent visitors are an important market, but they rarely stop at information centers. Using a variety of sources is necessary to piece together the market area. For this study, data was reviewed from any source we could acquire and includes: campground registration; guestbook sign-ins; and the zip codes of the permit or license holders from the recreation survey.

Zip code data is one of the best and easiest ways to determine the residence of a visitor. Knowing the point of origin for a visitor is highly valuable for a wide range of marketing, business expansion, and strategic planning purposes. Ironically, these data are not collected by most tourism-based organizations or businesses. County and municipal governments do not retain these data on visitors even though it is collected when campers make a reservation. Even several private businesses stated that they do not have point of origin data because their credit card processors keep this information.

Table 5-1: Residence of Visitor to PGE Campground Sites.

	Promontory Park	Timothy Lake
Northeast	0.00%	0.00%
Mid-Atlantic	0.78%	0.12%
Southeast	1.00%	0.06%
Mid-West	0.89%	0.15%
Southwest	1.22%	0.21%
Northwest	92.34%	99.05%
OR	83.02%	90.24%
WA	9.32%	8.69%
West	3%	0.39%



Portland Gas and Electric manages several campgrounds in the upper Clackamas River area. Registration for these campsites includes zip code data and were made available for this study. The results are shown in table 4-1. Promontory Park campground is visited by Oregon residents 8 out of 10 times and visitors to Timothy Lake are 90% Oregon residents. Between 8 and 9 percent of the visitors are from Washington State and the remaining are from California with a small percentage from the rest of the country.

The guest book at the Zig Zag ranger station shows a very different geographic composition. Like most visitor centers, it is visited by people who need information or simply want to stop, take a break from travelling, and get some ideas on what to do in the area. A lesser percent is seeking site specific information on a place they intend to go. However, most outdoor recreational travelers already have this information before they leave home. Naturally, the resulting data will include a disproportionately large percentage of state travelers. Unlike PGE data, people visiting the Zig Zag information center are from a wide range of locations. The

information combines Oregon with the other neighboring western states including Washington, California, Idaho, Nevada, and Arizona. These western states combined make up only 55% of the visitors. Approximately 26% are from the USA but outside of the west and another 18% are from overseas.

A final indicator of the market area is the zip codes of license and permit holders. The entire database of fishing licenses holders, motor boat registrations, and AIS permit holders are mined to extract zip codes. This is a more complete database of water-based recreationists than what was used in the survey because all registrants have a mailing address with a zip code. The survey, in contrast, relied on only those with email addresses.

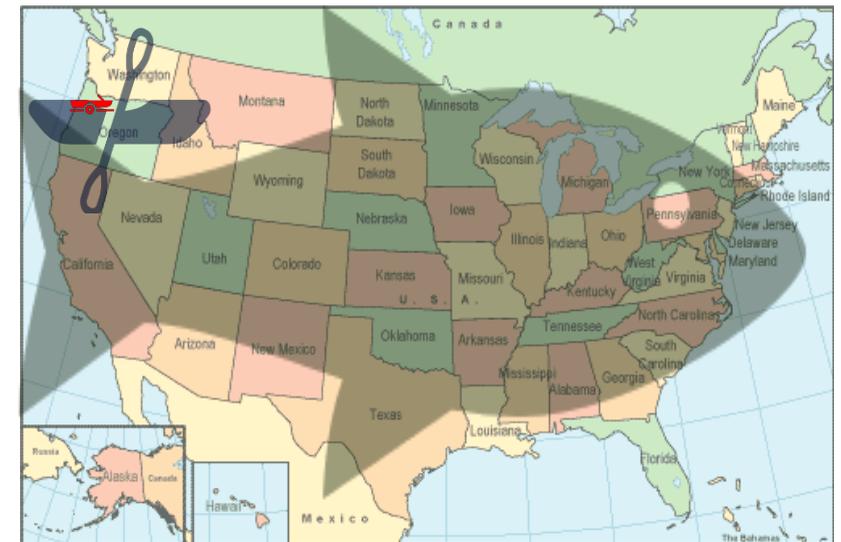
License Holders

These data show that the amount of out of state visitors for water-based recreation will vary depending on the primary activity. Paddlers make up the most out of state visitors of the three groups with 25%. Anglers are not far behind with 23%. Paddlers however, don't travel from very far. Ninety percent of the out of state paddlers are from Washington and the remaining are from neighboring states. Out of state anglers, on the other hand, travel farther. While most are still from neighboring states, visitors are coming from a wider diversity of western states and nearly every state in country.

In determining the market area, marketers must first know what and who they want to market. Water-based tourism strategies will require a segmented approach. Marketing efforts in areas beyond Washington and California should be limited to only anglers. Paddlers can be reached in Washington, California and Oregon. Any communication to motor boaters should be limited to not only Oregon residents but those primarily in the northwest part of the state.

Table 5-2: Market Size and location for In-State and Out-of-State Water Recreationists

	Market	Oregon Resident	Non-Oregon Resident
	Anglers	77%	23%
	Motor Boaters	98%	2%
	Paddlers	75%	25%



Anglers

Anglers are the largest and most established market in Oregon’s water recreation market. They are responsible for 83% of all overnight stays from water recreationists. Their market size is 2.5 times greater than motor boaters and 3 times larger than paddlers. Fishing is also the favorite water-based activity on all of Oregon’s top ten rivers and all of Clackamas County’s favorite waterbodies. Fishing is so popular that it is even the favorite water-based activity among paddlers. On the other hand, fishing has been anecdotally referred to as a dying sport with rumors abound that fishing license sales have been decreasing. This section investigates the extent to which this is true. How could the sport be so popular, and the participation be declining? Is participation actually declining? A review of fishing licenses sales helps provide some answers.

Fishing licenses sales from 2009 to 2016 is used as an indicator of the market demand for fishing in Oregon. The data is also being used as an indicator of visitation by non-resident anglers. Total angling licenses sold form a u-shaped curve from 2009 to 2012 but the overall trend from 2011 to 2016 shows a compound annual average growth rate of one percent for 8 years. This includes all fishing licenses sold by the Department of Fish and Wildlife. Total demand for angling does not appear to be in decline but instead rebounding from a recent recession. Participation in angling nationwide also shows a similar pattern. Total participation in fishing nationwide is currently at the highest level since 2009 and has a net increase over the past 6 years^{xi}.

The U-shaped pattern in Oregon fishing licenses sales from 2009 to 2012 can be explained by the visitation rates by non-residents. The great recession in the US economy occurred in mid-2009 resulting in unprecedented levels of unemployment and a highly constrained travel and tourism industry. Overall, US tourism spending and employment decreased sharply during this time.^{xii} Oregon’s tax revenue from local lodging also decreased in a similar pattern^{xiii} which corresponds to the national trend in travel and tourism, and Oregon’s fishing license sales. These data show a strong relationship between fishing licenses sold and tourist visitation to Oregon.

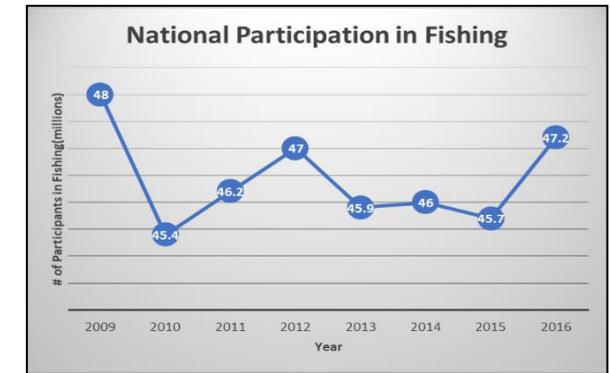
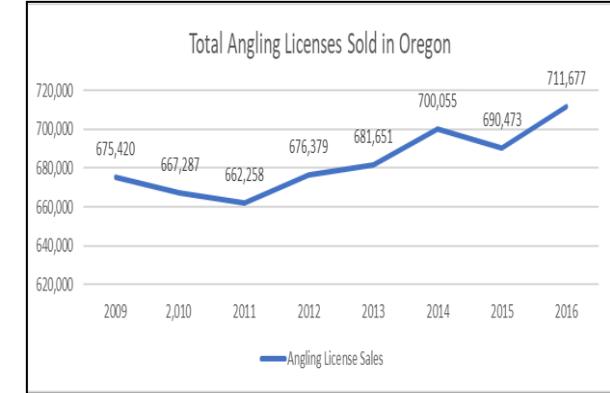
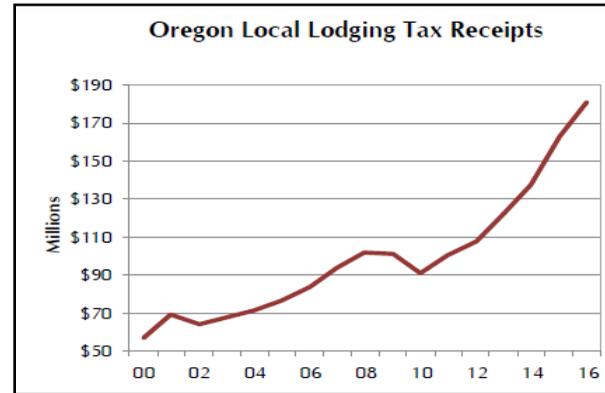


Table 5-3 Purchases and Cost of Fishing Licenses in 2015		
Non-Resident Annual	17,646	3%
Non-Resident Daily	178,804	26%
All Resident Purchases	494,023	72%
TOTAL Purchases	690,473	100%
Cost for Daily Fishing Licenses		
License	Cost	
1-day Angling	\$ 19.00	
2-day Angling	\$ 35.50	
3-day Angling	\$ 50.50	
7-day Angling	\$ 76.50	

When separating Oregon residents from total fishing licenses sold, we see this relationship more clearly. Annual fishing licenses for residents cost \$36; for non-residents, the cost is \$97. The price for daily fishing licenses for residents and non-residences is the same (table 4-3).

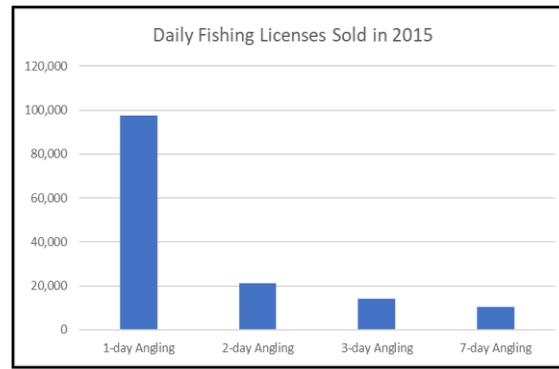
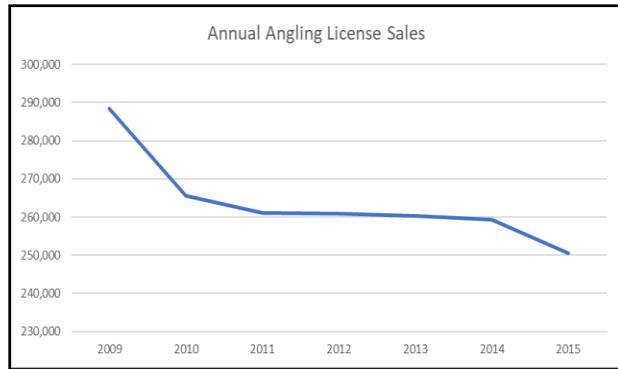
An Oregon resident can buy an annual license for less cost than a 3-day license, so there are very few residents who purchase 3, and 7-day licenses (although .3% of resident license holders did exactly that). Less than 7% of Oregon fishing licenses holders bought a daily license of any duration; 93% of them purchased one of the 21 different types of annual licenses available.

Since we know that a large majority of Oregon residents do not buy daily licenses, we can use daily license purchases as a proxy for measuring the purchasing patterns of non-resident anglers. A series of figures on the following page show that most daily licenses are purchased for one and two days only. The 7-year trend data shows 1-day and 2-day license sales closely tracking total angling licenses sold (and total visitor spending) from 2009 to 2015. Seven-day licenses resumed pre-recession sales in 2012 but are now showing a downward trend. Total annual angling licenses do not mirror total visitor spending, in fact annual fishing licenses, which are predominately resident purchases, run in opposite direction as the trend in total licenses sold. This indicates that the increase in total fishing licenses sales is due to non-resident purchases. Since a visitor spends an average of 3.3 nights^{xiv} in the state doing a variety of activities, this also explains why 7-day licenses are decreasing while 1 and 2-day licenses are increasing in demand.

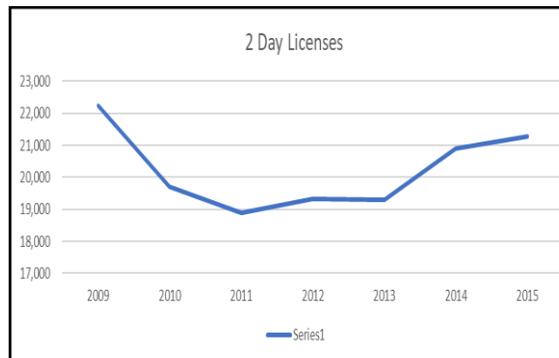
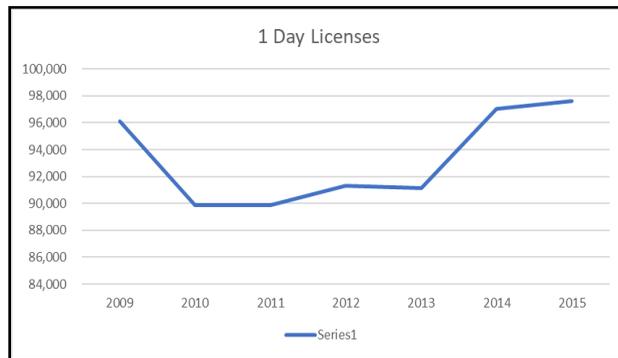
The anecdotes that fishing license sales are decreasing appear to be true but only for Oregon residents. However, if total fishing license sales are declining for Oregon residents, then why does the water-based recreation survey conducted in this study show fishing the clear favorite activity, by far, among residents? The answer lies in the way fishing licenses are bought. The market does not purchase fishing licenses every year. A national study of fishing licenses purchases over a 10-year period in 12 different states shows that approximately half of all anglers purchase a fishing license only once every ten years. Only 4% of anglers will purchase an annual license every year.



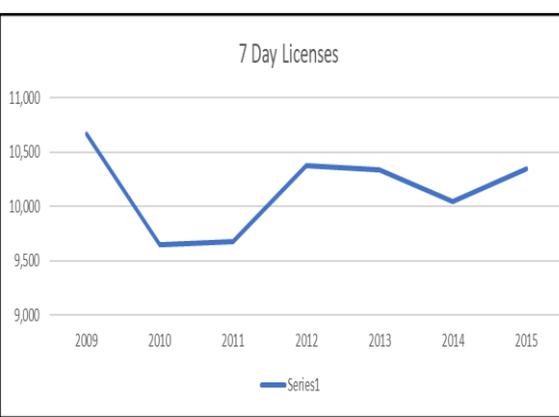
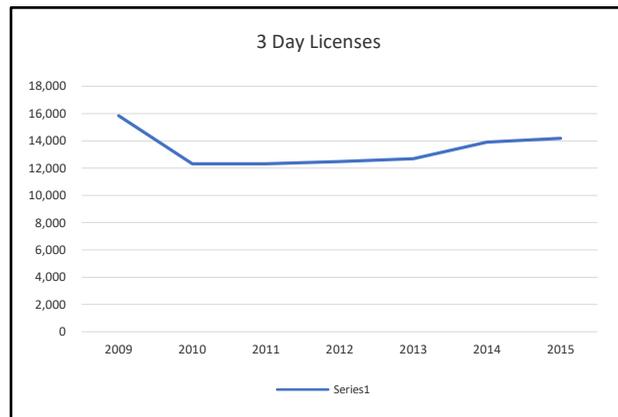
“These data show a strong relationship between fishing licenses sold and tourist visitation to Oregon ... the increase in total fishing licenses sales is due to non-resident purchases.”



Approximately 73% of first time buyers intend to purchase a license every year but only 32% do. In Oregon, only an estimated 7.9% of annual anglers purchase a license in five out of five years, and only 19% purchased a license in 3 out of 3 years. Nonetheless, 45% of this same sample reported fishing with a frequency of 9 to 16 days per year. Basically, annual fishing license sales are not a good indicator of fishing interest or participation rates for residents. However, daily licenses sales from non-residents is a reliable indicator since it would be rare (and odd) for a tourist to purchase a fishing license and not go fishing.



A sales data graph that includes 2009 to today will show a precipitous drop due to the great recession. However, graphing sales that excludes this economic crisis (starting from 2011) paints a different picture. The overall trend is increasing with an annual average growth rate of 1% over the last 5 years. So, considering that most anglers purchase a license only once in every 5 to 10 years, and that licenses sales are slowly increasing over that last 5 years, it would be incorrect to conclude from licenses sales that fishing is a dying sport in Oregon. When you combine this information with the results of the statewide water-based recreation survey conducted in this study, fishing is alive and well in Oregon.



Nationwide, fishing also one of America’s favorite outdoor activities and is growing in popularity. Although participation may have dropped from past decades, it has grown consistently in the past 6 years. We don’t know if fishing is declining relative to other outdoor sports or if the nation is collectively spending less time outdoors. While 13% of the nation goes fishing every year, which alone is a large number of people, it actually understates how popular fishing really is, because most anglers do not fish every year. The American Sportfishing Association and the Association of Fish and Wildlife Agencies found that less than 15% of Americans who had fished in the previous five years had fished in all five of those years. The angler who fishes every year is rare^{xv}.

There are several differences between Oregon anglers and the rest of the Nation. These differences help set Oregon apart from the rest of the market and shed light on marketing strategies. In Oregon, fly fishing is the most popular type of fishing while it is the least popular to the national market. On the other hand, it is the fastest growing type of fishing in the US, capturing 15% of the market newcomers^{xvi}. So, Oregon is an ideal choice for those just starting to fly fish. The top five targeted species of fish nationwide will vary depending on the month you ask the question, however in general, they are Largemouth Bass, Pan Fish, Smallmouth Bass, Trout and Catfish^{xvii}. In Oregon, the preferences are almost the opposite with Trout as the number one target followed by Salmon and Steelhead in that order. Bass and bottom feeders are fourth and fifth place. This order of preferences is the same for residents and non-residents alike^{xviii}.

OREGON

- FLY FISHING IS THE MOST POPULAR TYPE OF FISHING
- FLY FISHING HAS STABLE OR FLAT GROWTH
- TOP TARGETED SPECIES = TROUT, SALMON, STEELHEAD
- TRUE FOR RESIDENTS AND NON-RESIDENTS ALIKE

VS

NATIONAL MARKET

- FLY FISHING IS THE LEAST POPULAR
- FLY FISHING IS FASTEST GROWING TYPE OF FISHING
- TOP TARGETED SPECIES = LM BASS, PAN FISH, SM BASS



Credit: Water Time Outfitters Oregon City OR

Proportional Share Analysis of the National Angler Market

Table 5-4: Proportional Share Analysis of Anglers for Selected States: Anglers by Anglers Days , 2011

State	Pop	Total Anglers†	Anglers /Capita	Non- Resident Anglers	%	Angler Days	Non- Resident Angler Days	%
Alaska	710,231	537,927	76%	327,418	5%	4,360,282	1,287,096	2%
Wisconsin	5,686,986	1,246,775	22%	336,753	5%	21,283,610	6,707,662	12%
Florida	18,801,310	3,091,952	16%	1,197,279	17%	57,593,836	9,543,924	17%
Oregon	3,831,074	637,746	17%	264,424	4%	5,658,437	1,262,784	2%
California	37,253,956	1,673,633	4%	97,967	1%	23,753,676	486,605	1%
Washington	6,724,540	938,053	14%	102,562	1%	13,448,784	341,327	1%
Idaho	1,567,582	446,718	28%	208,418	3%	5,506,803	3,341,667	6%
Wyoming	563,626	302,758	54%	193,076	3%	5,340,231	3,331,254	6%

A proportional share analysis will show if one state is attracting more, or less, than its proportion share of the national market of anglers. The US Fish and Wildlife Service studied angler participation in all 50 states and offers data with insightful comparisons on the non-resident angler market. By looking at non-resident anglers and the number of fishing days they generate, one can estimate the relative desirability of one state over another in attracting anglers.

Total non-resident angler days in one state divided by total angler days in the US results in the relative proportion of non-resident anglers visiting a state. The percentage of angler days in each state is calculated by state angler days divided by national angler days. Angler days is a factor of party size and length of stay. If the percentage of non-resident anglers is greater than the percentage of non-resident angler days, then fewer anglers are staying less often proportionally to other states. If the percentage of non-resident angler days is greater than the percentage of non-resident anglers, then either the party size or length of stay (or both) is larger than the national average. In other words, those are the states that are generating a larger proportional share of visitor/days than their competitors. For example, Alaska is well known for excellent fisheries. They attract 5% of the nation’s visiting anglers. However, they only generate 2% of the nation’s visiting angler/days. Their visitors are fewer in numbers or stay for shorter durations. By contrast, Wisconsin also attracts 5% of the nation’s visiting anglers but generates 12% of the nation’s visiting angler/days, indicating that their visitors are staying longer, have larger party sizes, or both. Florida is even at 17%. Table 4-4 shows a proportional share analysis for selected states, and the entire calculations can be found in Appendix 2). Oregon has room for improvement. Oregon attracts 4% of the national visiting anglers but only 2% of the nation’s visiting angler/days. The neighboring states of California, and Washington are doing better than Oregon by at least breaking even on a relative scale. Idaho and Wyoming, two competing states with excellent western fisheries, are generating twice as many visitor/days than their proportional share. Oregon is the only state west of Colorado that has a negative proportional share. Oregon’s has world renowned fishing resources, but it appears that Oregon’s angler market potential may be bigger than what they are currently attracting.

“Oregon’s has world renowned fishing resources, but it appears that Oregon’s angler market potential may be bigger than what they are currently attracting.”

Table 5-5: Top 10 Non-Resident Fishing Destinations and Expenditures, 2011



Rank	State	Non-Resident Anglers	Total Non-Resident Expenditures
1	Florida	1,197,279	\$898,283,876
2	Michigan	347,029	\$326,337,857
3	Wisconsin	336,753	\$445,006,874
4	North Carolina	328,810	\$260,296,738
5	Alaska	327,418	\$361,768,322
6	New York	297,070	\$282,573,249
7	Oregon	264,424	\$241,771,577
8	Minnesota	259,324	\$364,108,877
9	New Jersey	256,950	\$106,323,764
10	Missouri	244,290	\$205,686,074

According to the US Fish and Wildlife Service, Oregon ranks 7th among the top ten fishing destinations in the nation (Table 4-5)^{xi}. Alaska is ranked 5th. Based on the analysis above, both states are shown to generate a disproportionately lower number of visitor/days, however, they are generating more revenue from fishing than their neighbors. This means that those who do come to Oregon are willing to spend a disproportionately higher amount of money to do so. Willingness to spend tourism dollars is an indication that Oregon has a high-quality product and that it is worth the trip for non-resident anglers to visit the state. This information, combined with the Proportional Share Analysis, leads to a reasonable conclusion that Oregon has a high-quality product but is not maximizing its potential. There is untapped tourism potential in Oregon’s angler market.

Clackamas County can capitalize on this untapped opportunity by marketing new destinations. Non-residents are aware of the Deschutes, Rogue, Columbia and other famous rivers, but know little about Clackamas County rivers and lakes. The Clackamas, Sandy, and Willamette, are excellent fisheries that can be used to create new experiences for the visiting angler.

Understanding effective ways to market to anglers requires understanding what prevents them from fishing and what motivates them to go. The top 3 reasons people go fishing is to: spend time with family and friends; relax; and to improve their skills and gain some exercise (sport and recreation). Spending time with family and friends is the single most important reason people fish. Catching a fish is only a bonus, not the primary reason that people go fishing. Marketing and tourism promotion should focus on marketing fishing to

relax and spend quality time with family and friends. New recruits to fishing are more likely to seek relaxation, while avid anglers are more likely to seek excitement and improve their sport^{xx}.

Anglers stop or decrease participation in fishing for a variety of reasons. The reasons fall primarily within three general categories:

- 1) Time. Studies show that anglers are spending the same amount of time recreating but there is a growing shift in priorities and competition for the same leisure time. People have an expanded array of other leisure pursuits than they did previously. Competition for leisure time is particularly strong from indoor electronic activities that comes from new and improved television entertainment and games^{xxi}. Family obligations and changes in the way recreational time is spent is leading to a decreased amount of time fishing. Marketing efforts to increase angling should be more in tune with these shifting priorities. Television and electric media can be used to attract anglers and packages that are tailored to attracting the entire family including women and children is needed.
- 2) Health. The second most common reason that people stop fishing is declining health. This is mostly related to the aging of the angler population. Two tactics can be used to counter this trend. First, increase convenience for fishing including better parking, wheelchair ramps, and generally improved access. Second, increase youth participation. Most avid anglers started when they were 5 years old or younger. It is more difficult to get a teenager to start fishing. If youth participation starts at a very early age, then the rewards are likely to last a lifetime.

- 3) Fishing Experience: There are several reasons that are specifically related to fishing. Some anglers shift away from fishing, or quit altogether, because the fishing experience has been degraded somehow. The fish may be in fewer numbers, or the regulations are no longer friendly to fishing, or the experience has become mundane. Marketing efforts can counter this trend by innovating new and fresh angling experiences and ensuring fisheries management is fishing friendly.

All three of these reasons can be addressed by promoting more convenient family friendly fishing experience. This means focusing on women and children and creating angling experience that are more attractive to them. It also means promoting the “fishing experience and not the kill.”^{xxiii} Marketing efforts should shift away from images of dead fish and more toward the natural beauty of the environment. Fishing should be marketed as a relaxing day on the water with friends and family. Complementary activities such as wildlife viewing, birding, nature photography, and natural history to increase knowledge about the riparian ecosystem can all be rolled into a day of fishing. A successful day on the water is not counted by the number of fish caught but by the number of smiles produced.

“Fishing should be marketed as a relaxing day on the water with friends and family. Complementary activities such as wildlife viewing, birding, nature photography, and natural history to increase knowledge about the riparian ecosystem can all be rolled into a day of fishing. A successful day on the water is not counted by the number of fish caught but by the number of smiles produced.”



The Angler Profile:

Understanding who to market and how to reach them is critical to increasing water-based tourism in Clackamas County. Anglers come from a variety of demographic profiles. It would be convenient if the entire angler market had similar household incomes, family sizes, ethnicities, and they enjoyed the same magazines, radio stations and other sports. However, anglers are more diverse than that. Anglers like hunting and camping, as might be expected, but they also like gardening, cultural museums, and golfing. To compile a socio-economic profile of a typical angler, two secondary studies and data sources were used: (1) a national study on the angler lifestyle and (2) the use of Geographic Information System (GIS) analysis of consumer lifestyles segmented by zip codes across the country. The two studies are combined to identify the socio-economic profiles of anglers across the country and where they live. National GIS software firm, ESRI, has mapped zip codes across the country and linked them to key socio-economic and demographic data. This created Tapestry, a GIS marketing tool with 67 different market segments that identify the lifestyle choices, purchasing habits, and leisure time activities of the residents in each zip code in the nation. The angler profile study found that anglers fall within 10 of these 67 market segments^{xxiii}. These 10 are the following:

Table 5-6: ESRI's Tapestry Market Segments for Anglers

	# of Households	HH Size	Median Age	Median HH Income	Recreation Spending Index	Internet Savvy (1-5)	% of Home Ownership	Median Value of Home	% with College Degree
Savvy Suburbanites	3,543,000	2.83	44.1	\$ 104,000	184	5	91%	\$ 311,000	48%
Soccer Moms	3,327,000	2.96	36.3	\$ 84,000	145	5	86%	\$ 226,000	38%
Middleburg	3,319,000	2.73	35.3	\$ 55,000	98	4	74%	\$ 158,000	
Green Acres	3,794,000	2.69	43	\$ 72,000	128	3	87%	\$ 197,000	60%
Salt of the Earth	3,517,000	2.59	43.1	\$ 53,000	96	2	84%	\$ 134,000	
The Great Outdoors	1,850,000	2.43	46.3	\$ 53,000	104	3	78%	\$ 189,000	60%
Rural Resort Dwellers	1,215,000	2.21	52.4	\$ 46,000	93	2	82%	\$ 163,000	
Up and Coming Families	2,562,000	3.1	30.7	\$ 64,000	111	5	75%	\$ 174,000	66%
Southern Satellites	3,775,000	2.65	39.7	\$ 44,000	83	3	79%	\$ 119,000	41%
Rooted Rural	2,425,000	2.47	44.1	\$ 38,000	76	1	80%	\$ 104,000	
National Average	121,795,974	2.53	37.6	\$51,000	100		63%	\$177,000	

These two secondary sources were used to identify the socioeconomic profile of the typical angler and their geographic location with the United States. Then the list of ten profiles were narrowed down to the most probable buyers of Clackamas County's water-based recreation, which relied on field studies and primary data gathered in our survey. A detailed description of these ten market segments is included in Appendix 3. Table 4-7 provides a summary description of these market profiles and their applicability for water-based recreation in Clackamas County.

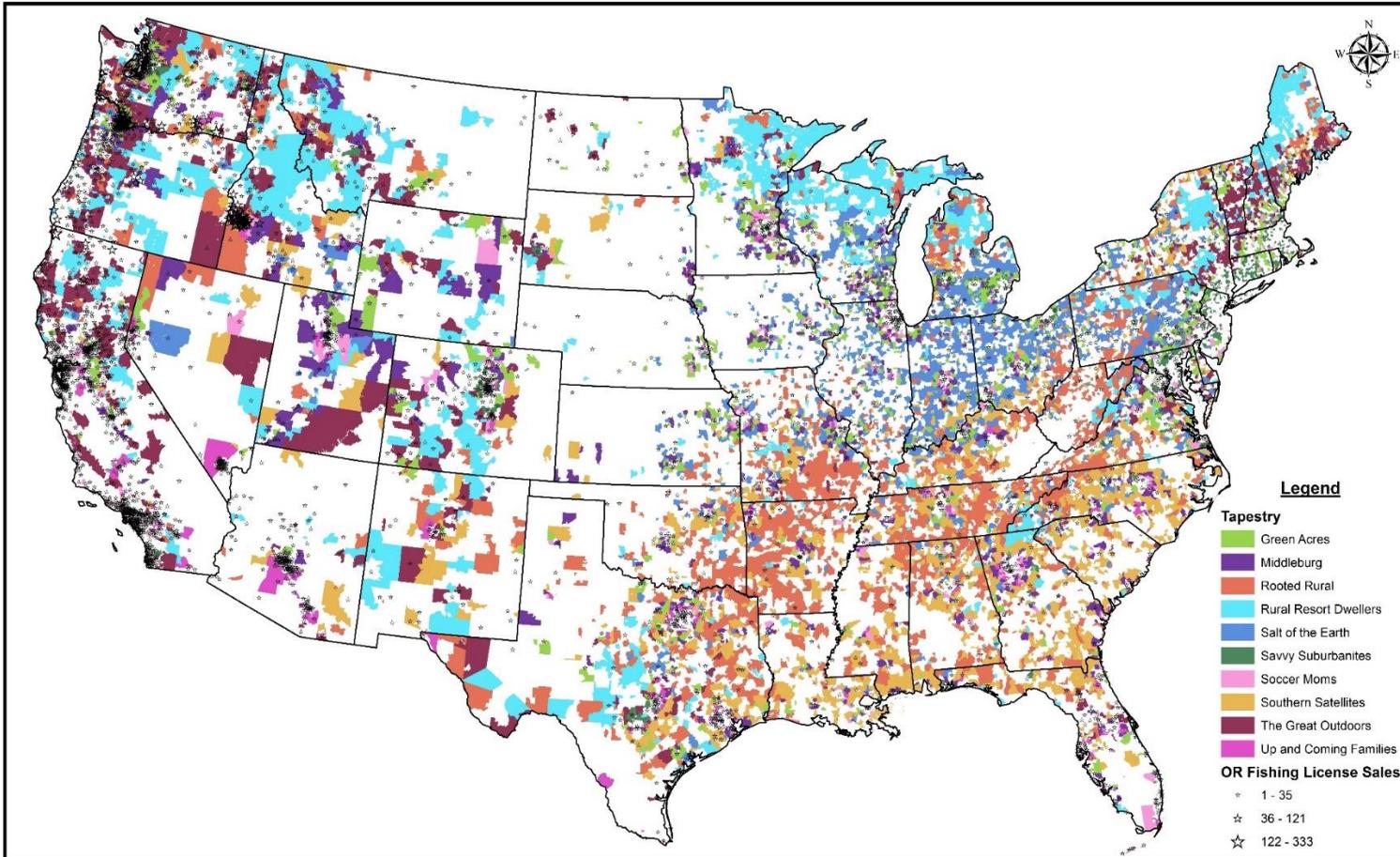
Table 5-7 Description of Market Profiles for Water-based Recreation	
Tapestry Segmentation for Anglers	General Description and Key Marketing Elements
1: Savvy Suburbanites	Have the highest expendable income for leisure activities among all 10 market segments. They are physically fit and pursue a variety of sports, from skiing to golf. They invest heavily in sports gear and equipment. They will likely enjoy a high quality guided fly fishing tour more than other types of fishing. They are tightly concentrated in the largest urban areas of the country including New York, Chicago, Los Angeles, San Francisco, Portland, Seattle, Denver, Houston, and Miami with their homes just outside their urban core. Although fly fishing would be an attractive sport for them, there is strong competition from other activities, so package deals with a range of activities would sell better than single sport tours. While most anglers are loyal to fishing, this segment is an exception. They rely heavily on the internet to research their trips prior to purchasing. Their children are older, and they would likely travel without them.
2: Soccer Moms	These are family-oriented, married households with children in high school or younger. They have above average household incomes and spend 45% more than the national average on recreation and outdoor activities. This is the target market for a family-oriented fishing trip where relaxing and family time is much more important than catching a fish. They enjoy nature and visit zoos, parks, and natural areas. They would value family oriented natural history tours, bird watching, and fishing lessons targeting any species with simple casting techniques. They are located almost uniformly across the country in suburban areas outside of large and small cities. They have above average commutes to work and listen to pop radio or news stations while do so. They watch a lot of television with an average of 4 TV sets in the house and use the internet extensively for most household functions including vacation planning. They can be reached best through these electronic media outlets.
3: Middleburg	Middleburg families are young married couples with children living in semi-rural subdivisions that were built on converted farmland. They earn slightly more than the national average and their homes are valued at slightly below the national average. Like Soccer Moms, they seek family-oriented nature-based activities and would appreciate family fishing trips. They also enjoy hunting, target shooting, baseball and bowling. Their recreational spending is on par with the national average. They are located predominately east of the Mississippi and south of the Mason Dixon line although can also be found in the rural suburbs of Dallas, Chicago, Salt Lake City, Portland OR, and Seattle. They rely on the internet for travel planning and prefer country and Christian radio channels.

Tapestry Segmentation for Anglers	General Description and Key Marketing Elements
4: Green Acres	Empty-nested, pre-retirement households with a fiscally conservative and independent streak. They have above average household incomes and spend 28% more of their household budget on leisure travel than the national average. They are avid gardeners and do-it-yourselfers and enjoy outdoor living with activities like hunting and fishing, motorcycling, hiking, camping, and occasionally golf. Of all segments, they are most likely to own an RV or camper. They would be attracted to Clackamas County's river and lakes for fishing and camping independently and on self-guided tours that included outdoor sports, cultural history, and natural history. They use the internet as a tool for gaining information but nothing more. They can be reached best through country, home and garden-oriented media. Most Green Acres households live in southern New England, eastern Pennsylvania, and the Great Lake States. Secondary populations can be found in the Smokey Mountains, St Louis, Minneapolis, Portland and Seattle.
5: Salt of the Earth	These are rural households who enjoy rural lifestyles. Two-thirds of these households are married and less than half have children at home. They are cost conscious savers, earning an average income but have a net worth of twice the national average. They love the outdoors and they spend most of their free time preparing for their next fishing, boating, or camping trip. Their top priority is to spend time with their families. Overnight camping trips are highly popular. They are heavily concentrated in four states: Pennsylvania, Ohio, Indiana, and Michigan. They are not reachable by the internet. Due to their rural locations and lack of trust for the internet, they prefer to conduct their business in person and to buy American. They most likely plan their travel with the help of agents, word of mouth, library books, and printed media. They commute long distances while listening to country music and news stations. They probably own RVs and campers. They would thoroughly enjoy Clackamas County water bodies. Although, because they are cost conscious, a trip to Oregon would be a once in a lifetime type of adventure.

Tapestry Segmentation for Anglers	General Description and Key Marketing Elements
6: The Great Outdoors	<p>Working hard in professional and management jobs earning above average incomes, with above average net worth and living in homes with above average values. They see retirement just around the corner and are more likely to invest in second homes and real estate than stocks and bonds. They prefer to travel domestically than overseas and spend slightly more than average on recreation and leisure. They enjoy hiking, hunting, fishing, and boating and watch the History Channel and Fox News. This segment would be attracted to fishing trips to Clackamas County that also included camping, hiking, and cultural history tours. They are more interested in a day on the water and learning about their surroundings than catching a fish. About 30-40% will travel with children, 35% are empty nesters and the remaining are not married. They don't heavily use the internet, but travel planning may be one of the uses. Great Outdoors families live within 100 miles of the East and West coasts, primarily in New England, Florida, and in Oregon, Washington and California.</p>
7: Rural Resort Dwellers	<p>Rural Resort Dwellers are blue-collar, empty-nesters that are close to retirement who live in scenic rural locations with proximity to excellent outdoor activities. They have very simple tastes but are passionate about outdoor activities and prefer to live, work and vacation in natural beauty. They especially enjoy freshwater fishing and hunting. Oregon's natural beauty would be highly attractive to them, but they spend less than the national average on recreation and leisure. Their median income is \$46,000, or \$5,000 less than the national average. Based on their income and leisure spending index, one might assume they prefer to live, work, and play close to home. These households are found spread across the country but especially on the coasts of Maine, Carolinas and Florida, the Smokey and Catskill Mountains, Great lake States, Rocky Mountain communities, and west of the Cascades. Their TV preferences reflects their lifestyles such as Animal Planet, Discovery Channel, and the DIY Network.</p>

Tapestry Segmentation for Anglers	General Description and Key Marketing Elements
8: Up and Coming Families	<p>Young, hard-working, dual parent incomes with young children. They earn above average incomes and own homes valued at the national median. This is the fastest growing demographic market in the country and the only one of these 10 segments that have more Hispanic and Black families than the national average. They rank 4th in leisure spending with a recreation budget 11% higher than the national average. They are tech savvy and use the internet for most financial transactions, travel planning and entertainment. They enjoy nature and healthy lifestyles, taking their families to parks, backpacking, team sports, and zoos. They would enjoy family-oriented trips to Oregon for natural history tours, bird watching, and fishing lessons and other water-based recreation similar to the Soccer Mom market. These families live in newly built suburban neighborhoods outside of major urban areas in the South and California specifically, Miami, Tampa, Atlanta, Dallas, Houston, Phoenix, Las Vegas, Denver, Salt Lake City, and central California from Sacramento to San Diego. They would respond well to internet-based marketing.</p>
9: Southern Satellites	<p>Married couples with no children yet with multiple generations in the household. This market is typically non-diverse, slightly older than the national average. Almost a third of their homes are mobile homes and the median home value at \$119,000 is well below the national average. The unemployment rate in this market is at 9%. Workers are employed in a variety of industries with higher proportions in mining and agriculture than the US and earn well below the national median household income at \$44,000. Their recreation spending is almost 20% below the national average. They enjoy outdoor sports such as fishing and hunting. They live primarily in the southeast US. Given their low spending patterns and distance to Oregon, it is not likely that a marketing campaign would provide a return on the investment from this segment.</p>
10: Rooted Rural	<p>Rooted Rural residents are empty nesters employed in the forestry, extraction and trucking industries. They earn the lowest incomes of all 10 segments and have the lowest median house values at \$104,000. They enjoy time spent outdoors, especially hunting, fishing, or working in their gardens growing their own food. Indoors, they enjoy watching television with a spouse and spending time with their pets. These communities are heavily influenced by religious faith, traditional gender roles, and family history. They live in the Appalachian mountain range as well as in Texas and Arkansas. They have the lowest recreation spending index of all ten market segments. About half of the households have an internet connection and most don't trust it for financial transactions. Given their low spending patterns and distance to Oregon, it is not likely that a marketing campaign would provide a return on the investment from this segment.</p>

TWO MAJOR TARGET MARKETS FOR CLACKAMAS COUNTY



FAMILY ORIENTED TARGET MARKET



Middleburg

The Great Outdoors

Up and Coming Families

Soccer Moms

EMPTY NESTER TARGET MARKET



Green Acres

Rural Resort Dwellers

Savvy Suburbanites

Combining these GIS data with the locations of Oregon non-resident fishing license sales we can see that the two segments with the lowest incomes, Southern Satellites and Rooted Rural, are not purchasing OR fishing licenses and therefore are removed from further consideration. Salt of the Earth was also removed due to low sales in fishing licenses. This results in 7 marketable segments.

Two Target Markets for Clackamas County Anglers

After more detailed review, there are two general target markets that Clackamas County should focus on attracting. First, family oriented, nature-based travel that promotes the environment as the ideal medium for families to escape and reconnect with each other. The marketing strategy should emphasize water-based recreation, especially fishing instructions, natural history, floating and boating, as activities that help families bond. The market segments to focus on would be Soccer Moms, Up and Coming Families, Middleburg and the Great Outdoors. Each of these market segments has a certain number of zip codes. Since each zip code contains a relative proportion of people or addresses per zip code⁷, the market segments with the most zip codes contain the largest target populations for these four market segments. The states containing the top ten most populous zip codes, and the total number of zip codes, for each of the four market segments are shown in tables 4-8 and 4-9. The right-hand column shows the percent of market total of all 50 states. The higher the percentage the more concentrated the market is in these ten states. Soccer Moms, as previously stated are spread more evenly throughout the US while Up and Coming Families are concentrated in a few regions of the country. They live in 3039 different zip codes across the country and are provided to the client in electronic format.

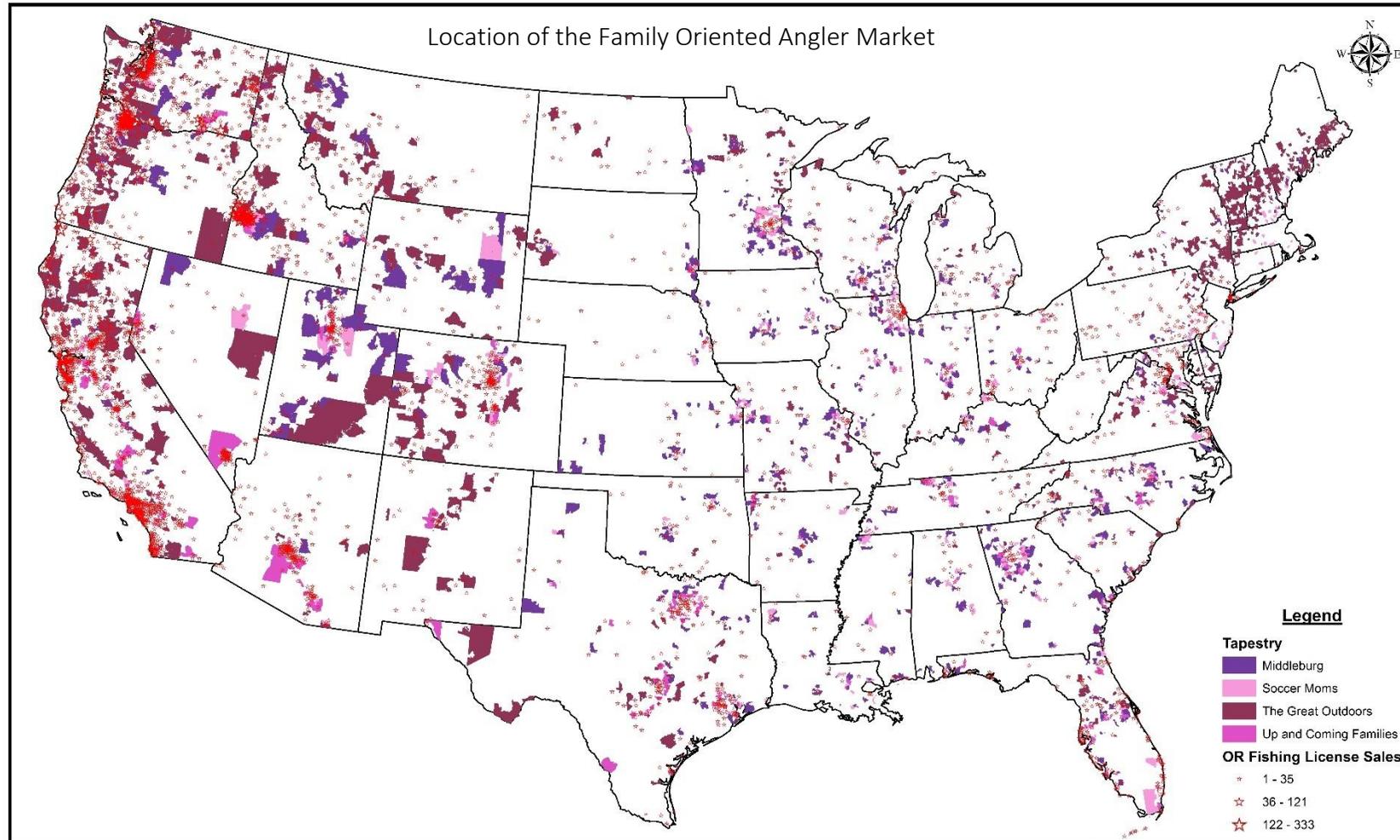
Segment	Total Zip Codes
Middleburg	810
The Great Outdoors	1361
Up and Coming Families	358
Soccer Moms	510
Total	3039

	IO	FL	UT	MO	IL	NC	TX	GA	WI	MI	Total	% of Market Total
Middleburg	29	30	34	35	40	43	43	46	48	49	810	49%
The Great Outdoors	NM	CO	VA	NH	OR	WA	ME	VT	NY	CA	Total	
	38	40	42	64	71	91	96	111	163	173	1361	65%
Up and Coming Families	IL	NC	CO	UT	NE	GA	FL	AZ	CA	TX	Total	
	11	14	15	17	18	20	24	27	33	80	358	72%
Soccer Moms	VA	UT	FL	MD	WI	TX	GA	CA	MI	IL	Total	
	18	18	18	20	21	22	24	26	28	31	510	44%
Total	96	102	109	136	150	176	187	210	272	333	3039	58%

⁷ On average there were approximately 7756 people in each Zip code in 2017. While this number constantly changes, the quantity is still relative to all other zip code. Adjustments are made monthly to maintain an efficiently delivery system.



As the tables show, there is not a single top ten list of states that is consistent for all four family-oriented market segments. None of the four have one state that is consistent throughout them all. California shows up on three of the four, as does Texas, Utah, Florida, Georgia, and Illinois. Middleburg, Up and Coming Families, and Soccer Moms seem to have the most consistency of states, however, The Great Outdoors has the largest total number of marketable zip codes. A Clackamas County marketing campaign that targets this audience will have to incorporate these variables along with the county's other marketing efforts, resources, and knowledge of these areas.



Middleburg Families	Soccer Mom Families	Up and Coming Families	Great Outdoors Families
Family Size: 2.73 Median Age: 35 HH Income: 53k Rec Spend Index: 98 Homeownership 74% Value: \$158k	Family Size: 2.9 Median Age: 36.3 HH Income: 84k Rec Spend Index: 145 Homeownership 86% Value: \$226k	Family Size: 3.1 Median Age: 30.7 HH Income: 64k Rec Spend Index: 111 Homeownership 75% Value: \$174k	Family Size: 2.4 Median Age: 46.3 HH Income: 53k Rec Spend Index: 104 Homeownership 78% Value: \$189k



The second general target market includes empty nesters travelling without children. They are older than 45 years, have a passion for the outdoors, and are represented by three of the market segments: Savvy Suburbanites, Green Acres, and Rural Resort Dwellers. They will come to Clackamas County for its natural beauty and expect to be active and challenged in their skills. They are fit and experienced at their sport. They are open to trying new outdoor adventures and would combine fishing tours with natural history and

Table 5-10: Empty Nester Target Markets

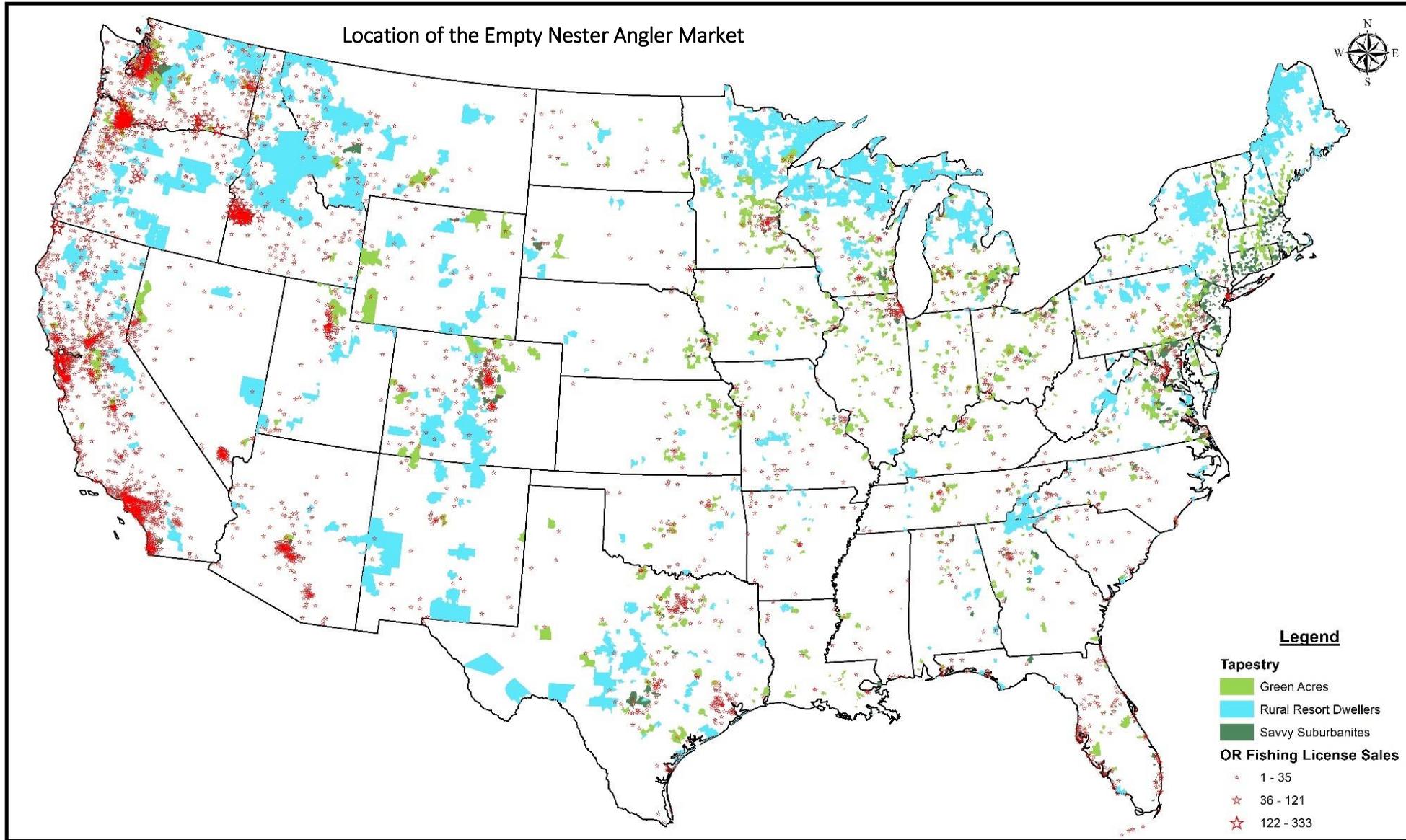
Segment	Total Zip Codes
Green Acres	1369
Rural Resort Dwellers	1484
Savvy Suburbanites	608
Total	3461

Table 5-11: Top Ten States for each of the Empty Nester Market Segments

	TX	NY	VA	IO	WI	MI	MN	IL	OH	PA	Total	% of Market Total
Green Acres	54	58	58	61	65	69	69	82	82	101	1369	51%
Rural Resort Dwellers	OR	WA	CA	PA	ME	TX	MN	WI	NY	MI	1484	61%
Savvy Suburbanites	OH	IL	MI	VA	PA	MA	NY	MD	NJ	CT	608	65%
Grand Total	135	150	151	159	182	204	213	238	259	309	3461	58%

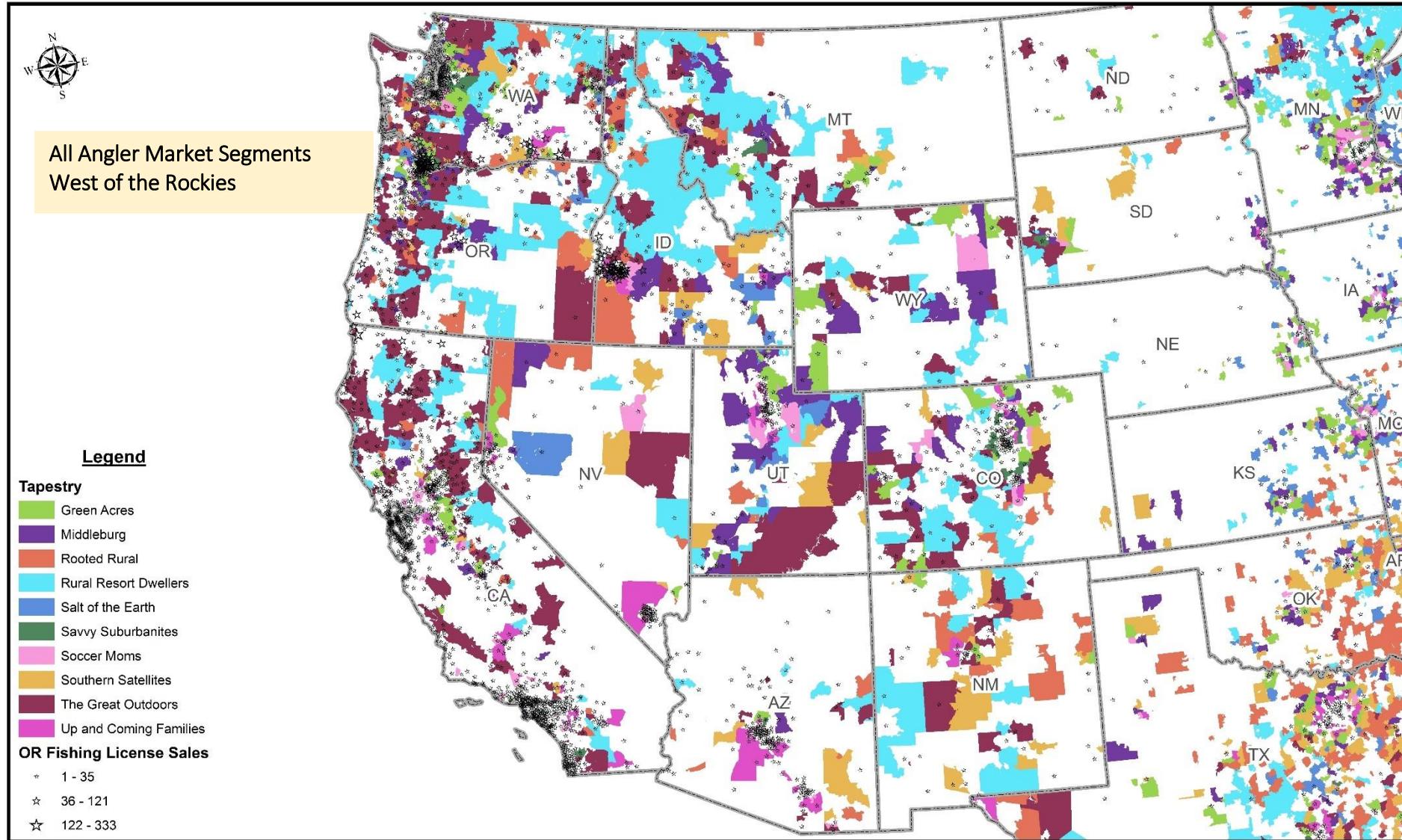
cultural history. Other than this, they don't have much in common with each other. Savvy Suburbanites would appreciate tours and some pampering while Green Acres like to do things on their own and prefer camping. They both spend well above average on leisure pursuits but are probably on opposite ends of the political spectrum and live in different urban densities with the former being closer to the urban core and Green Acres on ½ to 3-acre suburban lots. Rural Resort Dwellers don't have much to spend on travel and leisure and come from rural mountain towns or beach communities. On the other hand, there are over twice as many Rural Resort Dwellers than Savvy Suburbanites in the angler market and they probably participate more often in angling throughout the year. Savvy Suburbanites engage less because they have a wider diversity of interests that include more than outdoor activities and they have the money to pursue them.

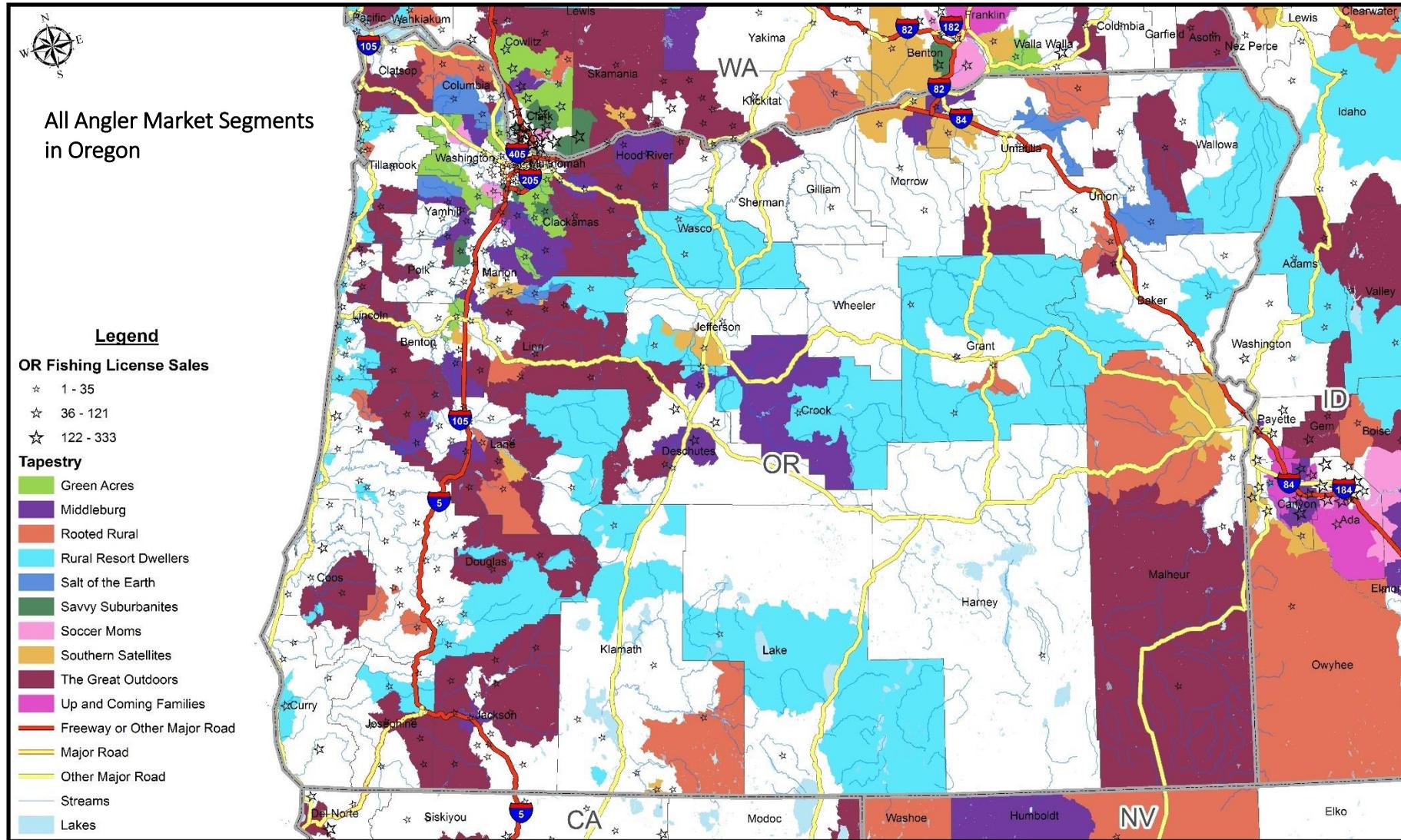
The results are shown in tables 4-10 and 4-11. The top ten most populous zip codes are extracted from the totals and show here. Each of these top ten represent between 51% and 65% of the total market. The biggest spenders in the angler market are from the northeastern US (with CT, NJ, MD, NY and MA as the top five). The second wealthiest market with an attraction to angling is in the Great Lake states, New York, and the west coast states. Rural Resort Dwellers are the largest market but spend less; they mostly come from the Great Lake States, New York, New Mexico and Texas. These three segments have more consistency than the family oriented markets with most of the market residing in the eastern and northern central US. The entire list of zip codes for these three market segments are provided to the client in excel format. This information should be used to develop a marketing campaign, package tours, and improved activities to attract these three segments.



Green Acres	Rural Resort Dwellers	Savvy Suburbanites
Family Size: 2.6 Median Age: 43 HH Income: 72k Rec Spend Index: 128 Homeownership 87% Value: 197k	Family Size: 2.2 Median Age: 52.4 HH Income: 46k Rec Spend Index: 93 Homeownership 82% Value: \$163k	Family Size: 2.8 Median Age: 44 HH Income: 104k Rec Spend Index: 184 Homeownership 91% Value: 311k







Paddlers and Motor Boaters

The market for paddlers and motor boaters are treated much differently than the anglers, mainly because of their smaller market size. The market area for paddlers is 90% within Oregon and southern half of Washington. Approximately half will stay overnight primarily preferring camping. The market area for motor boaters is primarily within northwestern Oregon and very few will stay overnight. One of the main objectives of this study is to generate more overnight stays for Clackamas County, however, these two groups are still highly important for creating an attractive destination for water-based recreation. Creating fun, convenient, relaxing and exciting water-based recreation for the local market is used in several ways to generate overnight stays for the non-residential market. First, they are a type of litmus test to measure the magnetism of recreational activities. Second, they are the workhorses behind events, celebration, festivals and competitions. They are the foundation and the implementers of any event, while the non-residents are only spectators. Non-residents have greater economic impacts at events, however, residents, while spending less, make them possible. Finally, residents serve as a base market providing a steady, albeit low, stream of economic contributions to the local recreation industry. Attracting local motorized and non-motorized boaters to Clackamas County is important to generate a buzz around the water, which in-turn, attracts non-locals who want in on the fun. Therefore, the market analysis of these groups, and the resulting marketing recommendations, are done with objective of maximizing each groups' contributions to the whole tourism market.

Paddlers and motor boaters are not getting on planes and flying to Oregon to boat. Avid boaters will own boats and travel with them to their preferred water. Motor boaters will trail their boats less distance than those carrying car top boats. Non-resident paddlers may travel such a distance that staying overnight is preferable, or because camping is part of the planned activities. Motor boaters travel less distance and therefore have less demand for paid accommodations. These are the reasons that the user survey shows anglers having the highest overnight stays, followed by paddlers, and then motor boaters.

Paddlers

Paddlers are also referred to as non-motorized boaters. They generally paddle kayaks, canoes, and SUPs (Stand-Up Paddleboards) or they use oars to propel row boats, drift boats/dories, skulls, and whitewater rafts. For the purposes of this study, paddlers are all non-motorized boaters and everyone else who recreates in the water without a motor or fishing gear. Therefore, this group also includes surfers, swimmers, free divers, snorkelers, tubers, windsurfers, and the like. Paddlers make up 38% of the U.S. outdoor consumer population. This amounts to 54.7 million paddlers nationwide, based on 144.4 million Americans who recreated outdoors last year^{xxiv}. In Oregon, the percentage is between 12% for non-motorized boaters and 53% for beach goers (see Table 4-12). For Oregon, the best available data is broken down by activity. Therefore, the total paddler participation, equivalent to the national figure, is not known since the data does not aggregate activities and averaging the averages would result in inaccuracies.

“Creating fun, convenient, relaxing and exciting water-based recreation for the local market is used in several ways to generate overnight stays for the non-residential market.... Attracting local boaters to Clackamas County is important to generate a buzz around the water, which in-turn, attracts non-locals who want in on the fun.”

Table 5-12: Non-motorized Water-based and Beach Activities

Activity	User Occasions	% Population Participating	Average # of Time for Participant	Average # Household Members Participating
White-water canoeing, kayaking, rafting	2,911,759	12.5	5.8	2.2
Flat-water canoeing, sea kayaking, rowing, Stand Up Paddle boarding, tubing, /floating	3,982,657	11.7	10	2.2
Surfing / ocean stand-up paddling	906,839	1.6	13.6	1.9
Windsurfing / kiteboarding	696,961	<1.0	32.7	1.4
Sailing	1,235,451	1.8	16.3	2.2
Beach activities – ocean	17,274,553	53.2	8.3	2.8
Beach activities – lakes, reservoirs, rivers	15,415,008	32.5	11.8	2.8
Swimming / playing in outdoor pools / spray parks	14,776,997	20.7	15.2	2.7
Snorkeling / SCUBA diving	1,013,127	1.3	15	1.7
source: SCORP 2011				

information for Clackamas County in Table 4-12 is the user occasions and the frequency of participation for whitewater, flatwater boating/floating, and for freshwater beach activities.

There are approximately 2.9 million visitations to whitewater recreational areas in the state on an annual basis. Households with whitewater boaters go approximately 6 times per year and have about 2 people on each trip. Flatwater boaters go more often. There are approximately 3.9 million visitations to flatwater areas and these households go about 10 times per year with about 2 people per trip^{xxvii}. Data from this study’s statewide survey shows that the average party size for non-motorized boaters is about 3 people.

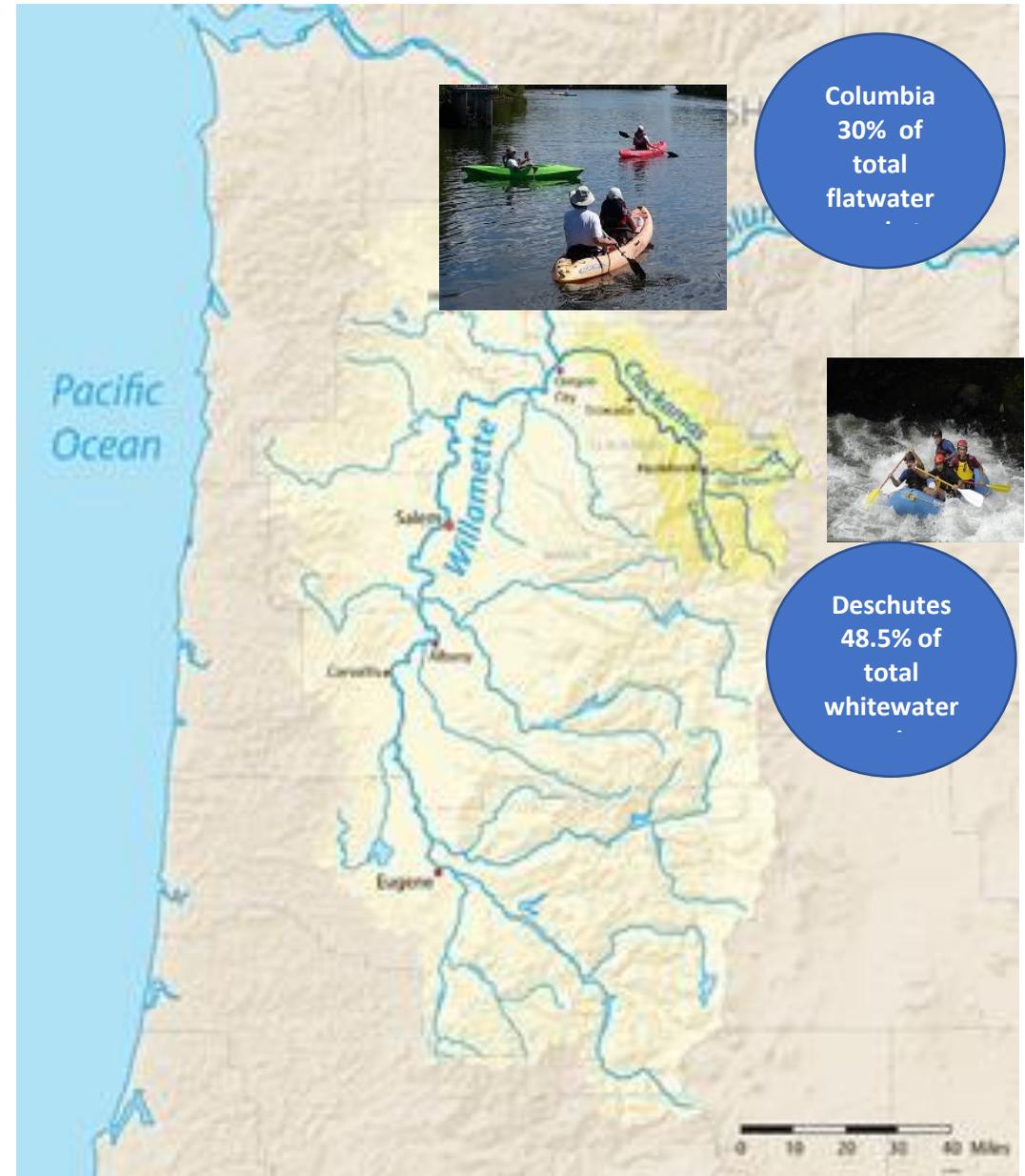
The national and Oregon market tend to be 60-65% male, and younger than the national average (except canoeists who are about even with the national average). Most (60-70%) are married with kids and are more likely to live in urban areas compared to the average U.S. outdoor consumer. Windsurfers and Stand Up paddlers are the most ethnically diverse group of paddlers with 25% of the participants being Hispanic^{xxv}. Non-motorized boaters in Oregon are generally well educated, with over half in a state-level survey reporting a bachelor’s degree or higher, and 75% reporting incomes greater than the Oregon median income, after adjusting for inflation. Households with whitewater only boaters are more likely to have above average household incomes while flatwater only paddlers are more likely to have below average household incomes. Residents who engage in both activities are also more likely to be in the below average income category. This may be due in part to the high proportion of young people who engage in both activities^{xxvi}. Non-motorized boating occurs at all ages, though it is particularly high amongst people in the 18 to 34 age range and declines with age. Whitewater participation declines quicker than flatwater.

Table 4-12 shows the participation rates of the most popular water-based activities. The data were collected through household surveys in which the respondent could list all activities in which they participate. Therefore, these data are not mutually exclusive. For example, respondents who would check “surfing” on the survey form were also allowed to list “beach activities- ocean,” and considering how people surf, they most likely would. Therefore, the percent of population participating includes double counting, however the user occasion data does not since one cannot perform two activities at the same time. The most important

“Deschutes River attracts 48.5% of all whitewater visitation in the state. Clackamas County and the Clackamas River are only 84 miles away and attracts only 9% For flatwater, the largest draw is Multnomah County attracting about 30% of the state’s total, while Clackamas County attracts 8.7%.... There are 2.4 million paddlers in Multnomah County alone and they are physically connected to Clackamas County by water”

Clackamas County attracts 9% of the total whitewater visitation in the state. This amounts to approximately 261,000 user occasions and about 574,000 people. By comparison, Deschutes County, and its namesake river, attracts 41% of the total state whitewater visitations or approximately 1.18 million visitations and 2.6 million people (Table 4-13). Clackamas County ranks third in the State, behind Linn County (Santiam River) by only .5%^{xxviii}. Other popular locations include Josephine and Jackson Counties (Rouge River) and Wasco County (Deschutes River). Wasco and Deschutes Counties benefit from the Deschutes River. If we combine visitations in these two counties, we see that the Deschutes River attracts 48.5% of all whitewater visitations in the State. Clackamas County and the Clackamas River are only 84 miles away from this huge market and a majority of boaters believe that the quality of the whitewater in Clackamas County is equal or better than the Deschutes. The reason many of these boaters don’t travel over the Mt Hood Pass to the Clackamas is not well understood. The primary survey didn’t reveal the reason. Interviews with guide and outfitters didn’t provide a clear answer. Strategies to attract this market should be developed after a thorough understanding of why the Deschutes has such a strong attraction to boaters.

For flatwater paddlers, the Deschutes River is not nearly as attractive. Only 12.8% of the state’s flatwater visitations occur in Deschutes County, and almost none in neighboring Wasco County. For flatwater, the largest draw is Multnomah County attracting about 30% of the



state’s total (table 4-13). The major attractions here are the Willamette and Columbia Rivers. Clackamas County ranks 5th behind Multnomah, Deschutes, Clatsop, and Lane Counties. Clackamas County attracts 8.7% of the state’s flatwater paddlers or 345,000 visitations involving 759,000 people. There are 2.4 million paddlers in Multnomah County alone. The large flatwater market in Multnomah County is physically connected to Clackamas County by water. Boaters visiting from the Portland area wouldn’t even need to leave their boat to access the benefits and beauty of Clackamas County.

Table 5-13: SCORP estimates of 2011 user occasions and participation

Location and user occasions by type					Percent participating	
County	Whitewater	% of OR	Flat water	% of OR	Whitewater	Flat water
Clatsop	12,000	0.42%	432,500	11.0%	6	11
Lincoln	33,800	1.17%	71,400	1.8%	10	12
Tillamook	10,500	0.36%	63,800	1.6%	5	10
Region 1	56,300	1.95%	567,600	14.4%	21	33
Clackamas	260,800	9.06%	345,000	8.7%	11	11
Columbia	8,200	0.28%	29,800	0.8%	7	10
Hood River	27,900	0.97%	59,000	1.5%	14	20
Multnomah	155,800	5.41%	1,173,100	29.7%	9	12
Washington	3,700	0.13%	23,000	0.6%	14	8
Region 2	456,400	15.85%	1,629,900	41.3%	55	61
Benton	18,400	0.64%	48,100	1.2%	11	14
Linn	274,000	9.51%	48,200	1.2%	9	11
Marion	30,900	1.07%	67,900	1.7%	11	7
Polk	-		3,400	0.1%	13	8
Yamhill	-		16,000	0.4%	8	11
Region 3	325,300	11.29%	183,600	4.7%	52	51
Lane	130,100	4.52%	359,900	9.1%	13	13
Region 4	130,100	4.52%	359,900	9.1%	13	13
Coos	30,400	1.06%	174,500	4.4%	22	25
Curry	18,100	0.63%	29,500	0.7%	16	16
Region 5	48,500	1.68%	204,000	5.2%	38	41

Table 4-13 con’t: SCORP estimates of 2011 user occasions and participation

Location and user occasions by type					Percent participating	
County	Whitewater	% of OR	Flat water	% of OR	Whitewater	Flat water
Douglas	48,500	1.68%	80,100	2.0%	11	16
Jackson	183,100	6.36%	160,400	4.1%	29	11
Josephine	152,500	5.29%	14,200	0.4%	29	11
Region 6	384,100	13.34%	254,700	6.5%	69	38
Gilliam*	-		-		9	10
Morrow*	-		21,500	0.5%	9	10
Sherman*	-		-		9	10
Umatilla	4,900	0.17%	32,000	0.8%	8	12
Wasco	215,600	7.49%	9,100	0.2%	15	7
Region 7	223,400	7.76%	64,500	1.6%	50	49
Crook	9,600	0.33%	21,600	0.5%	10	11
Deschutes	1,196,800	41.55%	503,800	12.8%	14	32
Jefferson	18,100	0.63%	26,100	0.7%	10	10
Wheeler*	2,100	0.07%	-		12	7
Region 8	1,226,600	42.59%	552,600	14.0%	46	60
Klamath	25,600	0.89%	106,000	2.7%	16	11
Lake*	-		13,800	0.3%	15	12
Region 9	26,600	0.92%	119,800	3.0%	31	23
Baker	2,800	0.10%	11,300	0.3%	10	9
Oregon Total	2,880,100	100.00%	3,947,900	100.0%		



Only about 7% of non-motorized boaters belong to a non-motorized boating organization or club, 92% do not. Any marketing campaign must keep in mind that communicating via clubs and boating organizations will only reach a highly targeted audience. Nonetheless, this audience tends to be the influencers and leaders of the general market.

Table 5-14 Other Activities Commonly Enjoyed by Paddlers

Rafters		Kayakers	
Canoeing	61%	Camping	63%
Fly Fishing	58%	Bicycling	62%
Backpacking	46%	Rafting	50%
Canoers		Windsurfers/SUP	
Day Hiking	66%	Canoeing	55%
Kayaking	60%	Trail Running	52%
Fly Fishing	57%	Mountain Biking	46%

Source: ConsumerVue 2014: Outdoor Segmentation Study.

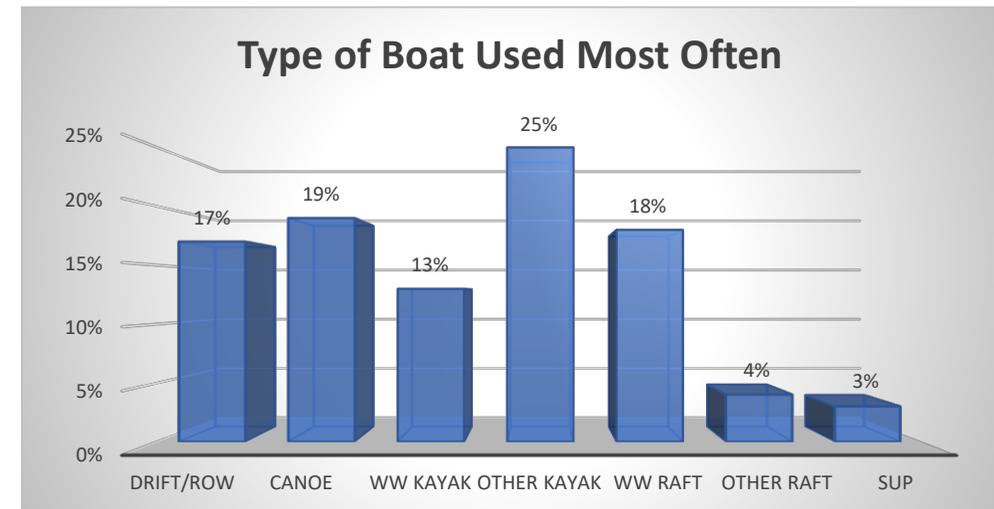
Non-motorized boaters are unique in that they are the most likely among all three groups to participate in a variety of activities. This study’s statewide survey shows that over 42% of non-motorized boaters perform other activities when they recreate on the water. A nationwide survey supports these findings with more details on the types of activities that paddlers enjoy. Table 4-14 shows the range of activities preferred by different paddlers.

The most commonly owned non-motorized craft is a type of flatwater boat; 35% of paddlers own a canoe and 34% own a flatwater kayak.⁸ The third most popular boat is a whitewater raft with 30% of paddlers owning at least one, followed by whitewater kayakers at 28%. Stand up paddleboards are the fastest growing product for non-motorized paddlers, with over 50% of the boards being new within the last 12 months. However, only 8% of households own paddleboards (Table 4-15).

Table 5-15: Boat ownership by type

	Percent owning number of boats				% usage	New in past 12 months	New as percent of owned
	1	2	3 or more	1 or more			
Drift or row	24	2	1	27	17	0.033	11
Canoe	28	6	1	35	19	0.037	8
WW kayak	13	8	7	28	13	0.057	10
Other kayak	11	17	6	34	25	0.111	16
WW raft	22	5	3	30	18	0.027	6
Other raft	16	3	1	20	4	0.026	10
SUP	4	3	1	8	3	0.071	54

Source: Oregon Non-Motorized Boater Participation and Priorities, 2015



Although the canoe is the most commonly owned watercraft and the flatwater kayak is second most common, the flatwater kayak is used most frequently of all boats. Most households that own a canoe only own one. By comparison, households with flatwater kayakers most often own two or more. This is likely because a canoe usually has two seats

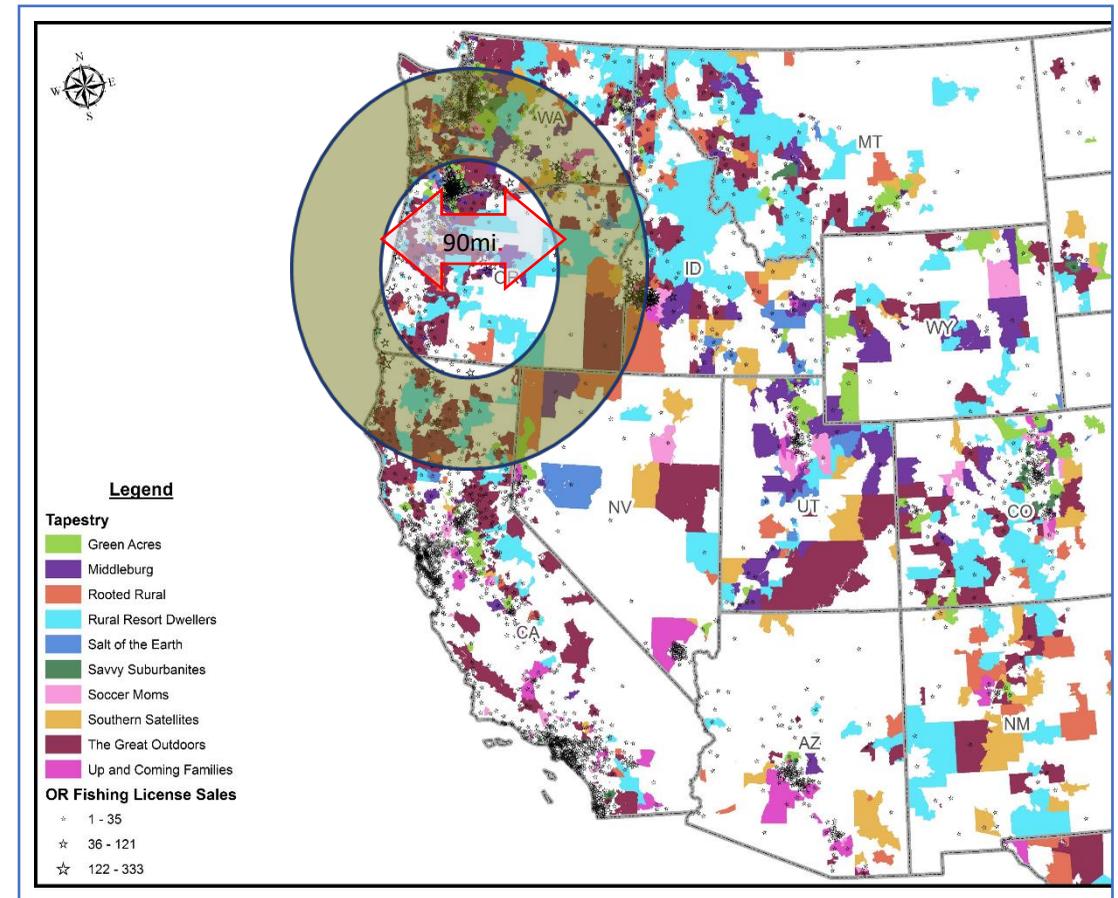
⁸ Technically, sea kayakers are included in this group of flatwater kayakers and for some adventurous boaters this doesn’t mean flatwater, however, they are the minority of paddlers.

versus a kayak with one. Nonetheless, most households will prefer to take the flatwater kayak out of storage and put it on the water over the canoe. While 30% of the households own at least one whitewater raft, it ranks 4th in frequency of use. Even though SUPs are the fastest growing watercraft being purchased today, they are still the least frequently used boat among paddlers.

Paddler Market Summary

Among non-motorized boaters, flatwater appears to be slightly preferable than whitewater, but not by much. Households own more flatwater boats than whitewater boats and they are used more often. Flatwater recreation areas are visited about 25% more frequently than whitewater, and there is a greater diversity of flatwater boats owned by Oregon residents (kayaks, drift boats, SUPs). Clackamas County has several of the most popular flatwater sites in the northwest Oregon region (region 2 according to the SCORP). The Willamette River between the Columbia and Canby is the second most popular flatwater river in the region and the third most popular in the entire state. Trillium and Timothy Lakes are also highly popular ranking third and fourth in the state, and second and third in the region.^{xxix} In addition, the Sandy, the lower Clackamas River, and the Tualatin are highly popular flatwater destinations for non-motorized boaters. Since this is a strategic plan to attract more tourism to Clackamas County waters, some may ask why is visitation rates among Oregon residents important? The reason is that Oregon residents know the best places to recreate. In Oregon, with literally hundreds of water recreation areas available, residents can vote with their feet and demonstrate without bias where the most prized water recreation areas are in the state. These visitation data provide solid evidence that Clackamas County has valuable water recreation locations to market to the nation.

“A marketing campaign that targets only paddlers for overnight stays must attempt to attract Oregon residents that are over 90 miles away, and residents of northern California, southern Washington, and western Idaho. Marketing campaigns that are trying to sell only paddling trips will not be successful for paddlers beyond these distances.”



There is little information on the preferences of non-resident paddlers, but we can piece together some key insights to help inform a potential market. First, if we assume that non-resident paddlers are willing to travel approximately the same distance as residents then we can use the results of this study’s primary statewide survey to estimate their propensity to travel.

These data show that paddlers are willing to travel about 50 miles one way to visit their most frequently visited waterbody. This number combines both day trippers and overnights. A statewide survey of non-motorized boaters conducted in 2015 by Oregon State University states that non-motorized boaters will travel only about 30 miles for a day trip one way. For overnight trips they will travel “over 90 miles” but the study does not provide the average or maximum distances^{xxx}. We can also review other studies to help answer this question. Paddlers traveling to the Snake River in Idaho travel approximately 73 miles one way^{xxxi}. If they are staying overnight they will travel 191 miles one way. On average, non-angling recreation visitors to the Snake River will travel 123 miles one way. A North Carolina study conducted by North Carolina State University shows that 41% of all paddlers travel less than 30 minutes (estimated to be 30 miles) to any river and another 20% travel less than 1 hour (estimated to be 60 miles)^{xxxii}. Presented with this combination of research, a marketing strategy that is attempting to attract non-motorized paddlers should assume that most paddlers will be travelling within a few hours’ drive of their home. This means only a small percentage will be staying overnight. This percentage can be estimated. The US Forest Service National Visitor Use Monitoring (NVUM) program estimates that non-resident paddlers visiting Forest Service lands is about 17% of all paddlers, while 83% are residents^{xxxiii}. However, a percentage of residents who travel more than about 90 miles one way will also be seeking overnight accommodations. A marketing campaign that targets only paddlers for overnight stays must attempt to attract Oregon residents that are over 90 miles away, and residents of northern California, southern Washington, and western Idaho. Marketing campaigns that are trying to sell only paddling trips will not be successful for paddlers beyond these distances. This is because there are far too many options closer to home for paddlers. Many studies documenting travel patterns of paddlers do not demonstrate a willingness to travel long distances for only one sport. Non-resident paddlers beyond these distances will still be attracted to Oregon, and they will be demanding overnight accommodations, but they will be here for multiple reasons. Most of those visitors will not be travelling to Oregon just to paddle. Existing travel and tourism marketing efforts by Clackamas County today should continue to include paddling as an option within a wide range of activities to attract visitors. The Tourism Board should review its advertising to be sure it includes a fair representation of water-based activities because, as previously stated, Clackamas County has excellent non-motorized boating opportunities for the adventure bound and solitude seekers alike.

Table 5-16: Most Visited Rivers and Lakes in Oregon’s Region 2

River	# of Visits	% of Category	% of Region
Columbia River (Saint Helens to Troutdale)	918	26	21
Willamette River (Columbia River to Canby)	858	25	20
Sandy River (Bull Run River to Columbia River)	251	7	6
Clackamas River (Source to River Mill Dam)	235	7	5
Clackamas River (River Mill Dam to Willamette River)	217	6	5
Tualatin River	213	6	5
Columbia River (Bonneville Dam to Deschutes River)	162	5	4
Columbia River (Mouth to Saint Helens)	139	4	3
Hood River (mainstem)	101	3	2
Sandy River (Source to confluence with Bull Run River)	77	2	2

Table 4-16 (con’t) Most Visited Rivers and Lakes in Oregon’s Region 2

Lakes	# of Visits	% of Category	% of Region
Henry Hagg Lake	214	25	5
Trillium Lake	210	25	5
Timothy Lake	171	20	4
Oswego Lake	71	8	2
Laurance Lake	40	5	1
Sturgeon Lake	28	3	1
Smith & Bybee Lakes	26	3	1
Frog Lake	25	3	1
Green Peter Reservoir	23	3	1
Vernonia Lake	9	1	0

Source: Oregon Non-Motorized Boater Participation and Priorities, OSU 2015



“The largest flatwater market in Oregon and the largest whitewater market in Oregon are both physically connected to Clackamas County. Both markets are between three and four times as large as the County’s current paddler market. There is untapped paddler potential within proximity to Clackamas County. With strategic planning, targeted marketing, and a concerted effort between local, county, state, federal and non-governmental stakeholders, Clackamas County can grow its paddler visitation rates.”

The largest flatwater market in Oregon and the largest whitewater market in Oregon are both physically connected to Clackamas County. Both markets are between three and four times as large as the County’s current paddler market. There is untapped paddler potential within proximity to Clackamas County. With strategic planning, targeted marketing, and a concerted effort between local, county, state, federal and non-governmental stakeholders, Clackamas County can grow its paddler visitation rates.



© Sam Drevo, eNRG Kayaking, Oregon City

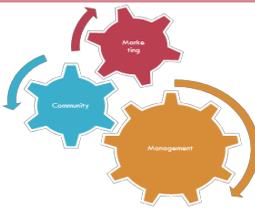
Chapter 6 THE OPPORTUNITIES

"Success is where preparation and opportunity meet." Bobby Unser

Community Involvement



Institutional & Organizational



Physical Improvements



Putting Clackamas "On the Map"



Improving the Experience



In this chapter, the information collected and analyzed in chapters two, three and four is brought to a culminating set of opportunities for Clackamas County. In Chapter 2 we studied the waterbodies of Clackamas County and learned what they have to offer visitors. In Chapter 3 we systematically analyzed the people using Oregon’s waterbodies, learned how they feel about Clackamas County’s waters, and investigated the unique experiences these waters have to offer. In Chapter 4, we studied the national and regional markets to calculate the untapped market potential for water-based tourism in Clackamas County. Here, in chapter 5 we combine this information and use it to direct us on how to seize the opportunities and achieve our unrealized potential.

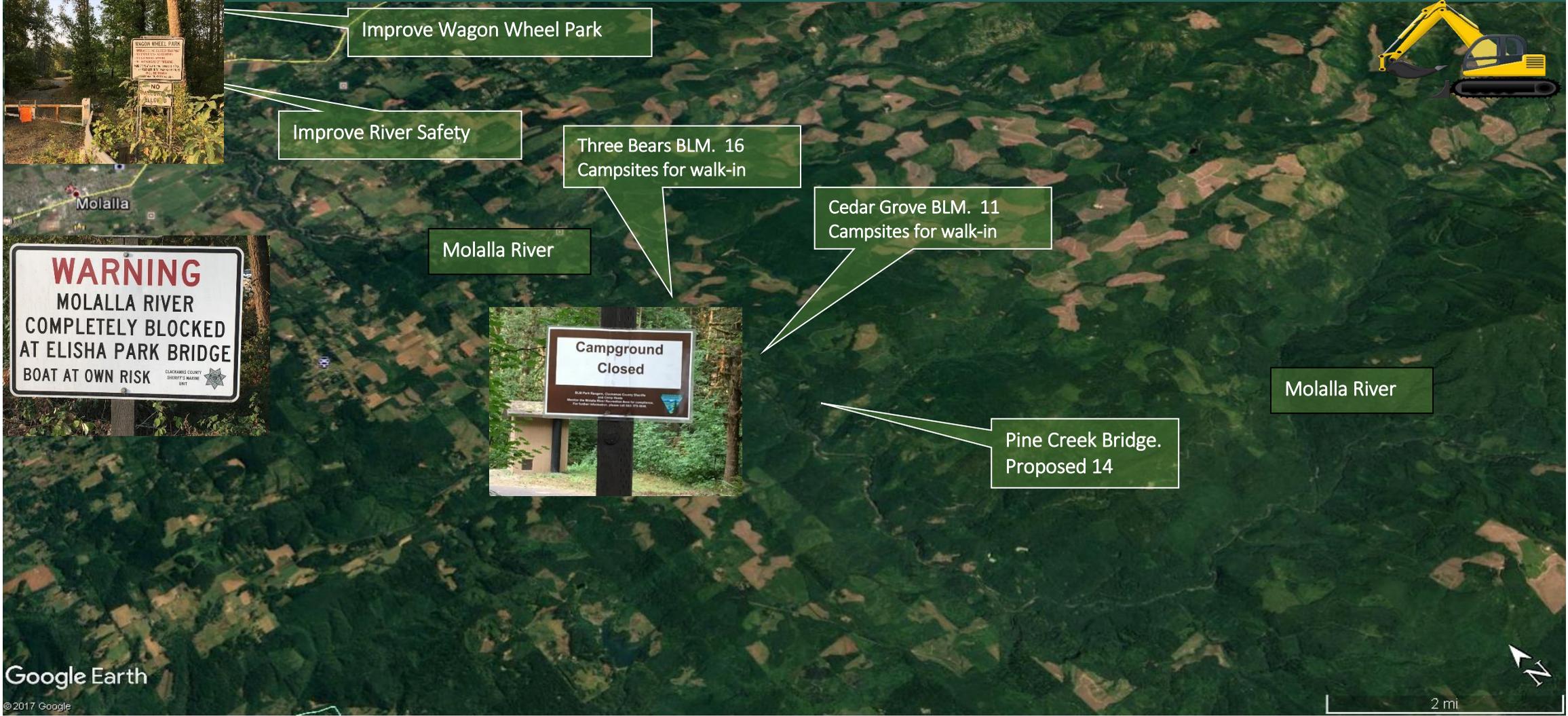
The opportunities presented in this chapter are discussed in 5 major categories:

1. Physical Improvements: a list of capital improvements that would help advance water-based tourism
2. Putting “Clackamas on the Map”: is a call for more targeted marketing
3. Improving the Experience: discusses how to open new markets in water-based tourism by expanding into new products and services
4. Community Involvement: building community support at the municipal level
5. Institutional and Organizational: the management and administrative structures necessary to support all these actions.

Each category includes many recommended actions. The entity to take the lead on each action will vary depending on the action but in all cases teamwork and collaboration among stakeholders will be required to successfully implement these recommendations.

Molalla River Corridor

Physical Improvements



Google Earth

© 2017 Google

2 mi

Recommendation 1: Upgrades at Wagon Wheel Park

Wagon Wheel Park is a riverfront park with inviting swimming holes that provide respite in a summer day. It very popular with town residents. The facilities at this park are in poor conditions. Necessary upgrades include parking lot repairs, bathrooms, and picnic tables at minimum. Additional improvements may include environmental interpretation signs, a community gathering facility and mobility impaired access.

Recommendation 2: Increase Camping in Corridor

Local non-profit river advocacy organizations, the BLM, and local authorities have combined forces to improve safety and security of the corridor and create a more inviting experience. Walk-in campsites have been created and maintained. However, more work needs to be done because the campsites are closed to the public for a majority of the week. The campsites are missing a management structure to allow them to remain open. This will be discussed in the Organizational and Institutional section. A physical improvement to assist the management of the campsites would be a camper and with hook up for a permanently stationed campground host. The BLM is also considering creating a RV park campground in the corridor. This is an excellent proposal; additional campsites are needed in the county and it would support attracting a campground host for the area.

Recommendation 3: Improve River Safety

The Molalla River is completely blocked at Elisha Park Bridge downstream of town. Any river hazard of this magnitude would decrease visitation and should be removed.

Willamette River Corridor

Physical Improvements



Remove (or improve safety at) low head dam on Tualatin R.



Improve day Use Area & Access Wilsonville Memorial Park

Improve Boat Ramp at Molalla River SP Canby



Connect West Linn Downtown with Willamette Park



Provide camping at Molalla River SP Canby

Hiking Trails connecting Canby with the River



Camping at Willamette Park

Willamette Falls RM23.5

Primitive Camping River Trail, Wilsonville to Milwaukie

Google Earth

© 2017 Google

2 mi



Willamette River Corridor

Physical Improvements



Recommendation 4: Wilsonville Memorial Park Improve Day Use Area & Access

Wilsonville Memorial Park provides an excellent opportunity for the Town to increase river-based tourism. River access, picnic areas, and a range of public facilities should be considered here. City residents should be involved in designing the new access area.

Recommendation 5: Improve Boat Ramp at Molalla River SP Canby

A broken concrete boat ramp is deteriorated, over grown, and is now being used as a fishing platform. It will likely continue to degrade until it is a safety hazard. Boats currently launch adjacent to this ramp on a dirt, single lane put-in. This entire area needs to be redesigned and reconstructed.

Recommendation 6: Provide camping at Molalla River SP Canby

Additional campsites are needed throughout the county and this state park is an ideal location for them.

Recommendation 7: Hiking Trails connecting Canby with the River

Connecting village center with the river encourages visitors to linger longer and helps local businesses to leverage the river as an attraction.

Recommendation 8: Connect West Linn Downtown with Willamette Park

Willamette Park is close walking distance to West Linn's commercial downtown. Visitors to the river should be encouraged to visit Main Street and vice versa. This is done through commercial promotions, events, camping, parades, walking tours, and signage.

Willamette River Corridor

Physical Improvements



Recommendation 9: Provide Camping at Willamette Park, West Linn

Paddlers and all boaters travelling downstream from Wilsonville area and other points south would find Willamette Park an ideal place to camp. A campground here would also provide the downtown with a new market of visitors. Camping is in high demand in this area of the county and would be profitable there.

Recommendation 10: Remove (or improve safety at) low head Dam on Tualatin

The low head dam at river mile 3.4 is extremely dangerous. It was originally built in the 1940s to serve Lake Oswego during a time when river recreation wasn't a popular sport or industry. The antiquated technology and design of this dam makes it impossible for boaters to by-pass. There is no boat portage at this dam, the banks are steep and surrounded by private property, and the nearest road crossing (take-out) is 2 miles upstream. Boaters are literally stranded at this location and gives them little choice but to attempt a downstream paddle. The hydraulics at this dam creates a recirculating wave which keeps boats and people recirculating in place from surface to bottom for an indefinite period. Drowning though exhaustion is often the result of a boater being trapped in a recirculating wave. Due to its remote and inaccessible location it would take hours for emergency personnel to be notified and then arrive at the scene. Without this dam, the river from the nearest put-in in Clackamas County (Shipleigh Bridge at Stafford Road) to Fields Bridge is beautiful, friendly, and safe. Downstream travel from here to the mouth at the Willamette River and Park is possible at different skill and water levels

Willamette River Corridor

Physical Improvements



Provide Public Viewing access for water ski club, West Linn

Car Top boat portage at West Linn Paper

Improve small boat access at Mary S. Young Park, West Linn

Gladstone Riverwalk

Primitive Camping River Trail, Wilsonville to Milwaukie

Pedestrian improvements Riverfront Park, Milwaukie

Upgrade Clackamette Park, Oregon City

Multiple Improvements at Willamette River Greenway

Map labels include: Pacific Hwy E, 99E, South End Rd, S Center St, High St, 43, Pacific Hwy, SE River Rd, SE Concord Rd, SE Courtney Rd, SE Harrison St, SE 17th Ave, SE 32nd Ave, SE 37th Ave, SE Tacoma St, SE Harney Dr, SE Kin, SE Har, SE J, SE I, SE H, SE G, SE F, SE E, SE D, SE C, SE B, SE A, SE 1st Ave, SE 2nd Ave, SE 3rd Ave, SE 4th Ave, SE 5th Ave, SE 6th Ave, SE 7th Ave, SE 8th Ave, SE 9th Ave, SE 10th Ave, SE 11th Ave, SE 12th Ave, SE 13th Ave, SE 14th Ave, SE 15th Ave, SE 16th Ave, SE 18th Ave, SE 19th Ave, SE 20th Ave, SE 21st Ave, SE 22nd Ave, SE 23rd Ave, SE 24th Ave, SE 25th Ave, SE 26th Ave, SE 27th Ave, SE 28th Ave, SE 29th Ave, SE 30th Ave, SE 31st Ave, SE 33rd Ave, SE 34th Ave, SE 35th Ave, SE 36th Ave, SE 38th Ave, SE 39th Ave, SE 40th Ave, SE 41st Ave, SE 42nd Ave, SE 43rd Ave, SE 44th Ave, SE 45th Ave, SE 46th Ave, SE 47th Ave, SE 48th Ave, SE 49th Ave, SE 50th Ave.

Physical
Improvements*Willamette River Corridor***Recommendation 11: Provide Public Viewing access for water ski club, West Linn**

This is another way to encourage the urban-river interface and to use the River to increase visitation to Main Street. Water skiing is a spectator sport and public viewing should be encouraged.

Recommendation 12: Upgrade Clackamette Park, Oregon City

Park managers are friendly, courteous and helpful. However, the physical conditions of this park are below average county standards. Landscaping to similar quality as the adjacent day-use area would be a big improvement.

Recommendation 13: Multiple Improvements at Willamette River Greenway

The Willamette River Greenway is a long term cooperative effort between state government and municipalities along the Willamette River to create and maintain recreational and historic trails and to improve natural, scenic and agricultural assets. The Greenway Program was established by the Willamette River Greenway Act in 1973. The proposed, yet uncompleted, work through Oregon City and Gladstone was studied for this report and it is recommended here that these planned improvements be implemented. The proposed trail would help create the Urban-River Interface by connecting Oregon City's downtown to the river and the River's assets to each other. It would also help connect Oregon City with Gladstone. All of these connections will improve the feasibility of promoting river-based events in Oregon City.

Recommendation 14: Gladstone Riverwalk

The City of Gladstone has riverfront on two of the County's most visited rivers, and therefore, a diamond in the ruff when it comes to riverfront opportunities. The City already has High Rocks, Cross, and Charles Ames Parks along the Clackamas River, plus Dahl and Meldrum Bar park along the Willamette. Connecting these parks with a riverfront walk would create a spectacular 4-mile multi-use and fully accessible riverfront trail. The gentle sloping beach at Dahl Park at the mouth of the Clackamas River presents an especially unique opportunity to provide fishing access for mobility impaired anglers seeking high quality fishing locations.

Recommendation 15: Improve small boat access at Mary S. Young Park, West Linn

Mark S. Young Park is a large area with a long riverfront. Current access is difficult there. Improved small boat access at Mark S. Young Park is a natural next upgrade for this location.

Willamette River Corridor

Physical Improvements



Recommendation 16: Car Top boat portage at West Linn Paper

Providing a safe boater passage at Willamette Falls has been a long-standing challenge. Industrial usage of the water falls for power and paper production created land uses incompatible for recreational boaters. The recent closure of the West Linn Paper Mill causes great concern in terms of job losses and economic impacts. While creating a small boat portage trail at the falls through the West Linn Paper plant will not remedy the loss, it can provide one positive element for the community. Recreational boaters in West Linn would now be able to paddle the entire 7-mile length of the City from Willamette Park to Cedar Oak Boat Ramp, or Mary S. Young Park. Upstream and downstream passage is equally possible. The small boat portaged at this location has always been physically possible. There would be no new capital improvements necessary. Historically, it was prevented because industrial and recreational uses were not compatible in this tight location; boaters portaging small boats through an industrial area was not safe. This safety concern is practically eliminated with the closure of the plant.

Boat portage at this site is also a win for the City in terms of attracting water-based recreationist from around the market area. Opening a passage at the Willamette Falls will be an historic event in the life of the Willamette River. It would help put Clackamas County “On the Map” and attract new visitors to West’s Linn’s downtown. Market surveys as part of this study show paddlers from throughout the market area are interested in traversing these falls. West Linn would receive a new market of visitors, making the Urban-River Interface at Willamette Park all that more important and profitable.

Recommendation 17: Pedestrian improvements Riverfront Park, Milwaukie

The City is currently planning on pedestrian improvement here. This study reviewed their plans and recommends their implementation.

Upper Clackamas River Corridor

Physical Improvements



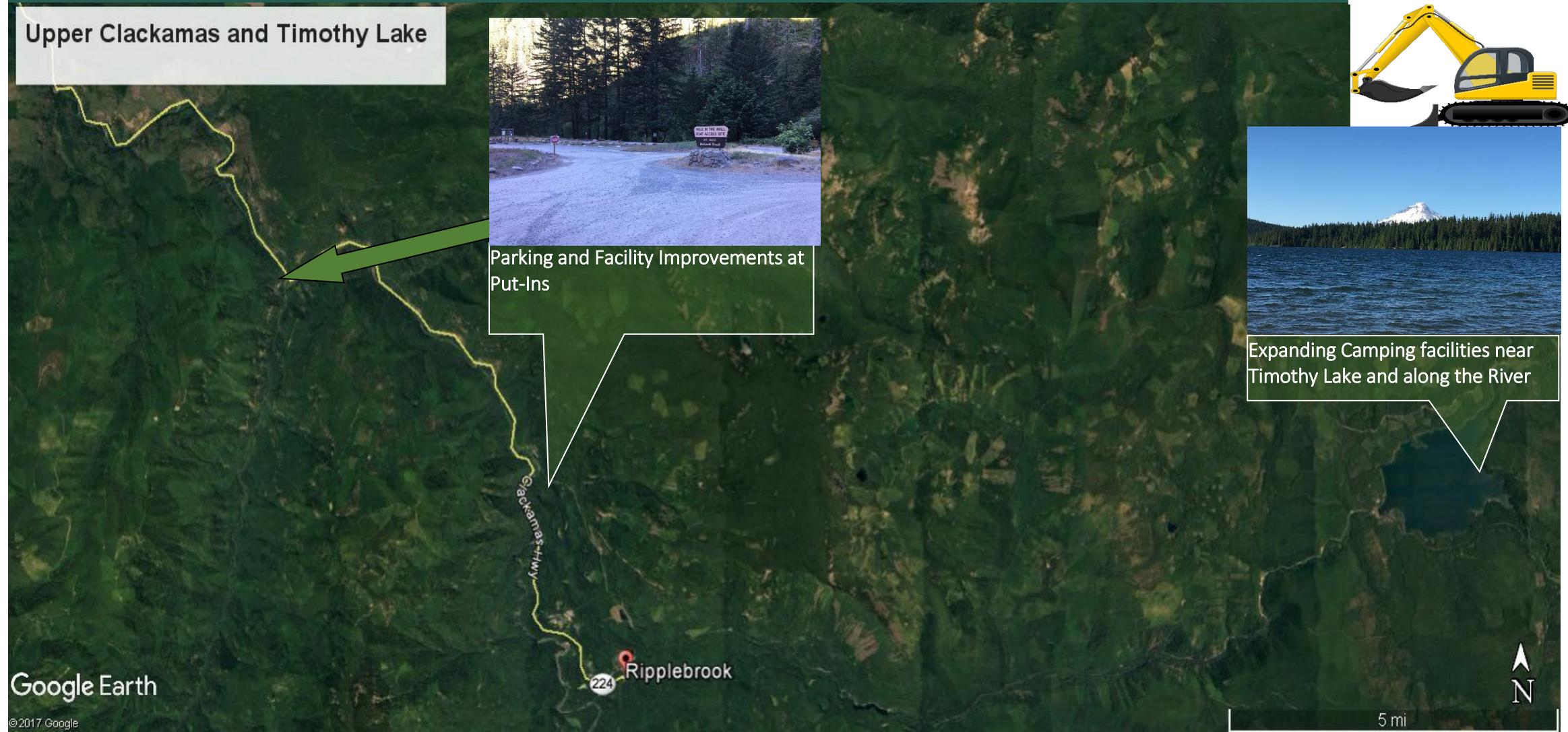
Upper Clackamas and Timothy Lake



Parking and Facility Improvements at Put-Ins



Expanding Camping facilities near Timothy Lake and along the River



Upper Clackamas River Corridor

Physical Improvements



The Upper Section the Clackamas River is the most remote section of the river and provides highly technical whitewater and excellent fishing opportunities. This section of river gives visitors a wilderness experience. River tourists visiting this section expect to get away from development, experience wildlife in their natural environment, and find solitude. The Upper Clackamas has excellent trout fishing, riverside trails, and camping. It also has some of the best whitewater in all of Oregon. The small private whitewater boating community already knows this to be true as evidenced by their mass migration to the Upper Clackamas Whitewater Festival every May. Commercial whitewater on the other hand is seeing much less visitation than comparable rivers. The Corridor is managed primarily by PGE and the US National Forest Service. Physical improvements for this section of river are intended to continue offering a wilderness experience and solitude while making it available to more visitors.

Recommendation 18: Expand Camping Opportunities

The existing two campground providers offer excellent camping experiences that meet visitor expectations, however, the demand far outweighs the supply. Additional campsites at existing campgrounds and additional campgrounds are needed in the corridor. Potential new locations for additional sites between Timothy Lake and Memaloose at RM 33 should be studied and built. A new reservation system may also help open sites. Observations and interviews with campground hosts revealed that many sites are reserved but not used. There is little financial loss from reserving and not showing up. A new reservation policy can eliminate this financial incentive for wasting campsites.

Recommendation 19: Parking and Facility Improvements at Put-Ins

PGE and the Forest Service have made substantial progress over the last few years toward improving the physical access to the river. Additional improvements with parking, pedestrian and boat access, bathrooms, trash removal, signage and interpretation are needed throughout various locations in the corridor.

Middle Clackamas River Corridor

Physical Improvements



Lower Clackamas River Corridor

Physical Improvements



Lower Clackamas



Carver Park Bus Stop



Barton Park Bus Stop

Google Earth
© 2017 Google

Middle and Lower Clackamas River Corridor

Physical Improvements



The Middle Section of the Clackamas River is anchored by the City of Estacada on the north side of the river and Milo McIver State Park to the south with a series of three hydroelectric impoundments providing flatwater paddling, swimming, and warm water fishing opportunities. The City has been unable to capitalize on river tourism to the extent possible due to its location and physical infrastructure. The recommendations for the Middle Clackamas River are intended to increase tourism opportunities for Estacada City.

Recommendation 20: Pedestrian Bridge Connecting Milo McIver State Park to Estacada

Approximately 400,000 people visit Milo McIver State Park annually. While no data exist to show how many of them visit Estacada City, anecdotally it is known to be very few. A pedestrian bridge would allow easy access from the campground to downtown and increase foot traffic to local merchants and restaurants.

The Lower Clackamas River is the most used river section the county. On warm summer days the river can appear as if there is a well-known river festival occurring. The river in this section is fun and friendly. Certain sections can be remote, the fishing is excellent, the swimming holes and beaches are plentiful, and the scenery is beautiful. However, this is also the section where most of the user conflicts occur. The river needs a river management scheme that can accommodate its level of visitation. Two physical improvements are recommended to help ease the pressures that the river is experiencing:

Recommendation 21: Improve Feldhiemer Boat Launch

The Feldhiemer boat launch is in rough condition. The ramp is not conducive for small vehicles and has little official parking. Improvements on these facilities would increase the usage here and help relieve the traffic congestion at Milo McIver State Park (the next launch upstream).

Recommendation 22: Promote Mass Transit Use with Bus Stops at Barton and Carver Parks

The Barton to Carver float can be done today on mass transit. Trimet's #30-line to Estacada will pick up passengers in Carver and take them to Barton in 17 minutes. However, both stops are a considerable distance to the river if you are walking with packs, and river equipment. The county should provide stops in the parking lots of these Parks to encourage mass transit use and ease the pressure on the traffic and parking in these Parks.

Sandy River Corridor

Physical Improvements



Upgrades to Camping at Dodge Park

Improve Ed Latourette Park. RM 19.5



Provide Camping Ed Latourette Park. RM 19.5

Sandy River Park. Sandy City RM22. Create parking, access and day use areas

Google Earth

© 2017 Google



Sandy River Gorge
6 miles of Class IV and V rapids. No Access

Bull Run R.

Marmot. BLM. RM30.5
Improve Day Use area

Clackamas County Line

Barlow Trail Park.
No direct access

Upper Sandy R.

Provide Public Access at Confluence of the Sandy and Salmon RM

Salmon

Mt Hood Village

3 mi



Sandy River Corridor

Physical Improvements



Previous chapters in this report describe the excellent recreational and tourism opportunities and values that the Sandy River has to offer. The Sandy is poised to be a world class fishing destination. A recent and detailed study on the recreational capacity of the river concluded that visitation varies by season and that “Social capacity issues, therefore, do not seem to be problematic in most cases on this river.” Since the river receives visitation in all four seasons for a range of purposes, it presents great opportunities for year-round tourism. The major impediment to elevating this river to renowned status is access. Significant physical barriers prevent this river from being enjoyed by the public. The following recommendations address this issue:

Recommendation 23: Provide Access at RM38 (Salmon River)

The Sandy River Trail recommends that visitors park at the Sandy Ridge Trailhead and walk about ½ mile through a wooded trail to access the river. This is a formidable task for any boaters seeking to float the 8 miles of fun intermediate level rapids to Marmot. It also prevents any mobility challenged visitor to enjoy this section river. Since private property prevents access from here to the Marmot Day Use area, public access at this location is critical in expanding water-based tourism opportunities on the Sandy.

Recommendation 24: Improve day Use Area & Access at Marmot

The BLM does an excellent job at maintaining a day use park at this location with the limited resources at their disposal. This report encourages the BLM to continue to make modest annual improvements at this site as currently proposed including road maintenance, trail maintenance, picnic areas, parking, and the like. Over the longer term, leave-no-trace tent camping should be considered.

Recommendation 25: Access Upgrades and Camping Ed LaTourette Park

Clackamas County owns approximately 30 acres of flat land with gentle sloping access to the Sandy River. Considering that most of the corridor is bounded by steep cliffs or private property, this parcel presents a rare and valuable opportunity on which a private sector entrepreneur would capitalize. The County should do the same. Camping is in high demand from water-based tourists and so is access to this river. A campground here would likely generate net positive revenue.

Recommendation 26: Improvements, Parking and Access at Sandy River Park

Like the County, the City of Sandy also has a rare opportunity that it is not capitalizing on. The city’s only access to their namesake river involves parking on residential streets and walking one mile down steep terrain. Providing access to the river’s edge would most likely increase tourism visitation.

Recommendation 27: Upgrade Camping Facilities at Dodge Park

Dodge Park is an excellent location within amazing natural beauty. However, there are only 5 RV sites and no site includes water or electricity. Camping services and facilities at Dodge Park need upgrades to meet current demand.

Improving the Experience

"If opportunity doesn't knock, build a door." Milton Berle

"Improving the Experience" is an umbrella term for a group of recommendations aimed at expanding the market size for water-based recreation in Clackamas County. Expanding the market base is necessary for Clackamas County to compete against famous water destinations like the Columbia, Deschutes, and Rogue. It involves creating new types of water-based recreation products and services, increasing the quality of the experience, and rebranding existing activities. Expanding the market size for Clackamas County also requires capturing a percentage of recreationist who are visiting other destinations by attracting them here through targeted marketing campaigns. These types of actions are described in the proceeding section "Putting Clackamas County on the Map." This section is all about improving the experience for anglers and paddlers.

Recommendation 28: Improve the Fishing Experience

The future of fishing is evolving, and Oregon needs to recognize and attract new markets of anglers. Clackamas County is well positioned to take the lead by creating new tourism products to appeal to these new markets. Market data in chapters 3 and 4 show that angling is not a dying sport. Instead there is a large untapped angler market that Oregon is missing but has amazing potential to capture it. There is a future in fishing. Fishing is an old tradition that is rooted deep into American culture and these roots are not going anywhere. The reason fishing appears to be dying is because fishing has a steady and stable market with a rapidly changing world around it. America's traditional family structure is evolving; America's attitude toward the environment is changing; America's preferences for leisure travel is changing. What has not changed is our passion for the great outdoors and our desire to spend time with our families. These are the core motivations that get people on the water's edge with a fishing rod in hand. It is not to catch a fish. The marketing of fishing tourism has mostly ignored these core motivations and instead focused on skill and the kill. Enticing would-be fishing customers with words like "the big boys" or "monsters"; highlighting the "fight" and using highly technical terms like "4.3-inch Keitech swimbait on a ½-ounce jig", or a "green pumpkin tube on a ¼-ounce jig" may attract the existing market who already plans on going fishing somewhere, but it does nothing to attract a wider audience. The existing marketing efforts to attract angler tourism today is only rearranging the deck chairs on the Titanic. As the marketing of fishing becomes more focused on technique it becomes more intimidating and less inviting to newcomers. As the marketing of fishing makes "the kill" a central goal it forgets the core motivations of why families go camping and fishing in the first place.

The second most common reason people stop fishing, or have lowered their preference for fishing, is that it takes time away from families. The most common reason is lack of time. Eight out of ten former anglers said they would go again if they were invited by a friend or family member^{xxxiv}. The future of fishing lies in those households who rarely go, stopped going, or have never gone fishing. It lies in families who like spending time together outdoors, who have children, and who care about the environment and are curious about nature. These market segments were highlighted in the previous chapter. The recommendations presented here are intended to expand the existing angler market while also retaining the existing market. The recommendations are not mutually exclusive; in other words, implementation of some recommendations to increase a new market does not result in decreasing the base. The existing angler base market will remain and some of the following recommendations are intended to strengthen and grow the traditional angler market. Clackamas County has an uphill battle to compete for the traditional angler market. The Clackamas, Willamette and Sandy rivers are excellent fisheries in their own

Improving the Experience



right, but when a high-tech, high-end experienced angler has the opportunity to choose between these rivers and the Deschutes only 84 miles away, they most often go east. Nonetheless, Clackamas County has a competitive advantage on the *future* of fishing. They have more opportunities to offer fishing to new markets, it is geographically better positioned, and it is a level playing field. The following recommendations are intended for Clackamas County to take the lead on the future of fishing.

Improving the Experience



Recommendation 29: Develop Fishing Packages with Lodging Business

Anglers spend the most overnights of all water-based tourists. The highest spending anglers and the largest untapped angler markets are in locations beyond 100 miles. Providing a package of fishing guide services and lodging makes sense. During this research, it was found that some fishing guides are interested in working with lodging establishments but don't know how and some lodging establishments are wondering how to expand their customer base. The research from this report shows that the strongest relationships between guides and lodging amounted to a conversation, a handshake, and an exchange of business cards. A more formal and stronger connect should be built. The Mt. Hood DMO should facilitate a series of workshops to coordinate the two groups. The results of the workshops should be working agreements between lodging business and angler guides. One approach might be a central coordinator, like the DMO, to merge the two bookings. As it stands now, visitors seeking to fish are on their own to contact a guide. The lodging business might have a few names and numbers but that is all the help they get. Likewise, a prospective visitor booking a guided trip might get some names of lodging businesses and instruct the caller to find the hotel's web site. The objective here is to make it easy for visitors to pick lodging and have a guided trip available. They might also seek a guide first and have the lodging available through them because they have an agreed working relationship, or vice-versa. The DMO web site can provide this coordination, "Book a guided trip with one of the following fishing guides and receive 10% off lodging at your choice of the following accommodations..." The workshops should result in a final agreement between the businesses on how this relationship is mutually beneficial.

This arrangement should be structured to serve all market segments, from the high-end, east-coast angler seeking a pampered trip to a family of 4 arriving by mini-van from southern California looking for a weekend of water fun by day and s'mores around the campfire at night.

Recommendation 30: Create more Family Friendly Fishing Experiences



Market data shows a large untapped market for fishing experiences that are more family friendly and user friendly. Using Oregon's famous rivers to lure^{xxxv9} prospective family travelers is a new approach. The "family fishing trip" is not currently a product that is packaged. A guided fishing trip to catch charismatic steelhead or salmon is certainly a popular tourism product being packaged and sold today. High-end experienced anglers will fly to Oregon solely for fishing.

Likewise, skiers and bikers may come to Oregon specifically for these activities, but a family-friendly fishing package is not something that is sold today. Today, family fishing is merely an afternoon activity within a week or weekend of travel and structured by the traveler. A family-friendly fishing package is different. Families who enjoy fishing also enjoy learning about nature, viewing nature, and camping in nature. A family-friendly fishing package would be based at a campground and include fishing lessons, natural interpretation on the ecology of aquatic animals, natural history tours, boat trips, how to clean and cook fish, wildlife photography lessons, snorkeling for fish, and discounts on gear, permits or licenses. These activities would be packaged as a single product to attract visitors but would also be optional and informal. Guided tours can be a la carte and available through the campground. The entity providing these activities can be the campground owners or through a partnership with a private entity. This first prototype of this idea should be implemented at Milo McIver State Park. They currently have rangers giving natural history tours, they have the facilities, and a fish hatchery. This park would serve as an excellent location to

experiment with this concept and the Mt. Hood Territory DMO should lead the formulation and coordination of this product.

Recommendation 31: Expand Fishing Tour Products

Fishing shouldn't be just about casting a line with a hook at the end. A lot of people are discouraged from fishing because of what's involved with baiting hooks, removing hooks from struggling fish, and with waiting for a fish to bite. New fishing activities and tourism products can be created to make fishing fun and exciting and fresh. Some ideas include:

River SCUBA or snorkeling. While most people have seen a fish fighting to get off the end of a line, most people rarely see their natural habitat. Fish have predictable habits and habitats. While they are illusive to the angler with a hook, they are easily located by people in SCUBA or snorkeling gear. If you have never seen a 24-inch trout dominating its territory at the bottom of 6-foot deep pool, the author encourages you to try it once. Hunting for fish in their natural habitat, observing them interact with other fish, search for food, and master the river currents is as thrilling as reeling one in. Very few companies offer river snorkeling in the United States. The Crystal River in Florida is a popular destination and a company on the French Broad River in North Carolina offers tours with river biologists. A company in Oregon offering similar tours may be the first in the Western United States.

Improving the Experience



⁹ Pun intended

Nature Photography: There is only one person that oozes gear more than a fly fisherman and that is a nature photographer. The typical image of a nature photographer is one of a lone snipper braving the elements with 1000's of dollars of equipment waiting for the perfect shot. This is the image I want Clackamas County nature guides to destroy. Nature photography can be a family activity with kids making as much noise as they want. These tours give the family a fun learning experience on the basic techniques of nature photography such as framing, exposure, light, and composition all while using their cell phones or point and click cameras. Like with family-friendly fishing trips, the ultimate motivation for groups to do this will be to spend time together. During the tour, guides are not only teaching photography techniques but also about the nature that surrounds them. Families return home with a new sense of accomplishment and some memorable pictures to boot.

Improving the Experience



Wildlife Viewing and Natural History Tours: Family friendly fishing trips should offer opportunities for touring nature. This is not a new concept. As previously discussed, interpretive talks are offered in many locations such as Milo McIver State Park. Natural history interpretation and tours have been offered in public parks and campgrounds for decades. However, what is not occurring is the marketing and promotion of these services. Promotions and marketing of family friends fishing activities should promote these services. They should identify where and when they are scheduled and work with parks to maintain a consistent delivery of these tours.

Recommendation 32: “Promote the Experience not the Kill”

Marketing for fishing tours is primarily geared toward those who are seeking to take fish. The advertisements of almost every fishing guide or tour includes pictures of dead fish



Credit: Joel LaFollette, Royal Treatment Fly Fishing, West Linn OR

being hoisted by the gills. The text of the ads talks about the quality of the fight and the size of the trophy that customers will take. The central message of the ads is that you will catch and kill plentiful large fish. These ads are based on the false assumption that this is the main motivation to go fishing. The fact is that a small minority of people rate “catching fish” as the reason they go fishing. The most important reason people go fishing is to enjoy a sport while relaxing and getting away with family and friends^{xxxvi}. When you consider these motivations, you see that sport fishing is competing with many other sports and activities that also deliver the same experience. However, marketing and advertisements for fishing tours are really catering to a small percentage of the market’s motivation. This may be one of the several reasons behind unexceptional participation rates in fishing. The whole sport fishing industry needs a rebranding. The brand needs to appeal to a wider audience and address their core motivations. “Promote the experience not the kill” is a mantra being promoted by at least one Clackamas County fishing guide and where the author first heard it^{xxxvii}. Other fishing guides also agree but this is at the early stages. As a marketing and branding agency, the Mt. Hood Territory DMO should take the lead on changing the image of fishing from one of aquatic hunting to a vehicle for gathering friends and family. This won’t be easy because the traditional image of fishing is entrenched, and it will likely require the cooperation from other DMO’s, ODFW, and other relevant parties. However, this is also an opportunity for the Mt. Hood Territory to set itself apart and create a niche in a very large water-based tourism market.

Recommendation 33: Improve the Paddling Experience

Clackamas County has abundant and high-quality paddling resources. Flatwater paddling is the second most popular water sport in Oregon. The highest concentration of flatwater paddlers is located in Multnomah County which hosts 30% of the states total, yet Clackamas County attracts only 8%. Clackamas County has a large untapped market potential considering its proximity to a large market and its water resources. Paddlers are a much smaller market than anglers and they generate fewer overnight stays because many are within driving distance to their homes. However, they are a critical population for generating interest in new products and services and creating a stable base of support. Basically, if you generate interest among the local boaters in the short term, then over the long term out-of-state visitors will take notice and want to stay. Providing for the demand of local paddlers will help out-of-state water-recreationists to “linger longer.” With this in mind, the following recommendations are made.

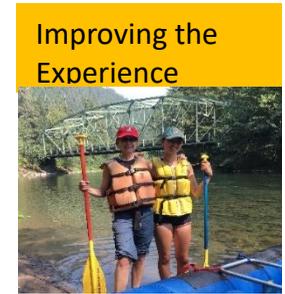
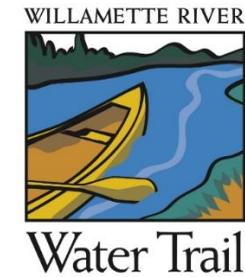
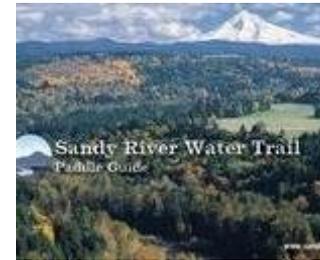
Recommendation 34: Move from Information to Inspiration

The quality of information for Clackamas County rivers is exceptional. The river trail maps for the Sandy, Willamette, and Tualatin rivers all exceed national standards on a comparative basis. After researching the Nation’s rivers for water trail maps and guides, the water trail information on these three rivers is equal or better than most in the country. Nonetheless the visitation is not exceptional. This is because “information does not lead to action.^{xxxviii}” In order for tourism promotion and marketing to influence boaters they must move their message “from information to inspiration.^{xxxix}” Marketing to boaters must inspire them to get on the water by appealing to their core motivations. Most paddlers get on the water for exercise, to be closer to nature, and to relax with friends and family. While the information provided to paddlers is excellent, marketers must know that is it not enough to get them on the water. Those paddlers that are using these guides and maps are already motivated to go paddling. The information didn’t get them on the water, it only made it easier. They would have found a way without these conveniently available maps to get on the water anyway. The paddling experience in Clackamas County needs to be rebranded to inspire prospective paddlers to choose the river over another recreational option. The Mt. Hood Territory web site’s link to water play provides excellent information. It starts with an introductory paragraph describing the variety of options that the Territory has to offer and then provides a highly detailed map with all the contact information necessary for a traveler to plan a trip. This is informative but not inspiring. A would-be paddler may see this site and say, “that’s exactly what I am looking for...” and take the next step but the idea to play on the water came from somewhere else. The web site is designed to inform, and potential paddlers know to go to the site access information. Inspiration has to go to them. Inspiration describe the benefits the paddler will get in such a way as to get them motivated. Inspiration content should make contact with personal feelings, emotions, and motivations. Think in terms of “nowhere else but here can you....”

Improving the Experience

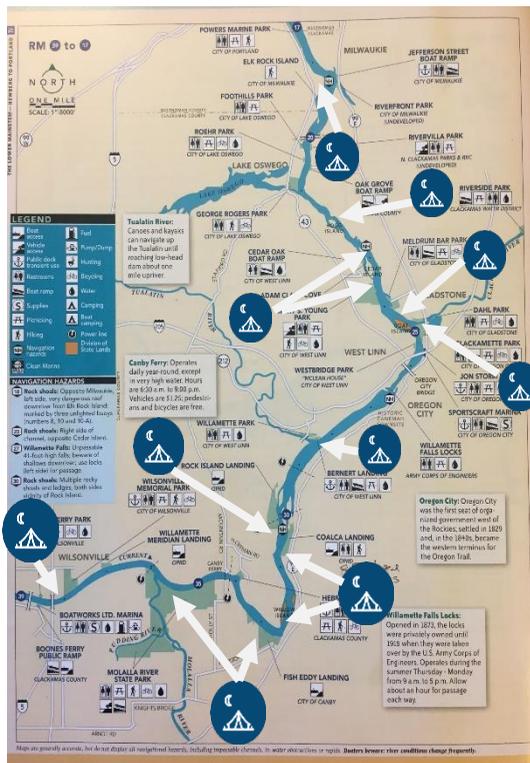
Recommendation 35: Create Water Trail Map for Clackamas River

Even though river trail maps do not motivate would-be paddlers to get on the water, they are still valuable information. It is ironic that the most popular river in the Clackamas County does not have a trail map yet the Sandy, Willamette, and Tualatin Rivers all do. The County should create a Clackamas River Trail Map to remain consistent with the information it is providing its visitors. The County has the existing capacity and three superb examples to model after, therefore, it would be a fairly straightforward process, and highly recommended, to create the Clackamas River Water Trail Map and Guide.



Recommendation 36: Develop a Primitive Camping Paddling Trail on Willamette River from Wilsonville to Milwaukie

A 20-mile primitive camping river trail is a rare asset in Clackamas County and can be used to attract new boaters to the region. The Willamette River between Wilsonville and Milwaukie offers numerous campsites that are accessible only by boat. This river trail has 13 exiting locations that could offer excellent camping opportunities. Some are pristine quiet islands while others are walkable to town services. With opening of the Willamette Fall portage at West Linn, this trail would help put Clackamas County on the map and promote river tourism to all 7 of its riverside cities. While primitive camping may not generate overnight lodging tax revenue, this river trail is invaluable in creating a regional identity in river-based tourism by connecting all 7 municipalities. It gives each city the opportunity to capture this market in their own way, it helps generate enthusiasm for the river, and it helps encourage visitors to “linger longer,” which is a long-term marketing effort by the tourism board.



Put Clackamas County “On the Map”

Put Clackamas “On the Map”

“Most people miss opportunity because it is dressed in overalls and looks like work.” Thomas A. Edison

Search the Internet for the best fishing in Oregon and you will find almost no mention of Clackamas County. The Orvis Guide Network doesn’t mention any Clackamas County rivers. Trails.com mentions the Clackamas River only but it received 0-star rating. DIYFlyFishing.com will send uninformed anglers to the Deschutes, Owyhee, Chewaucan Rivers and Paulina Lake with no mention of any Clackamas County waterbody. The site called OnlyInYourState.com lists the 10 best places to go fishing in Oregon and none are in Clackamas County. The web site, Best Fishing in America.com, does mention Clackamas County rivers but it is difficult to find and only because they divide the state into regions. The best mention of Clackamas County comes from Mt Hood Territory.com. The staff should take pride in knowing that a search for best fishing in Oregon puts Mt. Hood Territory on the first page of a google search. This is good news that internally, the DMO is doing all that it can. Nonetheless, externally the world of anglers still doesn’t recognize Clackamas County. Ask a random fly fisherman on the east coast, or even California, if he has ever heard of the Clackamas River and the answer will likely be no. The people who write those web pages don’t know much about Clackamas waterbodies. The DMO should now focus away from its own web site and start raising awareness on other media to make Clackamas, Willamette, and Sandy Rivers household names. A focused and carefully crafted strategy should be created to make these rivers as famous as the Deschutes. The actions to implement this recommendation might include: submitting articles to the mentioned web sites; submitting articles to travel, fishing and outdoor sporting publications; inviting outdoor sport writers to Clackamas County, social media campaigns, and similar public awareness raising activities. There are several fly-fishing blogs on the web today and some of them are written by Clackamas County fishing guides and fly shop owners. The DMO should coordinate with them to assist their efforts with articles on Clackamas County water bodies. The decision on which activities that the DMO will engage in should result from internal staff meetings.



Recommendation 37: Increase marketing efforts in high potential zip codes

Create two marketing campaigns that target the 7 markets segments identified in this report. The two campaigns should be focused on two different market segment groups: Family Oriented fishing with 4 market segments and the Empty Nesters with three market segments. Creating these marketing campaigns is not a simple task. It is complicated by:

- The diversity of market profiles. Each of the seven profiles has unique combinations of age, household incomes; household sizes, gender, race, and marital status.
- The location of markets. Maps showing the location of the seven market segments are in chapter 4 and display the wide geographic spread of each segment.
- The leisure habits and behaviors of each segment. There is little consistency between segments on how they spend their leisure budgets, the amount of their leisure budgets, their length of stay, and their preferred ancillary activities.

The purpose of this research and report is to determine if there is a potential to capture visitor spending from water-based recreation and to identify the type and location of these markets. The answer is an overwhelming “yes,” there is untapped market potential for fishing and other water-based recreation for Clackamas County. The market sizes and locations are in the areas identified in Chapter 4. However, these findings also discover that the market is diverse and segmented geographically and demographically across the

United States. Attracting these market segments to Clackamas County requires a carefully conceived strategy, which is outside the scope of this work and remains in the domain of the marketing experts at Mt. Hood Territory DMO. Marketing can be expensive, and it must provide a return on investment. Therefore, even though creating a marketing strategy is strongly recommended to capture untapped potential, the strategy must carefully consider several tradeoffs and questions such as:



- The wealthiest empty nester market segment is in the northeast US (Savvy Suburbanites). So, should you target them considering they have the largest expendable incomes, but they also have the most alternatives and they are the farthest away, or should you target the Empty Nesters with the least amount of household income but are closer in distance (Rural Resort Dwellers)?
- If you market to all the Empty Nester segments, is the ad campaign the same?
- Should you target only those segments with recreation spending indexes above the median?
- Should you target the largest Family Oriented segment (Soccer Moms) who also have the highest amount of expendable income but are uniformly spread across the country thereby requiring a more expansive marketing campaign to approach them or should you focus on a highly concentrated segment like Up and Coming Families who also have expendable incomes?
- How should the markets be tested to ensure you are hitting the right audience and selling the right product?

The Mt Hood Territory DMO should create a targeted marketing campaigns to attract these segments. The strategy on how to do that with limited resources will require a series of strategy meetings that consider all these factors. A reasonable target number for this goal should be to double the current annual water-based tourism overnight stays from 284,000 to 568,000 over the next 5 years.



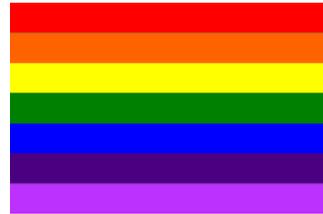
Maddie Brenneman@maddiebrenneman

Recommendation 38: Attract Niche Markets

There are several niche markets in fishing and paddling that are not being catered to in other areas of the state. Since Clackamas County is struggling to compete against Oregon’s most popular water-based recreation locations, it can build a name for itself by focusing on attracting these niche markets. Attracting these demographic groups may require new infrastructure or simply a carefully tailored message through specific media. The most effective strategy will vary depending on the group. Therefore, the DMO should study these groups to determine the most effective means through which they should be reached. The recommended niche markets are:



LGBTQ: The LGBTQ community is underserved in the outdoor industry. In October 2017, the nation’s first LGBTQ outdoor summit was held in Seattle Washington and sponsored by The Wilderness Society, Pride Outside, and REI. The event was also supported by and OUT There Adventures, National Wildlife Federation, he Sierra Club, National Park Conservation Association, the Nature Conservancy, Northwest Youth Corps, The North Face, Audubon, and Student Conservation Association which demonstrates a growing recognition that this an opportunity. This demographic is at the early stages of a rapidly expanding business niche. Early entrants in this market include tour companies like OUT There Adventures, IGLTA, R-Family Vacations, and OutVentures. The National Park Service is recognizing the new segment and is offering LGBTQ tours. Mt Hood Territory’s brand health research has shown that this region performs well with attracting lesbian families. Now specific efforts should be focused on attracting this market segment to fishing and paddling in the Mt Hood Territory.



Opportunities to market to this niche include: The International Gay and Lesbian Travel Association (IGLTA: <https://www.igлта.org/>), in Fort Lauderdale, Florida, has about 2000 members and holds an annual world convention in different tourism destinations around the world attracting over 500 representatives of the LGBTQ travel market; Passport Magazine, the only gay and lesbian travel magazine in the United States (<https://passportmagazine.com/>); and The Gay European Tourism Association (GETA: <http://www.geta-europe.org/>).

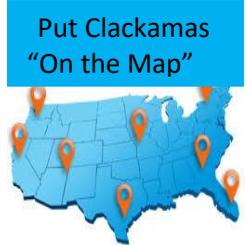
Youth at Risk: Approximately 18% of Multnomah County’s children live in poverty and another 12% do in Clackamas County. Organizations that work with youth-at-risk know the importance of outdoor recreation in their lives. Outdoor recreation and adventure sports helps reduce stress, builds skills not otherwise used, exposes them to nature, and introduces teens to team building and cooperative learning activities that they don’t normally experience in their everyday lives. There are several organizations in northwestern Oregon seeking opportunities to take youth into nature. They need locations that are safe and minimize logistical headaches. Several locations along the Clackamas and Willamette Rivers have what they need. The Oregon City waterfront at Jon Storm Park and Sportcraft Marina have excellent parking, water-tourism services, commercial retail services, and easy transportation. Other convenient and appropriate trips for this group include: the Barton to Carver float on the Clackamas; flatwater paddling at Estacada Lake and North Fork Reservoir (Promontory Park) in Estacada; and Molalla River State Park in Canby to Willamette Park in West Linn. There are many government, non-profit, and private organizations serving youth-at-risk. A recent interview with one organization in Portland that takes kids outdoors revealed that they didn’t know about Oregon City’s waterfront opportunities and like most Portland residents, didn’t know, or forgot, about the Willamette Falls. A focused marketing to these organizations would help raise awareness of the opportunities on Clackamas County’s waters.



Mobility Impaired Anglers and Paddlers: Access to water can be difficult for people with no disability, so anyone who is mobility impaired has significant barriers



to, or is outright prevented from, accessing the same recreational opportunities. There are few differences between people with disabilities and people without disabilities in their preferred outdoor recreation experiences^{xi}. They both want the same outdoor recreation opportunities, so accessible facilities are the major impediment to capturing this market. If Clackamas County created a long-term capital improvement plan specifically for accessible water based recreational facilities, then it might be the first in the nation to pay such close attention to this issue and help put the county on the map. This Plan should be integrated into the existing County capital improvement plan however the projects can be separated into one group to demonstrate the sincere effort the County is taking. This market niche is a large and growing market segment in America^{xii} and with the aging of the baby boomers it will continue to grow. Mobility impact access the Willamette in Gladstone, West Linn and Milwaukie present excellent opportunities. The DMO should advertise these new improvements to



organizations like Oregon Adaptive Sports (<http://oregonadaptivesports.org/>); Disabled Sports USA (<http://www.disabledsportsusa.org/>); Oregon Paralyzed Veterans of America (<http://www.oregonpva.org/>); Accessible Nature (<https://www.accessiblenature.info>) and many others.

Recommendation 39: Hold Annual Fishing Tournaments.

Fishing derbies and tournaments can generate a significant amount of excitement and infusion of cash for local businesses.

Fishing tournaments in Oregon can (and do) attract anglers and their families from throughout the Western United States. There are two general types of fishing competitions: one that generates serious competitors that may be qualifying events for national competitions, and more informal events that involve a broader audience and more relaxed rules. The first type has larger prizes with opportunities to qualify and compete nationally while the other type generates more local interest. The economic impact for fishing tournaments have been measured: total economic impacts of Salmon and Trout tournaments in Michigan are known to generate approximately \$578,000 in one weekend event; Elite Series Bass Masters Events can attract 20,000 to 30,000 people. The Sabine River Challenge in Orange, Texas attracted 33,650 people and on the St Lawrence River in New York 34,100 people showed up and generated approximately 3 million in expenditures, of which 25% was non-fishing related purchases. The Destin fishing Rodeo in Destin Florida distributes of \$100,000 in cash prizes and attracts 36,000 people from 27 states and 5 countries which generates 5.2 million in revenue to local economy. Fishing competitions in Oregon occur throughout the state but they are not well known and few if any occur in Clackamas County. Sturgeon, Steelhead, and Salmon competitions are held in and around the Columbia River basis. Oregon Bass Masters posts an annual event calendar, but none are in Clackamas County. There are several ideal locations in the county to hold fishing tournaments including: Oregon City's waterfront; Estacada; and Bernert Landing in West Linn. Completions can be held for salmon, steelhead, trout, bass, shad, and others. If the County is seeking to increase visitation and economic impacts through water-based tourism, then fishing competitions may offer one of best ways to meet this goal. Over a 5-year incubation period, the county could become host to a large, high-quality event with excellent prize money and corporate sponsorship.



Over a 5-year incubation period, the county could become host to a large, high-quality event with excellent prize money and corporate sponsorship.

Recommendation 40: Create the Oregon River Celebration

Oregon City and West Linn should combine forces to create a river festival unlike any other the state has seen. The Oregon River Celebration should be a two or three-day event to celebrate the Willamette's heritage and its role in founding of the State of Oregon. It will celebrate the Falls and its importance to Native American culture and the industrial revolution. It will celebrate the river's natural history from the power of the hydraulics, to the mysteries of spawning salmon. The Oregon River Celebration will remind people why this location was so important to so many people for such a long time. In so doing, the event will highlight and promote all that is fun about the river. It will bring together the wide range recreational activities that occur on the river and possibly introduce new ones. The event will become a cross-sectional rally of all river users from the local water ski clubs to rowing teams, to fishing guides, to river tour operators and paddling guides. Each organization will take advantage of the visiting crowds to promote its sport and each sport will attract spectators in its own way. Together they will create an upward spiral with river providers attracting visitors, and visitors building up new river tourism markets for the entire county. The local water ski club, Portland Water Spectacular, will perform; the Lake Oswego Community Rowing can hold a regatta; kayak, canoe and dragon boat races can be held; fishing guides can hold casting lessons and teach about the unique elements of Willamette River fisheries, and non-motorized paddle sports can be available all day. A river parade can be used to get everyone on the water. In addition to recreation, the working river history should be remembered. Tug boat operators can give tours and talk about their work; and tours of the paper mills and hydroelectric plants can be held. Nighttime events can include riverboat tours, music, art walks, and talks in venues scattered throughout downtowns of West Linn and Oregon City. The museums will stay open late and have special events. Restaurants can participate by hosting events and creating special menus. Like the Falls itself, the celebration will have multiple purposes and attract groups across a wide spectrum of interests. It will be used to attract attention to the river, build a market, and eventually create a new tradition and annual destination for all Oregonians. Most river celebrations start small with a dedicated following. Eventually they grow with corporate sponsorship and public support. Over time, a river celebration at this location, for these historic reasons, and with this wide range of sectorial interests, can be combined to become Oregon's largest and greatest river celebration.

Put Clackamas
"On the Map"

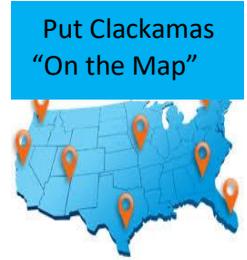


Recommendation 41: River Days Celebrations



Portland Spectacular, West Inn OR

In addition to creating Oregon’s largest river celebration, the Tourism Board should assist smaller municipalities throughout the County in holding river celebrations. Most communities in Clackamas County have the opportunity to use their local river as a means for holding public events that promote local businesses and attracts visitors. Milwaukie, Gladstone, Lake Oswego, Sandy, Estacada, Welches, Molalla, Wilsonville, and Canby all have this potential. Each municipality would have to determine if there is interest in holding such events and, if so, how to focus the event. Each community has a unique river opportunity and therefore can hold a unique event. For example, Milwaukie has a large urban river that would cater to motor boaters while Sandy would be all about fly fishing. This research has noted that most municipalities are not taking advantage of their unique river assets. The Tourism Board should act as a community facilitator and assist in generating interest, promoting the benefits of these river events, coordinating the meetings, and generally enabling the process.



Community Involvement Recommendations

Community Involvement

"...an optimist sees the opportunity in every difficulty." Winston S. Churchill

Recommendation 42: Promote the Urban-River Interface

The Urban-River Interface is a concept designed to connect a municipality's downtown with its river. The relationship between commercial centers and their rivers throughout America have evolved from a means of transport, to a source of food, to a producer of power, to dumping grounds for waste, and most recently, over the last 40 years as a community asset for recreation, business, industry, tourism and leisure. Today's rivers and waterfronts are a combination of all these purposes (except for receiving raw waste) and communities are learning to incorporate rivers into their long-term development plans. From the industrial revolution in the late 1800s to urban renewal of the 1970s, communities built physical barriers between downtown and the river's edge in the form of factory buildings, highways, riprap, channelization, shipping piers, and bridge overpasses. Promoting the urban-river interface reverses these blockades and attempts to make physical connections between downtown and the river. These physical connections will be different in each municipality. How the connections manifest themselves will depend on many factors including land ownership, distance, topography, public and private financing, development policies, politics, market conditions, and environmental limitations.

The Urban-River Interface is slowly emerging throughout Clackamas County. Some connections are strong, others are in the opportunity stage, but wherever people can walk from downtown to a place where they can put their toes in the water, an Urban-River Interface is being made. Examples include: Milwaukie's pedestrian-friendly connections across McLoughlin Boulevard; Oregon City's riverside walk to Jon Storm Park; West Linn's eight, tree-lined, residential blocks between Willamette Park and Willamette Falls Drive; and Estacada City's proximity to Estacada Lake. Opportunities also exist in Canby, Sandy, and the Villages. Promoting the Urban-River Interface is implemented through many avenues including infrastructure, policy, programs, and events. This report's recommendations seek to improve the Urban-River Interface in all these areas. It is mentioned here, in Community Involvement group, because they are best created and implemented by the community. A series of community-level water tourism workshops should be initiated to identify the best opportunities to reconnect downtowns with their greatest natural resource.

Recommendation 43: Community-level water tourism workshops

The greatest opportunities for increasing water-based tourism throughout the county is at the municipal level. Municipalities throughout the county hold the key to success. Even though municipalities usually have the least amount of resources, compared to higher levels of government, they have the greatest amount to gain, have the biggest incentives,



and generally control the areas where tourism occurs. Visitors want to see small towns. Campers, canoeists and those lovers of the great outdoors enjoy stopping in small towns for a meal, nighttime entertainment or to pick up a few forgotten items. A strategic plan to increase water-based tourism in Clackamas County, therefore, should identify actions at the municipal level. These actions range from infrastructure improvements to local development policies, to marketing and public events.

Each action item will be unique to the municipality. Ideally, they are identified and implemented by the municipality, however, the scope of this research didn't allow for community-based meetings with high levels of public involvement.

The following is a list of some suggested actions, but it is not exhaustive. They are a result of the consultant's interactions with community leaders, meetings and site visits throughout the summer of 2017. Additional community-based water recreation planning sessions should take place throughout the county in each municipality that is interested in leveraging its public waters to increase tourism. A model for these types of meetings already exist. The Bicycle Tourism Studios are community-based planning exercises promoted by Travel Oregon and its partners. The Studios are public engagement processes designed to foster development of bicycle tourism through improved infrastructure, services, businesses, events, and programs. This project started with a request to the consultant to investigate if a similar model for water-based tourism would be productive. After analyzing how water-based tourism flows through the county, where the assets and interests are located, what untapped potential is available to municipalities, and the future markets for water-based tourism in Clackamas County, a public engagement process for water tourism, like the bicycle studios, would be highly effective and is strongly encouraged.

A series of community-level water tourism workshops in each municipality should be conducted to identify their greatest water tourism opportunities and to strategize on how to use them to their advantage. These workshops are essential for building public support, which in turn, is essential in successful implementation of any public project. The workshops should be designed as a series of 4 to 7 public meetings that go from understanding the facts on the status of today's tourism market, to identification of assets and visioning the future, to goals and objectives, to strategies, and finally implementation actions, responsibilities and evaluations. This amount of public engagement wasn't possible under this project's scope nor was it known at the time if this would be the correct and effective approach. Today, based on the results of this study, we know their potential effectiveness, plus the information gathered during this study will serve as a solid foundation to launch this next phase. The data in this report on water tourism demand and untapped markets, can be used to help the public align their unique water tourism assets with the potential opportunities.

The following municipal recommendations are presented for consideration and a launching point to start these community discussions.

Estacada

Events: Currently Estacada is the closest location to the County's largest whitewater festival, the Upper Clackamas Whitewater Festival. The festival has attracted hundreds of boaters and spectators from the Pacific Northwest for 34 years. However, each year the boaters drive 17 miles right through Estacada to the festival site and the town gets little benefit from the event. There are several practical reasons that the festival occurs outside of town: first, the whitewater is 17 miles upstream from the town; it is not possible to

Community Involvement



hold the whitewater competitions any closer to town; Estacada is on the flatwater section of the river; there is little or no accommodations in town; and it's not safe to encourage driving between the festival site and downtown Estacada. These reasons are valid. The author has interviewed festival organizers who seem receptive to trying to integrate the town with the festival, however there are several challenges that need to be worked out. Meetings with festival organizers and town officials should occur to discuss how this integration can happen. The town has a lot to offer. They have warm and dry indoor spaces, music venues, and restaurants. The town can discuss opportunities such as free camping and shuttle buses. The festival's competition cannot change locations however, perhaps the festival can expand in scope to include flatwater events and demos from company representatives. Expanded activities can occur in town on Estacada's waterfront and Timber Park. The Town can and should use the Upper Clackamas Whitewater Festival as a foothold to expand the festival and slowly engage the town and attract visitors.

Community Involvement



Connection with Milo McIver State Park: Milo McIver State Park receives over 400,000 visitors each year but most of them rarely enter the City of Estacada because the park entrance is a 7 mile drive over a bridge and down windy roads. Nonetheless the park and the city border each other, connected by water. Park visitors who fish and float on Estacada Lake and Clackamas River are literally on the edge of the city. If there was a pedestrian bridge from the park to a walking trail on the city side, then visitors would be able to access downtown Estacada conveniently. If the city was able to attract only 20% of the park's annual visitation, then it would receive about 80,000 new visitors each year. This would be a substantial boost to a community of only 2700 people. Although no economic impact analysis was done here, and the costs are unknown, connecting the park to downtown Estacada may result in a positive net return on investment. It is recommended that a physical connection between the park and city be studied and implemented.

West Linn:

The City of West Linn would benefit greatly from a comprehensive series of community meetings on water-based tourism. The recent closing of their paper mill, combined with their extensive supply of waterfront assets, makes for good timing for a community wide discussion on the future of their water-based tourism assets. West Linn has five miles of riverfront on the Willamette that includes a wide diversity of uses such as major industrial sites, remote parks, the Willamette Falls, conserved natural areas, public parks, and private lands. In addition, they also have two miles of riverfront along the beautiful Tualatin River.

The results from this report suggest a few actions that the City should consider during these workshops. They include:

- Making physical connections between the historic center of West Linn (Willamette Falls Drive) and the Willamette River. During this research, the author arrived by boat to Bernert Landing and Willamette Park. From here we walked to Willamette Falls Drive, enjoyed an evening there, and with special permission, stayed the night at the boat ramp. This is not normally allowed but the experience was so enjoyable that it is recommended to consider opening this area to campers. Connecting Willamette Falls Drive with the riverfront can open new tourism opportunities for main street shops and improve the boating experience for many river users. There are many creative ways of connecting Willamette Falls Drive with the river including sales and promotions, thematic walking tours, concerts, and events. The details of these ideas should be the focus of a community dialogue with the residents.
- Willamette Falls: Due to the recent and unfortunate closure of West Linn Paper Mill, there is a hotbed of conversation occurring throughout the City about what to do at this site. Therefore, the author prefers to allow the community to continue the dialogue without being influenced by this report. The site, and its future use, is

complicated by the array of stakeholders from a public utility, to private sector investors, and all levels of government. The findings in this report are clear that the Willamette Falls has excellent tourism potential. However, trying to replace lost jobs should be (and probably is) the number one priority for the City. A merger of modern industrial uses with tourism is possible at this site and, in fact, the West Linn Paper Mill was considering tourism as a secondary revenue source. Tourism and industry are not mutually exclusive at this site. The City needs to engage in a comprehensive strategic planning process with the key stakeholders at this site.

Oregon City

Oregon City has the potential of becoming the center of the water world for Clackamas County. The City lies at the confluence of the two most popular rivers in the county and in northwestern Oregon. It has a mile of riverfront is bursting with Oregon's history, a promenade overlooking the Willamette Falls, and acres of waterfront parks. The city provides excellent recreation opportunities for all three of the major water-based recreation groups: anglers; motor boaters; and non-motorized boaters. Few other municipalities can boast this claim. There are three public and private boat launches. The fishing can be excellent for a wide range of species in all four seasons. Paddlers can enjoy relaxing flatwater trips with a wide diversity of aesthetics from wildlife to historically significant industrial structures and architecture, to the base of the Willamette Falls. This all occurs within walking distance to a vibrant Main Street bustling with shops and restaurants. The City has the opportunity to leverage river assets to attract visitors far more than it has or does. A visitor walking down Main Street might not know the River is two blocks away or a visitor to Jon Storm Park might ask why it is so empty. Oregon City would benefit greatly from establishing a solid Urban/River Interface where visitors know they are in a river city and residents are reminded of its roots. It is beyond the scope of this report to go into the details of how this is done but a few brief ideas are presented for future discussion during a water tourism workshop:

Clackamette Park: The RV Park should be upgraded. The author spent many nights in campgrounds throughout the County, including Clackamette Park on several occasions, and on a comparative basis this park has much more potential. RV parks in the county generally offer more comfortable amenities. The Park provides almost no shade nor grass in stark contrast to the adjacent day-use areas. The Park has riverfront access, great views, and a boat launch. Upgrading this area to county standards would likely attract more water-based tourists.

Waterfront festivals: In addition to creating Oregon's largest river festival (see below), Oregon City has many opportunities for smaller events that take advantage of the river including: fishing derbies; triathlons; water ski competitions; and Willamette River heritage festivals.

Community Involvement



Organizational and Institutional Recommendations

Institutional & Organizational

“Progress occurs when courageous, skillful leaders seize the opportunity to change things for the better.” Harry S Truman



Recommendation 44: Complete a Competitiveness Analysis for Angling

Why do all of Oregon’s neighboring states fare better than Oregon in attracting anglers? Given the size of the market and the untapped potential for angling tourism, it should be imperative for Oregon and Clackamas County to determine why Oregon is not attracting its proportional share of anglers (See Chapter 4). Oregon attracts 4% of the national visiting anglers but only 2% of the nation’s visiting angler/days. The neighboring states of California and Washington are doing better than Oregon by at least breaking even on a relative scale. Idaho and Wyoming, two competing states with excellent western fisheries, are generating twice as many visitor/days than their proportional share. Oregon is the only state west of Colorado that has a negative proportional share. Oregon has world renowned fishing resources, but it appears that Oregon’s angler market potential may be bigger than what they are currently attracting. The DMO needs to conduct a competitiveness analysis that is focused

Oregon	264,424	4%	1,262,784	2%
California	97,967	1%	486,605	1%
Washington	102,562	1%	341,327	1%
Idaho	208,418	3%	3,341,667	6%
Wyoming	193,076	3%	3,331,254	6%

specifically on recreational angling markets in Idaho, Wyoming and Oregon. A competitiveness Analysis will compare and contrast these three state-level angler markets against key market indicators such as: market size, visitation statistics, marketing budgets, providers, products and services offered, species of fish, their habitats and populations, state reputations on the national market, exposure and notoriety, and other indicators of the market. There are two reasons that this recommendation is so important. First, because the largest untapped potential is largely in these two states. This is the low hanging fruit for Oregon’s angler market and therefore if they want to increase visitation, it is these

states that have the greatest opportunity for Oregon to capture market share. Second, the angler market is overwhelmingly the largest opportunity the County has in increasing water-based tourism and overnight visitation, as thoroughly explained in Chapter 4.

Recommendation 45: Create a Robust, County-wide Marketing Database

Zip code data is one of the best and easiest ways to determine the residence of a visitor. Knowing the point of origin for a visitor is highly valuable for a wide range of marketing, business expansion, and strategic planning purposes. Ironically, these data are not collected by most tourism-based organizations or businesses. County and municipal governments do not retain these data on visitors even though it is collected when campers make a reservation. Even several private businesses stated that they do not have point of origin data since their credit card processors keep this information. Knowing the point of origin of your visitors is one of the ways that you can determine if any of the enclosed recommendations are working. Measuring visitation is essential to measuring the efficacy of the marketing efforts. Many of the recommendations made here need to be evaluated by counting visitation, and in the next chapter, a measuring protocol may be recommended that does not yet exist because of the current state of existing visitor databases.

There are many approaches to creating a countywide visitor counting system. The final product will result from a collaborative effort between all the entities that collect data on visitors. So, the final product cannot be determined here. Currently, there is a wide range of disconnected and uncoordinated entities collecting visitor data including state parks, county parks, municipal parks, visitor bureaus and Chambers of Commerce, federal agencies, PGE, and large private destinations. Each entity collects data differently, using different fields, at different frequencies, and they are stored differently, or even discarded in some cases. What is recommended here is the creation of a consistent data collection protocol across all entities. The DMO should coordinate the creation of this database, monitor its implementation and be the collector, repository, and guardian of these data.

Recommendation 46: Create the Water Tourism and Economic Resiliency (WaTER) Advisory Board for Clackamas County

Approximately 25 of the recommendations presented here require coordination across multiple entities. Establishing a regional visitor database, creating the largest river celebration in the state, building a bridge across Estacada Lake are just a few examples of projects that will require cooperation across several levels of government. This project was funded and directed by the Mt Hood Territory DMO but only a minority of the recommendations can be implemented by them alone. Therefore, this entire report is at risk of not being fully implemented because the other relevant and responsible entities may not be wholly committed to these outcomes. Over the course of this project, many stakeholders were consulted, interviewed, invited to focus groups, and surveyed. All reasonable attempts were made to work with them as best as possible within the confines of this project's scope. Nonetheless, the project is concluding with a large number of recommendations that need these entities' cooperation, advise, expertise, and maybe even approval. Therefore, creating an interagency advisory board is necessary and highly recommended. The Water Tourism and Economic Resiliency (WaTER) Advisory Board would be comprised of all relevant entities that would be involved in these recommendations. They would be responsible for meeting to review these recommendations, ensuring their applicability, modifying them as necessary, soliciting resources as needed, and monitoring their progress. The WaTER Advisory Board would start with being presented with the details of this plan, being knowledgeable of the data and supporting justifications for the recommendations, then reviewing the recommendations to create buy-in, and finally using the implementation framework as a starting draft to modify and adjust timelines, budgets, responsibilities and monitoring protocols. This process may take 4-6 months before a detailed and implementable plan can emerge.

Creating a new entity is not recommended, only a reshuffling of exiting staff who are currently involved. All levels of government should be involved including: municipal economic development and parks; county and state marketing and recreation entities; federal agencies; non-profit organizations; and private sector interests. The exact name of this group, their title (council, board, committee), and its level of authority does not matter much. However, the people involved should be highly knowledgeable in water-based recreation, economic development, and tourism in Clackamas County. They should be invited/appointed by the county and recognized by them as advisory to the county commissioners. Without a cooperative board of this type, the author is convinced that many of this report's recommendations will be very difficult to implement.

Recommendation 47: Molalla River Management Structure

The Molalla River Corridor does not have a stable or fully resourced management structure that is suitable for the level of visitation it receives. The upper corridor, referred to as Molalla River-Table Rock Special Recreation Management Area (SRMA), is the most visited section and currently managed by the BLM out of the Salem office. The BLM has been working with the Molalla River Watch and the Molalla River Alliance to manage the SRMA. However, with limited resources and visitation of approximately 50,000 people per year, this management structure is inadequate. The volunteer organizations can't provide enough people to keep the campground open and the BLM does not have enough money to pay salaries. The result is the campgrounds are closed but still used illegally. A long-term solution for the management of this corridor is needed. Finding the correct

Institutional & Organizational



management structure for this area requires conducting a series of strategy sessions with all potential actors. Local county and state government, non-profit organizations, the BLM, and adjacent land owners should be involved. Creating a long-term management solution to keep the campgrounds open and generating revenue will be in the best interest of all parties. The most appropriate structure cannot be dictated here because it will require the cooperation and creative problem solving of all those involved. The DMO can and should act a facilitator to lead the coordination of these stakeholders until a mutually agreeable solution can be found.

Institutional & Organizational



Recommendation 48: Lower Clackamas River Management Plan



Based on the visitation rates at Milo McIver State Park and Barton Park alone, the Lower Clackamas is used by hundreds of thousands of people each year. However, the exact number is unknown because no such management study exists. Public safety officials at the Municipal, County and State levels are challenged with ensuring public safety along this corridor. User conflicts between boaters, floaters and anglers occur often. Private landowners are concerned about trespassing, trash and other mismanagement. It would be hard to find a more heavily used recreational river that doesn't have a river management plan than the Lower Clackamas. A River Management Plan for the Lower Clackamas will analyze its use, its purposes, and its public values across all economic sectors. The study will then determine its vulnerabilities, carrying capacity, strengths weaknesses, and opportunities. It will coordinate official management operations. A River Management Plan for the Lower Clackamas will bring together all river stakeholders to determine its vision for future use and determine the best strategies to implement that vision.

Recommendation 49: Navigable River Study for Clackamas River

In Oregon, the distinction between navigable and non-navigable waterways is critical to determine who owns the land underneath the water (otherwise referred to as submerged or submersible land). If a river has been declared navigable by the Oregon State Land Board (under ORS 274.040), then the river and the submersible and submerged lands is publicly owned, and the public has full rights to access under the Public Trust Doctrine. If no navigability study has been completed, then the State Land Board has not declared it navigable and ownership of the submersible and submerged lands belong to the adjacent landowner who owns the property above the ordinary high-water mark. In 2005, the Oregon Attorney General issued a formal opinion on the public's use of non-navigable rivers. The ruling states that the public can use the surface of a waterway in Oregon for any legal activity unless the waterway isn't wide, deep, or long enough for a boat to pass along it. In Clackamas County, the only waterways deemed navigable are the Sandy and Willamette. Since the Clackamas River is the most visited river in the County a navigable river study would be a valuable contribution to the management of the river. The River is heavily used by anglers, boaters, and floaters and a navigable water study may help alleviate user conflicts and clarify the development potential along the river. A 1979 study by the Division of State Lands researched the status of navigability for the Clackamas and concludes with conflicting and unclear information^{xiii}. The study cites historic navigation uses including transportation of logs, fish, and stone from Feldheimer's Ferry to the mouth. However, the study then states, "Despite this evidence of commercial navigation of the Clackamas, there are two county documents which state that the stream is not a navigable

river.” The first of the conflicting documents is a County Commissioner Journal of 1896 that says “Clackamas River in the County of Clackamas State of Oregon has not nor has any portion thereof been declared by law to be navigable, and that said river and the whole thereof from its source to its mouth is not in fact navigable for commercial purposes; that said river is susceptible of being made and ought in the public interest be made a public highway for the floating and transportation of logs, piling and poles” Even within the County Commission’s opinion that the river is not navigable, they insert ambiguity by expressing the desire for it to be exactly that. Based in part by these statements both the US Supreme Court and the Clackamas County Circuit Court declared the river to be non-navigable. There is clearly conflicting support, evidence, and need on the navigability of the Clackamas River and therefore a conclusive study is recommended.

Chapter 7 IMPLEMENTATION, MONITORING AND EVALUATION

This Chapter provides a general framework to implement the recommendations presented in Chapter 5. It suggests the recommended leaders of each recommendation, the estimated budget, resources, timeline, and it recommends key performance indicators that should be used to monitor progress. This chapter is only a reference tool; it was prepared without any involvement with the entities who would be largely responsible for its completion. The scope of work for this phase of the project did not have the luxury of time to allow extensive involvement with the numerous agencies that would be likely involved and would naturally require their cooperation. Building cooperation and collaboration with all the proposed responsible parties named herein would itself be a significant undertaking. The author fully recognizes that assigning work to organizations without their input (and expending their resources to boot) will likely result in resistance. This is understandable, and the entities should know that this implementation chapter is only presented as a suggested framework. Estimated timelines are difficult to know at this stage without understanding the existing constraints on the lead agency. The budgets are especially difficult to estimate, and some are not provided because there are too many unknown variables that would affect the amount expended. The first step before any of these recommendations are started is for the responsible parties to review these implementation actions, and their supporting justifications presented in previous chapters, and to provide their expert opinions on the implementation. Whether or not this will result in the required buy-in and cooperation that is necessary for any recommendation to be successful is yet unknown. However, this first step is necessary for all the recommendations in this plan, including those for which the Mt Hood Territory is the lead responsible entity. The Mt Hood Territory, being the lead agency on this Plan, would therefore be responsible for coordinating these entities, holding the required informational meetings and strategy sessions, making presentations, collecting their feedback, and modifying the recommendations and implementation actions accordingly. For this reason, the group of Organizational and Institutional Recommendations are presented here first and creating the WaTER Advisory Board is the first of the first recommendations. The buy-in and refinement necessary to make this plan successful is through this Advisory Board.



Organizational and Institutional Recommendations

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Create the interagency WaTER Advisory Board	Mt. Hood Territory	County	TBD				
Timeline	Spring	Summer	Summer	Summer	Fall	Winter	
Performance Indicators	MHT recommends board membership to County Commissioners	Board established by County Commissioners	First meeting, understanding the report's finding	Review of Recommendations	Modification of Implementation Framework	Completion and approval of recommendations and Implementation Plan submitted to County Commission	
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Establish a Molalla River Management Structure	BLM	BLM, County, Non-Profits, local	\$5000 (for strategy meetings)				
Timeline	Summer	Summer	Summer	Fall	Winter		
Performance Indicators	First Meeting: Goals and Objectives	Second Meeting: Brain storming sessions	Third Meeting: Probable options	Feasibility Research	Findings and Recommendations		
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Lower Clackamas River Management Plan	Clackamas County	Federal, State and County funds	\$120,000				
Timeline	Spring	Fall	Winter	Spring	Spring	Summer	Winter
Performance Indicators	Project Team Established	Funds Secured	RFP issued	Project Start date	Data Analysis	Stakeholder Input	Plan Completed
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Navigable River Study for Clackamas River	Oregon State Land Board	State funds	TBD				
Timeline	Summer	Summer	Spring				8 months
Performance Indicators	County level lead person appointed	Requests for the Study made to Oregon State Land Board	Project Start date				Plan Completed
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Competitivity Analysis	DMO	County	\$30,000-\$50,000				
Timeline	Spring	Summer	Fall	Winter			
Performance Indicators	Issue RFP	Hire Consultant, Project Kick off, Data collection and analysis	Revised Marketing Strategy for capturing market share from competitors	Strategy Approved and Implementation begins			
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Create County Wide Visitor Database and Data Collection System	DMO	County/State/Local	TBD				
Timeline	Summer	Summer	Fall	Winter	Spring		
Performance Indicators	Project Kick Off meeting with all parties responsible for data collection present	Strategy Sessions on how to coordinate the collection of tourism data in CC	Create the data collection protocol and tools necessary to receive, store and retrieve visitor data	Data collection system testing begins	System is fully operational		
Notes:							

Improving the Experience



Recommendation	Lead Responsibility	Resources	Estimated Budget				
Develop Fishing Packages with Lodging Business	DMO	Staff Time Partners Time	150 hours				
Timeline	Early Summer	Summer	Fall	Winter/Spring	Summer/Fall		
Performance Indicators	Concept presented to Fishing Guides and Hotels	Refinement of business partnership	Marketing materials developed	Number of bookings	Number of bookings		
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Create more family friendly Fishing Products	DMO	Staff Time Partners Time					
Timeline	Spring	Summer	Summer	Fall	Summer	Summer	
Performance Indicators	Create project team Invite partners including State parks, Fishing experts and tourism	Kick off meeting. Present objectives and justifications	Develop and test prototype activities packages, at Milo McIver SP	Study Lessons Learned	Launch and market final product	Measure number of bookings	
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Promote the Experience not the Kill	DMO/Joel LaFollette	Staff Time	50-90 hours				
Timeline	Summer	Summer	Summer	Fall	Winter/Spring	Spring-Fall	
Performance Indicators	Strategy Session on Methodology for Brand Change	Strategy Session on Methodology for Brand Change	Develop New Brand prototype and message	Develop delivery mechanism	Message distribution Develop followers	Measure number of followers and reproductions	
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Move from Information to Inspiration for Paddling	DMO	Internal					
Timeline	Early Summer	Summer	Fall	Winter	Spring		
Performance Indicators	Build paddling marketing team with private sector	Brain storm sessions on rebranding the paddling experience	Strategize on a delivery platform beyond DMO web site.	Create delivery plan with budget, timeline, and responsibilities	Distribute new inspiring message		
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Clackamas River Trail Map	DMO	State, Federal	\$20,000-\$40,000				
Timeline	Spring	Summer	Late Summer	Fall	Winter		
Performance Indicators	Identify and apply for funding	Find example to replicate	Create and develop pictorial and graphic content	Write descriptive content	Compile and print		
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Primitive Camping Trail on Willamette	NGO/State/County	NGO/State/County	TBD				
Timeline	Early Summer	Summer	Fall	Spring	Spring	Summer	Summer
Performance Indicators	Create project Team	Complete field research. Map trail. Develop campsites	Build coalition of local managing partners. Develop Campsites	Develop Rules, Guides, and signage. Create marking plan for new trail	Create management Plan	Celebrate opening	Create on-line sign up form to monitor participation
Notes:							

Put Clackamas County "On the Map"



Recommendation	Lead Responsibility	Resources	Estimated Budget				
Increase marketing efforts in high potential zip codes	DMO	DMO	TBD				
Timeline	Spring	Summer	Summer/Fall	Winter			
Performance Indicators	Staff meetings to study the market data	Develop marketing Strategy	Develop messaging, content, platforms, and frequency of marketing	Delivery			
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Attract Niche Markets	DMO	DMO	TBD				
Timeline	Spring	Summer	Summer/Fall	Winter/Spring			
Performance Indicators	Staff meetings to study the market data	Develop marketing Strategy	Develop messaging, content, platforms, and frequency of marketing	Delivery			
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Oregon’s River Celebration	DMO and Partner Agency	State/County/Local/Private	\$75,000 - \$150,000				
Timeline	Spring	Summer	Fall	Winter/Late Spring	Spring	Summer	
Performance Indicators	Create Oregon River Celebration partnership or implementing entity	Develop concept, vision, goals Establish key elements Set timeline. Create Business Plan	Acquire Major Sponsors Final activities, participation partners, and schedule.	Public Safety Plan Recruit Volunteers Create Marketing Plan	Logistical Preparations	Hold First Annual Oregon River Celebration	
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Hold Annual Fishing Tournaments	TBD - DMO to recruit leader	County/ Private	TBD				
Timeline	Spring	Summer	Fall	Winter	Summer		
Performance Indicators	Establish an implementing entity or enlist an existing one	Select location Develop concept, vision, goals,	Establish key elements Set timeline. Create Business Plan	Acquire Major Sponsors Final activities, participation partners, and schedule.	Implement Competition		
Notes:							

Community Involvement Recommendations



And

Physical Improvements



Chapter 5 discusses many recommendations for community involvement and presents some suggested ideas for each municipality to consider. The ideas are only “food for thought” to start conversations. Successful implementation of community actions will require the community level workshops proposed in Chapter 5. Likewise, the recommendations for Physical Improvements throughout the county are the consultant’s advice, based on experience and the information acquired during this work, which would produce the best results for improving water-based tourism visitation. None of the proposed recommendations for physical improvements or community involvement have much chance of success without the support of the municipality. One of the key findings in the report is that the municipalities hold the key to successful implementation of water-based tourism in Clackamas County. If the municipalities do not have the political support to implement some of the recommendations in this report (regardless of the funding source) then there is no sense in pushing it forward. The municipalities have not had the opportunity to fully digest this report’s findings. The purpose of this research was not to hold extensive public engagement processes with the municipalities, it was to determine the market potential for increasing water-based tourism. The untapped potential in water-based tourism has been well documented here, showing geographic locations, activity preferences, and demographic profiles of the unmet opportunities in water-based tourism for Clackamas County. The next step is for the DMO to present the findings of their report to each municipality and to gauge their level of enthusiasm for trying to capture more water-based tourism. If the response is positive then a series of community meetings should be facilitated to present the details of the opportunities, to gain their valuable feedback, and generate full participation in their implementation. The results of the meetings will be a local level implementation plan for a few key improvements to capture water-based tourism. The improvements may be physical, programmatic, administrative, policy, marketing or events. The implementation plan for these improvements would also include a budget, budget sources, timelines, and responsibilities. It is not appropriate for this level of detail to be suggested in this report at this time. Therefore, the final implementation actions in this report is to conduct these community level workshops to identify and implement the water-based tourism actions that they see as most beneficial.

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Present this report’s findings to the municipalities	DMO	internal	100 hours of Staff time				
Timeline	May 2018	June 2018	July 2018				
Performance Indicators	Present to 7-8 municipalities at public meetings. Collect feedback on their desire to engage in planning process	Present to 7-8 municipalities at public meetings. Collect feedback on their desire to engage in planning process	Internal memo on results of meetings, level of commitment to move forward in each municipality				
Notes:							

Recommendation	Lead Responsibility	Resources	Estimated Budget				
Community-level water tourism workshops	DMO/Municipality	State/DMO/Local	\$30,000 to \$40,000 per municipality				
Timeline	3 months		Fall	November	Winter – Late Spring		
Performance Indicators	Planning Process methodology and outcomes defined	DMO Announces Water Tourism Studio Community Planning Process for Clackamas County	Application Process for Municipalities	2019 Municipalities selected	Planning process	Public Announcement Final Projects and Actions, Budgets and Responsibilities.	Process repeats with new municipal applicants
Notes:							

References

- ⁱ Portland General Electric Oak Grove – Clackamas River Hydroelectric Project #2195, 2016. Internal report submitted to Federal Energy Regulatory Commission.
- ⁱⁱ State Scenic Waterway Report: Molalla River. Oregon Parks and Recreation Commission. October 27, 2014.
- ⁱⁱⁱ SALMON AND STEELHEAD RUNS AND RELATED EVENTS OF THE SANDY RIVER BASIN – A HISTORICAL PERSPECTIVE. Barbara Taylor 1998, Consultant. Portland General Electric Company, Hydro Licensing Department, Attn Marty May, 121 SW Salmon St, Portland OR 97204
- ^{iv} Mattson, Chester R. 1955. Sandy River and Its Anadromous Salmonid Populations
- ^v Barbara Taylor 1998, see above
- ^{vi} The SCORP (Statewide Comprehensive Outdoor Recreation Plan) also finds that “fishing from a bank other than fly fishing” is Oregon’s most favorite fresh water-based recreation activity. Of the top 8 recreation activities, only fishing is a water-based sport. The SCORP estimates that there are 10 million user occasions in fishing (excluding fly fishing) in Oregon in 2011. Fly fishing adds another 2.8 million user occasions. The SCORP finds that ocean beach activities are even more popular with 17 million user occasions. November 12th 2012. Oregon Resident Outdoor Recreation Demand Analysis. Randall Rosenberger Kreg Lindberg. OSU
- ^{vii} <http://www.oregon.gov/OSMB/boater-info/Pages/Statewide-and-Local-Regulations.aspx>
- ^{viii} Willamette Falls Locks Economic Impact Analysis Final Report, 2005, BST Associates, Bothell WA
- ^{ix} Willamette Locks Economic Potential Report, 2014. EcoNorthwest, Portland, OR
- ^x Willamette Fall Heritage Foundation, HISTORICAL TIMELINE of the WILLAMETTE FALLS CANAL & LOCKS
- ^{xi} 2017 Special Report on Fishing. Recreational Boating and Fishing Foundation. Alexandria VA. 2017
- ^{xii} US Department of Commerce. Bureau of Economic Analysis Travel and Tourism Satellite Accounts: https://www.bea.gov/industry/tourism_data.htm
- ^{xiii} Oregon’s State Lodging Tax report, Years 2005 to 2015: Oregon Department of Revenue, 2016. http://www.oregon.gov/DOR/programs/gov-research/Documents/state-lodging-report_604-005.pdf
- ^{xiv} Oregon Travel Impacts 1992 – 2016. May 2017. Prepared by Dean Runyan Associates for the Oregon Tourism Commission.
- ^{xv} Fishing License Renewals and Angler Lifestyles. 2015 Angler participation Research. American Sportfishing Association. March 2016
- ^{xvi} 2017 Special Report on Fishing. Recreational Boating and Fishing Foundation and Outdoor Foundation. 2017
- ^{xvii} American Sportfishing Association, 2017. <http://asafishing.org/facts-figures/angler-participation/anglersurvey-data/top-5-targeted-species/>
- ^{xviii} A Survey of Oregon’s Resident and Nonresident Sportsmen. For Oregon Department of Fish and Wildlife, by Southwick Associates. April 17, 2014.
- ^{xix} 2011 National Survey of Fishing, Hunting and Wildlife-Associated Recreation, U.S. Fish and Wildlife Service.
- ^{xx} “Fishing License renewals and Angler Lifestyles. 2015 Angler participation Research. American Sportfishing Association. March 2016
- ^{xxi} “Understanding Activities that Compete with Recreational Fishing” Responsive Management and Southwick Associates, on behalf of the American Sportfishing Association February, 2012.

- xxii Joel LaFollette, Royal Treatment Fly Fishing, West Linn, OR. Personal Interview August 16th 2017.
- xxiii "Fishing License Renewals and Angler Lifestyles. 2015 Angler participation Research. American Sportfishing Association. March 2016
- xxiv Outdoor recreation participation Report, 2017. The Outdoor Foundation, Washington DC. www.outdoorfoundation.org
- xxv ConsumerVue 2014: Outdoor Segmentation Study. Outdoor Industry Association
- xxvi Oregon Non-Motorized Boater Participation and Priorities, Report in support of the 2015-2024 Oregon Trails Plan May 27, 2015. Oregon State University for the Oregon Parks and Recreation Department
- xxvii Rosenberger, R. and K. Lindberg. 2012. Oregon Resident Outdoor Recreation Demand Analysis. Report to the Oregon Parks and Recreation Department. Available at http://www.oregon.gov/oprd/PLANS/docs/scorp/2013-2018_SCORP/2013-2017-SCORP_App_C.pdf
- xxviii *ibid*
- xxix *ibid*
- xxx Oregon Non-Motorized Boater Participation and Priorities, Report in support of the 2015-2024 Oregon Trails Plan May 27, 2015. Oregon State University for the Oregon Parks and Recreation Department
- xxxi McKean, J., Donn Johnson, Garth Taylor, Richard Johnson. 2005. Willingness to Pay for Non-Angler Recreation at the Lower Snake River Reservoirs. *Journal of Leisure Research*, 2005, Vol 37, No 2. Pp1778-194 © National Recreation and Park Association.
- xxxii 2008 PADDLE TOURISM STUDY, NORTH CAROLINA STATE TRAILS PROGRAM. North Carolina State University
- xxxiii U.S. Forest Service National Visitor Use Monitoring Survey Results National Summary Report Data collected FY 2012 through FY 2016
- xxxiv Understanding Activities that Compete with Recreational Fishing, American Sportfishing Association 2012.
- xxxv Needham, M. Bo Shelby, Joshua Petit, 2015. Visitors and Use Levels on the Lower Sandy Wild and Scenic River, Oregon State University and US Bureau of Land Management
- xxxvi *ibid*
- xxxvii Joel LaFollett, Royal Treatment Fly Fishing, West Linn
- xxxviii Daniel Kahneman, Nobel Laureate in Economics, 2002. Ted Talk Interview
- xxxix Scott Bricker, Travel Oregon, during a focus group
- xl Brown, T. J., Kaplan, R., & Quaderer, G. (1999). Beyond accessibility: Preference for natural areas. *Therapeutic Recreation Journal*, 33(3), 209-22 1.
- xli Cordell, H. K. (1999). *Outdoor recreation in American life: A national assessment of demand and supply trends*. Champaign, IL: Sagamore Publishing
- xlii Farnell, James, 1979, Clackamas River Navigability Study. Oregon Division of State Lands.

Mt. Hood Area Visitor Survey Final Results

October 2018

Prepared for:

TRAVEL  **OREGON**

Research Manager: Ladan Ghahramani

Prepared by:

RRC Associates

4770 Baseline Road, Suite 360 Boulder,
CO 80303

303/449-6558

www.rrcassociates.com



INTRODUCTION / METHODOLOGY	1
KEY FINDINGS AND RECOMMENDATIONS.....	3
VISITOR DEMOGRAPHICS	6
Visitor Type	6
Respondent Profile	7
Geographic Origin	11
Travel Party Composition.....	13
Previous Visitation in Prior Two Years	14
OVERNIGHT VISITOR PROFILE.....	15
Location & Type of Accommodations	15
Length of Stay.....	19
TRIP CHARACTERISTICS.....	20
Main Purpose of Visit.....	20
Activity Participation	20
Locations Visited in the Area	23
Average Expenditures	24
TRANSPORTATION PROFILE	27
Method of Travel	27
Familiarity with Public Transportation Options	29
Barriers to Taking Public Transit.....	31
Factors That Would Increase Utilization of Public Transit.....	33
Frequency of Usage of Transportation Methods in a Typical Week	38
SUGGESTIONS / OPEN ENDED COMMENTS	40

INTRODUCTION / METHODOLOGY

This report presents the final results of a visitor survey conducted for Travel Oregon and Mt. Hood Territory by RRC Associates between March and June, 2018. A total of 995 visitor intercept survey were conducted at a variety of locations throughout the Mt. Hood region. Survey results generated from the 2018 sample of respondents interviewed have a margin of error of approximately +/- 3.1 percentage points calculated for questions at 50 percent response¹.

Roughly 18 different survey locations were grouped into four major locations for analysis: Estacada, Sandy, Ski Resorts, and Other Highway 26 Locations (see table below). Consideration was given to representing a wide distribution of locations throughout the region, as well as the optimal locations for intercepting visitors.

Table 1

<i>Survey Location</i>	<i>Grouped As:</i>
<i>Downtown Estacada</i>	Estacada
<i>Metzler Park</i>	
<i>Milo Mclver State Park</i>	
<i>Upper Clackamas Whitewater Festival</i>	
<i>Downtown Sandy</i>	Sandy
<i>Jonsrud Viewpoint</i>	
<i>Sandy Ridge Trailhead</i>	
<i>Mt. Hood Meadows</i>	Ski Resort
<i>Mt. Hood Meadows Park & Ride</i>	
<i>Mt. Hood Skibowl</i>	
<i>Timberline Ski Area</i>	
<i>Timberline Resort Shuttle</i>	
<i>Camp Creek Campground</i>	Other Highway 26 Location
<i>Government Camp</i>	
<i>Mirror Lake Trailhead</i>	
<i>Mt. Hood Express</i>	
<i>Trillium Lake Trailhead</i>	
<i>Zigzag Mountain Trailhead</i>	

Results were also grouped into two seasons (Late Winter and Spring) for analysis; weather data were analyzed to determine the seasonal breakout (Late Winter: April 23 and earlier / Spring: April 24 and later).

¹ For the total sample size of 995 respondents interviewed during Late Winter/Spring 2018, margin of error is +/- 3.1 percent calculated for questions at 50% response (if the response for a particular question is “50%”—the standard way to generalize margin of error is to state the larger margin, which occurs for responses at 50%). Note that the margin of error is different for every single question response on the survey depending on the resultant sample sizes, proportion of responses, and number of answer categories for each question. Comparison of differences in the data between various market segments and from year to year, therefore, should take into consideration these factors. As a general comment, it is sometimes more appropriate to focus attention on the general trends and patterns in the data rather than on the individual percentages.

This report will be primarily focused on transportation in the region, with specific recommendations made regarding increasing public transportation usage in the area. The intercept survey probed familiarity with public transit options in the area, method of travel to the Mt. Hood area, obstacles to taking public transportation, factors that would increase utilization of public transportation, and typical usage of public transit and rideshare. However, results from other questions on the survey, such as visitor demographics and activity participation while in the region, are also summarized in this report, as these results aid in the interpretation of transportation-related data.

We direct the reader to a copy of the survey form, included in the Appendix A section of the report, as a reference to all questions addressed in the intercept survey. Open-ended comments from the survey, including visitor suggestions for improving travel to the Mt. Hood area, are included in the Appendix B section. Tables showing detailed survey results for the visitor intercept survey are provided in Appendix C.

KEY FINDINGS AND RECOMMENDATIONS

- Personal vehicles are, by far, the most used transportation method in the region.** Eighty-three percent of respondents traveled by private car, an additional 8 percent by camper/RV, and 5 percent by rental car. Only 4 percent of all respondents used the bus, although the frequency of bus usages was higher among visitors to ski resorts (7 percent) and other Highway 26 locations (13 percent). Bus usage was also higher in late winter (5 percent) than in spring (1 percent).
- Improve communications about public transportation offerings.** Respondents were more likely to be “not at all” familiar with each of the four public transit options in the area than they were “somewhat” or “very” familiar. Familiarity with Trimet and Mt. Hood Express was higher than for Sandy Area Metro or Columbia Gorge Express, but for all four options more than half of all respondents indicated they were “not at all” familiar (56 percent for Trimet to 85 percent for Columbia Gorge Express). Additionally, one in five respondents said they would be more encouraged to take public transportation in the future if they knew more about the offerings.

Familiarity was higher for Trimet, Mt. Hood Express, and Sandy Area Metro in late winter, signaling an increased attention to alternative transportation methods during periods of inclement weather. However, familiarity with Columbia Gorge Express was consistently low, highlighting that improved communications about that option may be warranted in particular.

- To increase public transportation usage, make the experience as seamless as driving a car.** About three in five respondents who didn’t take public transportation as part of their travels to the Mt. Hood area would be encouraged to take public transportation to the area in the future if some factors were addressed (60 percent). The top factor cited was having travel time be about the same as driving a car (26 percent), followed by increasing public awareness about bus service (20 percent), fewer transfers (19 percent), increasing bus service frequency (15 percent), and offering seat reservations (11 percent).
- Focus on promoting transportation opportunities to visitor segments that are more open to taking public transportation in the future.** There is more willingness to travel by public transportation to the Mt. Hood area in the future among single respondents without kids, day visitors from a nearby area, wintertime visitors, and Oregon residents. When asked what, if anything, would most encourage you to take public transportation when traveling in this area in the future, these segments of visitors were less likely to cite “None – would not ride the bus more frequently”. Rather, they were more likely to select a variety of motivators. Top among them were having travel time be about the same as driving my car, increasing public awareness, fewer transfers, and increasing frequency of service along existing routes.

- **To increase bus usage among solo travelers, focus on optimizing bus service along Highway 26.** About 12 percent of all visitors were traveling alone. About one in five of these visitors took the bus when traveling to a ski resort or other Highway 26 location, highlighting that there is opportunity to increase bus usage among solo guests going to Highway 26 locations. Solo travelers were generally open to taking public transit in the future, and would like to see increased speed of trip, travel time be about the same, increasing frequency of service along existing routes, and having more information about what's available.
- **Improve gear storage options on public transit.** Other than just preferring to drive (cited by 57 percent of respondents), the biggest reason cited for not taking public transportation was having too much stuff (44 percent). Given that leisure/outdoor recreation is overwhelmingly the reason for visiting the area (87 percent), visitors are likely to have a lot of gear. Some of the gear-intensive activities in which visitors participate while visiting the region include downhill snowsports (41 percent), biking (14 percent), fishing (10 percent), backcountry snowsports (9 percent), and watersports (9 percent). Open-ended comments further highlighted that visitors find public transportation a challenge with so much gear (i.e., ski equipment in winter, camping equipment in spring).
- **Accommodate public transportation for pets.** Eight percent of all visitors were traveling with pets. This number was even higher among springtime respondents and those camping in the area. When asked why they didn't take public transportation on their trip, many people said they had dogs with them.
- **Try to capture out-of-state visitors who flew and rented a car by providing bus service between Portland and Government Camp, and offering stops near ski resorts, trailheads, and restaurants.** Additionally, it might be fruitful to focus marketing efforts on the scenic aspects of this transportation route. Thirteen percent of all out-of-state visitors flew to the area. Among those who flew, 58 percent rented a car. These visitors were most likely to be going to Portland and Government Camp, and were most likely to be participating in hiking/trailing running (63 percent), scenic drives (38 percent), snowsports (34 percent), and dining out (31 percent) while in the Mt. Hood area.
- **Offer "hop on, hop off" ride option with one easy, affordable ticket.** About half of all respondents visited more than one location during their trip. Government Camp, Portland, Sandy, Timberline, Hood River, the Columbia River Gorge, and Oregon Coast were the most visited locations. Providing user-friendly connections and cost savings between locations could help increase the share of respondents opting for public transit.

- **To increase economic impact to the region, attract the visitors that tend to spend more while in the area: ski resort visitors, wintertime visitors, overnight visitors, out-of-state residents, and families.** To appeal to the interests of these higher-spend visitors, focus on expanding service or at least making sure communication to these groups aligns with their values. Ski resort visitors would like to see increased frequency of service on existing routes. Households with kids were more likely to desire guaranteed seats via reservations. All visitors were most likely to want travel time be about the same as driving a car.
- **Market to current users of public transit and rideshare.** Current users of public transit and rideshare are notably more likely than non-users of being willing to use the bus more frequently in the future if certain factors were addressed. Both of these user groups would most like to see travel time be about the same as driving a car. Current public transit users were also much more likely to want to see increased frequency of bus service on existing routes.

Singles without kids are the most likely to use public transit at least once in a typical week (32 percent), while couples without kids are the most frequent users of rideshare in a typical week (28 percent). Respondents in lower income brackets use public transit more often, while those in higher income brackets use rideshare more often. Oregon residents use each transportation mode more often in a typical week than out-of-state residents (26 to 27 percent vs. 15 to 17 percent).

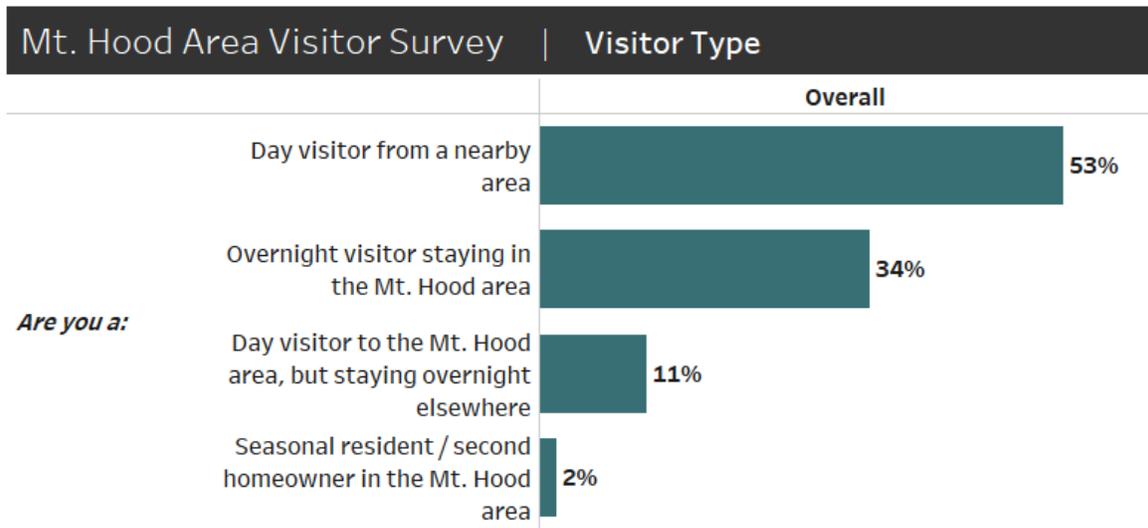
- **Improve signage for regional attractions.** A comment that came up frequently among visitors to the area was that signage could be improved. Guests noted lack of signage, difficult-to-read signage (both in terms of size and lack of lighting at night), and just a general desire for more information. Developed in conjunction with expanded bus service, improved signage could create a more user-friendly and seamless visitor experience in the region.
- **Incentivize carpooling with premium parking at trailheads and ski resorts.** A majority of visitors take their personal vehicle while traveling in the area. The top reason cited for not taking public transportation is because of a preference for driving (57 percent), a notable 40 percent would not be motivated to take public transit, and visitors travel in large parties on average (3.6). In addition to increasing public transportation, there might be opportunity to increase carpooling among those who will drive to the area regardless by offering preferred parking at high-traffic locations.

VISITOR DEMOGRAPHICS

Visitor Type

The largest segment of visitors to the Mt. Hood area were day visitors from a nearby area (53 percent). One in three respondents were overnight visitors staying overnight in the Mt. Hood area (34 percent), 11 percent were day visitors to the Mt. Hood area but staying overnight elsewhere, and 2 percent were seasonal residents/second homeowners.

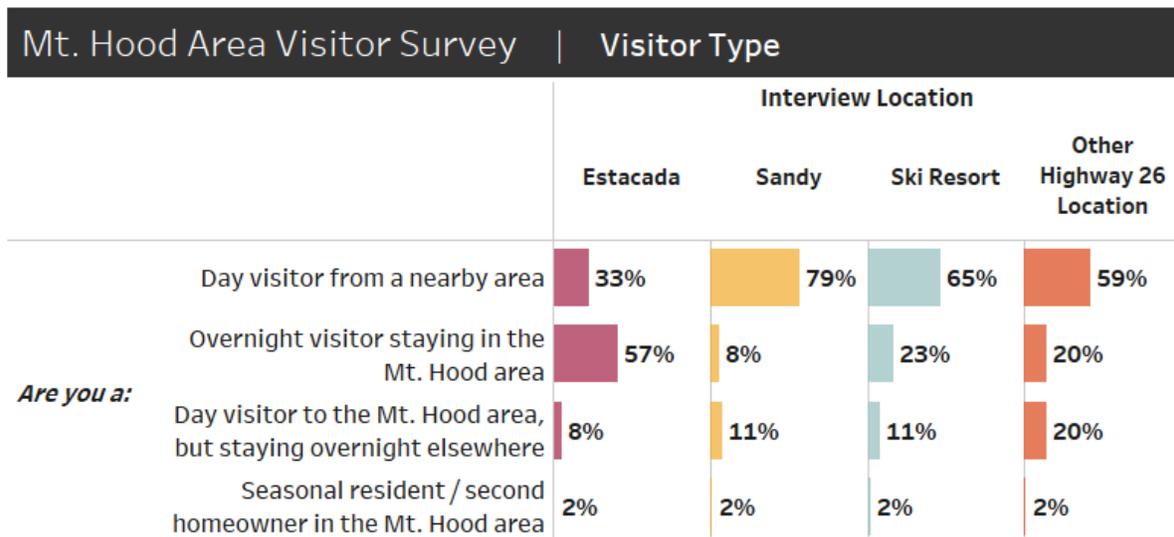
Figure 1



Source: RRC Associates

Sandy and Highway 26 locations (including the ski resorts) tended to pull more day visitors, while a greater share of overnight visitors were found in the Estacada area.

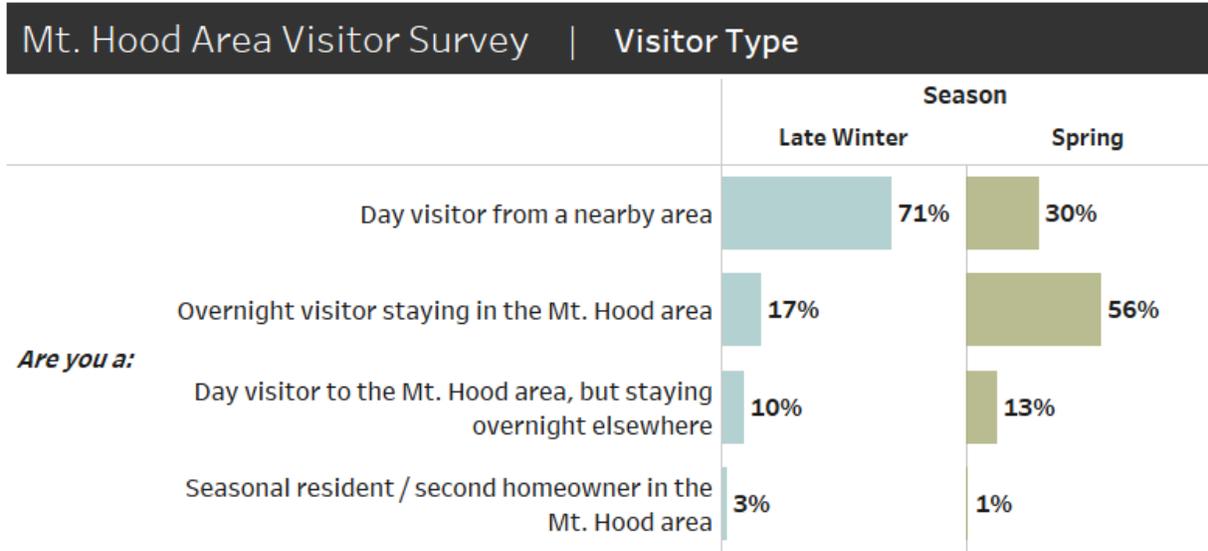
Figure 2



Source: RRC Associates

Late winter also had a larger day visitor draw (driven by a large share of surveys conducted at ski resorts in late winter), with increasing shares of overnight visitors noted into the spring.

Figure 3



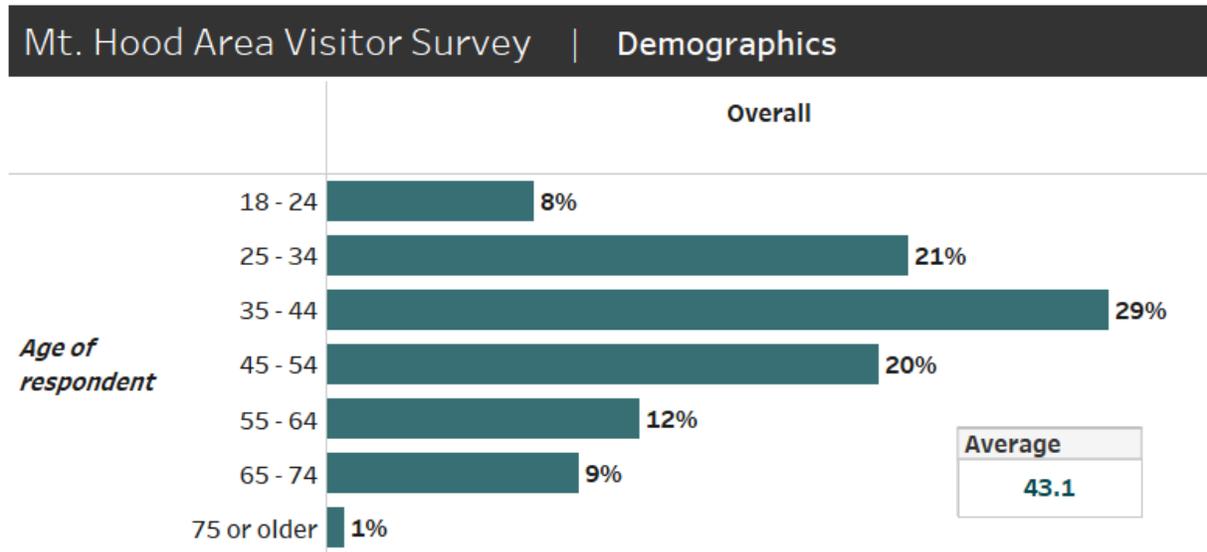
Source: RRC Associates

Respondent Profile

Specific demographic results from the visitor intercept survey include the following observations:

- Age.** The Mt. Hood area attracts visitors from a variety of age cohorts. The average visitor age is 43.1. The age profile varies somewhat by location, time of season, and geographic origin. Overall, ski resorts in the area attracted slightly older visitors (average age 45.2) and the age profile skewed somewhat older in late winter as compared to spring (44.1 vs. 41.7). Out-of-state visitors are slightly younger, on average, than in-state visitors (42.6 vs. 43.3).

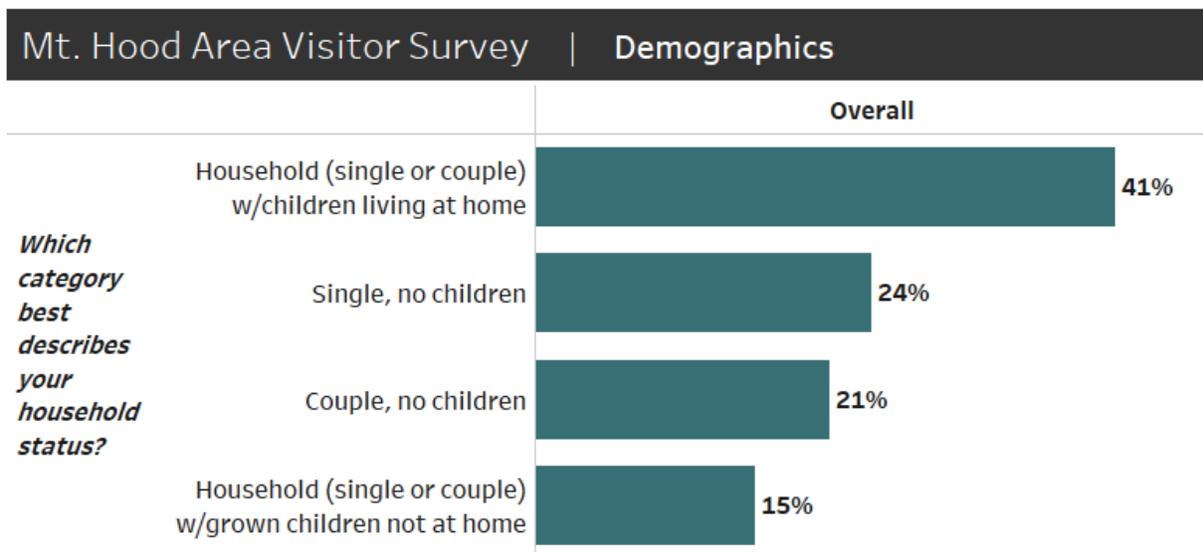
Figure 4



Source: RRC Associates

- Household Composition.** The largest segment of visitors to the region were households with children living at home (41 percent). In contrast, 59 percent of visitors to the region do not have children at home. Visitors particularly likely to have children include overnight visitors (48 percent), visitors to the ski areas (48 percent), and Oregon residents (43 percent).

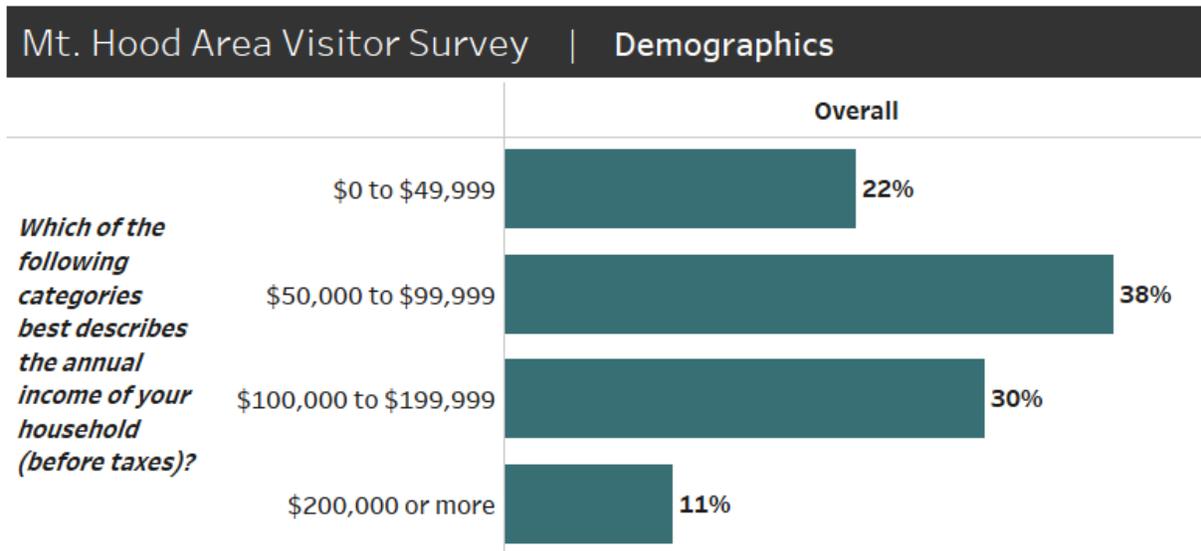
Figure 5



Source: RRC Associates

- Annual Household Income.** The Mt. Hood area is a draw for visitors, regardless of income – highly affluent and less affluent guests were identified throughout the region. Households with children skewed more affluent (19 percent earn at least \$200,000 annually), as did ski resort visitors (18 percent), and wintertime visitors (13 percent).

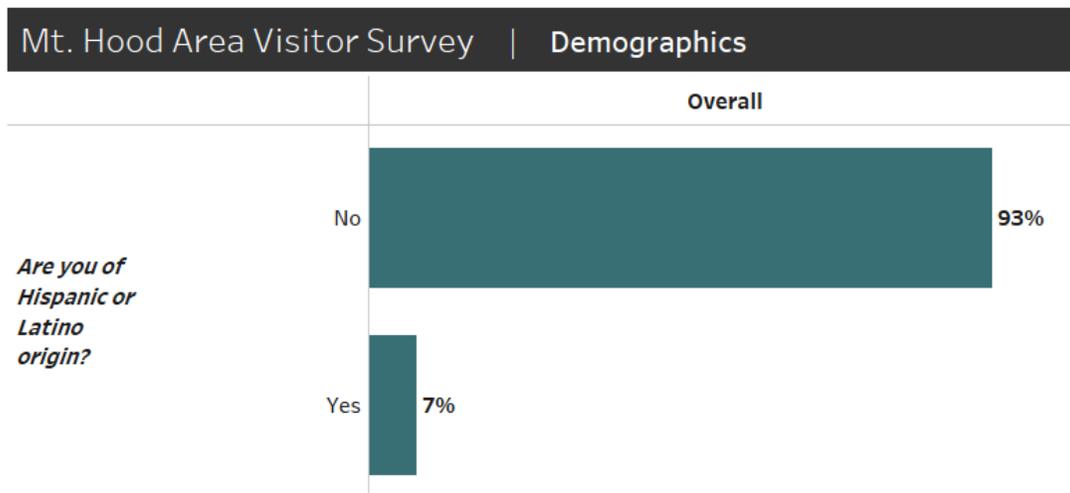
Figure 6



Source: RRC Associates

- Race/Ethnicity.** Overall, there is opportunity to broaden the diversity of visitors to the Mt. Hood region. In particular, the share of respondents who identify as Hispanic or Latino was notably lower than the Oregon population as a whole (7 percent in the survey results vs. 13 percent of Oregonians, according to Census data). Although, it should be noted that Estacada had a higher share of visitors identifying as Hispanic or Latino (11 percent) than other survey locations.

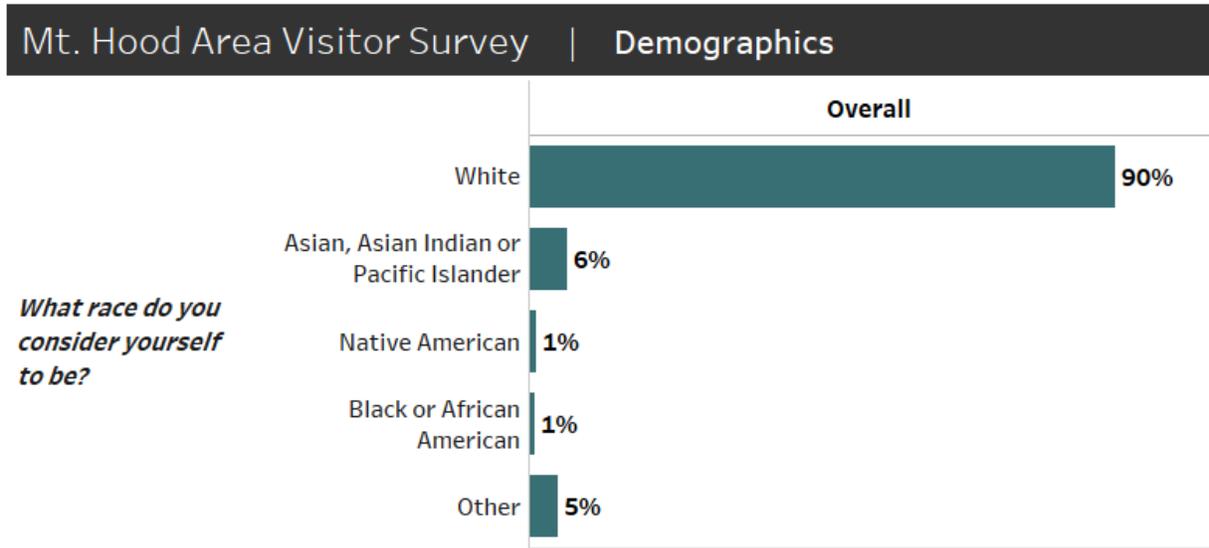
Figure 7



Source: RRC Associates

- About nine in ten of all respondents identify as White (90 percent), distantly followed by 6 percent identifying as Asian, Asian Indian or Pacific Islander. A higher share of visitors identifying as Asian, Asian Indian or Pacific Islander was observed for Highway 26 locations (13 percent).

Figure 8

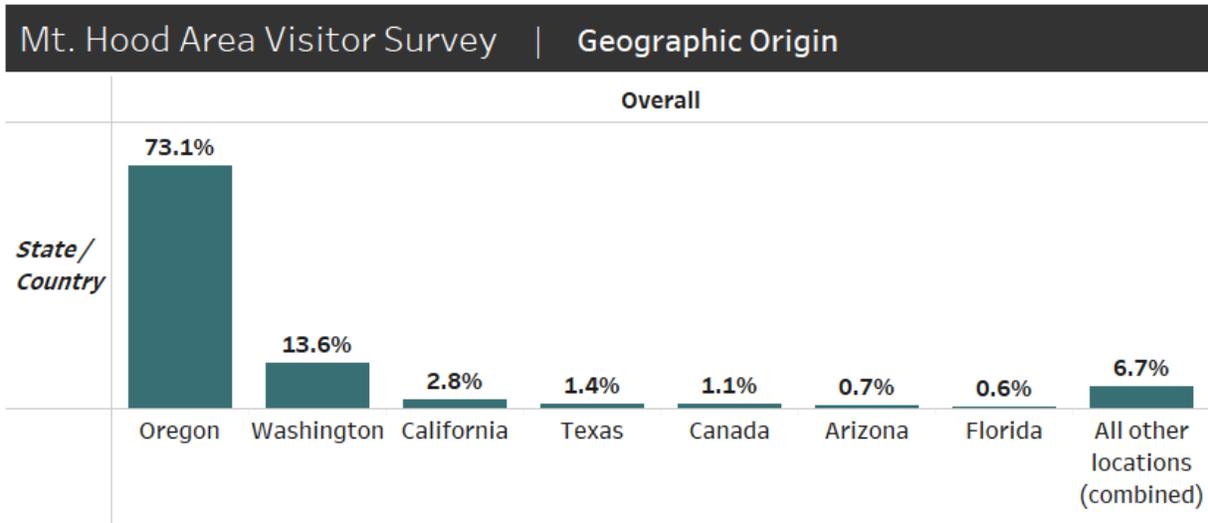


Source: RRC Associates

Geographic Origin

The Mt. Hood area attracts mostly in-state residents; nearly three-quarters of all respondents reside in Oregon (73 percent). The second most common origin of visitors is Washington (14 percent), followed distantly by California (3 percent), Texas, Canada, Arizona, and Florida (each 1 percent). Visitors from over 30 other locations collectively accounted for 7 percent of all respondents.

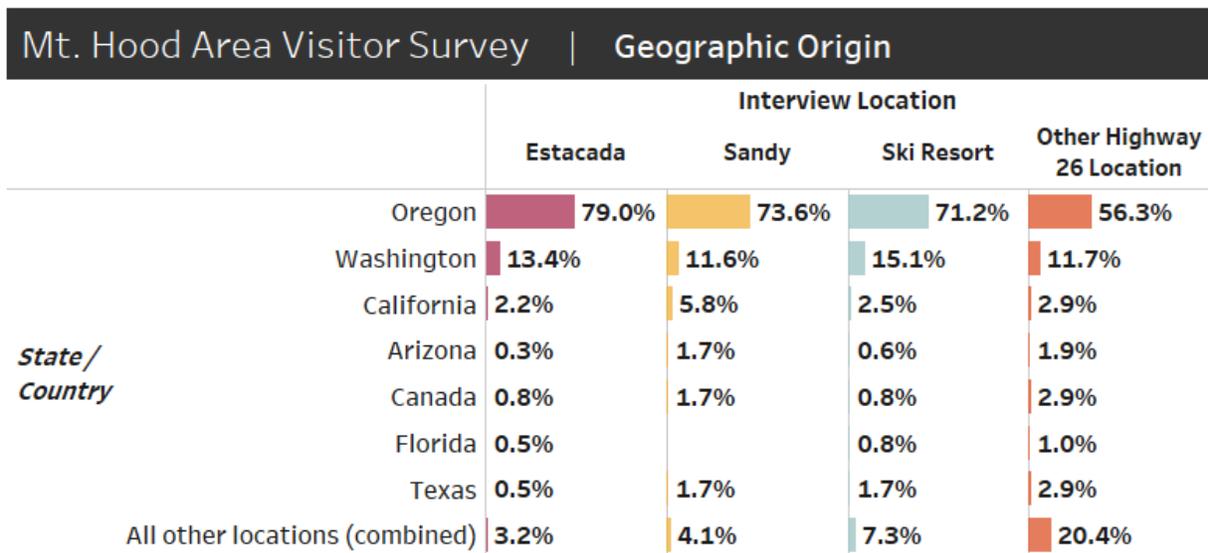
Figure 9



Source: RRC Associates

Out-of-state visitors were more likely to be found along Highway 26 locations (including ski resorts) than in Sandy and Estacada. While results should be interpreted with caution due to small sample sizes for individual locations, greater shares of out-of-state visitors were identified at Timberline Ski Area, Mt. Hood Meadows Park and Ride, Mirror Lake and Trillium Lake Trailheads, and on Mt. Hood Express.

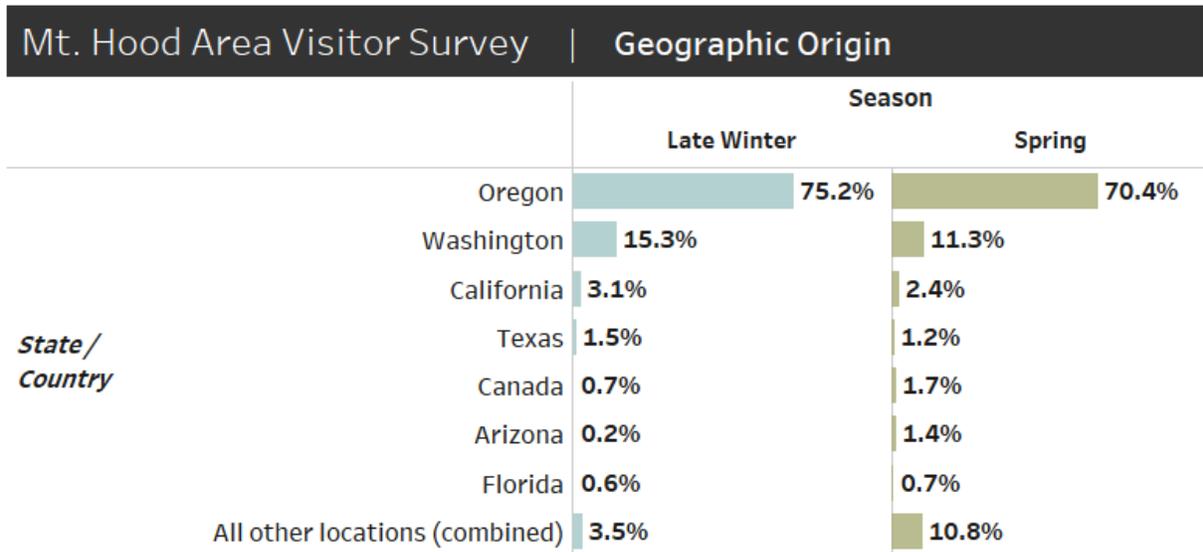
Figure 10



Source: RRC Associates

Total out-of-state visitation was proportionately higher in the spring than in late winter (30 percent vs. 25 percent). However, visitation among Washington residents was higher in late winter (15 percent) than in spring (11 percent), mostly driven by ski resort visitation.

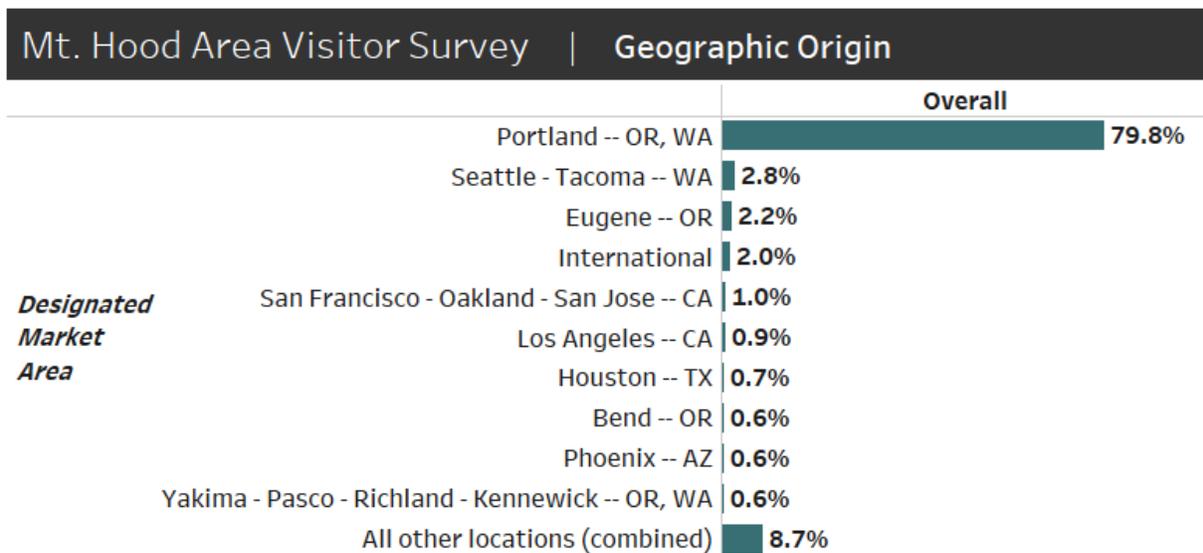
Figure 11



Source: RRC Associates

Most visitors reside in the Portland market area (80 percent), with progressively smaller shares of visitors from the Seattle-Tacoma (3 percent) or Eugene (2 percent) market areas. Two percent of all respondents were from outside of the United States, with Canada comprising the greatest share of international visitation.

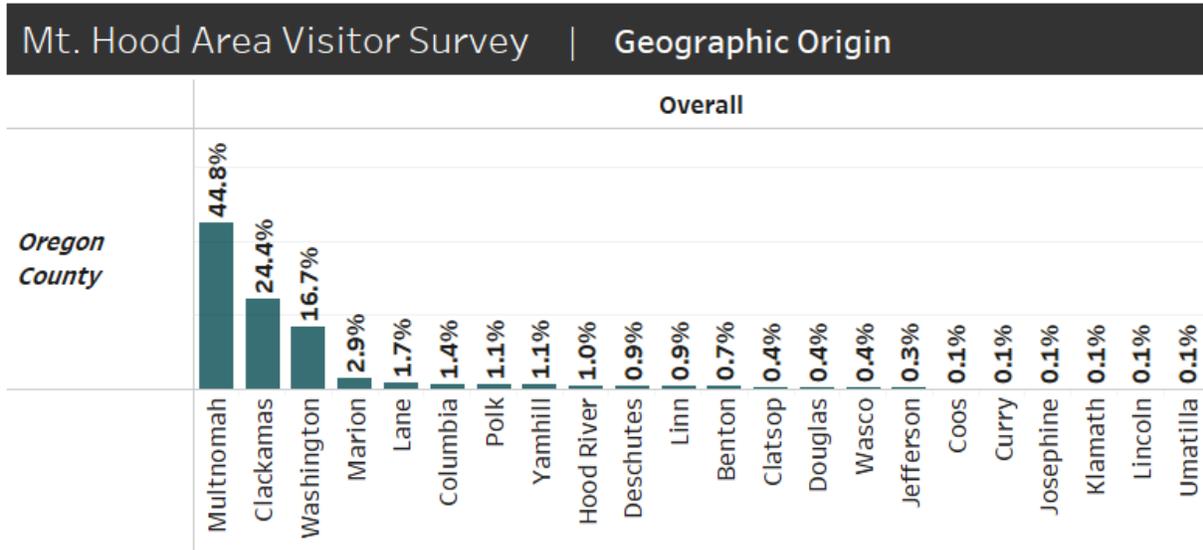
Figure 12



Source: RRC Associates

Looking just at Oregon respondents, Multnomah (45 percent), Clackamas (24 percent), and Washington (17 percent) Counties together comprised 86 percent of all in-state visitors to the region.

Figure 13

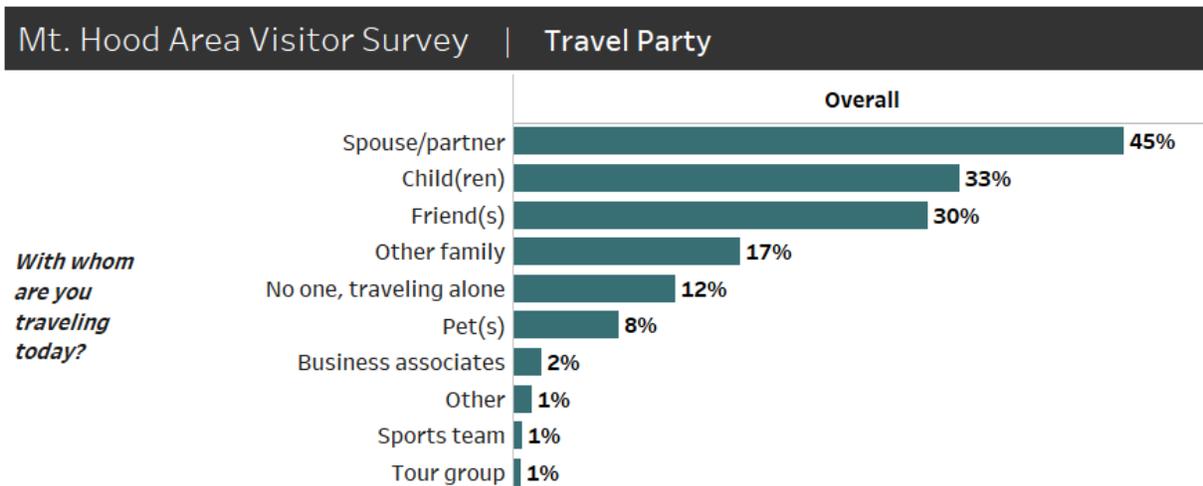


Source: RRC Associates

Travel Party Composition

Overall, visitors to the Mt. Hood area were most likely to be traveling with a spouse / partner (45 percent), child(ren) (33 percent), and/or friends (30 percent). Traveling with pets was more common among visitors surveyed in Sandy (8 percent) and Estacada (15 percent), than among those surveyed at ski resorts (1 percent) or Highway 26 (4 percent) locations. Over half of visitors to other Highway 26 locations in late winter were traveling alone (57 percent).

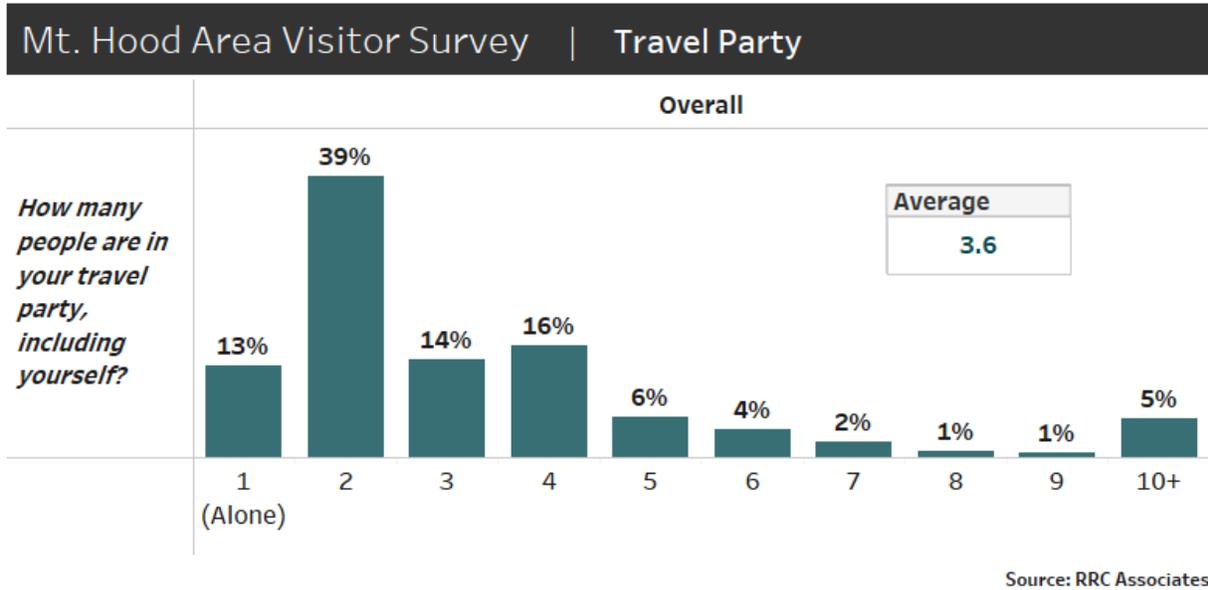
Figure 14



Source: RRC Associates

The average party size was 3.6 people. Larger average party sizes were observed among visitors surveyed in Estacada (4.1) and at the ski resorts (3.7). Larger parties were also observed in spring than in late winter (4.0 vs. 3.2).

Figure 15



Previous Visitation in Prior Two Years

Visitors have been to the area a total of 11.7 times in the past two years, on average. Average previous visitation was highest among visitors to Sandy (13.9), ski resorts (13.2), wintertime visitors (13.8), and day visitors from a nearby area (16.3).

Table 2

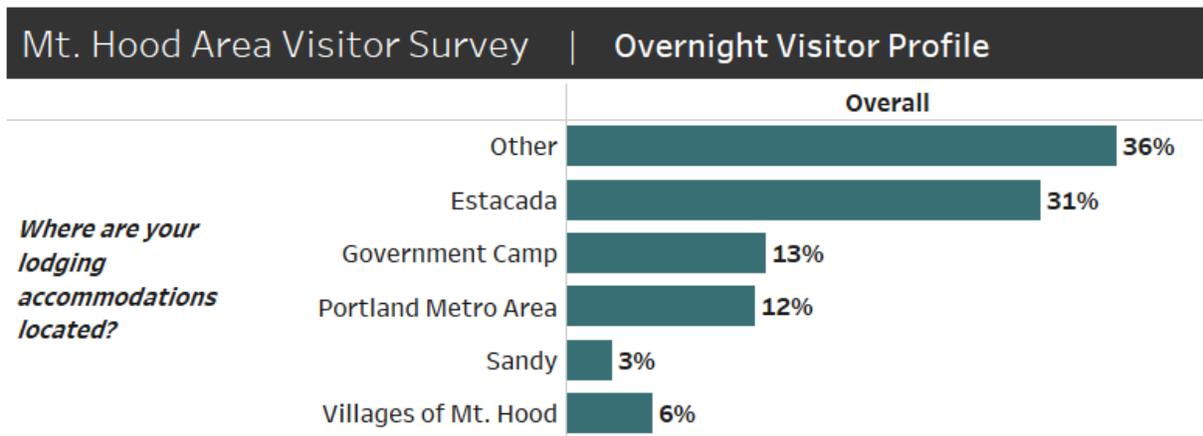
	Average Number of Visits to the Mt. Hood Area in the Prior Two Years	
<i>Overall</i>	11.7	
<i>Survey Location</i>	Estacada	10.1
	Sandy	13.9
	Ski Resort	13.2
	Other Highway 26 Location	10.1
<i>Season</i>	Late Winter	13.8
	Spring	8.8
<i>Geographic Origin</i>	Oregon resident	13.9
	Out-of-state resident	5.8
<i>Visitor Type</i>	Day visitor from a nearby area	16.3
	Day visitor to the Mt. Hood area, but staying overnight elsewhere	5.7
	Overnight visitor staying in the Mt. Hood area	7.2

OVERNIGHT VISITOR PROFILE

Location & Type of Accommodations

The most popular bed base in the area was Estacada, with nearly one-third of respondents staying there overnight (31 percent). It should be noted that this number may be inflated due to a high share of surveys conducted in Estacada and given that 54 percent of overnight respondents interviewed in Estacada stayed in Estacada. The next most common bed bases included Government Camp (13 percent) and Portland Metro Area (12 percent). A notable share of visitors also stayed overnight in an “other” location not listed (36 percent). Write-in comments for bed base highlight that a number of overnight respondents stayed in Hood River, Rhododendron, Welches, and campgrounds throughout Mt. Hood National Forest.

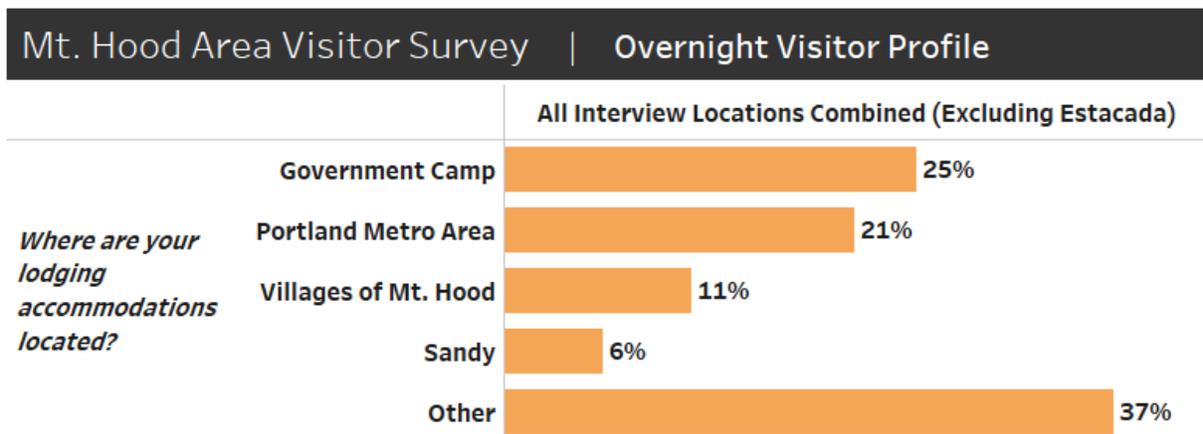
Figure 16



Source: RRC Associates

When respondents surveyed in Estacada are excluded from the sample, the share of overnight respondents staying in Government Camp (25 percent) and Portland Metro Area (21 percent) are even more pronounced.

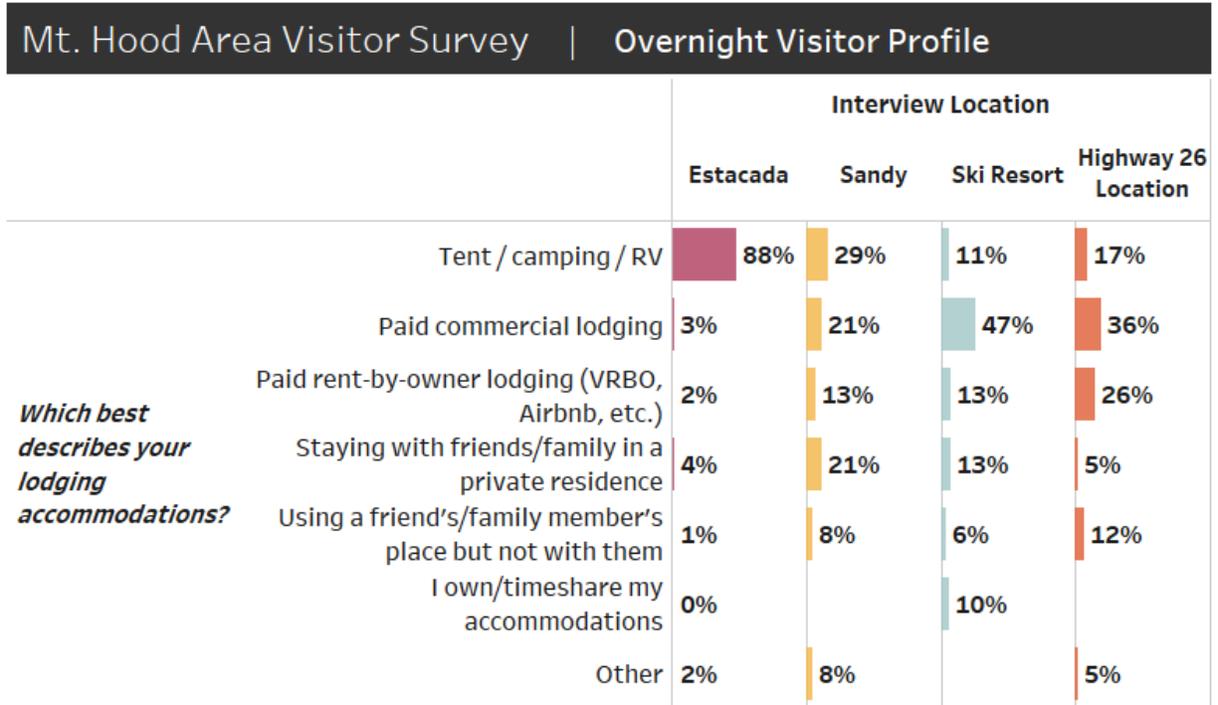
Figure 17



Source: RRC Associates

Lodging type varied considerably by interview location. Close to half of overnight respondents surveyed at ski resorts were staying in paid commercial lodging (47 percent), while nearly nine in ten overnight respondents that were surveyed in Estacada camped (88 percent). Overall, overnight visitors were most likely to camp in an RV or tent (58 percent of all respondents). However, given a high share of surveys conducted at Milo McIver State Park in Estacada, this is likely overstated.

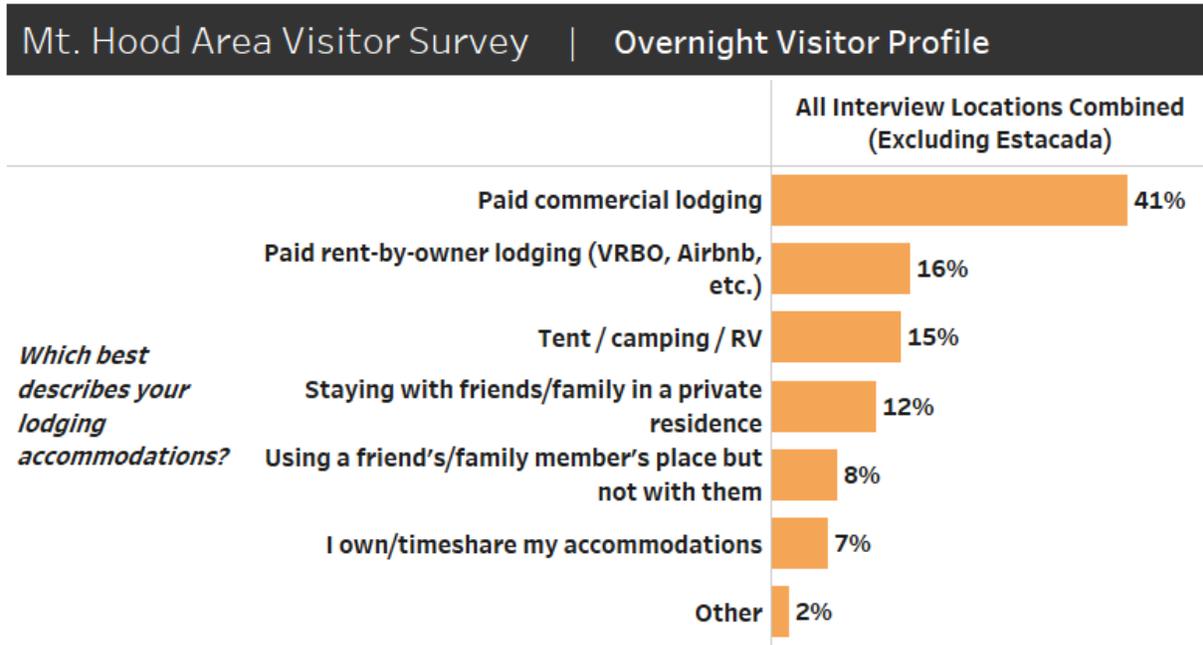
Figure 18



Source: RRC Associates

When lodging type is evaluated without respondents surveyed in Estacada, paid commercial lodging rises to the top as the most popular type of accommodations (41 percent). In a second tier of responses, prevalent types of lodging include rental-by-owner (RBO) accommodations (16 percent), tent/camping/RV (15 percent), and staying with friends/family in a private residence (12 percent).

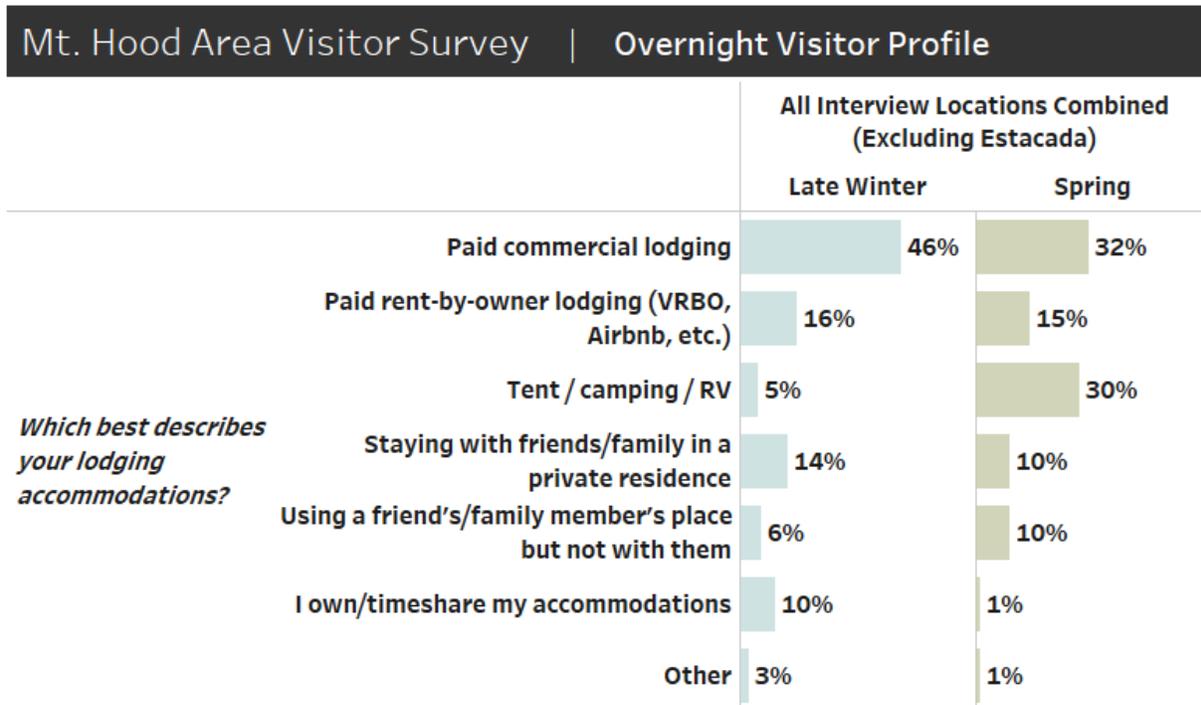
Figure 19



Source: RRC Associates

As might be expected, camping was more popular in the spring (30 percent vs. 5 percent), while paid commercial lodging was more common in late winter (46 percent vs. 32 percent), but still the most used type of accommodations regardless of season. The shares of respondents staying in RBO accommodations or with family/friends were relatively consistent, regardless of season. Meanwhile, the share of respondents staying in their own or timeshared accommodations was higher in late winter than spring (10 percent vs. 1 percent). Oregon residents were much more likely to camp as compared to visitors coming from out-of-state.

Figure 20

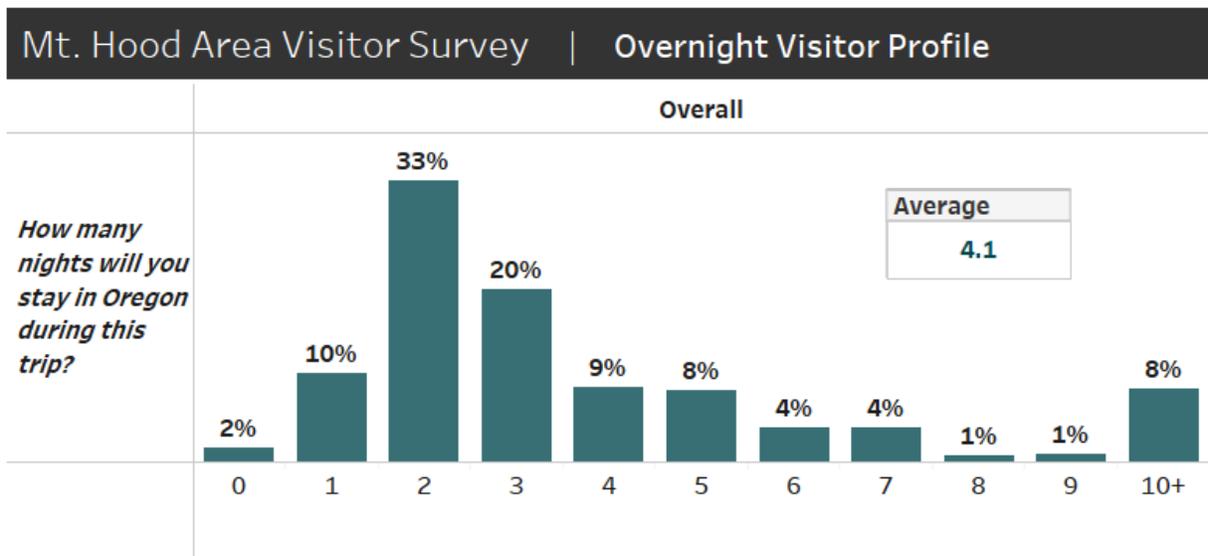


Source: RRC Associates

Length of Stay

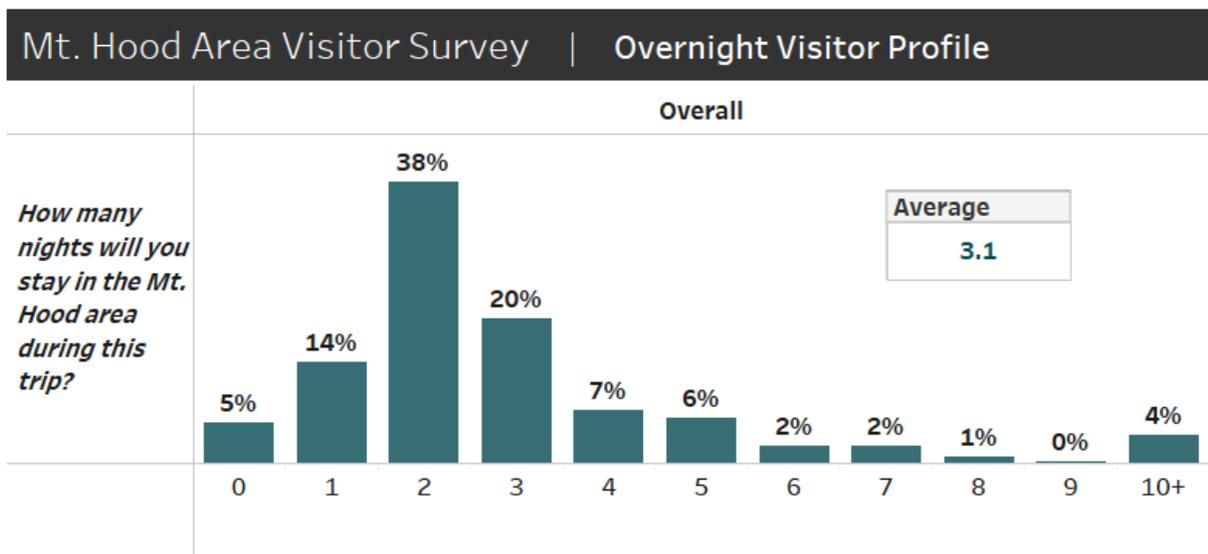
Overnight visitors stayed an average of 4.1 nights in Oregon and 3.1 nights in the Mt. Hood area, for a capture rate of 76 percent. Average nights stayed in both Oregon and the Mt. Hood area were higher in late winter Oregon, 3.5 in the Mt. Hood area: capture rate of 76 percent) than in the spring (3.9 nights in Oregon, 2.9 in the Mt. Hood area: capture rate of 74 percent), although the capture rate remained steady regardless of season. By accommodation type, those staying with friends or family in their private residence tended to stay the longest on average (5.0 nights), followed by those in RBO accommodations (4.9), paid commercial lodging (4.4), and then tent/camping/RV (3.8).

Figure 21



Source: RRC Associates

Figure 22



Source: RRC Associates

TRIP CHARACTERISTICS

Main Purpose of Visit

By far, visitors to the Mt. Hood area were visiting for leisure/outdoor recreation (87 percent). This was the primary reason for visiting regardless of location, although visitors to Estacada were more likely to be visiting for a special event (note: surveys were conducted during the Upper Clackamas Whitewater Festival, which explains the higher share of Estacada respondents reporting a special event as the primary trip purpose). When results are evaluated for all locations excluding Estacada, leisure/outdoor recreation is cited by an even higher share of respondents (93 percent).

Figure 23

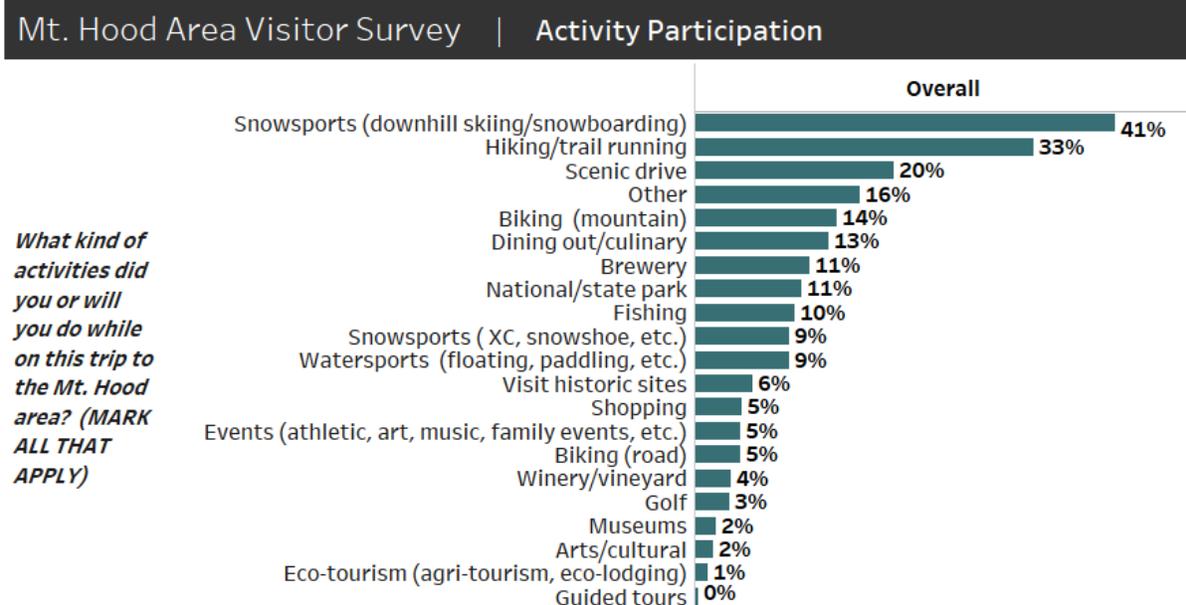


Source: RRC Associates

Activity Participation

Visitors to the area participated in a variety and number of activities in the region (2.2 on average). Downhill snowsports (41 percent) and hiking/trail running (33 percent) were the most common, with many others also participating in scenic drives (20 percent), mountain biking (14 percent), dining out (13 percent), brewery visitation (11 percent), national / state park visitation (11 percent), fishing (10 percent), other snowsports (9 percent), and watersports (9 percent). A high share of respondents indicated participating in “other” activities not listed (16 percent). A variety of answers were received, but camping and disc golf were frequently mentioned.

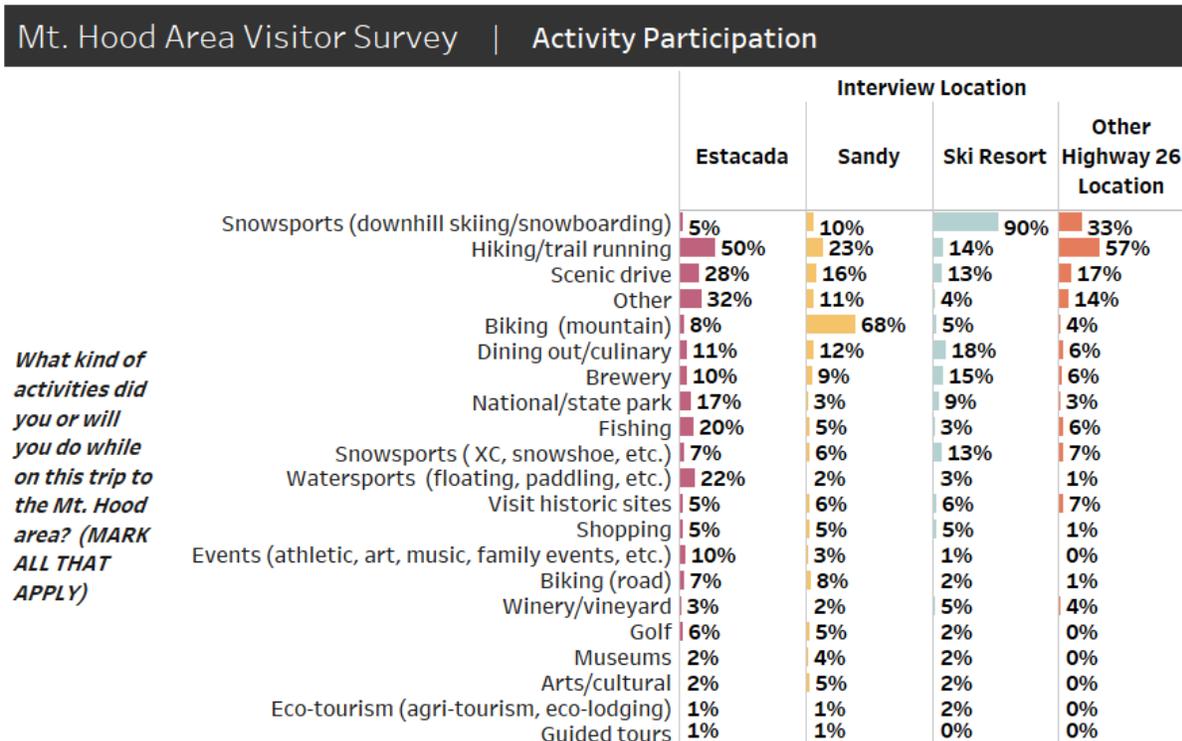
Figure 24



Source: RRC Associates

Activity participation varied considerably by where the respondent was interviewed. Hiking/trail running was most popular among respondents interviewed in Estacada and other Highway 26 locations, mountain biking for Sandy respondents and (not surprisingly) snowsports for those interviewed at the ski resorts.

Figure 25



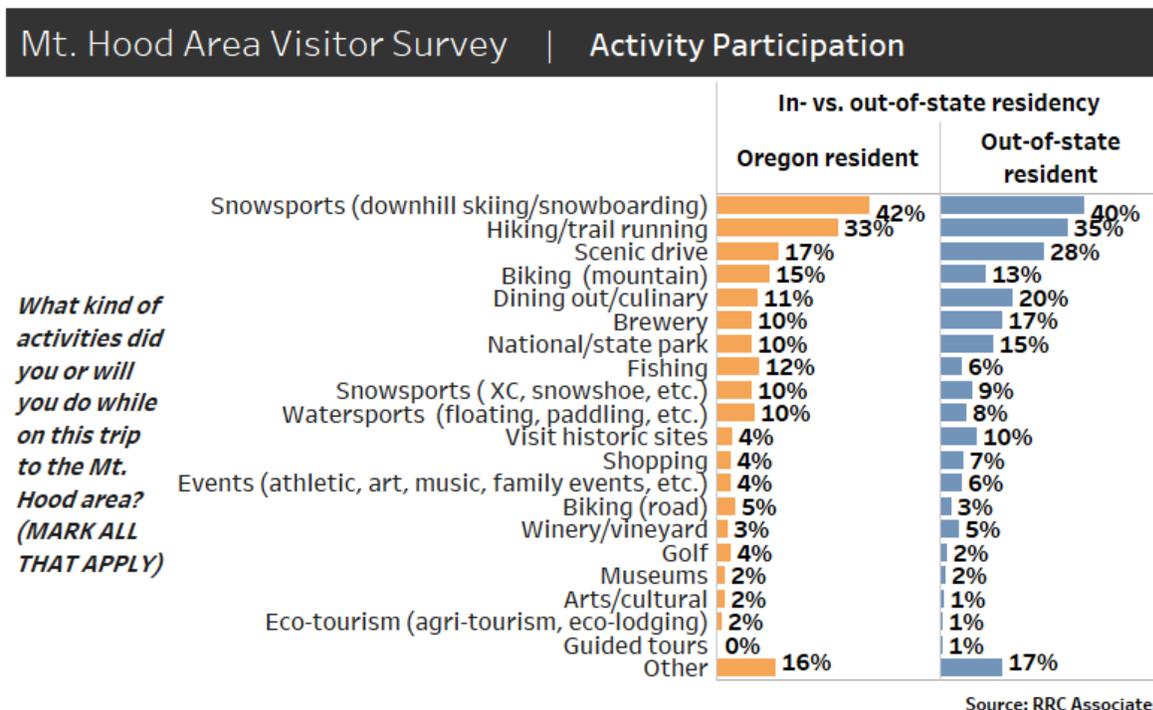
Source: RRC Associates

Activity participation also shifted by season and geographic origin. Hiking, biking, and water-based activities were more popular in the spring. Out-of-state visitors were more likely to go on scenic drives, dine out, and visit historic sites than their in-state counterparts.

Figure 26



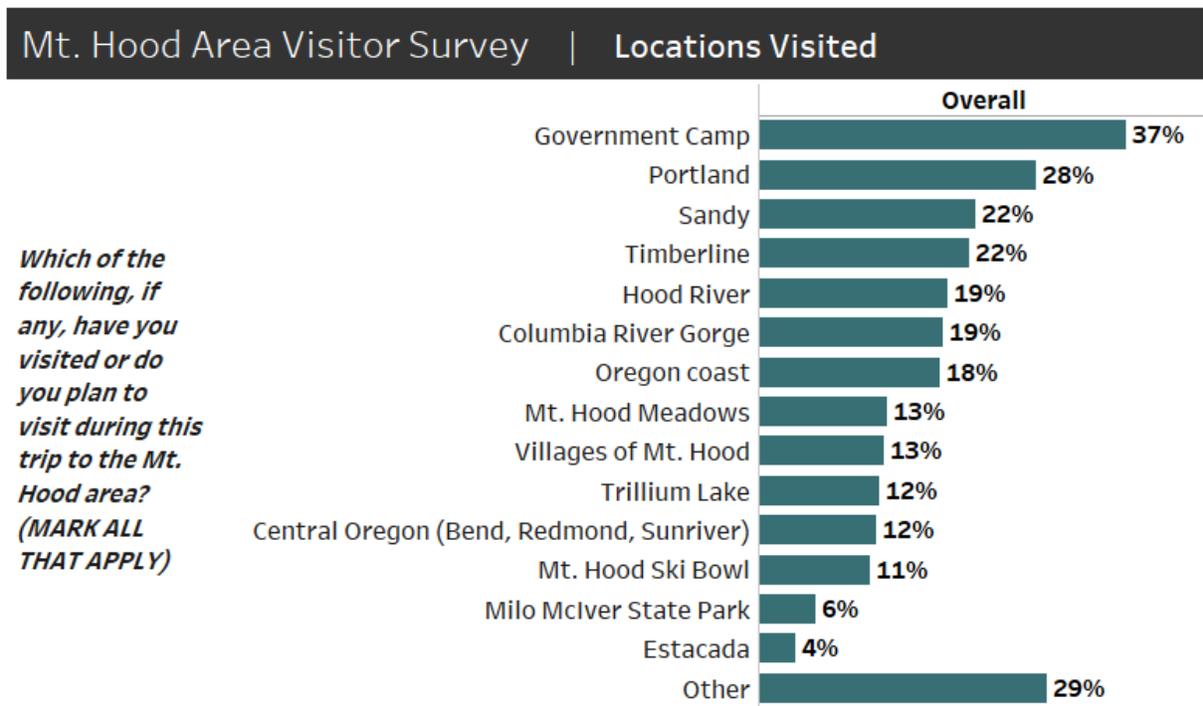
Figure 27



Locations Visited in the Area

Visitors went to a variety and number of locations (with 2.7 locations cited on average). The most common locations respondents visited while on their trip were Government Camp (37 percent), Portland (28 percent), Sandy (22 percent), Timberline (22 percent), Hood River (19 percent), Columbia River Gorge (19 percent), and the Oregon Coast (18 percent). Many cited “other” locations, with Sandy Ridge, Mirror Lake, and Zigzag Falls frequently reported in the write-in comments. Average number of locations visited was the same regardless of season, although places visited did shift somewhat (for example, Government Camp was more frequently visited in late winter than in spring—41 percent vs. 32 percent).

Figure 28



*Which of the following, if any, have you visited or do you plan to visit during this trip to the Mt. Hood area?
(MARK ALL THAT APPLY)*

Source: RRC Associates

Average Expenditures

Total average spend per party for the entire trip was \$285, with a total spend per party per day of \$184, total spend per person for the entire trip of \$91, and total spend per person per day of \$61. Lodging, recreation/entertainment/activities, and food and drink were the expenditure categories in which visitors spent the most money.

Table 3
Spending Category **Average**

PER CAPITA		
Per Day	Lodging	\$17
	Recreation/entertainment/activities	\$19
	Food & drinks	\$16
	Shopping/retail	\$4
	Other items (gas, parking)	\$6
	TOTAL	\$61
Entire Trip	Lodging	\$29
	Recreation/entertainment/activities	\$26
	Food & drinks	\$23
	Shopping/retail	\$6
	Other items (gas, parking)	\$10
	TOTAL	\$91
PER TRAVEL PARTY		
Per Day	Lodging	\$55
	Recreation/entertainment/activities	\$53
	Food & drinks	\$51
	Shopping/retail	\$11
	Other items (gas, parking)	\$19
	TOTAL	\$184
Entire Trip	Lodging	\$97
	Recreation/entertainment/activities	\$76
	Food & drinks	\$75
	Shopping/retail	\$16
	Other items (gas, parking)	\$28
	TOTAL	\$285

Visitors surveyed at the ski resorts and other Highway 26 locations spent more on average (\$405 and \$224, respectively) than visitors surveyed in Sandy (\$145) and Estacada (\$210). Additionally, spend was higher in late winter than in spring (\$295 vs. \$271), with ski-related expenditures contributing to a higher average spend overall.

Figure 29

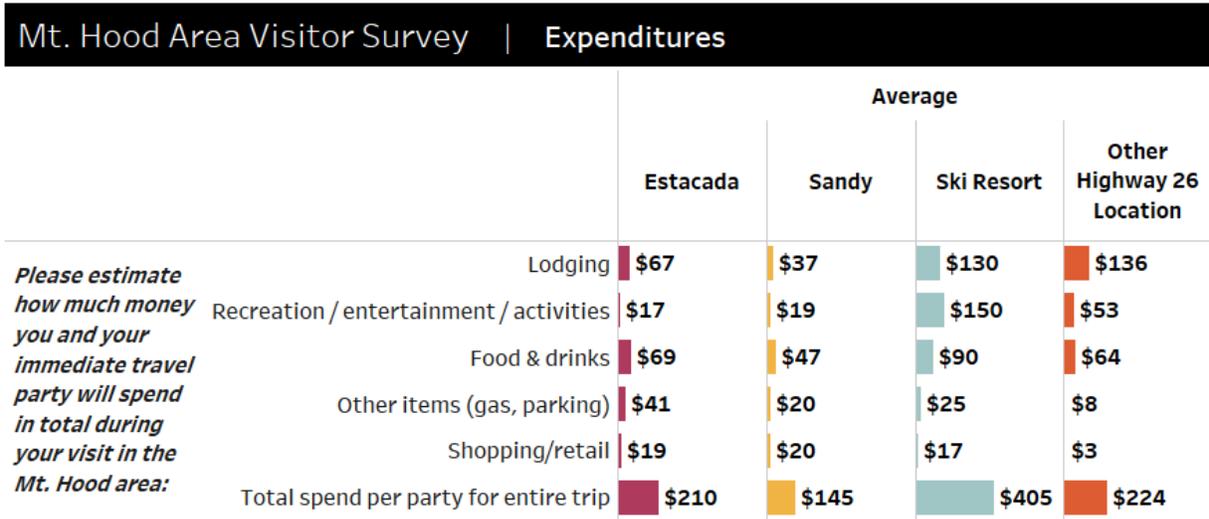
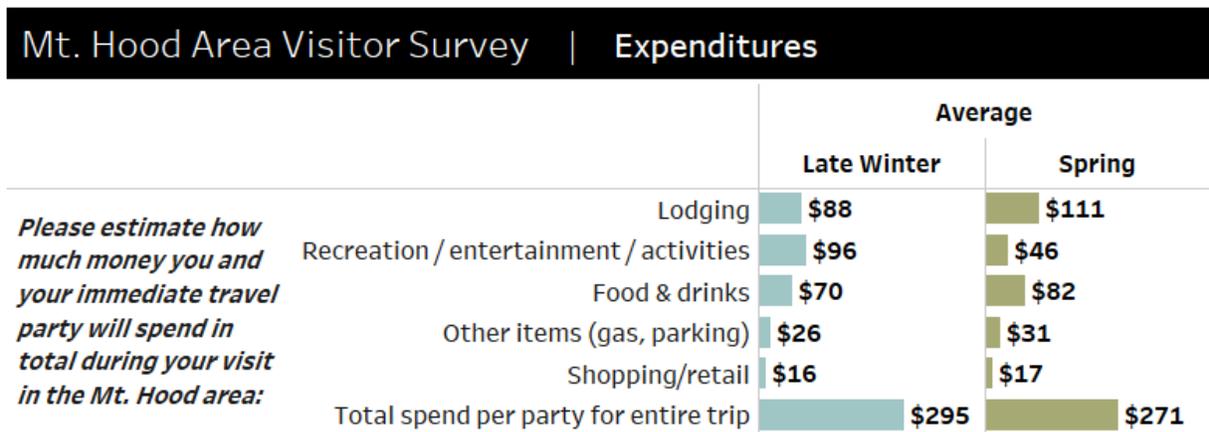


Figure 30



Overnight visitors staying in the Mt. Hood area spent more on average (\$455) than those who stayed overnight outside the region (\$329) or day visitors (\$136). Out-of-state visitors spent more than in-state residents (\$427 vs. \$223).

Figure 31

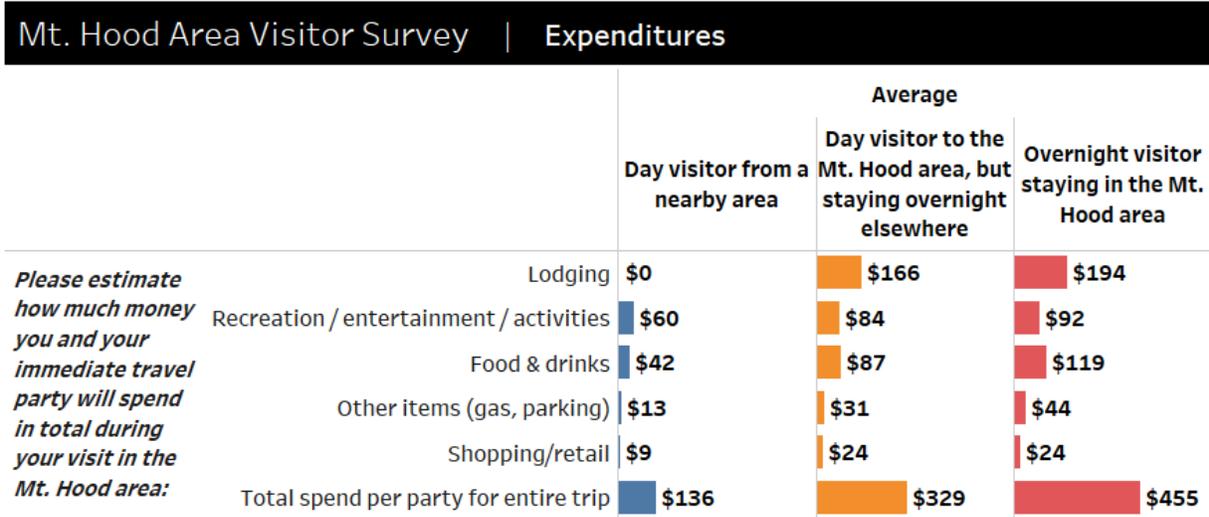


Figure 32



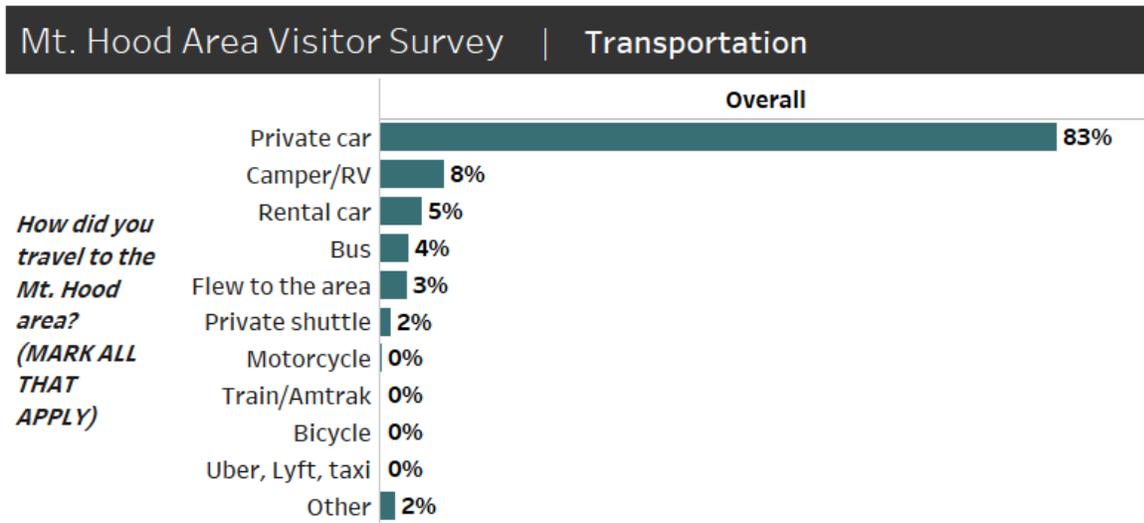
TRANSPORTATION PROFILE

A key component of the visitor study was understanding transportation methods, preferences, and barriers. This section of the report will take a detailed look at current transit patterns in the region, as well as opportunities to grow public transportation usage in the future.

Method of Travel

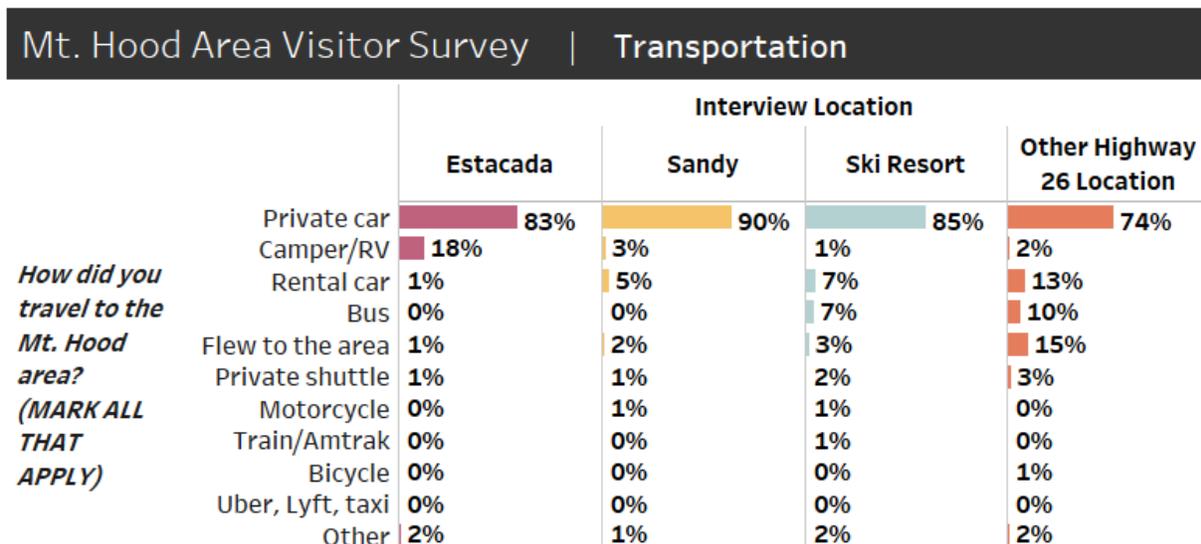
Most respondents traveled to the area by private car (83 percent), with the other travel modes each used by fewer than one in ten respondents. Visitors surveyed along Highway 26 locations were more likely to have used a rental car, bus, and/or airplane in their travels to the area.

Figure 33



Source: RRC Associates

Figure 34



Source: RRC Associates

Private cars are used proportionately more in late winter than in spring (86 percent vs. 80 percent), while a higher share of campers/RVs are used in the springtime (13 percent vs. 4 percent). The bus is also used more in late winter than in spring (5 percent vs. 1 percent). Day visitors from a nearby area are more likely to use private cars (93 percent) and the bus (5 percent).

Figure 35

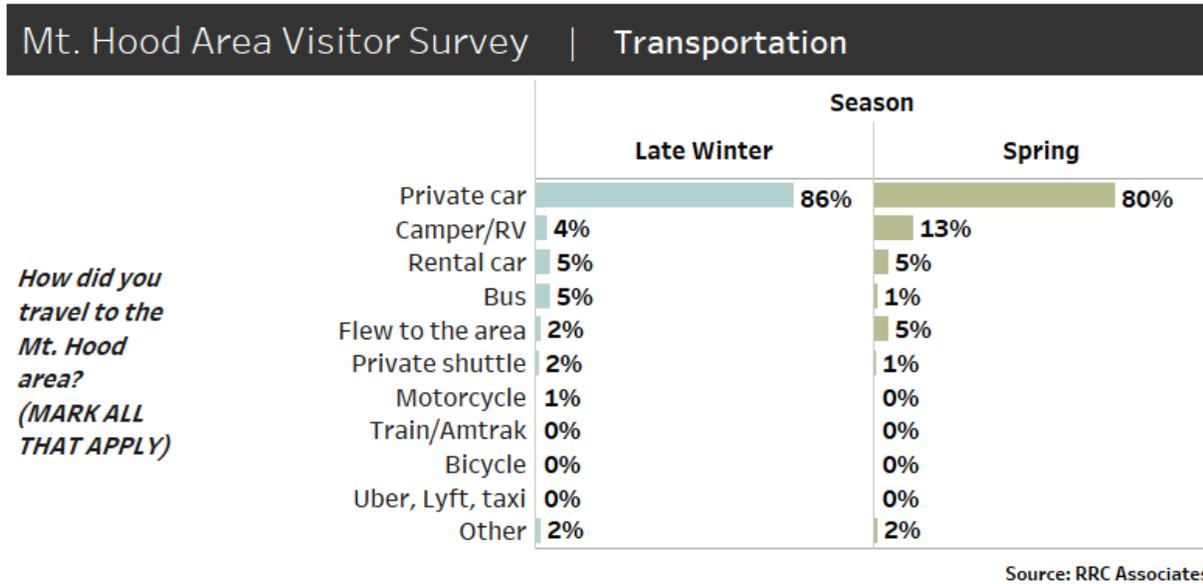
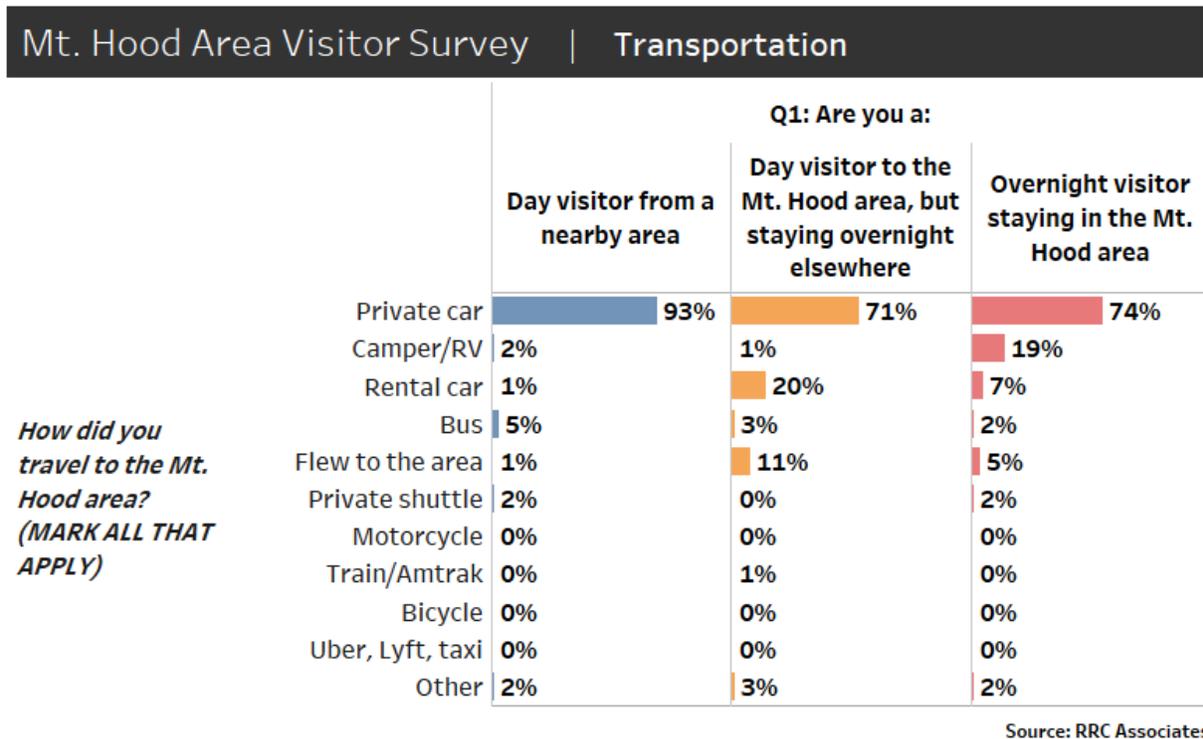
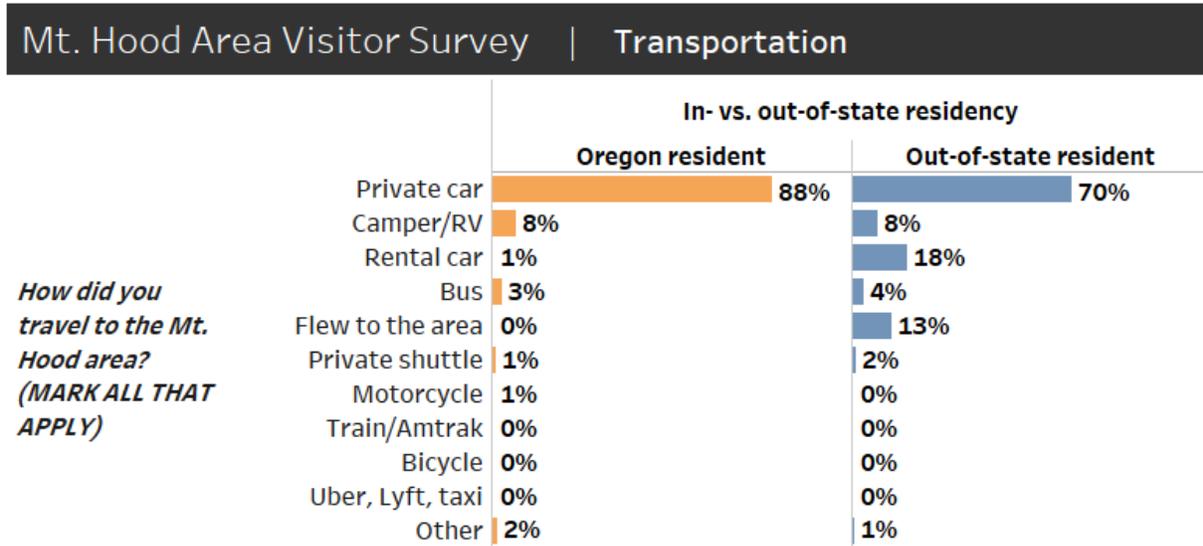


Figure 36



Thirteen percent of out-of-state visitors flew to the area and 18 percent used a rental car. Oregon residents were more likely to use a private car (88 percent vs. 70 percent). Each segment of respondents is about equally as likely to have used a camper/RV or the bus.

Figure 37

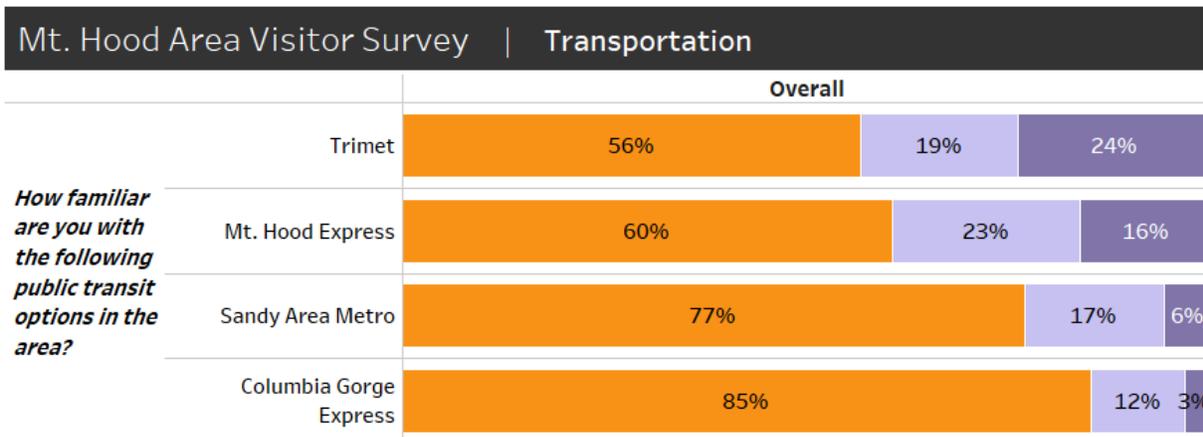


Source: RRC Associates

Familiarity with Public Transportation Options

A higher share of respondents noted they were “not at all” familiar with Trimet, Sandy Area Metro, Columbia Gorge Express, or Mt. Hood Express than the combined share of respondents who said they were either “somewhat” or “very” familiar. However, familiarity was higher for Trimet (44 percent) and Mt. Hood Express (40 percent) than for Sandy Area Metro (23 percent) or Columbia Gorge Express (15 percent).

Figure 38



Source: RRC Associates

■ NOT AT ALL ■ SOMEWHAT ■ VERY

Familiarity with the various public transit options was higher in late winter than in the spring (with the exception of Columbia Gorge Express). Day visitors were more familiar with the options than visitors staying overnight in the region or elsewhere. Similarly, Oregon residents were more familiar than out-of-state residents.

Figure 39

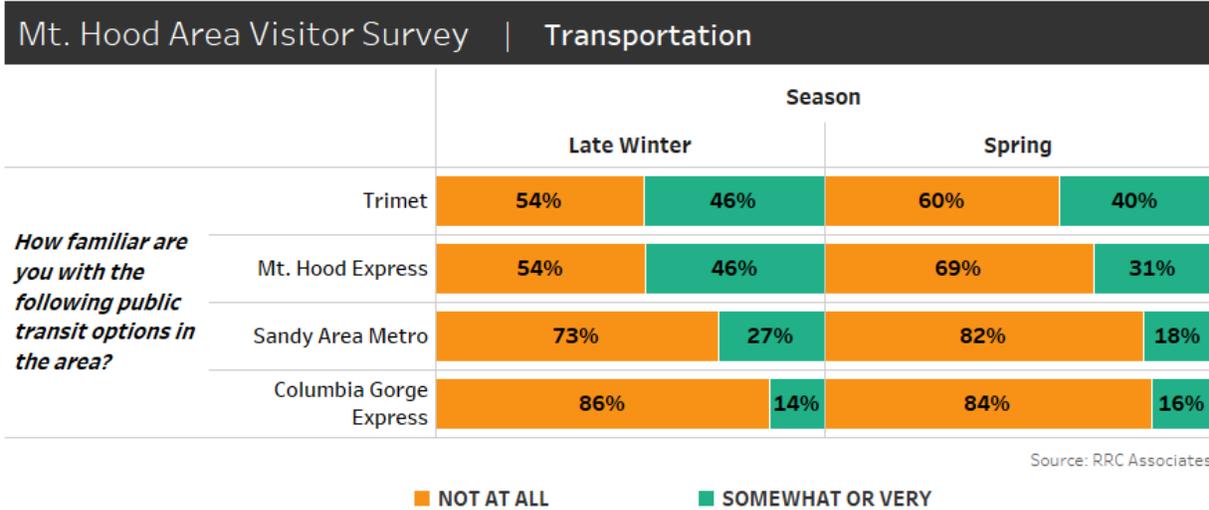


Figure 40

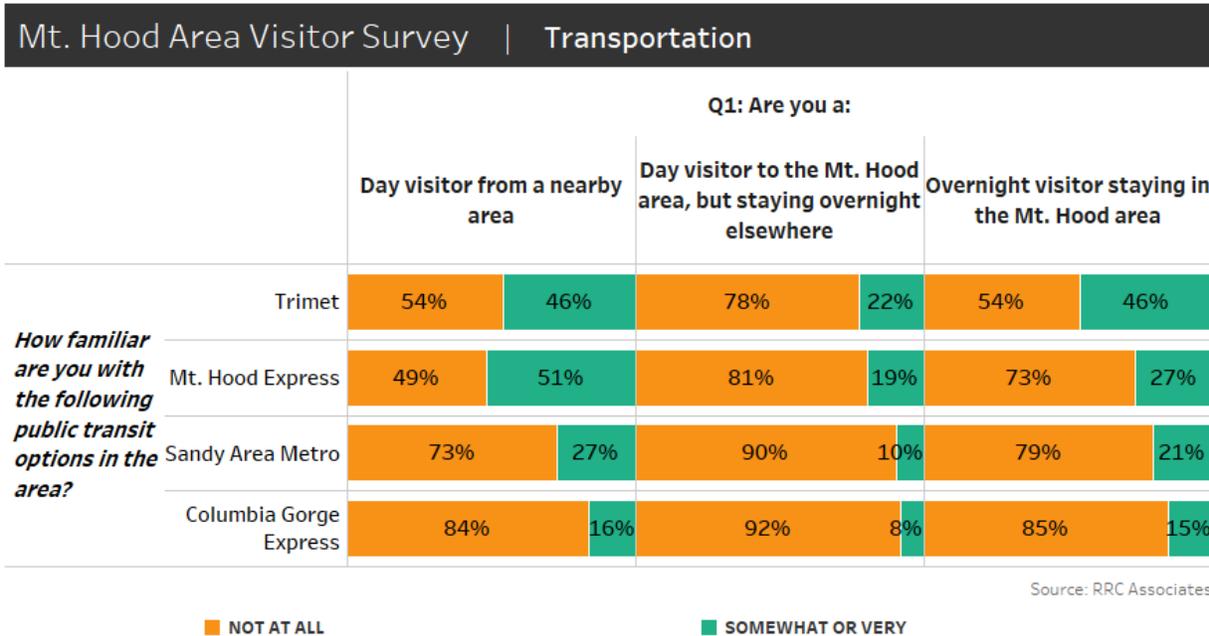
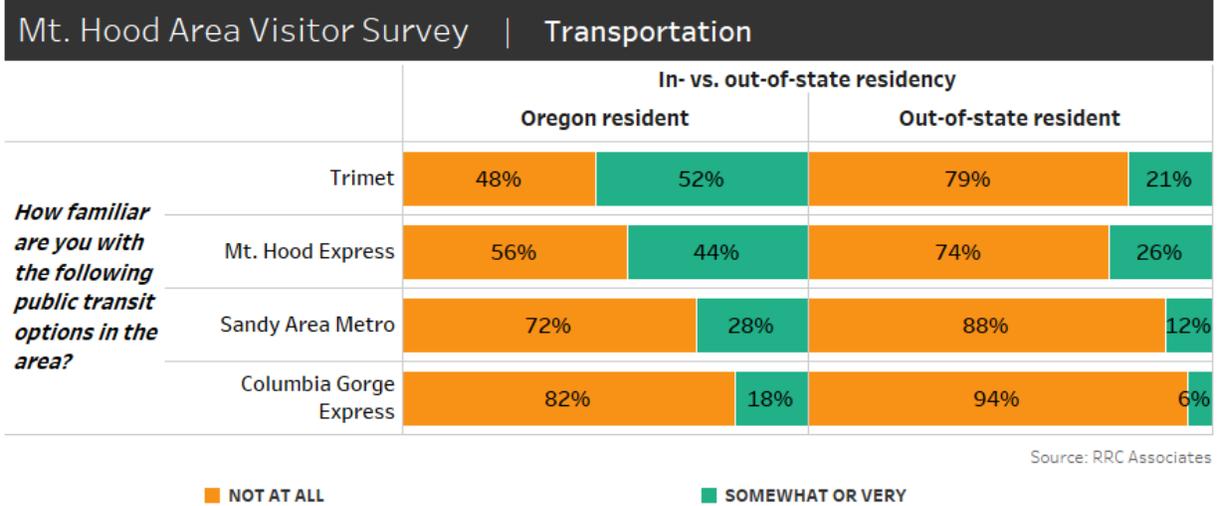


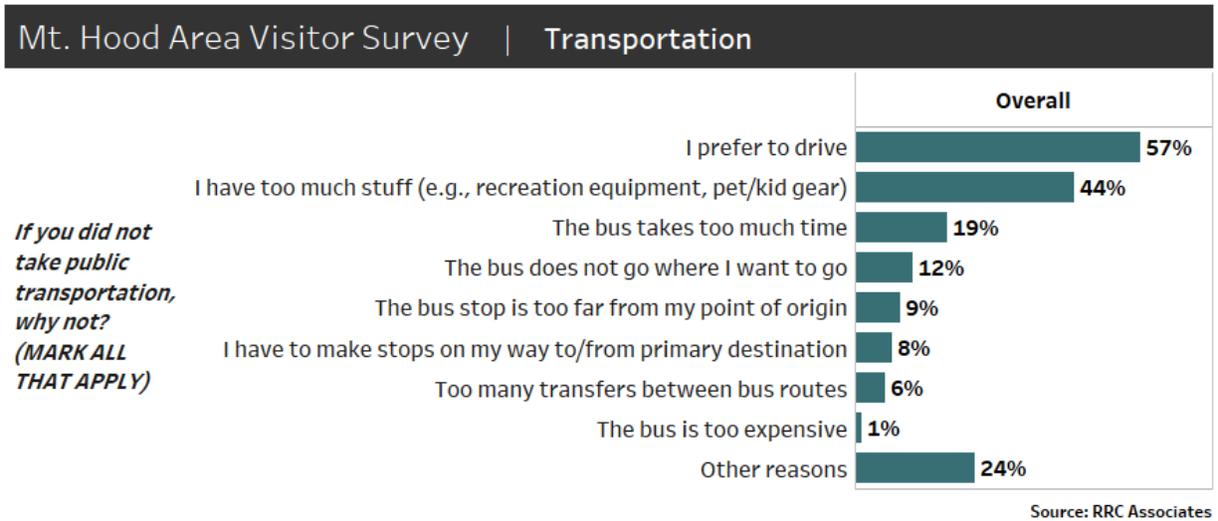
Figure 41



Barriers to Taking Public Transit

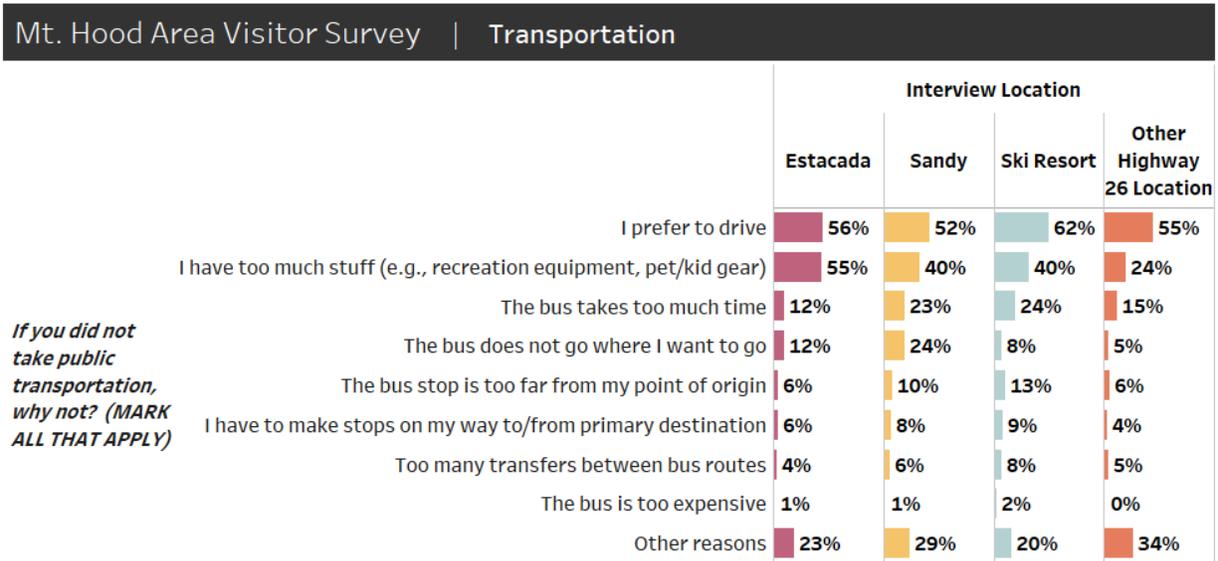
Over half of visitors who did not take public transportation during their travels to the Mt. Hood area said they preferred to drive (57 percent). Having too much stuff (e.g., recreation equipment, pet/kid gear) is the second most cited reason for not taking public transit (44 percent). Many cited “other” reasons, with write-in comments frequently mentioning traveling in a larger group, traveling with dogs, and being unaware of the public transportation options.

Figure 42



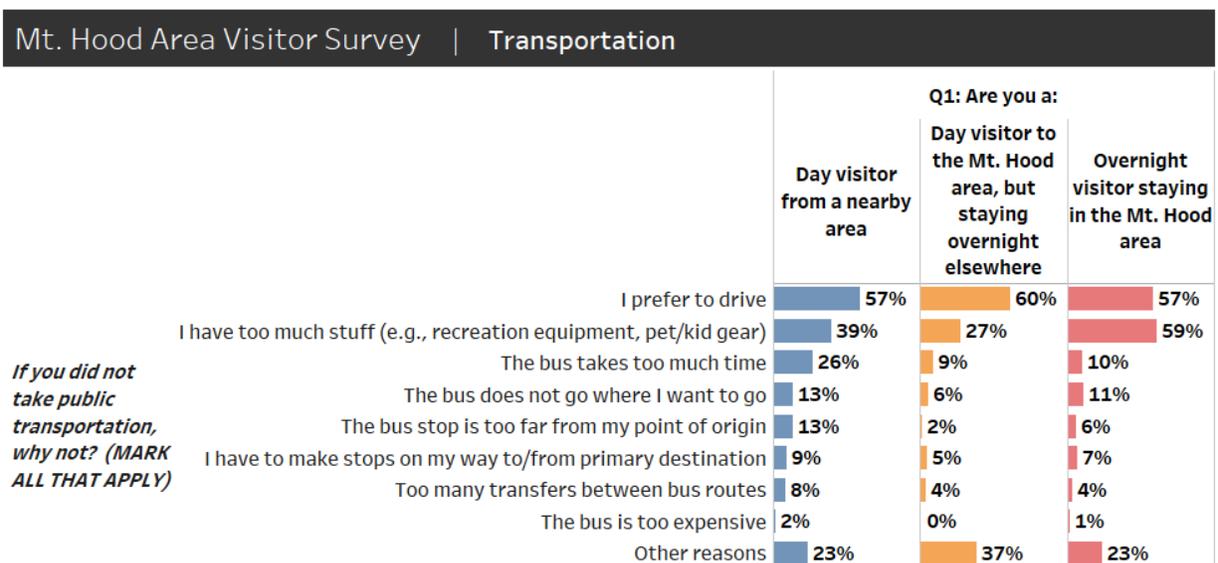
Visitors surveyed in Estacada, overnight respondents, and Oregon residents were more likely to cite “too much stuff” as a reason. Given the high share of overnight respondents in Estacada who camped (89 percent), results highlight that many respondents perceived having too much camping equipment to make taking public transportation a feasible option. “Too much stuff” was also cited more frequently in the spring than in late winter (53 percent vs. 37 percent). Day visitors from a nearby area, as well as wintertime respondents were more likely to say the bus takes too much time. Day visitors were also more likely to indicate that the bus stop is too far away from their point of origin than the other visitor types.

Figure 43



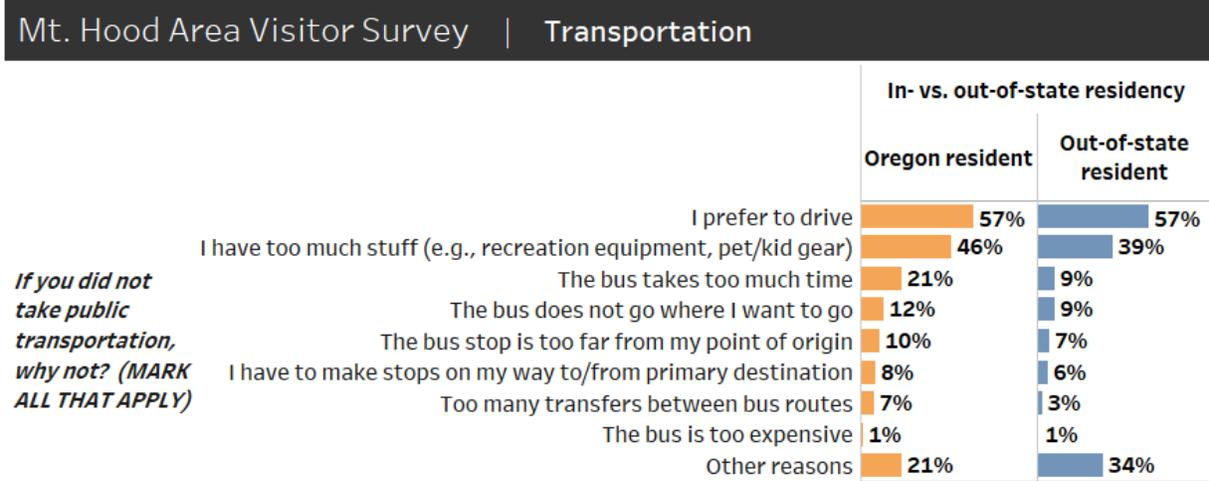
Source: RRC Associates

Figure 44



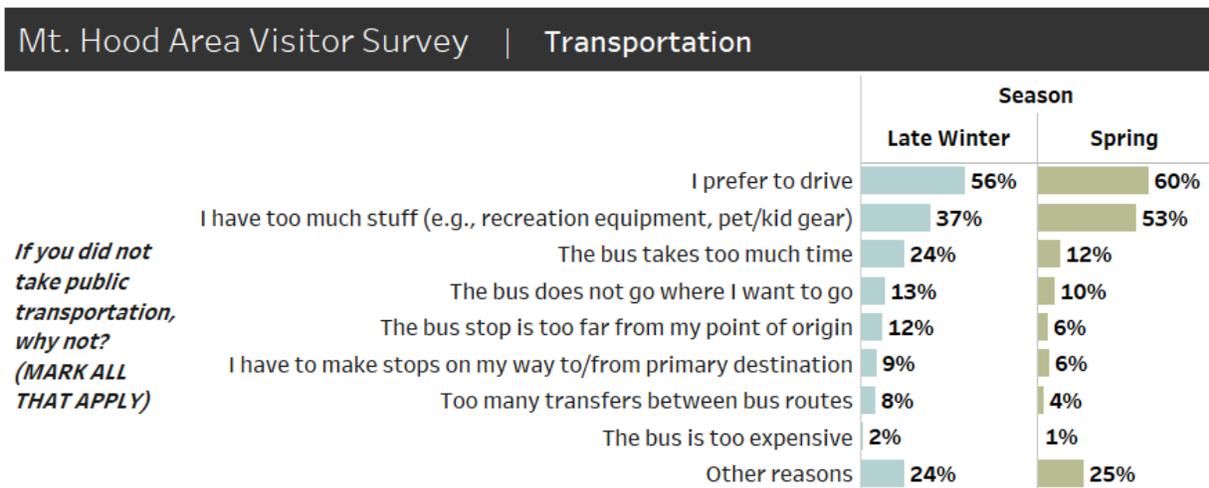
Source: RRC Associates

Figure 45



Source: RRC Associates

Figure 46



Source: RRC Associates

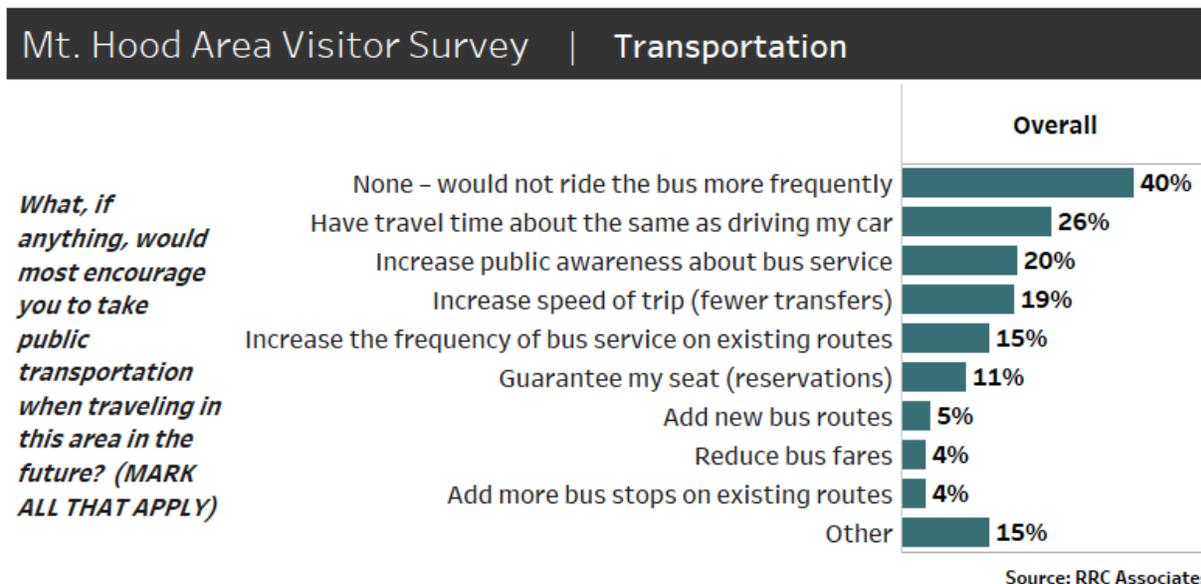
Factors That Would Increase Utilization of Public Transit

About three in five respondents who didn't take public transportation as part of their travels to the Mt. Hood area would be encouraged to take public transportation to the area in the future if some factors were addressed (60 percent). The top factor cited was having travel time be about the same as driving a car (26 percent), followed by increasing public awareness about bus service (20 percent), fewer transfers (19 percent), increasing bus service frequency (15 percent), and offering seat reservations (11 percent).

Additionally, 15 percent of respondents selected “other” factors that would encourage them to take public transportation. Responses were varied, with many reiterating why taking public transit would be inconvenient (e.g., traveling with family or dogs, have too much gear, don’t visit area often, etc.). However, others made specific suggestions of things they would like to see changed. Increased convenience, ability to travel with gear, and more frequent and consistent service came up many times in the comments. Below is a verbatim sampling of suggestions provided:

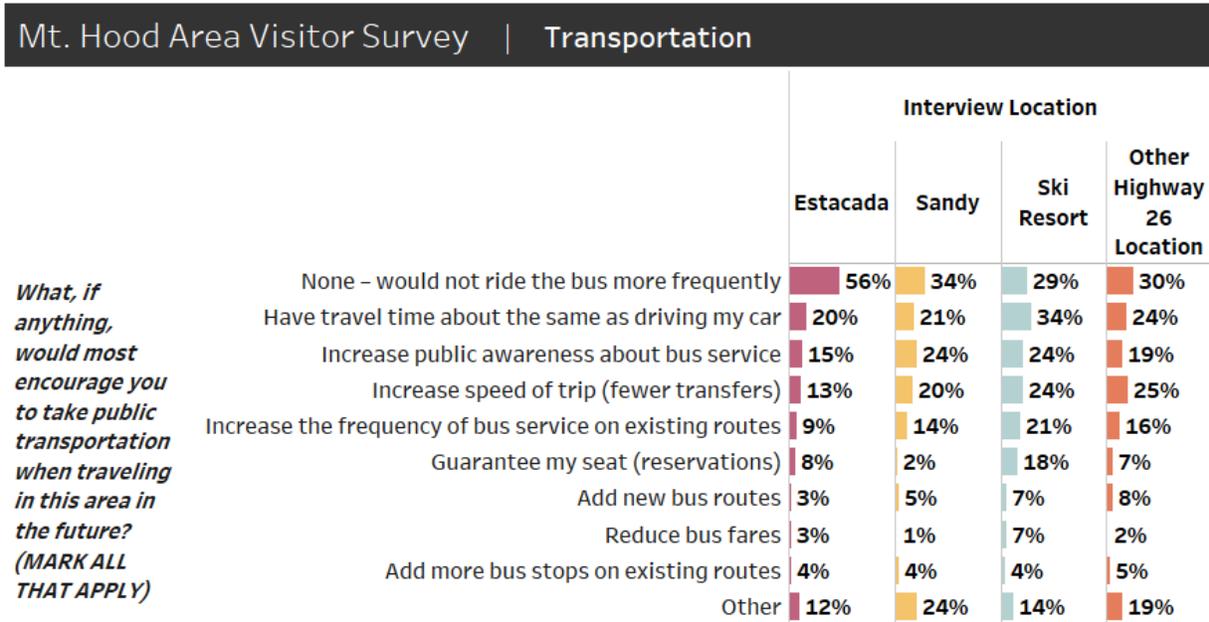
- *Address safety concerns*
- *Be able to get on and off with the same ticket/multiple stops*
- *Be able to take kayak?*
- *Bus to Timberline fills up need more buses*
- *Have service consistent with mountain being open*
- *Have used Mount Hood Express to ride from timberline to Government Camp but can't imagine much else*
- *More comfortable seats*
- *Mount Hood Express or other bus if stopped at or very nearly trailheads, I would use, if I don't have my dog.*
- *Place for gear, group seating*
- *Schedules not accurate bus late sometimes*
- *Used Mount Hood Express to Timberline but trailer scratches up bikes needs to be fixed*
- *We play it by ear on snow conditions need our own car to go place to place easily*

Figure 47



Respondents surveyed in Estacada were the least willing to take public transit in the future (56 percent; likely because of the high share of respondents who camped), while respondents interviewed elsewhere had relatively similar levels of openness to public transportation. Respondents interviewed in Sandy would most like to see increased public awareness (24 percent). Respondents surveyed at ski resorts would most like to see travel time be about the same as driving a car (34 percent). Meanwhile, respondents interviewed at other Highway 26 locations would most like to see an increased speed of trip via fewer transfers (25 percent). Ski resort respondents were more likely to cite increased frequency of service (21 percent).

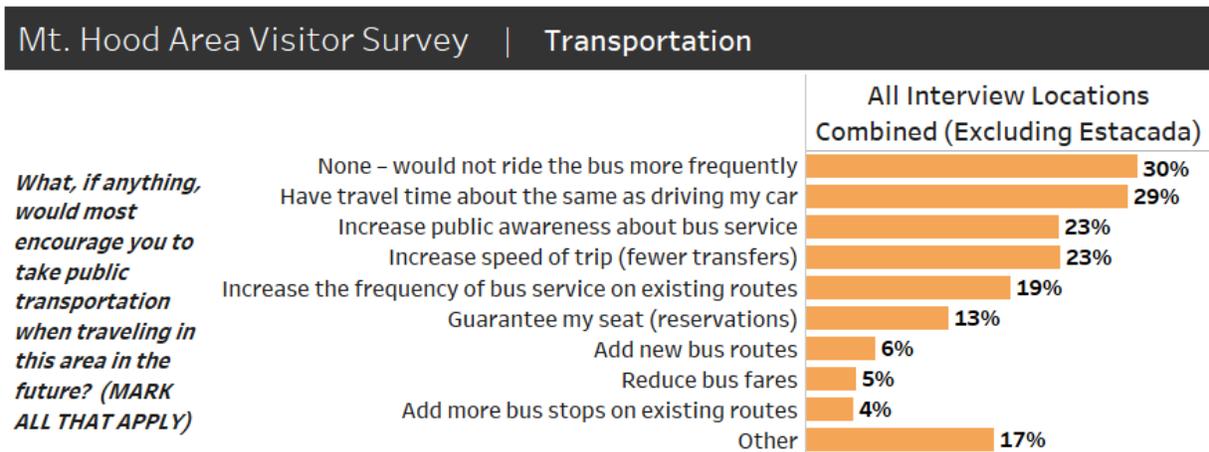
Figure 48



Source: RRC Associates

Results assessed without respondents interviewed in Estacada show that 70 percent of respondents would be willing to ride the bus more frequently (vs. 60 percent).

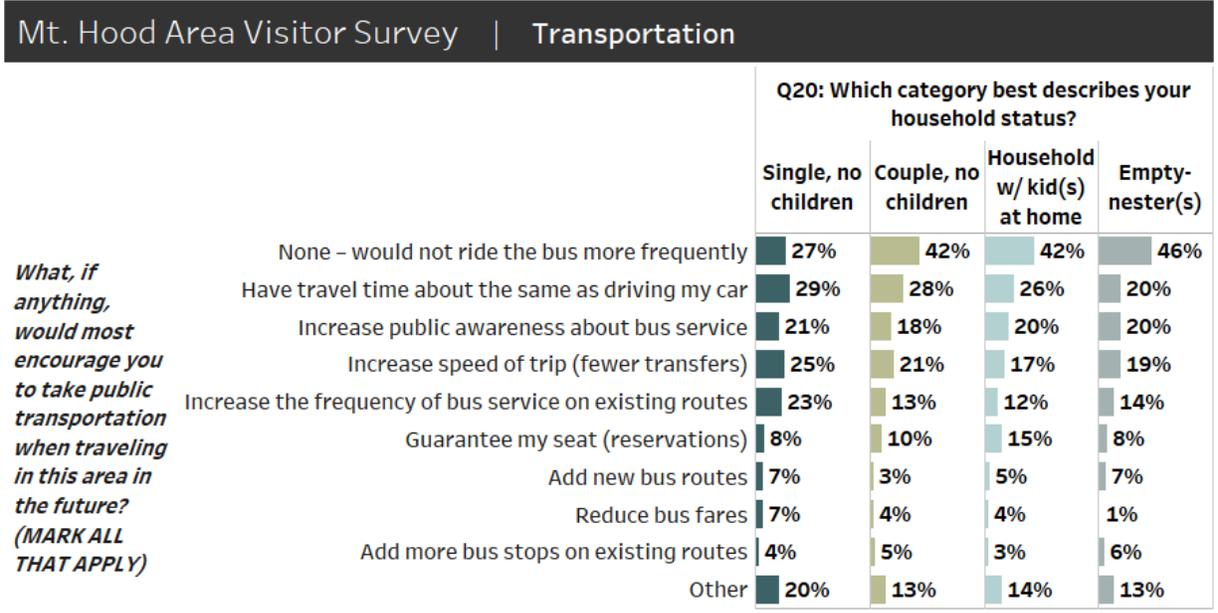
Figure 49



Source: RRC Associates

Of all household types, single respondents without kids would be the most willing to take public transportation in the future (73 percent vs. 54 to 58 percent). Single respondents without kids are more likely to select increasing the speed of trip (25 percent) and increasing frequency of service on existing routes (23 percent) as factors that would motivate them to take public transit in the future. Households with kids were more likely to select seat reservations as a motivating factor (15 percent).

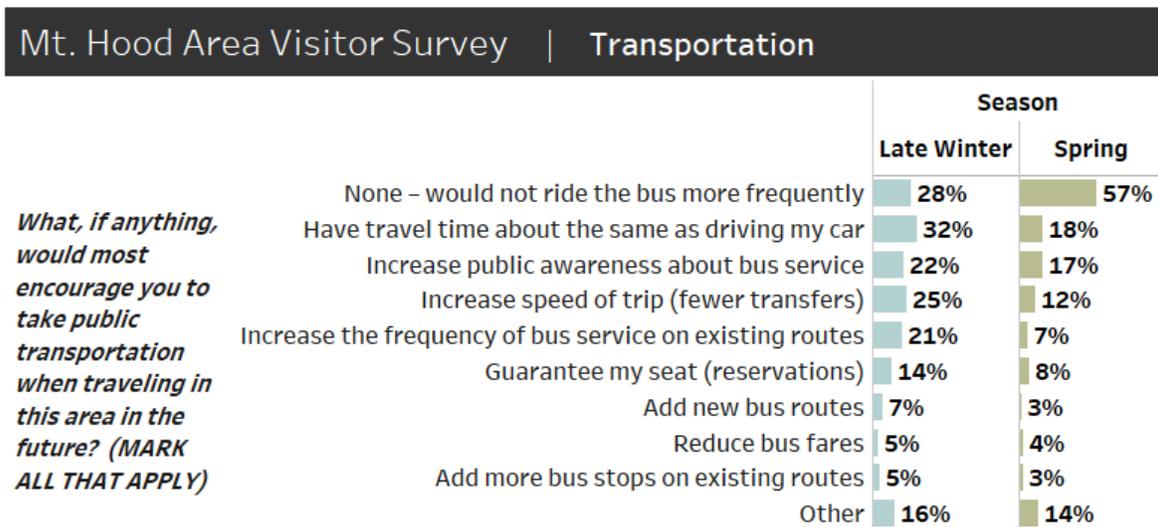
Figure 50



Source: RRC Associates

Respondents surveyed in late winter (72 percent), day visitors (72 percent), and Oregon residents (64 percent) are more open to taking the bus to the area in the future than other visitor segments.

Figure 51



Source: RRC Associates

Figure 52

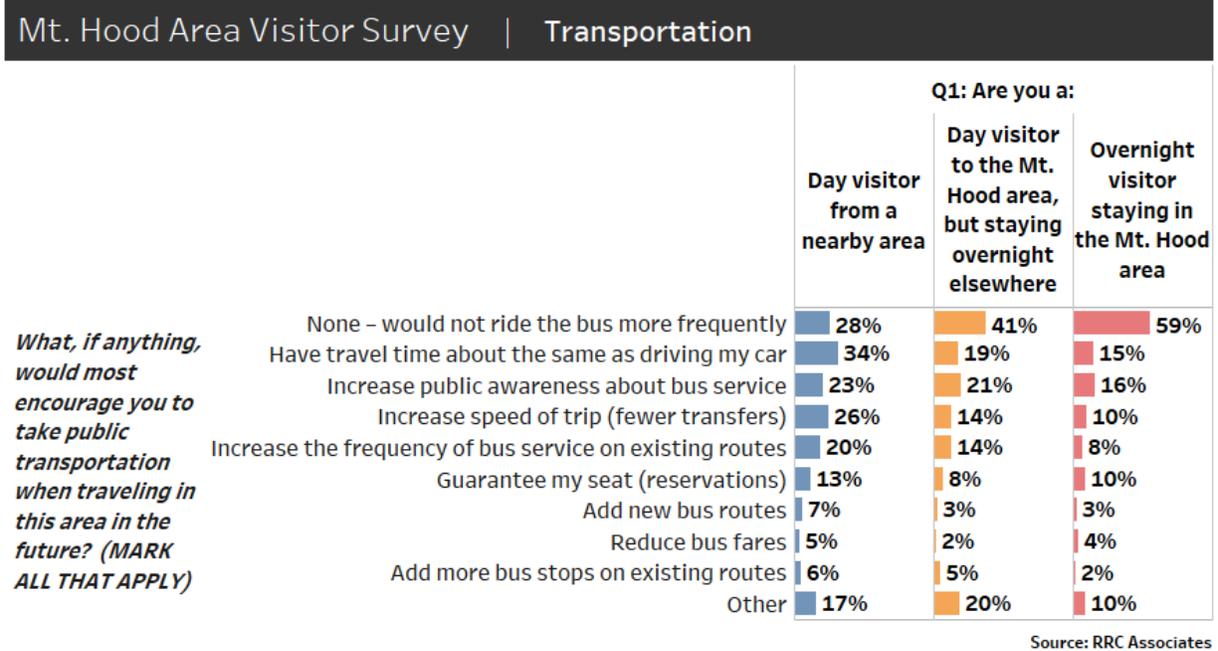
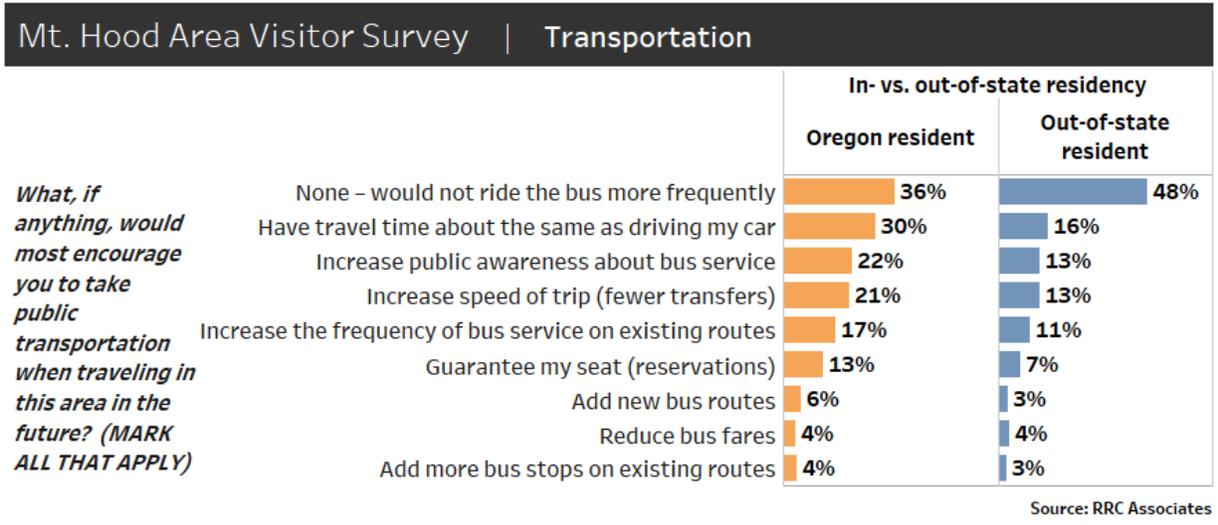


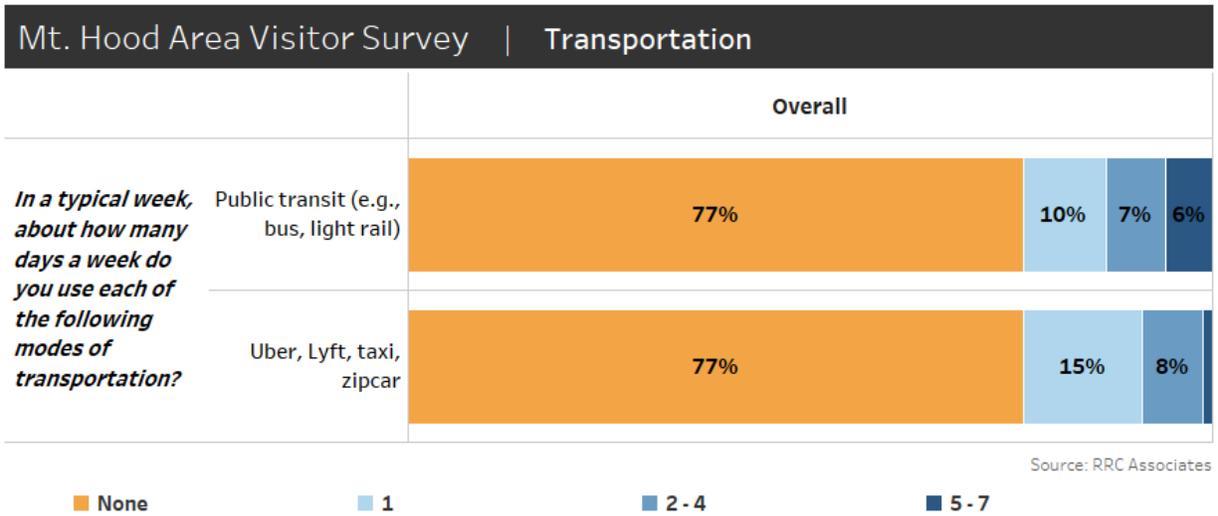
Figure 53



Frequency of Usage of Transportation Methods in a Typical Week

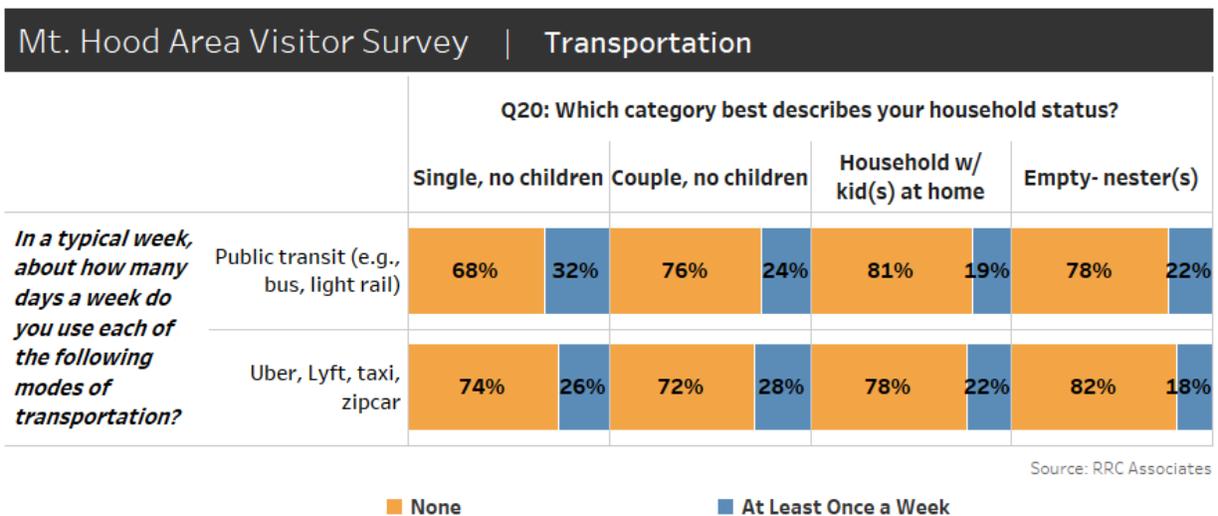
Nearly a quarter of respondents use public transit or rideshare at least once a week (23 percent each, respectively). Rideshare is most often used one day a week on average, while those who use public transit tend to use it more days in the week.

Figure 54



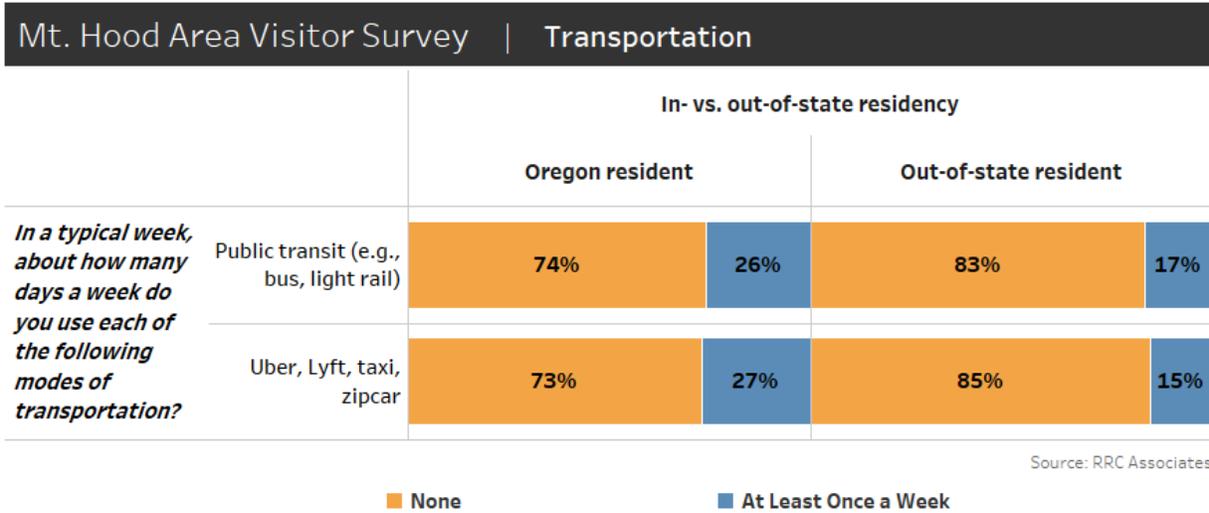
Singles without kids are the most likely to use public transit at least once in a typical week (32 percent), while couples without kids are the most frequent users of rideshare in a typical week (28 percent).

Figure 55



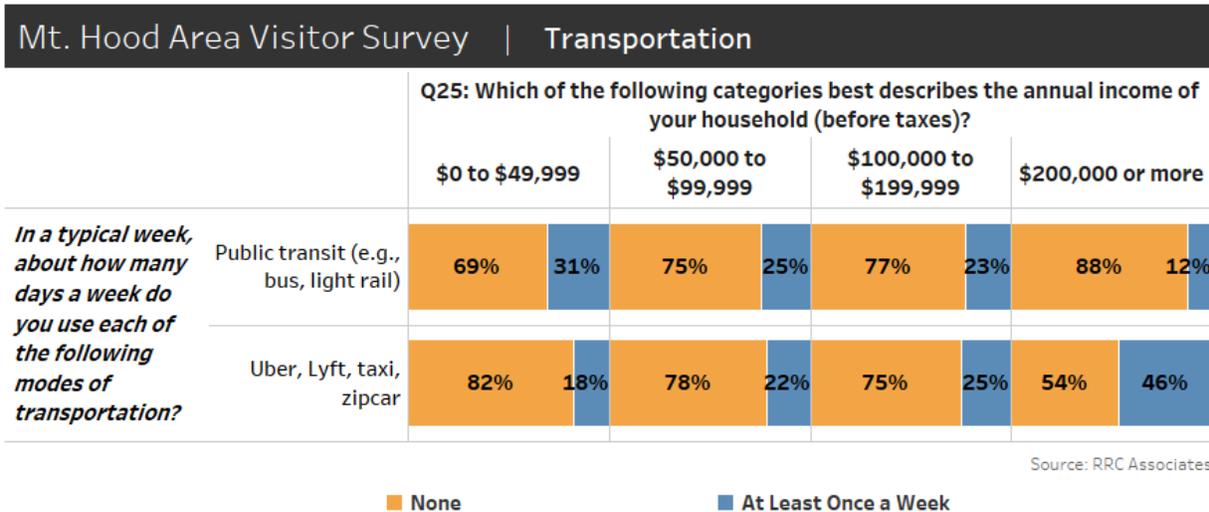
Oregon residents use each transportation mode more often in a typical week than out-of-state residents (26 to 27 percent vs. 15 to 17 percent).

Figure 56



Respondents in lower income brackets use public transit more often, while those in higher income brackets use rideshare more often.

Figure 57



Users of public transit and rideshare are notably more likely than non-users of being willing to use the bus more frequently in the future if certain factors were addressed. Both of these user groups would most like to see travel time be about the same as driving a car. Current public transit users were much more likely to want to see increased frequency of bus service on existing routes.

SUGGESTIONS / OPEN ENDED COMMENTS

At the end of the survey, respondents had an opportunity to provide any comments or suggestions about their experiences in or traveling to the Mt. Hood area. The full set of verbatim comments, provided under separate cover, should be read to understand the full breadth and depth of respondent opinions. While many took the opportunity to express positive sentiments, others made suggestions for improvement. Better signage, more food and beverage options, more parking locations, more lodging options and at a variety of price points, better communication/advertising, and traffic mitigation emerged as themes of areas to address in the future. A random sample of verbatim comments is provided below:

- *8:45 bus never showed*
- *Back roads not bike friendly*
- *Beautiful*
- *Bus from Hood River is nice*
- *Bus rates to all camping on designated times*
- *Diverse area attractive to use access easy*
- *Easy travel here*
- *Enforce chains on Timberline and US 26 to reduce wrecks and traffic*
- *Fix 26 east of Zig Zag!*
- *Great, relaxing*
- *I love you Mt. Hood*
- *I'm impressed with hiking trails well maintained nice you have rest stops too*
- *It's beautiful here, just love it!*
- *Keep doing what you do*
- *Like idea of shuttle*
- *Love the Mt. Hood area, would like to be able to purchase snow park passes, forest passes*
- *Meadows is getting too crowded. The highway often has tons of traffic.*
- *More food options at better prices*
- *More information for out of towners*
- *More parking would be nice*
- *More regulations to control numbers*
- *Poop bags for dogs*
- *Roadside signage is inadequate and misleading other than that wonderful area*
- *Season lockers at areas should be cheap to encourage public transit*
- *Too many people not carpooling, too many single drivers*
- *Universal park pass for all areas would be great idea not 5 or 6 separate passes*
- *We love camping this area. Usually do so twice a year.*
- *Would like to see that Sandy Ridge remain for mountain bikers and not be developed for other uses. There is a great bike culture here and would like it to remain so*