

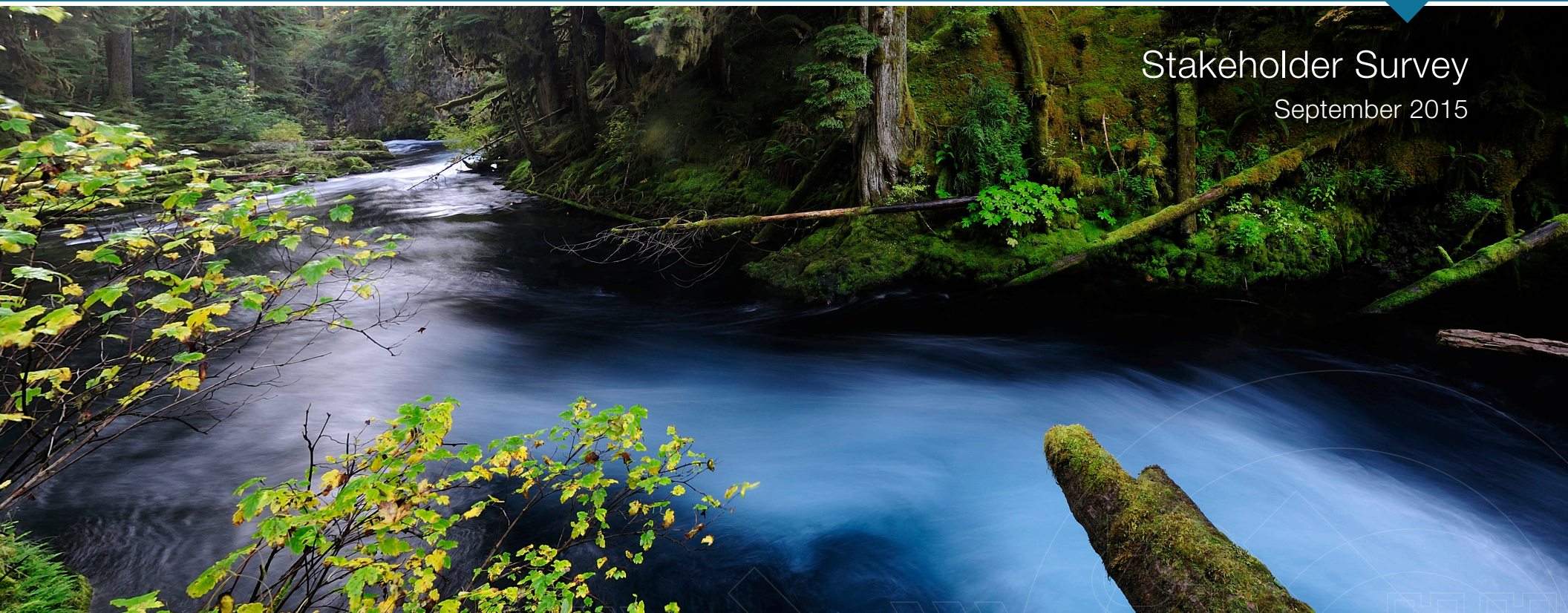


GORGE
TOURISM STUDIO

COLUMBIA RIVER GORGE TOURISM STUDIO

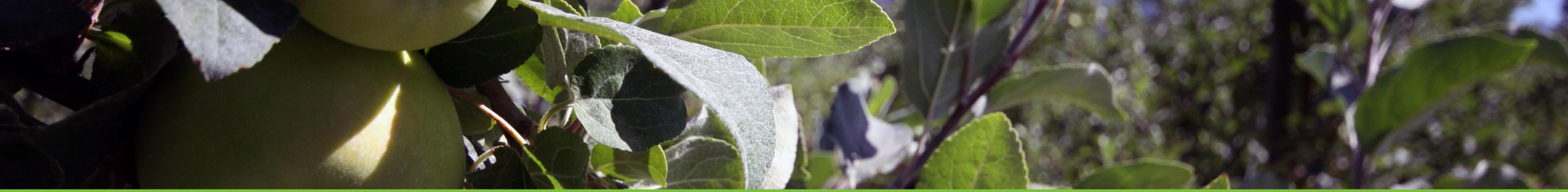
Stakeholder Survey

September 2015



future*→iq*

Create **Future Intelligence™**
www.future-iq.com



Columbia River Gorge Tourism Studio - Stakeholder Survey Opportunities and Constraints for Tourism Development

September 2015

Travel Oregon's Destination Development Team conducted the 'Columbia River Gorge Tourism Studio - Stakeholder Survey'. Future iQ Partners were contracted to help design and analyze the survey results. This survey was sent to key industry stakeholders and the broader Gorge tourism industry in August 2015. There were approximately 220 total survey respondents.

Survey Report Prepared By:

David Beurle
Future iQ Partners



future→iQ

Create **Future Intelligence**™

www.future-iq.com



TABLE OF CONTENTS

Introduction 4

Question 1: Which sector do you work in? (Please select one based on your PRIMARY role in the community)..... 5

Question 4: What are the best tactical OPPORTUNITIES to advance the economic impact of tourism in the Gorge over the next 3-5 years?..... 6

Question 5: List any significant contributions you have made to advance the opportunities. 7

Question 6: What are the critical CONSTRAINTS facing development of the industry over the next 3-5 years? 12

Question 7: What have you or your organization thought about to address one or several of these critical issues? 13

Question 8: Please rate the importance of long-term (5-10 years) strategic objectives 18

Question 9: What would you ideally want to see in the Gorge to foster a well-functioning tourism economy? 19

Conclusions 24

Recommendations..... 24

About Future iQ Partners 25

About Travel Oregon and the Tourism Studio 25



INTRODUCTION

This survey was conducted to support the design of the Tourism Studio program for the Columbia Gorge region. The Gorge Tourism Studio is a program designed to help public agencies, private enterprises, community leaders and youth design the future of a growing tourism economy in the Columbia River Gorge. Specifically, the program aims to help this region address the key challenges it faces in the area of:

- Leadership and destination management.
- Heavy seasonality of visitation.
- Congestion at the “lures” during peak season; overtaxed infrastructure in some areas.
- Integrating cultural heritage into the visitor experience.
- Preserving cultural and environmental assets.
- Capitalizing on and making the most of visionary projects underway in the Gorge.
- Developing and connecting new ‘product’ (experiences) throughout the entire region, particularly focused on three areas: outdoor recreation, culinary/agri-tourism and cultural heritage.
- Connecting fragmented resources for marketing the area as a destination.

Representatives from the Gorge tourism industry have applied for a Tourism Studio, designed and delivered by Travel Oregon’s Destination Development team. This Tourism Studio will commence in late 2015. It has been decided to take a modified approach to this Tourism Studio.

The region has significant and well-developed destination products, but there are some gaps that can be filled. In addition there is complexity in the region given it crosses two States.

In addition, the region is suffering significant tourism tension points, driven by high volume congestion in certain periods, and this is resulting in the to be expected ‘love / hate’ phenomena with locals and tourism.

It was concluded that the Columbia River Gorge Region is an ideal study site to examine and develop best practice world-class solutions to tourism congestion and related issues, and to build a coordinated regional response plan. Such a plan is well beyond the programming scope of the existing Tourism Studio framework, but also represents an important opportunity for Oregon to create innovative approaches to what is a problem of national significance.

This survey has been conducted to help inform the program design and gather important community perspectives. The Travel Oregon Destination Development team and the Gorge Tourism Studio Steering Committee have used these survey results to help inform the critical program design and focus.

The survey was prepared by Harry Dalgaard and Kristin Dahl from Travel Oregon, with input from David Beurle from Future iQ Partners. The survey was distributed electronically to key stakeholders in the Gorge tourism industry, and they further distributed it via their networks. In total approximately 220 people undertook all or parts of the survey. This report presents the summary of responses to a range of the key questions.

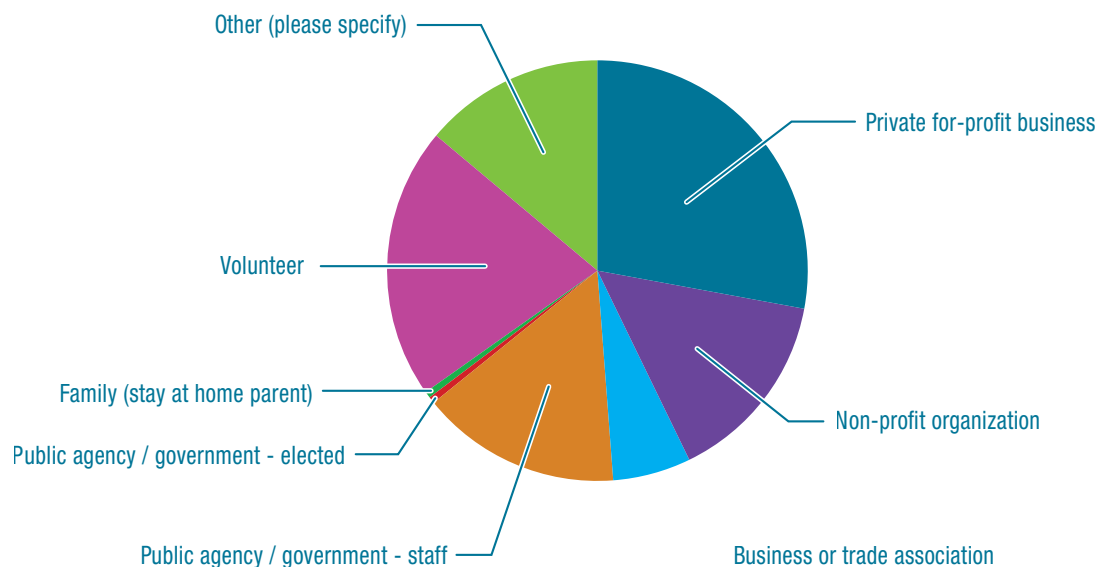


Question 1: Which sector do you work in?

(Please select one based on your PRIMARY role in the community)

Survey participants were asked a number of profile questions. This question was asked to ensure there was a relatively representative cross section of respondents.

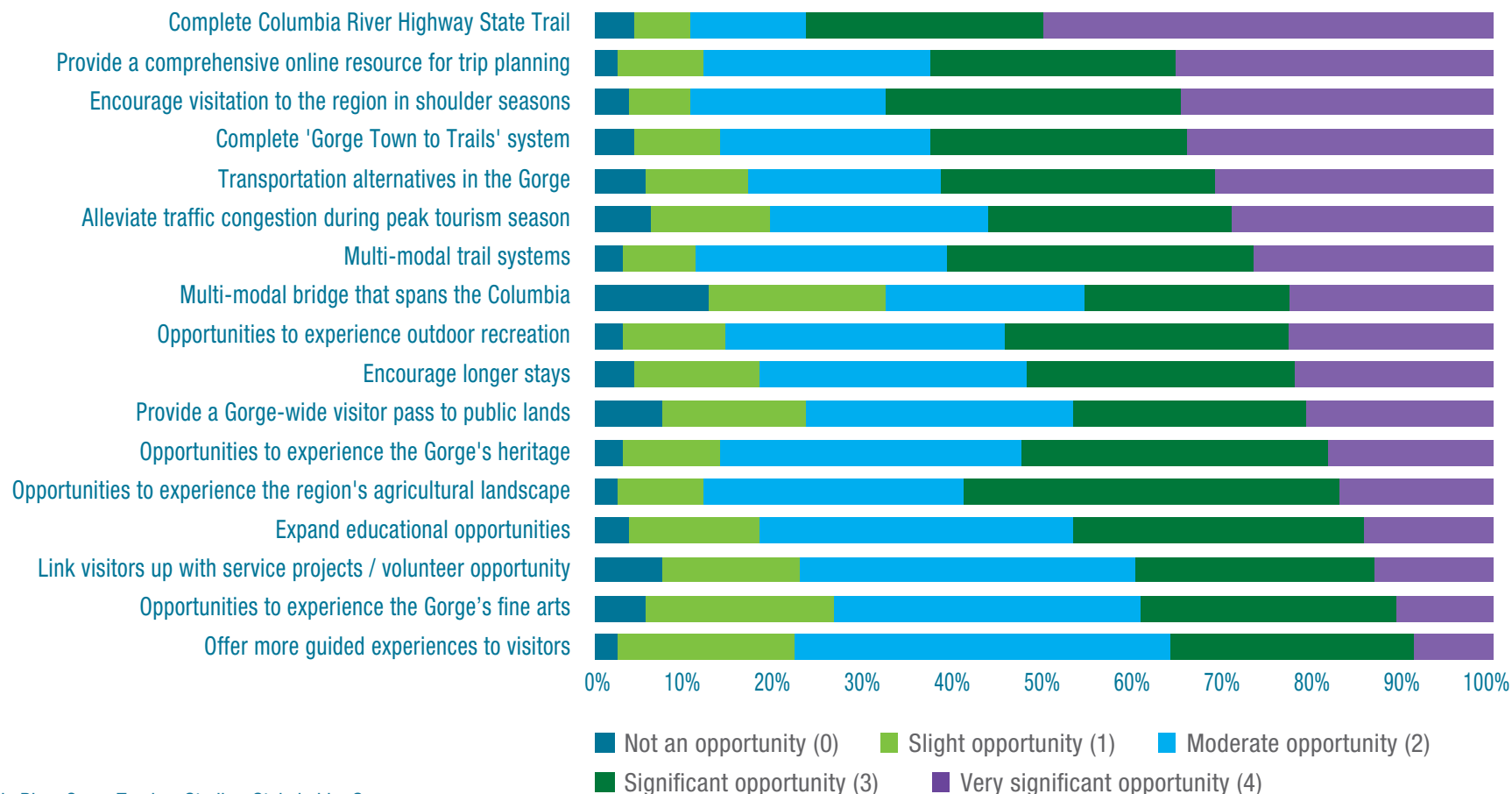
The accompanying chart shows there is a relatively good cross section from sectors in the industry. This was an important validation question to ensure the survey gathered sufficient views to help inform the Tourism Studio design.





Question 4: What are the best tactical OPPORTUNITIES to advance the economic impact of tourism in the Gorge over the next 3-5 years?

Participants were asked 'What are the best tactical OPPORTUNITIES to advance the economic impact of tourism in the Gorge over the next 3-5 years?' For each of the listed opportunities, they were presented with a 5-point scale that went from 'Not an opportunity' to 'Very significant opportunity'.





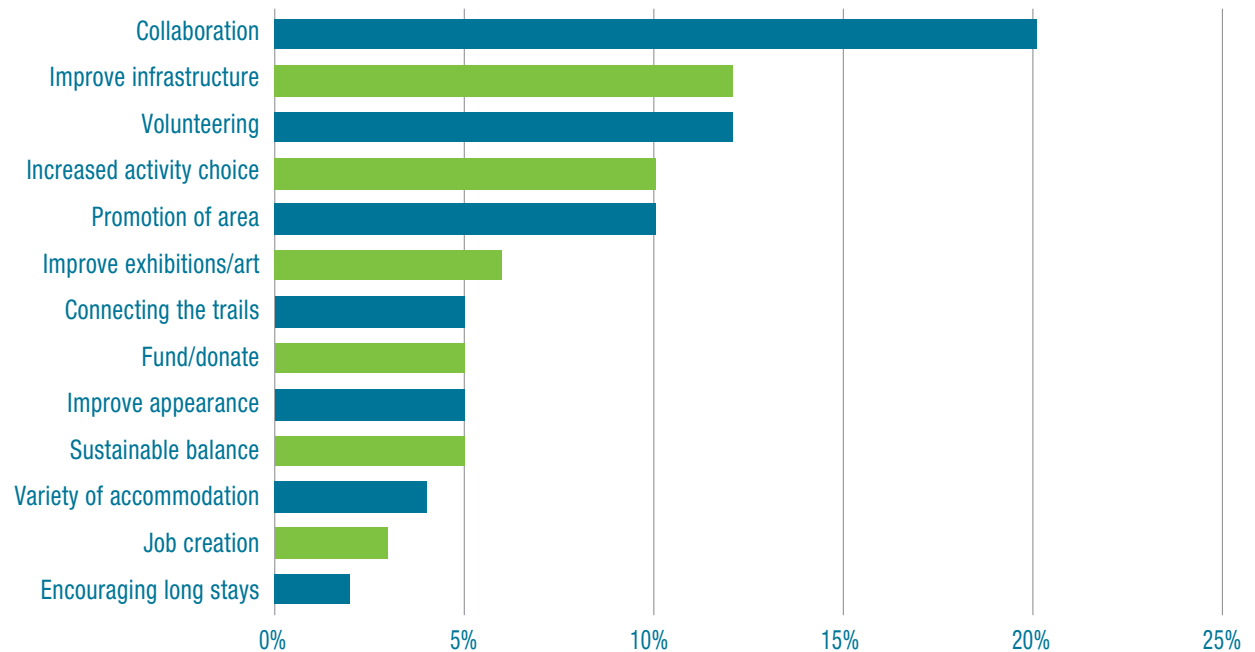
Question 5: List any significant contributions you have made to advance the opportunities.

Survey participants were asked to 'List any significant contributions which they or the organization they represented, had made to advancing these opportunities' (referring to question 4). Survey participants were given an open text field, and their responses were collected into 13 categories. These categories were developed to reflect the major threads of the written responses.

For the purposes of this report, the main ideas generated from the surveys are summarized for each of the following categories:

- Collaboration
- Improve infrastructure
- Volunteering
- Increased activity choice
- Promotion of area.

In addition, notable comments have been gathered from the remaining categories, and presented under a heading of 'Miscellaneous categories'





Collaboration

This was the most popular category, of contribution. The main tenor in the responses was people working together in various geographical areas, and with different groups to increase tourism, build new trails and add to the appeal of the area. Some examples of responses related to collaboration included:

- *As president of the Mt Adams Chamber of Commerce, I/we have diligently included all chambers in the Gorge and participated actively in the Columbia Gorge Visitors Association to assure ALL businesses in the Columbia River Gorge were included in activities to increase tourism to the region.*
- *We are working with the six Oregon communities to develop "Gorge Hubs" in each community in order to encourage visitors to start their Gorge experience from one of the urban areas.*
- *Collaborating with partner agencies.*
- *The Troutdale Historical continues to work with groups such as the Friends of the Columbia River Highway and others in order to help bring tourist into the Troutdale.*
- *Our organization is already working with Friends to promote the design of high quality, low maintenance,*

trails that our volunteer program participants can build and maintain.

- *My friends and I built a play park on county land because the county had no financial ability to replace an old, worn play structure.*
- *We are working with the Oregon Dept. of Transportation and West Columbia Gorge Visitors Assn. to investigate alternative transportation modes for visitors to recreation sites in the Columbia River Gorge.*
- *I have collaborated with others on the pedestrian lane for Bridge of the Gods.*

Improve Infrastructure

This was the second most popular category. The most common area was that of trail tending, improving walkability and creating new facilities to enhance the experience of cyclists and those who visited the area. Some examples of responses, which addressed improvement of infrastructure, included:

- *We are working to improve the walkability and alternative transportation paths throughout the city by increasing safety.*
- *KTC has fought for the existence of and the development of the beautiful 31 mile Klickitat Trail, a*

rail-trail along the Klickitat River that offers recreation opportunities for hiking, biking, and horseback riding, and is good for groups. We have fought against the continuing opposition of the Klickitat Co. Commission. If we could remove the disconnect in the trail by replacing the trestle State Parks removed at Suburbia, 3 miles north of the town of Klickitat, and if we could do other improvements such as improving the surface, the trail would give recreation opportunities to a wider range of abilities, and be a greater economic asset for the towns of Klickitat and Lyle.

- *We are addressing the aging infrastructure of facilities.*
- *I try to take advantage of every reasonable trail maintenance opportunity. I use the trails, and feel a responsibility to make returns on that benefit.*
- *Tending the trails.*
- *Trail maintenance and new trail construction on the Washington side of the Gorge via Washington Trails Association.*
- *We've added a charging station with the help of Tesla. Our next plan is to add a "fixit" station for cyclists. And, we've signed up to warmshowers.org to give cyclists a safe place to stay the night, get a meal and take a warm shower.*



- *We are working with the Oregon Dept. of Transportation and West Columbia Gorge Visitors Assn. to investigate alternative transportation modes for visitors to recreation sites in the Columbia River Gorge*

Volunteering

This was a very popular topic in the responses, which were collected. People were very involved in working in a voluntary capacity to enhance the appeal of the area. This involved advising tourists, volunteering on trails, writing books and volunteering at Vista House. (An observatory at Crown Point in Multnomah County that also serves as a memorial to Oregon pioneers and as a comfort station for travelers on the Historic Columbia River Highway). Some examples of responses that involved volunteering included:

- *Volunteers in the area asked to turn some city land into a bike park and created the Spokes Bike Park, where people can learn and improve their mountain biking skills.*
- *I presently volunteer at Vista House and enjoy the visitors. They often ask tour questions that we cannot answer because it would involve business. I think this is a mistake and should be addressed with the US Forest Service.*
- *I volunteer on trails with WTA, Mazamas, and Cape Horn Trail.*

- *Volunteered with the PCTA, MCSO SAR, clean-up days.*
- *Our organization is already working with Friends to promote the design of high quality, low maintenance, trails that our volunteer program participants can build and maintain.*

- *I have developed a suggested reading list and included a couple of DVDs on it about the geology of the Gorge, the ice age floods, the birds, flowers and other wildlife found in the Gorge, and the USFS. I have had the reading list reproduced and put on display at the Visitor Center at Multnomah Falls at my own expense.*
- *Volunteers assist with all questions from the visitors about all of the hiking trails and other places in the Gorge that may be of interest to them. We distribute maps and brochures of the Gorge areas, including the Washington side. In fact, we take bus tours annually to visit other places that might be of interest to our visitors. Many are active in more than one volunteer group in the Gorge.*
- *Volunteer with Friends of the Gorge. Encourage friends to become involved as both volunteers and tourists. I attend Port of Camas/Washougal meetings regularly.*
- *I volunteer at Vista House where I interact with visitors, guiding them to places they've read or heard about and introducing them to new areas to visit.*

- *We provide not only provide volunteer opportunities at Multnomah Falls in the Visitor Center but give educational and interpretive information to the visitors from around the world. Over 3 million visitors in 2014 and more this year. We are often the only place that many people seek out for information about trails and other things to do in the Gorge.*
- *The Friends of the Historic Columbia River Highway have adopted the Historic Columbia River Highway State Trail and have 4 volunteer work parties per year.*
- *My husband and I volunteer at the Vista House, which is the gateway here.*

Increased Activity Choice

Many respondents were involved in increasing the choice of activities in the area, by creating community events, to marketing different types of weekend getaways in hotels, to introducing new types of sporting activities into the area. Some examples of responses which incorporated increased activity choice included:

- *Trout Lake Area Business Association has aided and expanded the number of community events in the Trout Lake Valley to draw more visitors and increase our waning economy.*



- Oregon Randonneurs, Seattle International Randonneurs, and Desert River Randonneurs organize bicycle tours ('brevets') along the Gorge. Randonneuring is a rapidly growing sport world-wide.
- Date Trips for couples both overnight - weekend getaways and day trips Soft Adventure travelers from around the world that are seeking the opportunity to reconnect to nature and still have the comforts of a resort or Northwest experience.
- We are putting together seasonal Wellness travel packages with The Lyle Hotel.
- We help the guests figure out what meets their expectations and offer additional options.
- I organize many annual events that occur in Skamania County locations.
- I pioneered the whitewater rafting industry for the gorge. Currently, over 50K people per year utilize the whitewater of the White Salmon River alone.
- Helping to promote more mountain bicycling and multi-user trails, particularly around Cascade Locks and Hood River.

- Main Street cooperated with the Chamber of Commerce to create festival activities in the new Riverfront Festival Park. They are hosting the state Main Street convention in The Dalles in October.

Promotion of the area

There is a lot of promotion of the area occurring. Whether this is in a voluntary capacity or through individuals running their own businesses – many of the respondents cited that they promoted the area widely, in order to enhance the economy, attract tourists and just to celebrate the beauty of the region. Some examples of responses that incorporated promotion of the area included:

- I am constantly promoting cycling in the area
- I'm working with Weinstein PR to promote Hood River County as an all-season destination, encouraging multiple night stays
- I have been photographing the Gorge and its trails since 1985.
- The Troutdale Historical has opened a new \$150,000.00 exhibit dedicated to the 100 anniversary of the Columbia River Highway, which opened July 18, 2015 and will be on display for the next 5 years. We are seeking opportunities to bring tourist to the Barn Exhibit Hall museum where the exhibit is located.

- Developed local brochure for "base camp", access to Gorge and to the Portland area.
- There is a dedicated space in our store to display and hand out Travel Oregon brochures and information.
- We promote the shoulder seasons and cultural events.
- We have an interactive map on our website to help tourists decide what to do while they're here.
- Our marketing strategy is focused on bringing visitors to the Gorge.
- My book, "Building the Columbia River Highway: They Said It Couldn't Be Done" has helped to build interest in the highway, the Gorge, and the area's many points of interest.
- Our motel has maps and brochures of area attractions that we point out to visitors when they stop for a room. We always send visitors to the scenic highway to see the waterfalls and inform them about our easy climb mountain bike trail at the Port.



Miscellaneous categories

The remaining categories of contribution to the area included Improving exhibitions, connecting the trails, funding/donating, improving the appearance of the region, sustainable balance, variety of accommodation, job creation and the encouraging of long stays.

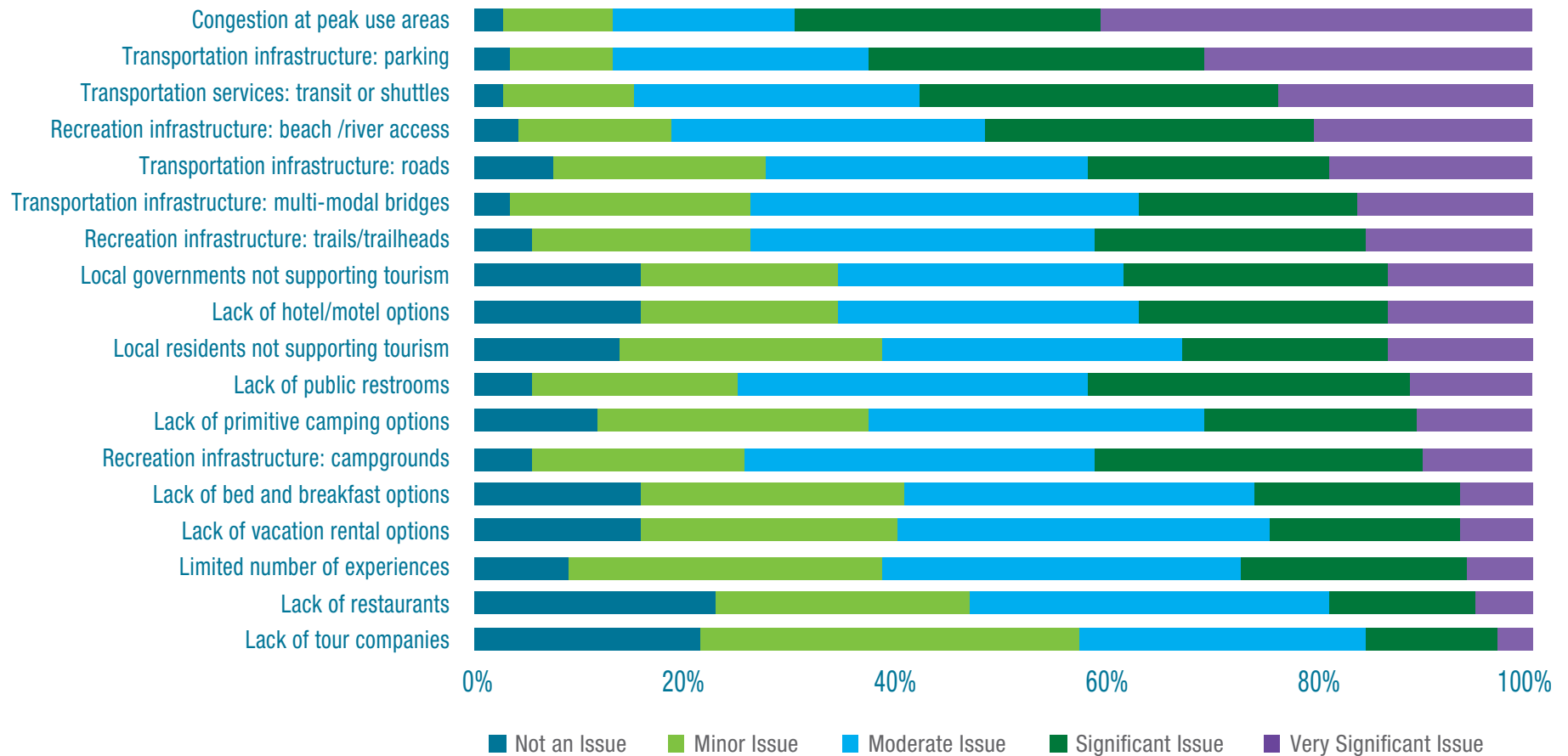
Some interesting comments were drawn from these categories:

- *We don't want to be a secret but we do want to keep the non-commercial country atmosphere that permeates our mostly organic farming valley.*
- *My company gives funds to local non - profits such as friends of the Columbia Gorge, Col Riverkeeper as well as funding all 8 Gorge Farmer's Markets.*
- *I contribute to Downtown beautification.*
- *We always encourage overnight stays, as we are a hotel, we partner with other organizations in the shoulder seasons to encourage more traveling to the Gorge. We talk to each guest about what the Gorge has to offer and encourage them to visit other locations or try activities, and enjoy the culture.*
- *My company creates full time jobs.*
- *My company provides local farm to table food that supports the local economy.*
- *I use the trails and roads, pay the use fees, purchase drinks and snacks at local businesses and most importantly bringing up the next generation to love and respect The Gorge.*



Question 6: What are the critical CONSTRAINTS facing development of the industry over the next 3-5 years?

Survey participants were asked 'What are the critical CONSTRAINTS facing the development of the tourism industry in the Gorge over the next 3-5 years?' For each of the listed opportunities, they were presented with a 5-point scale that went from 'Not an issue' to 'Very significant issue'.





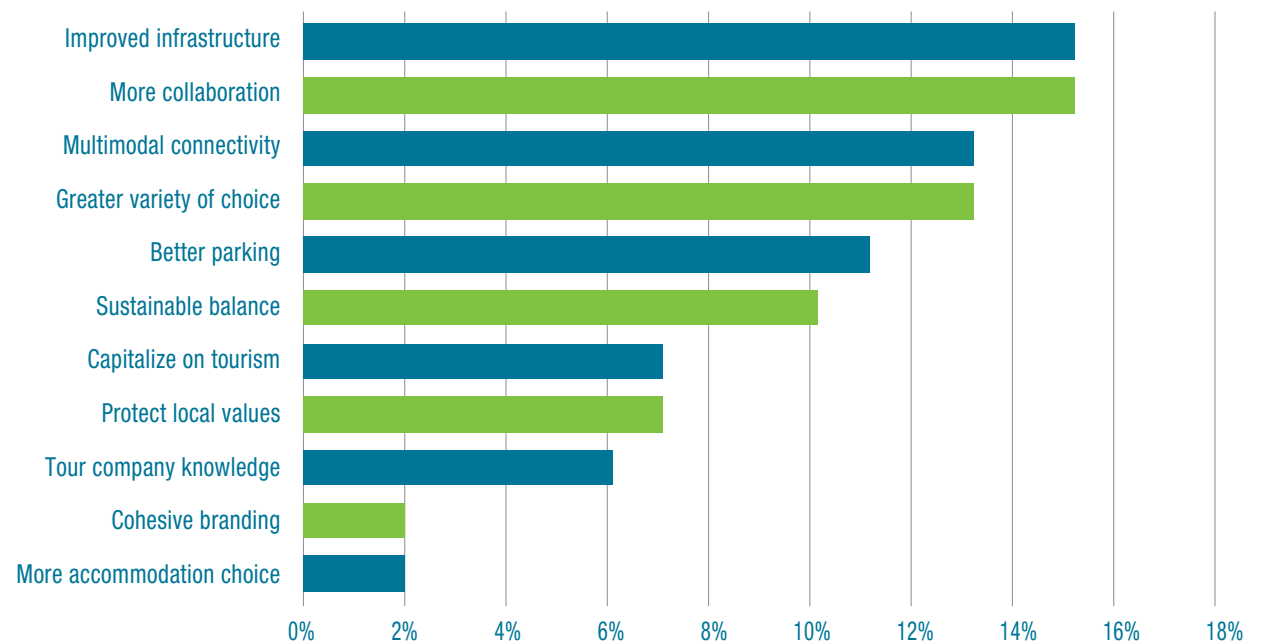
Question 7: What have you or your organization thought about to address one or several of these critical issues?

Survey participants were asked 'What have you or your organization thought about to address one or several of these critical issues?' (Referring to question 6). Survey participants were given an open text field, and their responses were collected into 11 categories. These categories were developed to reflect the major threads of the written responses.

For the purposes of this report, the main ideas generated from the surveys are summarized for each of the following categories:

- Improved infrastructure
- More collaboration
- Multimodal connectivity
- Greater variety of choice

In addition, notable comments have been gathered from the remaining categories, and presented under a heading of 'Miscellaneous categories'.





Improved Infrastructure

This was the category, which was most popular. Examples were given in the survey responses of how respondents, or the organizations that they represented, had tried to tackle some of the infrastructural problems. Equally respondents made suggestions as to how the infrastructure could be improved with more roadhouses, improved public restrooms, and better facilities. Some examples of responses related to improved infrastructure included:

- *We are improving our parking capacity and ensuring that any new development takes parking into consideration when building downtown. We are also working to leverage more of our street fund for grants to improve the roads in the city and make them complete streets. We are also looking to improve our downtown streetlights and the overall layout of parking, etc. downtown to make it more safe and inviting.*
- *For recreation infrastructure, first, the improvement of the Klickitat Trail would give 31 miles of more easily used trail than it is at present. Second, if we could fix the one mile of disconnect in the trail just north of Klickitat, it would give more opportunities, for instance running marathons, and giving a reason for overnight stays in Klickitat. Third, KTC has been donated a property along the trail that*

might be suitable for primitive camping, and definitely for picnicking, Klickitat River access (kayaking, maybe swimming), and informal Klickitat Trail access. Fourth, the trail can provide Klickitat River access for fishing, swimming, kayaking, and just sitting by the river, and this could be improved with better signage and better trail surface, as well as by fixing the disconnect north of Klickitat.

- *We need to start seeking funding for improving the infrastructure; providing public restrooms/maintenance, water access, trails and more recreation areas.*
- *We need to gradually keep working to improve shoreline access trails at Bonneville's North Shore recreation area. There is an opportunity to link it to the Washington shore visitor facility. We also need to keep up regular maintenance of already developed trails. Need to be adding additional (Vault restrooms) in some recreation areas.*
- *The Forest Service as part of the Columbia River Gorge NSA Interagency Recreation Strategy Team has identified strategies to help deal with some of these issues. Forest Service and ODOT have applied for a FLAP Grant to conduct a congestion mitigation study for the HCRH. The CRGNSA Management Plan provides guidelines for recreation infrastructure and development.*

- *When the Gorge gets crowded, I avoid it. Trails feel less crowded when there are loops and people are hiking/riding the same direction. Hiking out and back is like going through a buffet line then having to walk back through the same line passing all the people who are waiting their turn. If there were a shuttle bus to PDX/VAN, one could get dropped off at point A, hike to point B and then ride home. Ideally points A and B would be in town where one could get a pre-hike breakfast or post-hike beer.*
- *We need to greatly expand and encourage the use of public transit throughout Gorge. It's overcrowded beyond its capacity, and is a very dangerous situation.*
- *At our visitor center, we re-direct hikers to less known trails to ease congestion at the most popular. Because of the Gifford Pinchot National Forest, we are able to provide dispersed camping options, outside of designated campgrounds.*
- *The Port of Hood River supports any effort to ease the parking/congestion on the Washington SR 14 sites that are causing very serious safety problems in the busy season, especially near Dog Mountain. The Port supports any investments in transportation infrastructure development in the region.*



- “Roadhouses” (restaurants) were commonplace in the early days of the Columbia River Highway. Perhaps a FEW such places would enhance the experience for people who come to spend the whole day.
- Divert traffic to less-well-known trailheads and attractions.

More Collaboration

Collaboration featured very strongly in responses to this question, as respondents cited the need for more collaboration to meet the constraints, which had been highlighted in Question 6. It was noted that each community was working in isolation to attract tourists, and needed a large agency to bring the communities into a collaborative group. It was noted that the States should work together and collaborate more, and some examples were given as to how individuals/businesses were encouraging collaboration. Some examples of responses related to improved infrastructure included:

- Presently each community is working alone to garner what they can from tourists. An effort by an agency such as Travel Oregon to unite the communities into one cohesive group would help immensely.
- It would be a boost to businesses if locals would take the time to do tours. Many have said that they have never experienced the gorge!

- I believe that a partnership with the school or fire department for a “park and ride” arrangement would benefit the public and the agencies. I also believe that partnering with the outlet mall would help with transportation issues.
- We’re considering with partners options for addressing congestion.
- We need the States working together more.
- Our organization allows our employees to participate during work hours to volunteer with local organizations and with events in a collaborative manner.
- We are currently addressing the Port and the City, hoping that they will reconsider this deal. We believe that our town can have much more collective agency to attract businesses that would be more appropriate for the Gorge.

Multi Modal Connectivity

This was seen to be of extreme importance in the area, in order to alleviate traffic congestions, parking problems and enhance the transportation system to and from the Gorge. Some examples of responses related to Multi Modal Connectivity included:

- Electric interurban passenger rail service should commence ASAP

- The biggest issues are these: multimodal bridges and beds on the north side to alleviate congestion on the south side.
- Traffic is becoming a big, big problem in Portland, which impact I84 and the Gorge. Many times we don't go out to hike in the Gorge if we feel we can't get back in time to beat traffic.
- We need transit services in peak season to alleviate congestion.
- Shuttles from offsite parking areas from 10am-6pm and higher parking fees during those hours if not using the shuttle.
- We’re considering with partners options for addressing congestion. Have a strong interest in improving public transit.
- GREATLY EXPAND and encourage use of public transit throughout Gorge
- Shuttles on regular routes -- mandatory in certain areas and at certain times.



- *Get a shuttle coming out from Gresham or Troutdale and stopping along highway 30 at Visitor Spots, trailheads, etc. and then on I-84 on to Mosier. This would be cheaper than using the reader boards and gates at Exit 31 where empty spots are there and cannot get in from the west. It is a parking lot and people are coming and going all the time so they can wait for a parking spot to open.*

Greater Variety of Choice

There seemed to be a great appetite for a greater variety of choice in the area, for tourists. The responses mainly included the development of more trails and more residential options to meet the needs of tourists coming into the area.

Some examples of responses related to having a greater variety of choice included:

- *The critical issues listed above are beyond our means but we feel our tourism is constrained by 1) the Hood River Bridge (many folks find it scary), 2) the lack of a large hotel on the north shore, and 3) the lack of tour companies knowledge of our area.*
- *Confluence is working to create curated experiences for visitors through signage, tours, audio tours and a multimedia interactive website.*
- *We need to complete the Historic Columbia River Highway and State Trail.*
- *We are working on providing numerous spaced trailheads to access the State Trail, thereby spreading the recreational use over more of the Gorge. We are also encouraging recreationists to start in the urban areas and then spread out over the length of the Gorge*
- *For recreation infrastructure, first, the improvement of the Klickitat Trail would give 31 miles of more easily used trail than it is at present. Second, if we could fix the one mile of disconnect in the trail just north of Klickitat, it would give more opportunities, for instance running marathons, and giving a reason for overnight stays in Klickitat. Third, KTC has been donated a property along the trail that might be suitable for primitive camping, and definitely for picnicking, Klickitat River access (kayaking, maybe swimming), and informal Klickitat Trail access. Fourth, the trail can provide Klickitat River access for fishing, swimming, kayaking, and just sitting by the river, and this could be improved with better signage and better trail surface, as well as by fixing the disconnect north of Klickitat.*
- *We need more campgrounds*
- *We would like to see the communities within The Gorge develop services to receive high volumes of day visitors with some mix of B&B and camping. In addition the communities at both ends of The Gorge develop hotels and alternative transportation into the gorge.*
- *Need for more trail opportunities that will disperse people across the landscape. Also need for visitor education about other opportunities beyond the most popular trails, such as Dog Mountain and Angel's Rest, to disperse users and relieve congestion*
- *The river access would be a huge draw since most of the travelers are seeking something different than their lifestyle. The beach area added to Hood River is very successful and many of our guests use it. Having the beach expanded in Stevenson to include a sandy area, a covered picnic area and a safer swim area would be a great start.*
- *Creating more trail opportunities, developing more mountain bike guiding options.*
- *What about an off-street bike trail Rose Quarter via I-84 to Multnomah Falls and beyond?*



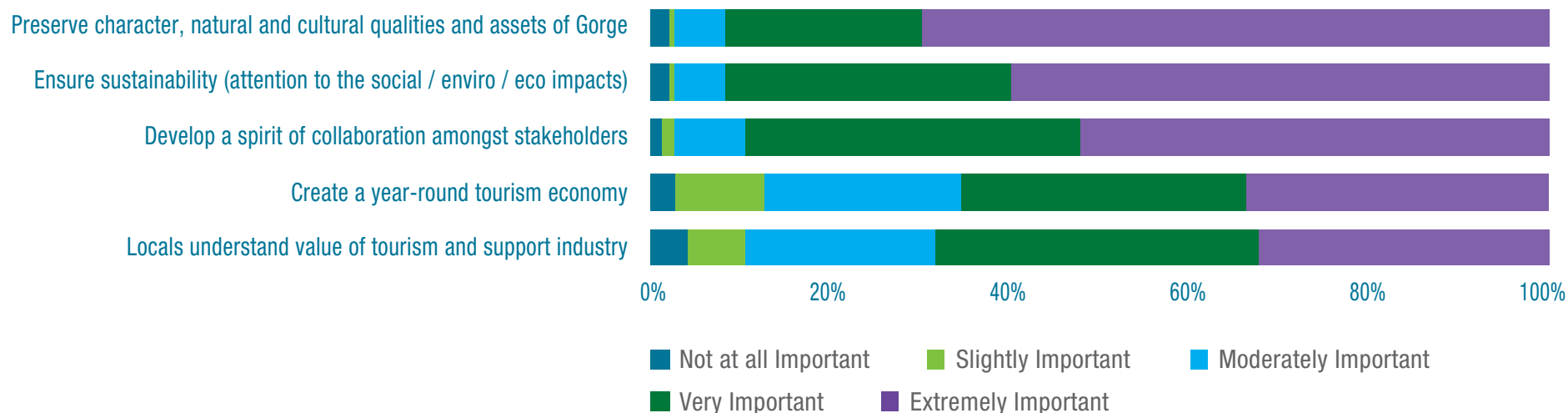
Miscellaneous Categories

The remaining categories of contribution to the area included: Better parking, Sustainable balance, Capitalize on tourism, Protect local values, Tour company knowledge, Cohesive branding and More accommodation choice. Some interesting comments were drawn from these categories:

- *The local communities are often at a loss on how to capitalize on tourism, and how to incentivize tourists to spend money there. A series of educational workshops would help.*
- *One of the critical issues being lack of residents support. The lack of tour companies is a critical issue, congestion at peak area. The biggest one of all is parking.*
- *Development of a "Sales" force from the Tourism / Travel Industry. Travel Professionals today need to learn about the "experience" that is available to their client to sell the area!*
- *We would like to see the communities within The Gorge develop services to receive high volumes of day visitors with some mix of B&B and camping. In addition the communities at both ends of The Gorge develop hotels and alternative transportation into the gorge.*
- *Want more permanent living wage jobs, so we can develop out additional tourism jobs. We need additional permanent housing to house the workers and their families.*
- *Develop moderately priced, pleasant hotels.*

Question 8: Please rate the importance of long-term (5-10 years) strategic objectives

Survey participants were asked 'Please rate the importance of the following long-term (5-10 years) strategic objectives'. For each of the listed objectives, they were presented with a 5-point scale that went from 'Not at all important' to 'Extremely important'





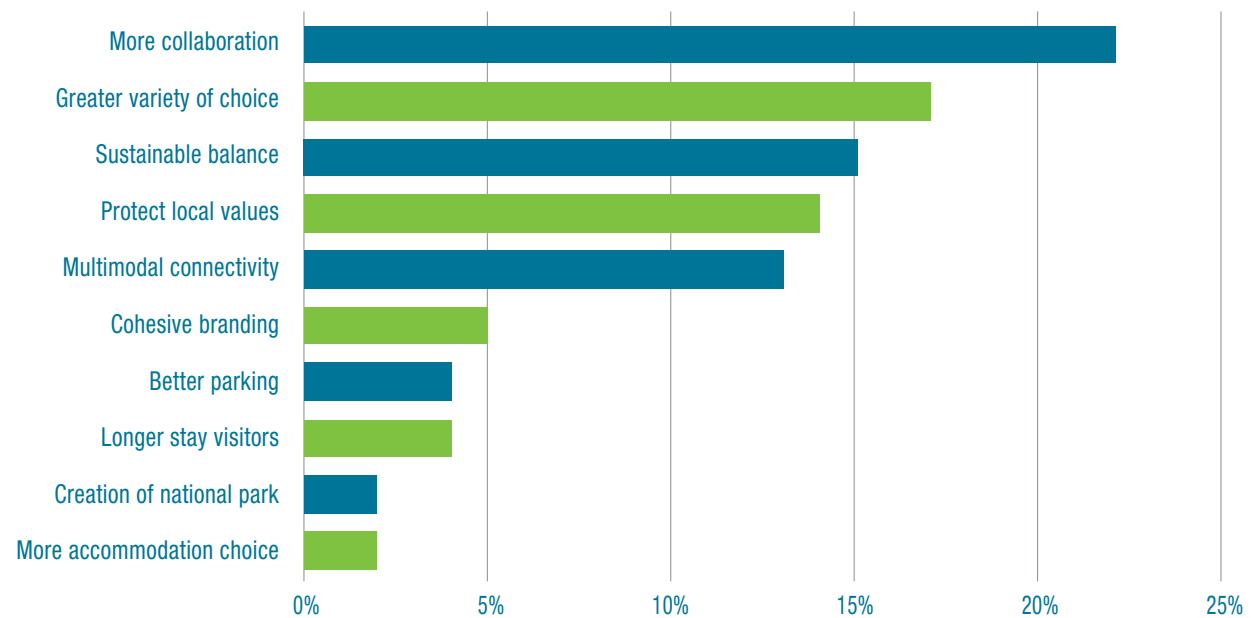
Question 9: What would you ideally want to see in the Gorge to foster a well-functioning tourism economy?

Survey participants were asked 'What would you ideally want to see in the Gorge to foster a well-functioning tourism economy?' Survey participants were given an open text field, and their responses were collected into 10 categories. These categories were developed to reflect the major threads of the written responses.

For the purposes of this report, the main ideas generated from the surveys are summarized for each of the following categories:

- More Collaboration
- Greater variety of choice
- Sustainable balance
- Protect local values
- Multimodal connectivity

In addition, notable comments have been gathered from the remaining categories, and presented under a heading of 'Miscellaneous categories'





More collaboration

Respondents felt that they needed to see more collaboration in the area, in order to foster a well functioning tourism economy. A disconnect was seen between the two states, as well as a lack of chambers, businesses and areas working together for the overall benefit for the area. Interestingly there were a number of respondents who felt that there should be more collaboration between local people and businesses/ tourism agencies. This shows that there is more work to do on building collaboration across the area currently. Some examples of responses related to collaboration included:

- *Better communication and interaction between the two states on the economy of the area.*
- *All the Chambers need to be working together to promote tourism throughout the Gorge. Tourist are not concerned what state, county or town they are in but what experience they have during their visit.*
- *We need the Integration of the Gorge and local communities / services.*
- *Recognition that the Gorge includes two states with equally important, but different, offerings to tourists.*

- *More collaboration between local people and the tourism economy. I believe that offering tours for the locals might help them understand why people from all over the world want to visit.*
- *A tourist development board that meet regularly. Participants should reflect most genres of tourism, not just hotels etc. Really feel youth should be highlighted here for consideration.*
- *What I would hope to see is a new vision of what is possible when bright, talented, capable and concerned citizens from all sectors and walks of life spend time sharing collective wisdom, long-term goals and hopes, a love of place and a willingness to think in new ways that empower and conserve.*
- *There will have to be a collaborative effort to find that "sweet spot" - the balance - that will continue to make this place a world-class destination.*
- *We need collaboration between local residents, local businesses, community leaders, and public agencies.*
- *We need significant cooperation among all the cities and locations in the Gorge that provide services to the visiting public.*

- *2 States working together, and 1 tourism focused agency funded and staffed with a team of professionals, by both states, covering the whole Gorge area, creating one brand for the entire region.*
- *I would like to see a council focused on tourism comprised of representatives from all of the Gorge towns.*

Greater variety of choice

It was felt that a greater variety of choice was essential, in order to foster a well functioning tourism economy. Responses ranged from more variety regarding the types of sporting activities on offer, the trails that are currently available, a split between the types of activities available in the summer and winter (thus, more activities could be developed to meet the needs of each season), and more choice regarding accommodation, restaurants and shopping. Some examples of responses related to a greater variety of choice included

- *Well-functioning to me means year-around tourist opportunities in all the Gorge, including the neighboring communities that actually have something to offer tourists.*



- Complete the gorge trail system to allow hikers access to currently isolated properties, and encourage long-distance trekking as a more significant portion of the tourism portfolio in the Gorge.
- We need stronger communities with a wide variety of food, lodging and entertainment choices.
- Diversity of activity awareness for the different seasons within the Gorge
- A well functioning tourism economy needs moderate places for people to spend the night or two. A list of different activities for tourist to do separated by summer and winter activities. And most of all places where people can bring their families and have something for everyone to enjoy.
- More year round balance, as seasonal hiring/training is very hard. Wish to provide more year round full time employment with trained staff. Need more hotels and one high end one. Need more activities that aren't wind or alcohol related.
- More quality restaurants and boutique shopping. Cycling activities that include the whole family.
- Multi experience based tourist activities. Not all tourists want to hike.... We need all forms of recreation out here.

So, outdoor activities, cultural activities, retail, restaurant, motorized sport activities and any activity for people to decompress from their daily lives.

- A very definitive investment in recreation based activity. Kite-board, zipline, boating, hiking nearby, mtn biking trails etc...but done professionally charging reasonable dollars for the experience. It has to be almost scripted and presented in a way that middle age family with kids can come and have their day handed to them guided almost.
- We need better transportation options and better information for visitors to enrich their visitation experience. Spreading out visitation times by encouraging visitors to come early or late in the day.
- Additional roadside turnout along HCRH with refreshments, Trails network as in Europe, that have overnight and refreshment amenities. Food, drink, cabins, yurts, etc
- The Gorge is known for extreme sports. I would like to see more family inclusive opportunities for outdoor recreation. Not just for the hardcore athlete but family friendly as well. Learn to mountain bike, kayak, fishing derby's for amateurs, half marathons, paddle board clinics etc.

Sustainable balance

Many of the respondents had concerns with regard to maintaining a balance between the tourism/outsider experience and the retention of the area as a place in which they lived. This category of sustainable balance was mentioned throughout the responses. The respondents were keen to note that tourism should be of a sustainable nature, that the balance should be found that would sustain the economy of the area but would protect the natural resources. Some examples of responses related to sustainable balance included:

- It's a significant challenge, but a balance between tourism use and sustainability (economic & environmental).
- Educating the community to the value of Tourism to the economic of the area and the ability to preserve the unique qualities that are here. IT is not the idea that we keep tourism out to preserve but that we share and appreciate what is here for everyone to enjoy. Careful planning and development will do that but respect for the area and local interest must be a part of the plan
- Sufficient tourism volume to provide the supplemental income necessary to permit the local economy to more efficiently function at a high level.



- *Sustainability - find balance that will sustain the economy of the Gorge, provide high quality recreational experiences while protecting natural, scenic and cultural resources.*
- *Places for families to picnic in a clean environment next to the natural order of our land.*
- *Elected officials who believe in and foster a tourism economy, recognizing its dependence on ensuring the natural and cultural assets of the Gorge are preserved.*
- *Over-use of popular trails and sites in the Gorge needs to be addressed and managed so as to ensure the long-term protection of those resources, for their own sake and for the enjoyment of future generations.*
- *Make sure that the rural character of the Gorge is not lost to commercialism. Keep the development in the cities with readily available access to the activity sites.*

Protect local values

Connected to, yet different to Sustainable balance was the category Protect local values. This was a category/topic which was represented widely across the survey responses. Residents in the area expressed concerns as they gave ideas about what was needed to foster a well functioning economy. Ideas such as fewer vacation rentals and less

economic reliance on tourism were expressed, as well as increased employment options and pay, and more of a focus on what the area needed as a residential place. There was a disconnect between the responses across the survey regarding building the tourism economy and those living in the area, who were very concerned about protection of the local values. Some examples of responses related to a protection of local values included:

- *Fewer vacation rentals, and actually, less economic reliance on tourism in general. These rushes cause people to speculate on new construction for second "homes" and crush local people's ability to rent and live in affordable housing near their work which is often low paid tourism service work. With the current number of people here, the economy is out of balance, skewed towards visitors and tourism at the expense of residents. Growing tourism increases the magnitude of the problem. If we were in balance, I would say we could slowly grow the tourist industry, but we are not, and we cannot. Growth is never the answer. Balance is always the answer.*
- *Tourism is of no interest to me. The less people up there the better. Tourists often don't get the sustainability piece of this equation, and frankly, I don't like seeing tour buses up there.*

- *I don't want to call it a 'Tourism Economy'. I want to call it something more akin to 'sharing the richness of place and together, stewarding our future'. What I would hope to see is a new vision of what is possible when bright, talented, capable and concerned citizens from all sectors and walks of life spend time sharing collective wisdom, long-term goals and hopes, a love of place and a willingness to think in new ways that empower and conserve versus take and use.*
- *Making sure a tourism economy doesn't infringe on rural residential neighborhoods.*
- *Better paying jobs for more people. lower price housing for the low paid employees.*
- *One that supported the cost of having them here! One that educated them about the fact that the river kills... that the mountains do not care how beautiful they think it is....if you are silly and go on the trail uneducated and unprepared for what may happen, you COST us ...you add nothing to the community.you block our access to all we grew up with even to drive to Hood River unimpeded.....one that somehow respects that this is community not just for their enjoyment.....it s our living room!*



Miscellaneous categories

The remaining categories of contribution to the area included: Multi modal connectivity, Cohesive branding, Better parking, Longer stay visitors, Creation of a National Park, and More accommodation choices. Some interesting comments were drawn from these categories:

- *Few cyclists are willing to ride even for short distances along the Interstate. A scenic, low traffic route all the way from Portland to The Dalles is extremely attractive. Places to find food and lodging (ranging from campsites and fast-food to hotels, bed-and-breakfast, and informal but nice dining) also make riding the gorge more attractive.*
- *Better transportation between all the communities. Link is doing the best they can. But transportation from Klicitat county to Vancouver, Skamania County... Wasco, Jefferson, Sherman etc all need recreational transportation.*
- *I would like the Gorge, or at least all the public land in the Gorge, made into a National Park. All the State Parks in OR and WA as well as all Forest Service land should be put under one unified management entity with great experience in tourism, and also great experience in landscapes other than forest, since the East Gorge is not commercial forest and therefore not something the Forest Service is trained to manage. The National Park Service seems to me to be the logical unified manager for the Gorge.*
- *A collaborative and unifying website, such as a trip-planning website, could assist in visitors visiting during different seasons they might not have considered had information or travel planning itinerary not been provided.*
- *Adequate camping and parking*
- *Affordable bus or shuttle service from PDX*
- *An organization that oversees tourism marketing and promotion for the entire Columbia River Gorge National Scenic Area - with paid staff.*



CONCLUSIONS

The survey responses were generally of a high quality, with people taking considerable time and effort to provide extensive narrative and input to the open text questions.

The survey results highlight a number of critical themes, including:

- Collaboration was repeatedly highlighted both explicitly and implicitly. There is a clear view that stronger regional collaboration, across a range of issues is required to tackle the significant challenges facing the Gorge.
- There is a critical need to build more multi-modal transport systems and better connected trails that spread and manage visitor flow. Congestion and overstressed infrastructure was a repeated concern and pressure point. This is impacting visitor experience and leading to friction within the region.
- There is an expressed sentiment that people are ready to come together – and they want to build sustainable tourism that distributes benefits across the region, but does not destroy the region. It is worth noting that 70% of respondents viewed ‘Preserve character, natural and cultural qualities and assets of Gorge’ as an extremely important strategic objective, and that 60% viewed ‘Ensure sustainability (attention to the social, environmental and economic impacts)’ as also extremely important.

The Tourism Studio offers opportunity for the regional stakeholders to come together and tackle these important and challenging issues in a structured and coordinated manner.

RECOMMENDATIONS

The surveys offer a valuable insight into the concerns and desires of the Gorge tourism industry stakeholders.

It is clear that the tourism infrastructure is overstressed, in critical ‘pinch-point’ locations. It is also apparent that annual tourism traffic is increasing, but the patterns of usage are not well distributed across the region, or across the season.

The Gorge tourism industry has the opportunity to come together and create innovative, original and locally driven approaches to manage the overall destination. In undertaking this work, there are several recommended themes that should connect the ensuing work. These include:

- There needs to be a well-designed approach to manage and alleviate congestion and overstress of key locations and infrastructure. Spreading the traffic across the region, and across the season will provide enhanced visitor experience and preserve the region’s unique environment.
- The region needs to adopt a strong ‘systems’ approach to integrating the communities and tourism sectors into crafting collaborative solutions.
- Finding the correct balance between economic vitality driven by tourism, and protecting the intrinsic nature and value of the region and people will be paramount. This will require thoughtful dialogue to identify the desired vision and the pathway to achieve that outcome.

Based on the thoughtful and comprehensive survey responses, it does appear that there is the will and the intellectual heft, to tackle and solve the challenges before the Gorge community.

ABOUT FUTURE IQ PARTNERS

Future iQ Partners is a market leader in the development and application of scenario planning; network analysis; industry and regional analysis; and, community engagement and capacity building. The company specializes in applying innovative tools and approaches to assist organizations, regions and industries shape their economic and community futures. Future iQ Partners takes a practical, hands-on approach to working with groups and communities. With over a decade of business experience, the company has grown to have a global clientele spanning three continents.

Report Prepared By:

David Beurle

Future iQ Partners

To learn more about Future iQ Partners, and recent projects visit www.future-iq.com or email info@future-iq.com



www.future-iq.com

ABOUT TRAVEL OREGON AND THE TOURISM STUDIO

This study is one of several being produced to support the Gorge Tourism Studio. The Gorge Tourism Studio is a program designed to help public agencies; private enterprises, community leaders and youth design the future of a growing tourism economy in the Columbia River Gorge. To learn more about Travel Oregon's Destination Development program, please visit <http://industry.traveloregon.com/>

For more information regarding the Tourism Studio please contact:

Kristin Dahl

Director, Destination Development
Travel Oregon
319 SW Washington Street, Suite 700
Portland, OR 97204
Tel: +1 503.967.1560
Email: Kristin@TravelOregon.com

To learn more about Travel Oregon visit www.TravelOregon.com

