



GORGE TOURISM STUDIO

Baseline Assessment January 2016

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I. Introduction

This report includes qualitative and quantitative baseline information about the Columbia Gorge region at the start of the Gorge Tourism Studio (GTS) project. The Gorge Tourism Studio is an adaptation of Travel Oregon's award-winning Rural Tourism Studio, which aims to stimulate new tourism development activities that generate business revenue, jobs, entrepreneurial opportunities, and revenue for public services over time. In the Gorge, the focus is as much on managing and distributing existing tourism as it is on increasing tourism, so that the region can continue to mature as a world class destination while preserving its unique environment and vibrant community cultures.

The core of the host region is defined as the 457.1 square miles within the Columbia Gorge National Scenic Area, which spans parts of six counties in Oregon and Washington. The region also includes the north to south valley between Mount Adams in Washington and Mount Hood in Oregon, including the gateway communities on the southern flank of Mount Adams and those on the northern flank of Mount Hood. These outlying areas are tightly connected with Gorge marketing and travel patterns.

While the Columbia Gorge National Scenic Area is the Tourism Studio's primary focus, this creates challenges for gathering and comparing data. Data specific to the National Scenic Area primarily focuses on natural resources utilization, congestion and recreation trends within the confines of the National Scenic Area. For data on public lands management, the relatively small geography of the Scenic Area crosses three offices of the U.S. Bureau of Land Management and two planning regions for the State Comprehensive Outdoor Recreation Plan (SCORP) in Oregon. In Washington, the Gorge is split between two regions of the State Department of Natural Resources, and is part of one, much larger region for the SCORP. Most demographic, economic and tourism data is only available at the county level, which includes major parts of the entire Portland/Vancouver metropolitan area outside the CGNSA. There are also regional studies for the rural counties of the Columbia River Gorge, but they vary in terms of which counties are included in the defined boundaries. Finally, Travel Oregon has some tourism data that is not available for Washington counties, given the lack of a funded state tourism agency. While information based on county data should not be seen as totally representative of trends in the target region for the Tourism Studio, Travel Oregon's market data should generally be relevant for trends in the Washington side communities.

The GTS workshops, which will launch in January, 2016, are designed to help public agencies, private enterprise, community leaders and youth work together for a healthy tourism economy in the Columbia River Gorge. According to local steering committee notes, the program specifically aims to help this region address key challenges it faces in the areas of:

- Leadership and destination management
- Marked seasonal variation in 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/agritourism and cultural heritage
- Connecting fragmented resources for marketing the area as a destination

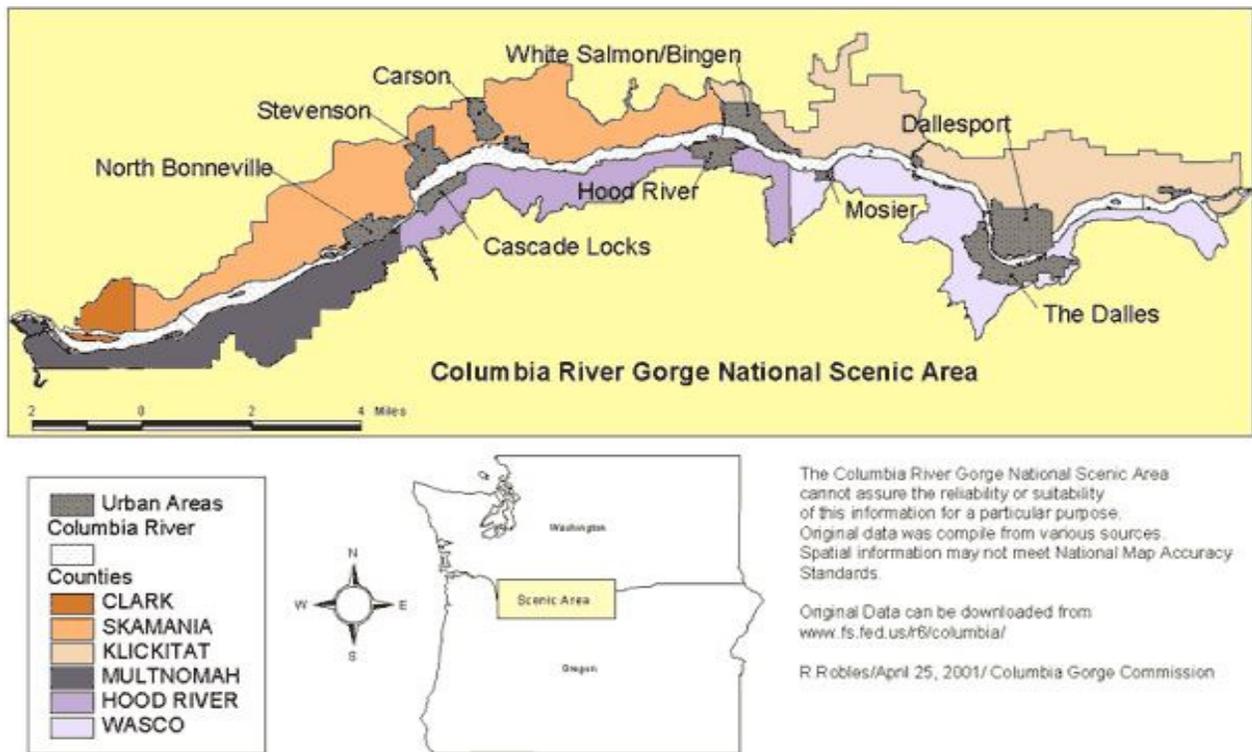
Baseline report data will be combined with workshop participant surveys, ongoing key stakeholder interviews and project implementation updates to assess the value of the Tourism Studio program approach for fostering beneficial tourism, and to provide useful information to local participants with which they can gauge their

progress. A list of people who are serving on the Steering Committee to customize and organize the Gorge Tourism Studio is included as an Appendix.

II. General community profile and context

The Columbia River traces most of the state boundary between northern Oregon and southern Washington, and the Columbia River Gorge extends from the Portland/Vancouver metropolitan area to the Deschutes River east of The Dalles. Within the Gorge, The Columbia Gorge National Scenic Area was created in November 1986 as one of the nation’s first scenic areas. It now consists of 457.1 square miles (293,000 acres) spanning both states along 80+ miles of the river. While the Gorge communities have many distinct histories and personalities, there is a long history of working collaboratively across county and state lines.

The six counties that have acreage within the CGNSA are: Clark, Skamania and Klickitat counties in Washington and Multnomah, Hood River and Wasco counties in Oregon. While there are no Indian reservations within the Scenic Area, there are trust lands belonging to multiple tribes in the region.



Source: Oregon Department of Environmental Protection

The Gorge contains just six percent of the six counties’ total land mass. Skamania County has the most acreage located within the NSA: Multnomah County has the greatest percentage of its land in the NSA.

Land in the CGNSA as a Percentage of Total Land Mass, by County							
	Clark	Skamania	Klickitat	Wasco	Hood River	Multnomah	Total
Square miles	656.3	1683.8	1904.2	2395.2	533.6	465.5	7638.6
Sq. miles in NSA	12.1	136.1	116.1	69.9	60.4	62.5	457.1
% in NSA	2%	8%	6%	3%	11%	13%	6%

Source: Columbia Gorge Commission

A. History and Topography

The Columbia River Gorge Management Units Plan (Oregon Parks and Recreation Department, 2015) contains an excellent overview of the region's history. There is evidence of human settlement in the area for over 10,000 years, most notably at the Celilo Falls fishing site which was a major trading area for tribes throughout the Northwest. Pictographs along the river, including the well-known "She Who Watches" or "Tsagaglal", bear witness to the long tenure of Native Americans. Today, the Warm Springs, Yakima, Umatilla, Nez Perce and Columbia River Tribes all have rights associated with their substantial ancestral lands in the area, and the river's edge is still lined with traditional fishing platforms. The Yakima and Warm Springs reservations established by treaty extend into three of the six Gorge counties, but not into the CGNSA proper.

Meriwether Lewis and William Clark passed through the Gorge in 1805 and 1806, following the river's contours on their cross-country journey to the Pacific Ocean. Their 4,600 mile trail is a designated National Historic Trail. Successive generations of immigrants- pioneers from the east along the Oregon Trail, Chinese laborers, Japanese and Latino farmers and more- settled the area and layered on their traditions. Agriculture was a consistent draw for many settlers, and it remains a significant part of the regional economy.

Given the Gorge's location along the major waterway linking the Central Plateau to the Pacific Ocean, transportation and energy production have also shaped its history. What is now WA Highway 14 was the first highway through the Gorge, built in segments from 1905 to 1913. The Historic Columbia River Highway (HCRH), built for leisure travel and especially waterfall viewing, was built from 1913 to 1922.

Before tourism was a major industry, local leaders anticipated the need to protect its natural assets from overdevelopment or exploitation. An Oregon law passed in 1915 prohibited the diversion or interruption of waterfalls. That same year, the U.S. Forest Service set aside 14,000 acres of federal land as the "Columbia Gorge Park Division of the Oregon National Forest": this was the first time federal forest lands were dedicated solely for recreation or scenic enjoyment. In 1916, the country's first developed campground was created at Eagle Creek.

After World War II, infrastructure investments accelerated. Construction of a "modern highway", Interstate 84, isolated or destroyed segments of the old HCRH. Celilo Falls was flooded in 1957 to power hydroelectric generation downstream, a project that is still controversial especially for the area's Native Americans. By this time, leaders from both Washington and Oregon also recognized the need for integrated regional planning. Separate Gorge Advisory Commissions were established, but there was no dedicated funding.

In 1986, the present-day Columbia Gorge Commission was created, with funding, to administer the Columbia Gorge Natural Scenic Area in partnership with the US Forest Service. Two National Forests, Mount Hood and Gifford Pinchot, are partially located within the NSA.

Topography:

Prior to human settlement, the Columbia River Gorge topography was shaped by dramatic geological events, including the birth of the Cascade Mountain range, volcanic eruptions, and epic floods. The Missoula Floods at the end of the last Ice Age cut steep walls through the rock as waves of water, icebergs and boulders rose as high as Crown Point. What were once tributaries of the Columbia River were left suspended at the edge of cliffs and transformed into waterfalls; at least 40 on the Oregon side and another 13 in Washington. On the high plateaus and rolling hills further from the river's edge, volcanic eruptions and flooding sedimentation combined to form fertile agricultural and forest lands.

As millenniums of travelers have moved up and down the Columbia River, they have experienced extremely diverse topography, weather and nature. The elevation varies from the sea-level at the river (the only sea-level

waterway between the Central Plateau and the ocean), to 4000 feet above sea level. Just outside the boundaries of the Scenic Area, the sentinel peaks of Mount Adams and Mount Hood rise to 12,281 feet and 11,239 respectively. The annual rainfall varies from 10 to 100 inches, with heavier precipitation generally in western Gorge's temperate rain forests and lighter in the eastern Gorge grasslands. Due to atmospheric pressure differentials from east to west, the Gorge is often a wind tunnel, with winds commonly reaching 35 miles per hour. The many different climate zones support diverse ecosystems and micro-habitats, with many endemic species of plants and animals. Fifty eight plant species are classified as rare or endangered.

Access:

The Columbia Gorge is easily accessible from Portland's International Airport, which is approximately 20 minutes from the western edge of the National Scenic Area. For private aircraft, there are four small airports, all on the Oregon side of the river:

- Columbia Gorge Regional Airport in the Dalles, co-owned by the City of the Dalles and Klickitat County WA (with the longest runway in the region, at 5097 feet long)
- Cascade Locks State Airport
- Ken Jernstedt Airfield, owned by the Port of Hood River
- Troutdale Airport, owned by the Port of Portland

East-West highways parallel the river on both sides: State Highway 14 in Washington, and the larger Interstate 84 in Oregon. The primary north-south roads for access between Mount Adams and Mount Hood are State Highway 141 in Washington and State Highway 35 in Oregon. Just east of the National Scenic area is US Highway 97, Central Oregon and Washington's major north south route. The area can have severe winter weather and high winds any time of year, which can make access difficult and dangerous at times.

According to the 2011 "Columbia River Gorge Vital Signs Indicators Resident and Visitor Survey", nearly two out of three visitors to the Columbia River Gorge (62%) travel to the area via Interstate 84 in Oregon. Nearly a quarter (22.3%) arrive via WA State Highway 14, and the balance travel on the Historic Columbia River Highway (US Highway 30) or via north-south routes. The Appendix includes average daily traffic counts for I-84, US 30, WA 14, WA 141, and OR 35.

Most visitors to the Gorge travel by private vehicle, which contributes to congestion. There is no public transit linking destinations within the Gorge on a consistent basis. Limited options exist, however, for traveling to the Gorge from the nearby urban areas, and seasonally for some recreation areas.

- Starting in 2014, there has been scheduled weekend bus service during the peak summer season through Gorge West End Transit (WET). This travel option links Vancouver and Portland with nine communities and trailheads along the Washington side of the river.
- Columbia Area Transit (CAT), based in Hood River, provides intercity bus service between The Dalles and Portland, on Tuesday and Thursday. There are current efforts to expand CAT's service to include key recreational areas as stops.
- Amtrak (WA side) and Greyhound Bus (OR side) also link the Gorge with daily service to and from the Portland/Vancouver Metropolitan area.

There are several studies planned or already underway by the Oregon Dept. of Transportation to alleviate traffic congestion along the HCRH, including through the introduction of new transit options:

- Pilot project for a transportation service from East Multnomah County to Multnomah Falls, to be implemented in time for the June 7, 2016 celebration of the Historic Columbia River Highway's Centennial.

- New federal grant to ODOT to study potential long term solutions to congestion along the HCRH and I-84 at Multnomah Falls.
- Oregon Solutions Team appointed to problem-solve safety issues between Bridal Veil and the Ainsworth section of the HCRF

B. Demographics

While it contains part of the Portland/Vancouver metropolitan area, most of the Columbia Gorge Natural Scenic Area is rural. Within the NSA, land is divided into three categories: special management areas, general management areas, and urban areas, for which overlay zoning rules determine which types of development activities are permitted. Development is most restricted in the Special Management Areas, due to the presence of sensitive natural, cultural and recreational areas. Urban areas are exempt from the NSA Management Plan’s guidelines, including overlays. The bulk of the area’s residents live within urban areas.

According to the Columbia Gorge Commission, approximately 55,000 people live within the NSA boundaries as of 2000. There are 13 urban areas in the National Scenic Area, eight of which are incorporated cities, as shown by an asterisk:

Oregon	Washington	
Cascade Locks*	North Bonneville*	White Salmon*
Hood River*	Stevenson*	Bingen*
The Dalles*	Carson	Lyle
Mosier*	Home Valley	Dallesport
		Wishram

Population is concentrated on the Oregon side of the Columbia River. There are 24,118 residents of incorporated cities on the Oregon side: an additional 3,168 people live in the “rural centers” of Corbett and Bridal Veil portions of Multnomah County. The incorporated cities on the Washington side of the river have a total population of 5,497, with White Salmon (2013 population- 2,305) the largest. An additional 2,079 people reside in the large unincorporated community of Carson, WA. The Dalles, OR is the largest community in the Gorge with a 2013 population of 15,158.

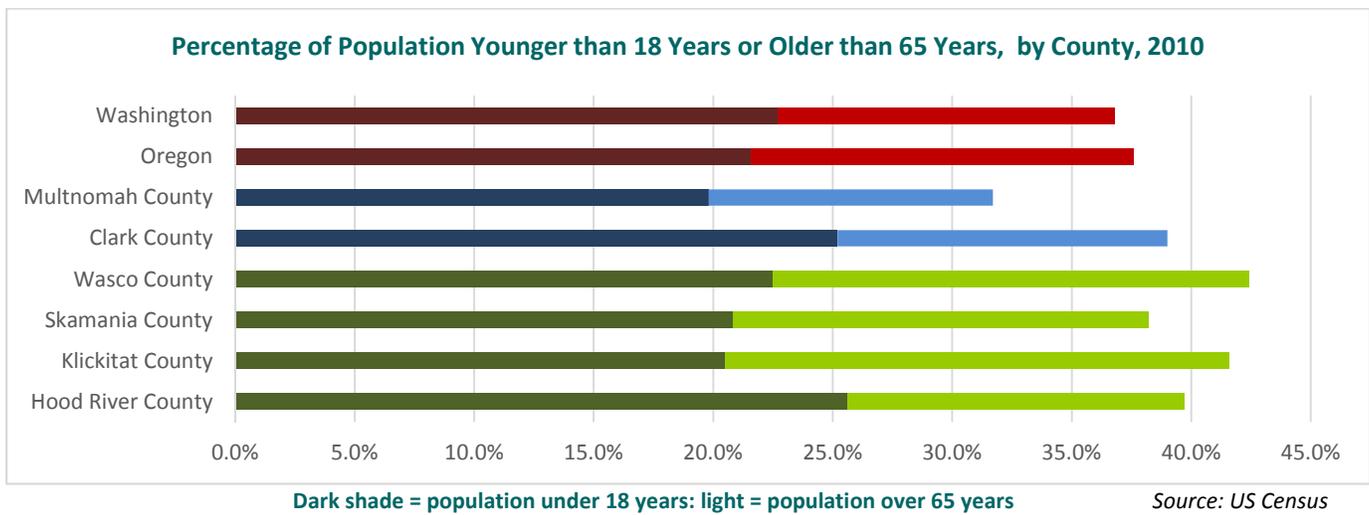
If the population of the NSA grows at the same rate as it grew from 1980 to 2000 (55%), there could be 85,000 people living within its boundaries by 2020 (Columbia Gorge Futures Forum, 2008). In the six county region as a whole, population has been also been growing. As is typical for the Pacific Northwest, the rural counties are growing more slowly than the urban counties. Wasco County, the largest of the rural counties, is the slowest growing in the region.

Population	2010	2014	Change
Hood River County	22346	22885	2.4%
Klickitat County	20318	20861	2.7%
Skamania County	11066	11340	2.5%
Wasco County	25213	25515	1.2%
Clark County	425363	451008	6.0%
Multnomah County	735334	776712	5.6%
Oregon			3.6%
Washington			5.0%
USA			3.3%

Source: US Census

The population of the region is primarily white, but the Latino population is growing. There is also a sizable Native American population in Wasco and Klickitat Counties. Within the NSA, it is estimated that 10% of the population is Latino. This population is more concentrated in Hood River County, where one in four residents are Latino (Columbia Gorge Futures Forum). According to the 2013 Columbia Gorge Regional Community Health Assessment, 30-45% of the region’s Latino residents are undocumented, which creates major barriers to employment.

In terms of age distribution, **the rural Columbia River Gorge counties, with the exception of Skamania County, have a larger share of the population outside of normal working age** (see chart below). Rural populations are in general older than metropolitan areas, and this affects the size of the available workforce. During recent community planning for “Fresh Start”, a culinary social enterprise in Hood River, **anecdotal information has surfaced about labor shortages in the region, including skilled food preparation and service among others.**



A high proportion of the population holds a high school degree, but with the exception of Hood River County and Multnomah County, the region is below average in terms of the number of college graduates.

Educational Attainment by County	Hood River County	Klickitat County	Skamania County	Wasco County	Clark County	Multnomah County	OR	WA
At least high school graduate	84.1%	87.0%	89.6%	85.1%	91.3%	89.7%	89.4%	90.0%
At least Bachelor degree	30.5%	19.5%	20.8%	20.1%	26.0%	39.9%	29.7%	31.9%

Source: US Census

While parts of the region appear prosperous, and new economic development initiatives (including increased tourism) have diversified the region’s economy, many residents still struggle economically. One indicator is the rate of poverty, and poverty rates are increasing statewide and nationally. In the rural Columbia Gorge region, poverty rates are highest in the two easternmost counties: Wasco and Klickitat. Poverty has increased rapidly in Wasco County since 2000. Poverty rates are lowest in Hood River County, where there has been a significant improvement over the same time period.

Poverty Rate	2000	2010	Change
Hood River County	14.2%	11.6%	-18.3%
Klickitat County	17.0%	17.5%	2.9%
Skamania County	13.1%	12.5%	-4.6%
Wasco County	12.9%	18.2%	41.1%
Clark County	9.1%	12.4%	36.3%
Multnomah County	12.7%	17.8%	-28.7%
Oregon	12.8%	16.2%	26.6%
Washington	9.6%	13.4%	39.6%
USA	11.3%	15.4%	36.3%

Source: US Census

Affordable housing is another indicator of community well-being, and it is common to see housing costs rise in communities that are attractive to visitors, especially if located close to metropolitan areas. **Lack of affordable housing can generate localized labor shortages for part-time and entry-level jobs as well.** The City of Hood River and Hood River County are at the epicenter of cost pressures. According to the 2015 City of Hood River Housing Needs Analysis, one third of households can't afford current housing prices. Short term rentals for visitors also put pressure on housing prices, especially for local renters. By 2010, it was estimated that 8% of all housing rentals in the city are for short term rentals, which is higher than Ashland, another popular tourist destination, but far lower than coastal communities such as Newport (14%) and Cannon Beach (54%). Efforts are underway to further regulate short term rentals in Hood River.

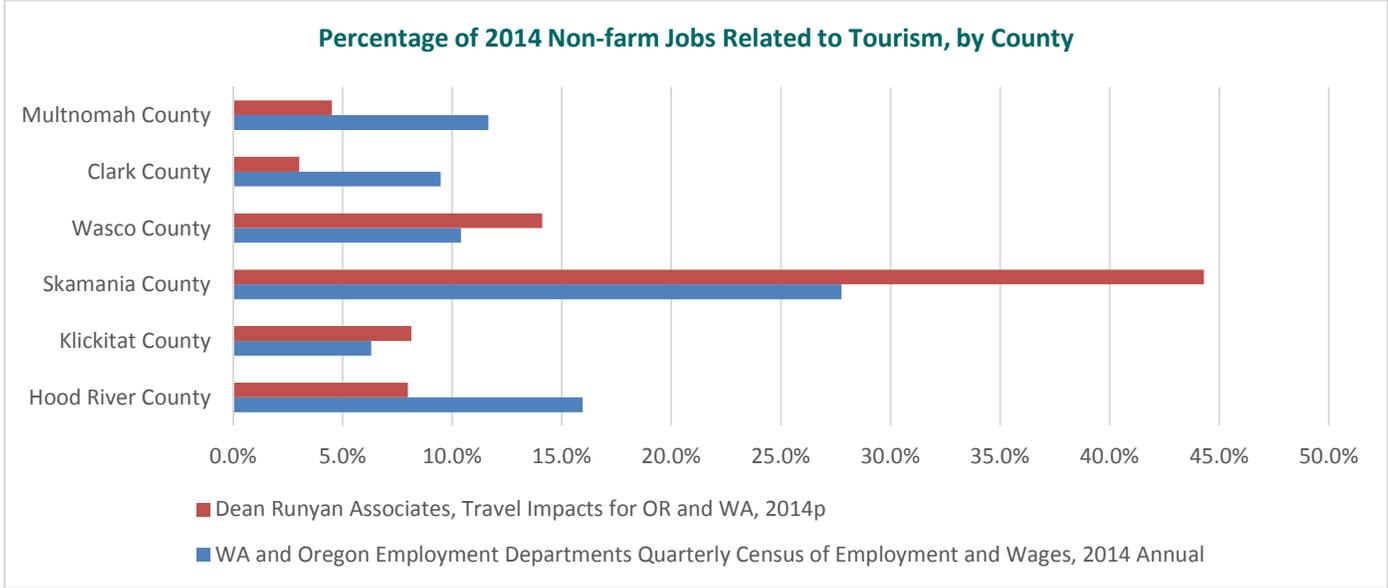
C. Economy

The economy of the Gorge has historically been driven by natural resource extraction and value added production (orchards, timber, wood products, livestock, food processing) and transportation, and these activities continue to be important. Public sector employment, especially at the local level, also continues as an economic driver. **Employment in these industries has been volatile because public policy governing their operations and/or budgets have also been volatile.** There are numerous closed manufacturing facilities dotting the regional landscape as a result.

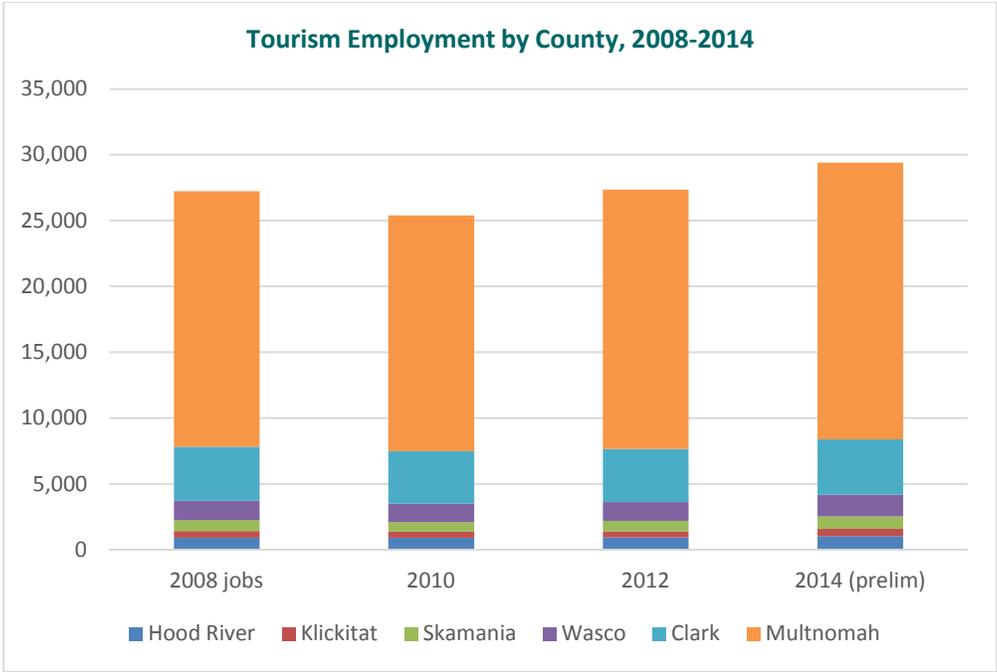
New economic activity is backfilling for lost jobs. There is a **strong focus on entrepreneurship and workforce development.** The Gorge Technology Alliance supports a cluster of high-technology businesses, and the Columbia Gorge Community College offers local training. New business activities include what is now categorized as "Information Businesses" such as Google in The Dalles. Renewable energy production in the form of wind and solar power is continuing to evolve, especially in the eastern part of the Gorge. Cutting edge technology is also applied in the design and manufacture of unmanned aircrafts (drones), outdoor gear and active wear, especially in the Bingen/Hood River area. As noted in the 2008 Future Forum report, **Gorge residents support tourism, but don't want to depend on it alone for the economic vitality.**

Finally, tourism is an important part of the Columbia River Gorge economy. **In 2009, because of the area's world-class assets, National Geographic magazine ranked the Gorge sixth in the world as a sustainable tourism destination. Four season outdoor recreation is the foundation for tourism in the Gorge. Culinary and agritourism is on the rise, and is complemented by a robust regional movement to build a strong local food system.** Along with numerous breweries, there are 40+ wineries and vineyards in the Columbia Gorge AVA (designated American Viticulture Area) growing over 140 varietals. As noted in the next section, tourism development is at a crossroads in terms of balancing development of attractions with managing growth to preserve what makes the Gorge a treasure.

Tourism accounts for a low of 3% of jobs in Clark County, WA and a high of 44.5% of jobs in Skamania County, based on estimates for each county developed by Dean Runyan Associates for Travel Oregon and the two State Employment Departments using an alternate methodology, The estimates count direct employment only, not the multiplier effect of dollars recirculating in the local economy.



Tourism employment (Dean Runyan estimates) has rebounded above pre-recession levels in all counties,



While tourism employment in Multnomah County, most of which lies outside the NSA, dwarfs the others, **tourism employment has actually grown faster in the rural counties** as shown on the next page.

Tourism Jobs (Direct Employment) by County, 2008-2014

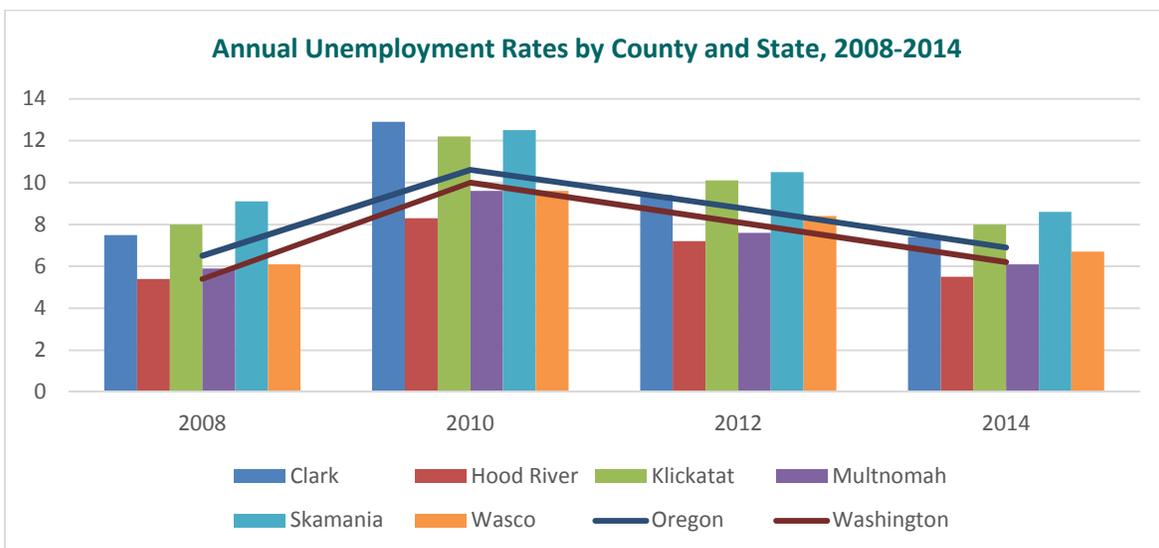
	2008	2010	2012	2014 (prelim)	% change 2008-2014
Hood River	930	920	950	1040	11.83%
Klickitat	500	470	460	570	14.00%
Skamania	820	710	800	930	13.41%
Wasco	1480	1400	1430	1640	10.81%
Clark	4100	3990	4020	4220	2.93%
Multnomah	19,400	17900	19700	21000	8.25%
Total	27,230	25,390	27,360	29,400	7.97%

Source: Dean Runyan Associates for Travel Oregon

According to the State Employment Departments, **tourism is one of the top five sectors in terms of employment for each county except for Klickitat.**

Top Five Sources of Employment, 2014, Ranked by County	Hood River County	Klickitat County	Skamania County	Wasco County	Clark County	Multnomah County
Natural Resources	1	1		3		
Manufacturing	4	5	3			
Trade, Transportation and Utilities	3	4	4	2	1	1
Professional, Business and Technical Services		3			3	2
Educational and Health Services			5	1	2	3
Leisure and Hospitality	2		1	5	5	4
Local Government	5	2	2	4	4	5

Unemployment rates are improved from the depths of recession levels, but particularly on the rural Washington side of the Gorge, they remain high.



Source: Oregon Labor Market Information Service; Washington Employment Service

Finally, Annual Travel Impact Reports also include a table illustrating the economic impact of tourism in each county as shown on the following page. The visitor spending and employment impacts vary according to the mix and cost of tourism goods and services in each county. The economic impact derived from each household encouraging one overnight visitor per year is especially interesting.

Summary of Tourism Economic Impacts by County, 2013

	Hood River	Klickitat	Skamania	Wasco	Multnomah	Clark
Amount of visitor spending that supports one job	\$81,570	\$64,330	\$69,890	\$60,350	\$106,730	\$103,430
Employee earnings generated by \$100 in visitor spending	27	32	26	30	30	28
Local and state tax revenues generated by \$100 in visitor spending	\$4.70	\$1.90	\$2.00	\$3.50	\$9.10	\$3.00
Additional visitor spending if each resident household encouraged one overnight visitor per year	\$1,386,000	\$940,000	\$840,000	\$1,290,000	\$98,630,000	\$27,860,000
Additional employment if each resident household encouraged one additional overnight visitor per year	17	15	12	21	924	269

Source: Dean Runyan Associates for Travel Oregon and Washington

Additional information on visitor spending volume and patterns is included in the Visitor Expenditures section, starting on page 15.

III. Visitor Information

According to the US Forest Service, the **Columbia River Gorge National Scenic Area hosts over two million visitors a year.** In addition to studies that are NSA specific, data is available for the six Gorge counties, as well as for the portion of four Oregon counties that make up the Mt Hood/Gorge marketing region.

A. Visitor Profile:

The following data is from 2013 Longwoods International Regional Visitor Report for the Mt. Hood-Gorge region. The region includes Hood River County, Wasco County, and small portions of Multnomah and Clackamas counties.

Visitors come to the Gorge from around the world, but the majority come from Oregon and Washington. The proportion of visitors from Oregon has increased since 2008.

Top Urban Zip Codes of Overnight Visitors to Mt Hood-Gorge Region

City	% of regional visitors from specific urban area, 2008-2009	% of regional visitors from specific urban area, 2012-2013
Portland OR	32%	38%
Seattle WA	13%	9%
Los Angeles CA	7%	5%
Eugene OR	4%	
San Fran/Oakland, San Jose CA	4%	
Boise ID	4%	
Spokane ID/WA	4%	5%
Yakima WA	4%	3%
Salt Lake City, UT	4%	
Washington DC		3%

Source: Longwoods International for Travel Oregon

Top Home States for Overnight visitors to Mt Hood-Gorge region, 2008-2009 and 2012-2013

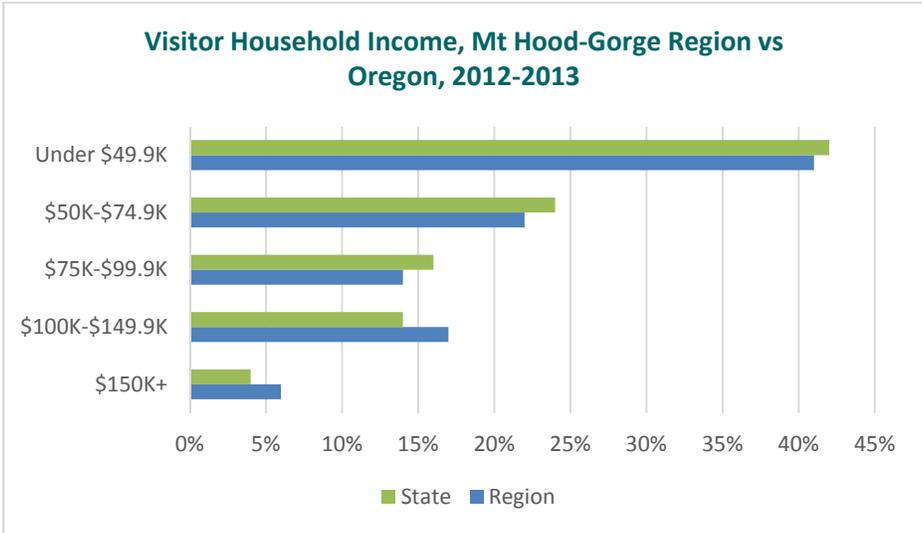
State	% of region's visitors, 2008-09	% of region's visitors, 2012-13
Oregon	33%	37%
Washington	23%	21%
California	7%	9%
Idaho	5%	
Florida		3%

Source: Longwoods International for Travel Oregon

According to the Columbia River Gorge Scenic Area 2011 Visitor Use Report, nearly a quarter (23.6%) of visitors to the National Forest within the NSA have traveled more than 500 miles away from home.

According to the same report, **non-tourists are also heavy users of the area's recreational assets. This report estimated that 60% of visits to the National Forest within the NSA come from people living within a 50 mile radius,** and unless they stay overnight, they are not classified as tourists. Thus, strategies to address congestion in outdoor recreation area will need to account for the habits and preferences of this exceptionally large base of local users.

Visitors to this region are somewhat wealthier than the average Oregon visitor:

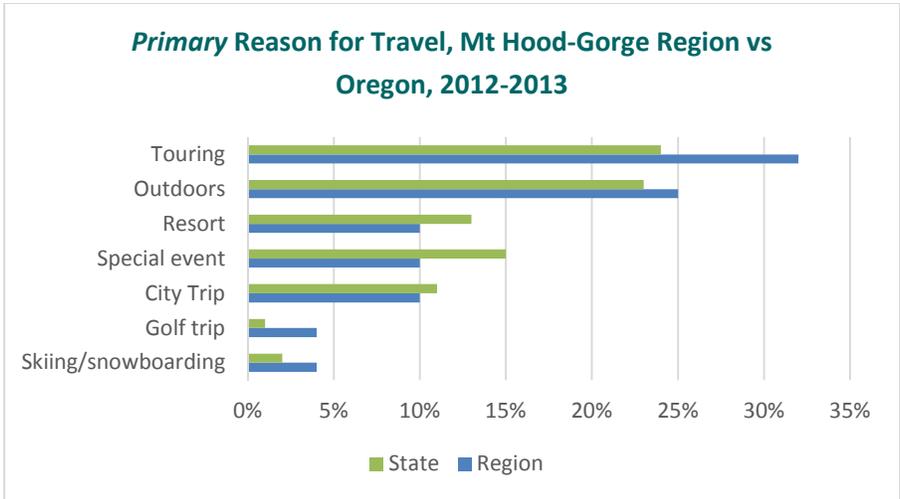


Source: Longwoods International for Travel Oregon

In terms of travel party size, Gorge visitors are fairly typical of the state. Gorge visitors are slightly younger, with an average age of 43 vs. 45 years for all Oregon visitors. However, they are **far less likely to travel with children**: 61% have no children under the age of 18 in their household.

B. Visitor Activities

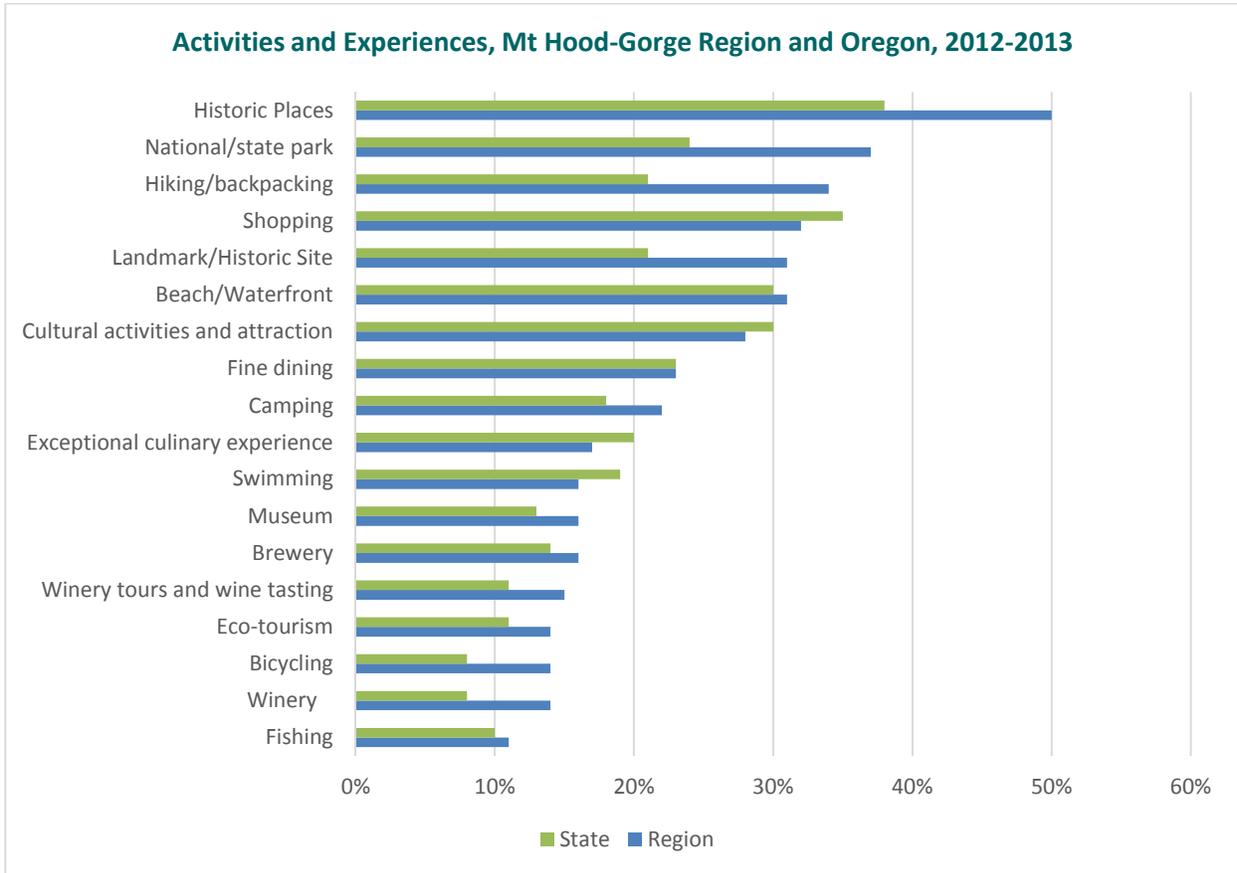
General “touring” is most cited as the primary reason for traveling to the Gorge. This is the main attraction for a third of the region’s visitors, and is a stronger draw here than for the state as a whole. Close behind, the opportunity to be “outdoors” motivates a quarter of the region’s visitors. Skiing and snowboarding, though representing a smaller percentage of the visitor pool, are also more of a primary draw for visitors to this region than for visitors statewide.



Source: Longwoods International for Travel Oregon

Visitors participate in many activities within the Gorge, and of the top 20 activities, several are more popular regionally than in the state as a whole:

- Activities and experiences related to heritage and culture (historic places, landmarks and historic sites)
- Outdoor recreation (national/state parks, hiking and backpacking, camping, bicycling, fishing).
- Culinary tourism related to beverages! (breweries, wineries)



The Oregon Comprehensive Outdoor Recreation Plan further describes trends in local outdoor recreation. According to the SCORP, the population of the Pacific Northwest has an extremely high proportion of residents who enjoy outdoor recreation, and participation continues to grow at a faster rate than the population. Between 1994 and 2000, such participation by people over 16 years old increased from 67% to 83%.

While hunting and fishing have declined, this has been offset by increases in wildlife or bird watching and photography. Day hiking has also grown in popularity: the 2013 Columbia River Gorge Meta-Analysis report forecasts that hiking will grow as much as 20% in this decade. The same report notes that:

- While mountain biking has peaked and dropped in the Gorge between 2000 and 2010, it has been growing again and is expected to continue to grow.
- Road cycling is less popular in the region, but is expected to increase as the Historic Columbia River Highway State Trail is completed.
- White water rafting is also expected to grow in the future.
- Finally, interpretive services and guides are in high demand, perhaps reflecting the under-recognized interest of Gorge visitors in heritage and culture. This is consistent with the Longwoods research and the 2014 Interagency Team Recreation Report.

C. Visitor Expenditures:

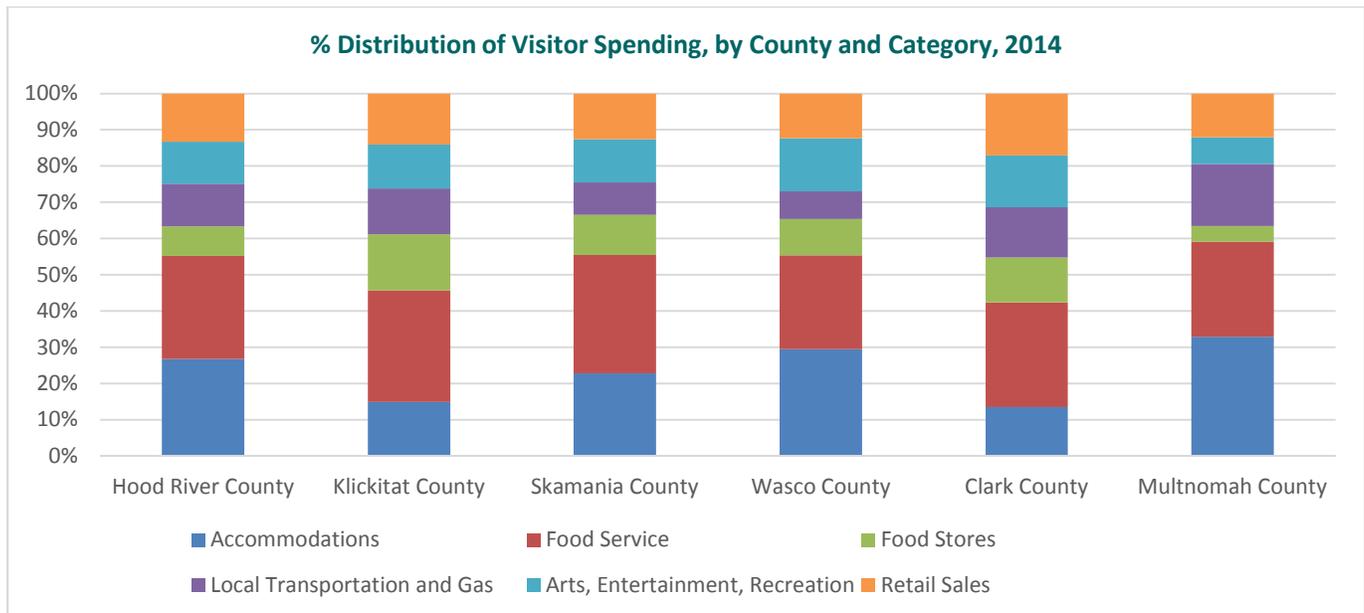
Visitor expenditures by category are available for each county, and more detail on the daily expenditures by day trippers vs. overnight visitors is available at the regional level only for the Oregon side of the Gorge.

Visitor Spending (in \$millions) by Category and County, 2014

Category	Hood River County	Klickitat County	Skamania County	Wasco County	Clark County	Multnomah County
Accommodations	22.4	5.4	14.7	29	56.7	562
Food and beverage	23.8	11.2	21.1	25.4	121.5	450
Food stores	6.8	5.6	7.1	9.9	51.8	73
Ground transport/motor fuel	9.9	4.6	5.8	7.5	58.3	293
Arts/entertainment/recreation	9.7	4.4	7.7	14.4	60.1	126
Retail sales	11.1	5.1	8.1	12.1	71.9	206
Total	83.7	36.4	64.6	98.4	420.3	1709

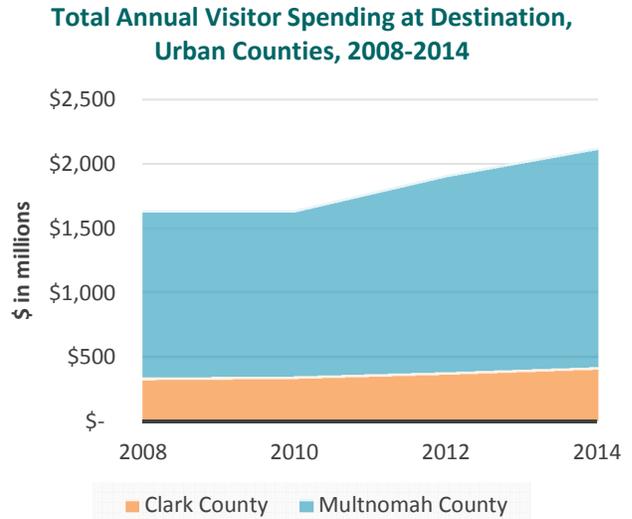
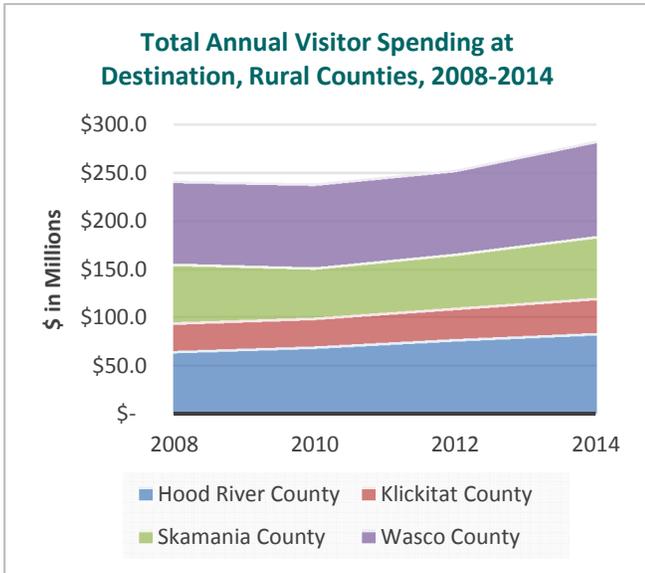
Source: Dean Runyan Associates for Travel Oregon and Washington

The bar chart below shows a snapshot of the spending mix in each county. In Skamania County, for example, the category on which people spend the most is food service. In Clark County, for example, a larger portion of visitor spending goes to retail shopping.



Source: Dean Runyan Associates for Travel Oregon and Washington

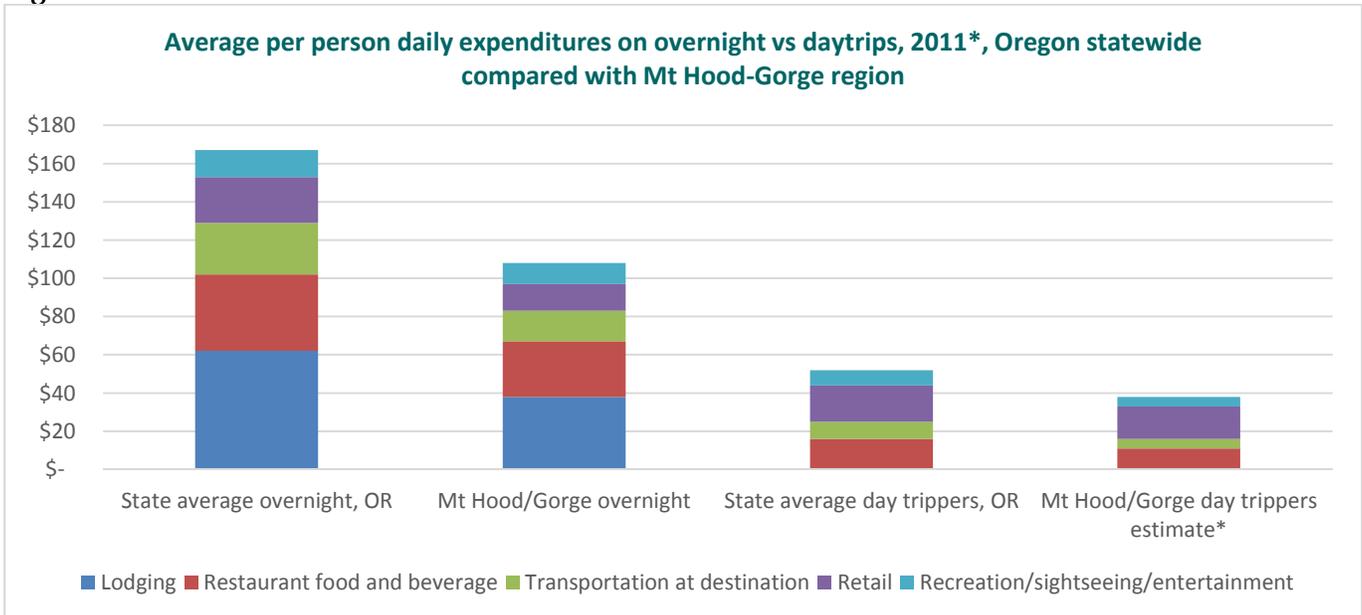
Visitor spending has recovered past pre-recession levels, but it has rebounded more emphatically in the urban counties.



Source: Dean Runyan Associates for Travel Oregon and Washington

While day trippers do spend more than no visitors at all, **lodging is a key element for capturing higher visitor spending across all categories of expense**, because overnight visitors spend far more per day than day trippers. The table below shows the difference in spending between day trippers and overnight visitors for the state and for the Mount/Hood/Gorge Region which covers the Oregon side of the Tourism Studio region. The Appendix includes a chart with the actual dollar amounts in each category.

Spending in this region is significantly lower than the state average, even though visitors tend to have higher incomes.

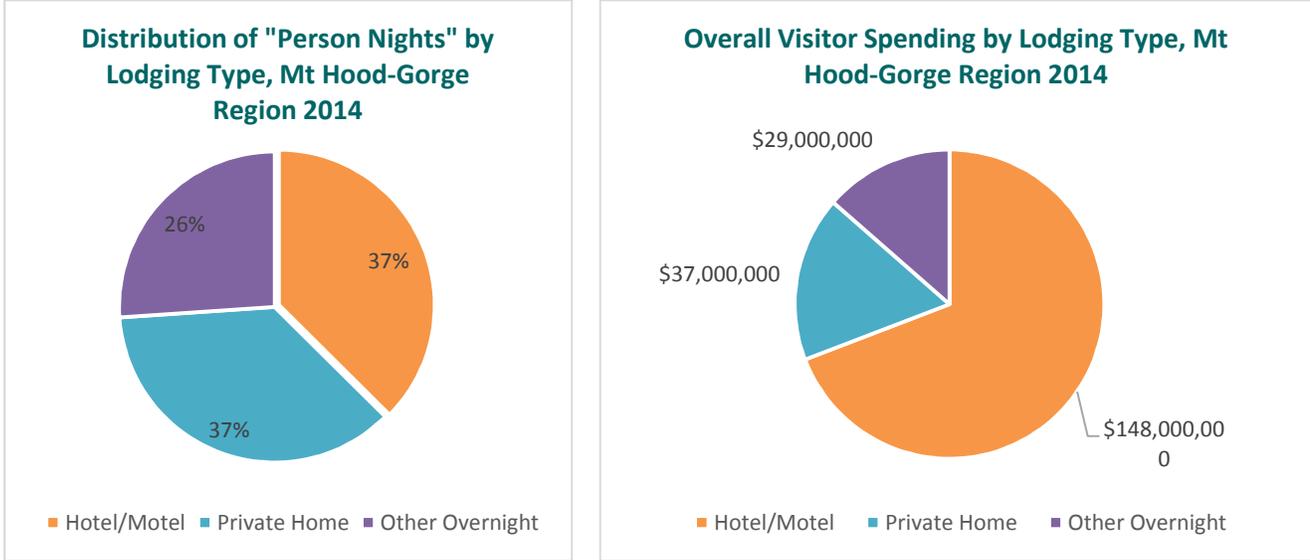


Source: Longwoods International

The above chart, showing average daily expenses of \$108 for overnight visitors to the Mt. Hood-Gorge region, is derived from a 2011 survey. The Dean Runyan Travel Impact reports provide an updated estimate of total daily expenses (not divided into categories) for overnight visitors. In 2014, the average overnight visitor to the

Mt. Hood-Gorge region spent an average total of \$64/day (including lodging cost). If he or she stayed in hotel or motel, the average daily expense per person was \$124 (including lodging cost).

The charts below show the distribution of regional visitors as compared with spending. The same percentage of people stay in hotels/motels vs. private homes, but those in hotels spend a much higher amount per day.

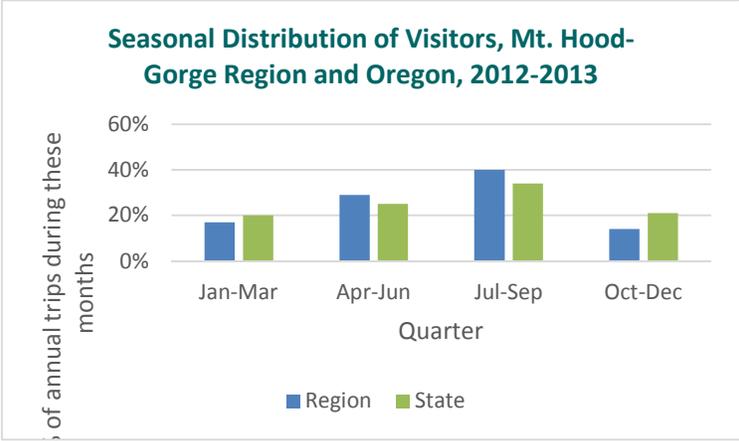


Source: Dean Runyan Travel Impacts Report, 2014p

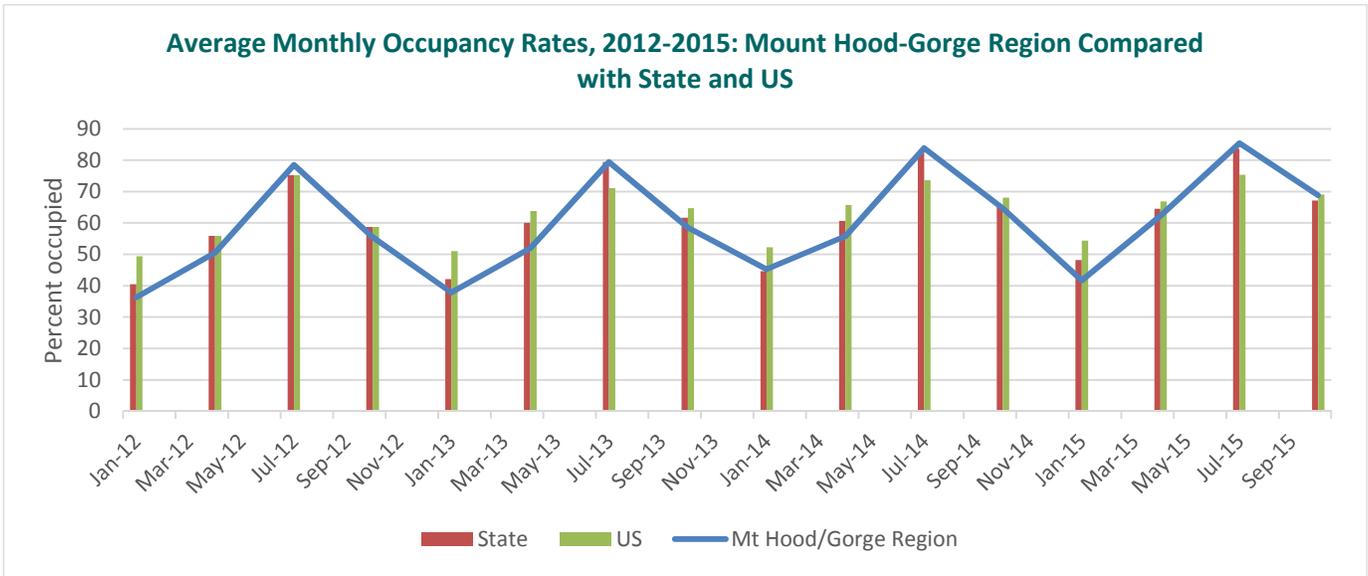
Depending on the visitor’s activity, daily expenditures can greatly. For example, 2014 “Columbia River Gorge Bicycle Recreation Economic Forecast” confirms studies from other areas that overnight bicycle tourists spend far more than average: \$204 per person if staying in hotels or motels. According to the 2103 study of “Sending and Economic Activity from Recreation at Oregon State Park Properties, Columbia River Gorge Management Unit”, the average state park visitor “party” spends \$40 if they come for the day, and \$226 per trip if they stay overnight. This is slightly lower than the rate of spending for state park visitors on the Oregon Coast.

D. Seasonality:

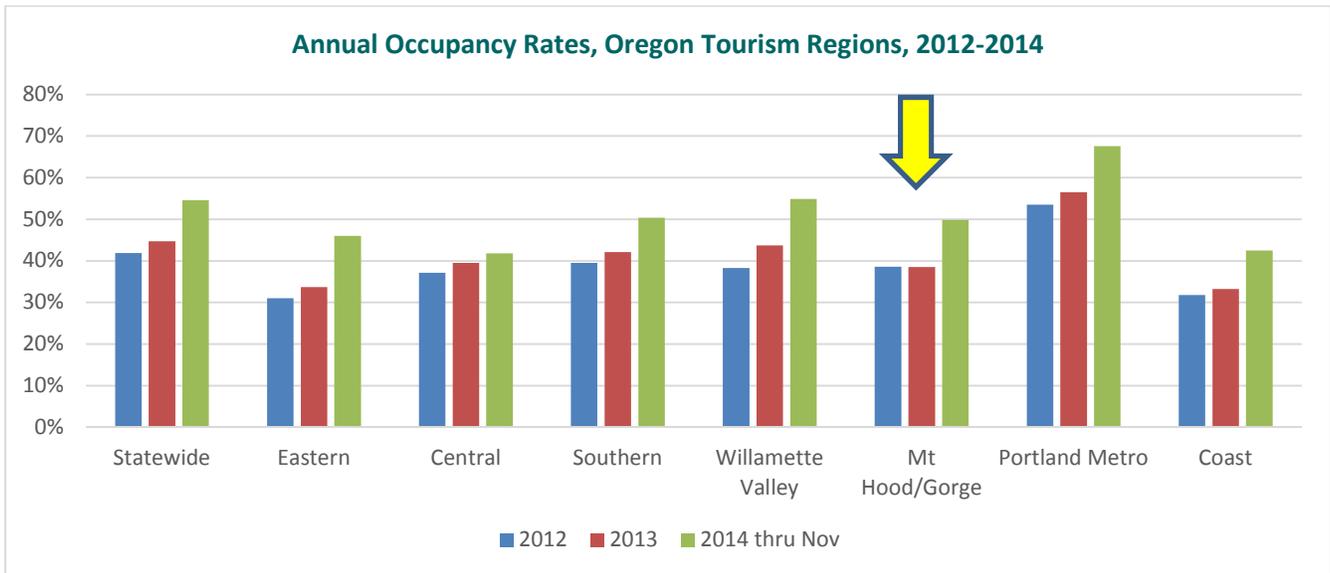
Visitors to the region come during all four seasons, and the seasonal swings in visitation are more dramatic than for the state as a whole.



In general, occupancy rates follow the same seasonal pattern, and are slightly lower in the Mt. Hood Region (including Oregon side of NSA) as compared with Oregon and national trends. **Peak season occupancy rates are approaching 90%** in the region.



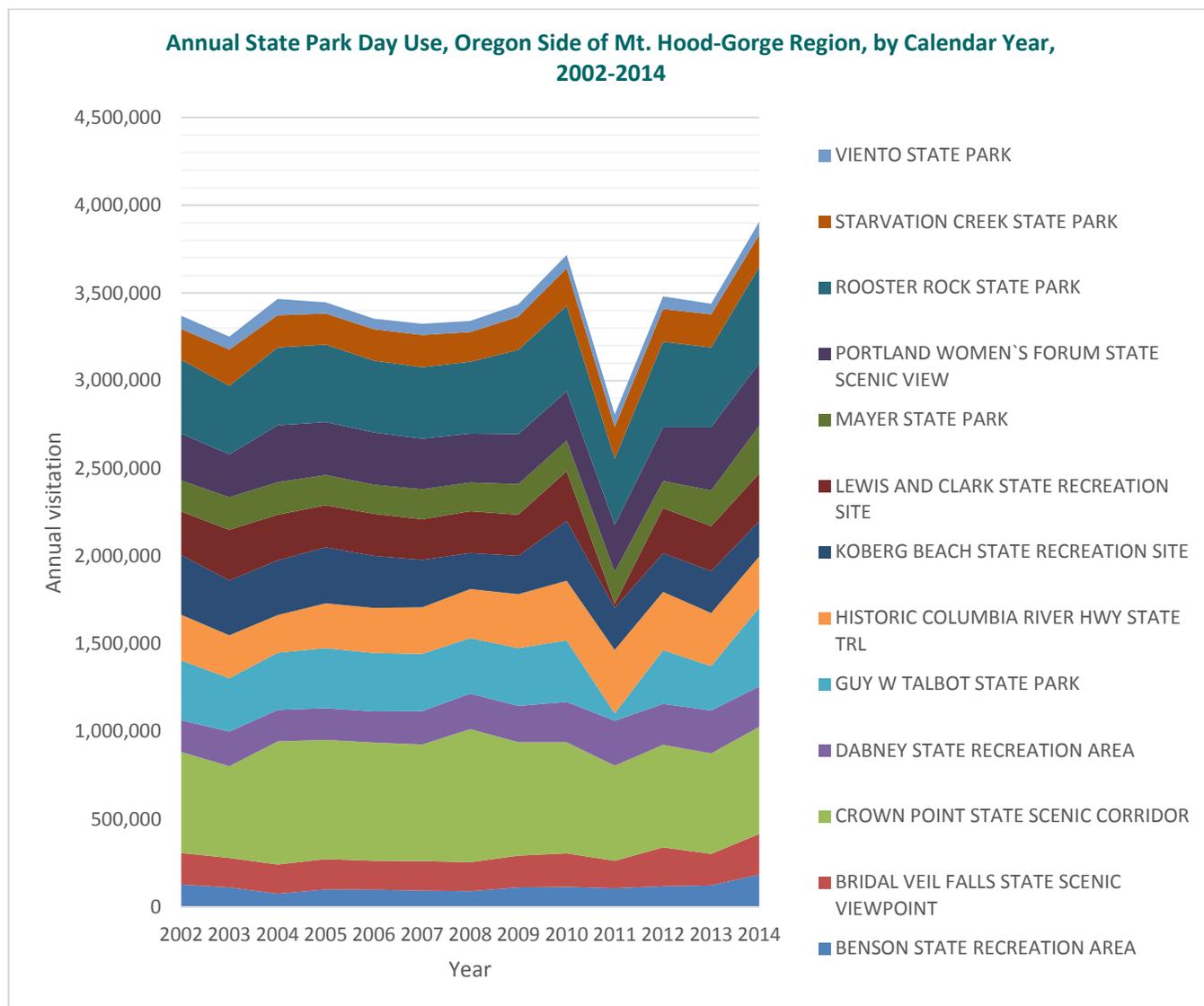
Source: Smith Travel Research



Source: Smith Travel Research

Until 2014, occupancy rates in the Mt. Hood-Gorge region were slightly below average for the state but are now very similar to the state average.

Data about visitation to state parks (only available for Oregon) is another source of information about visitor volume and seasonality.



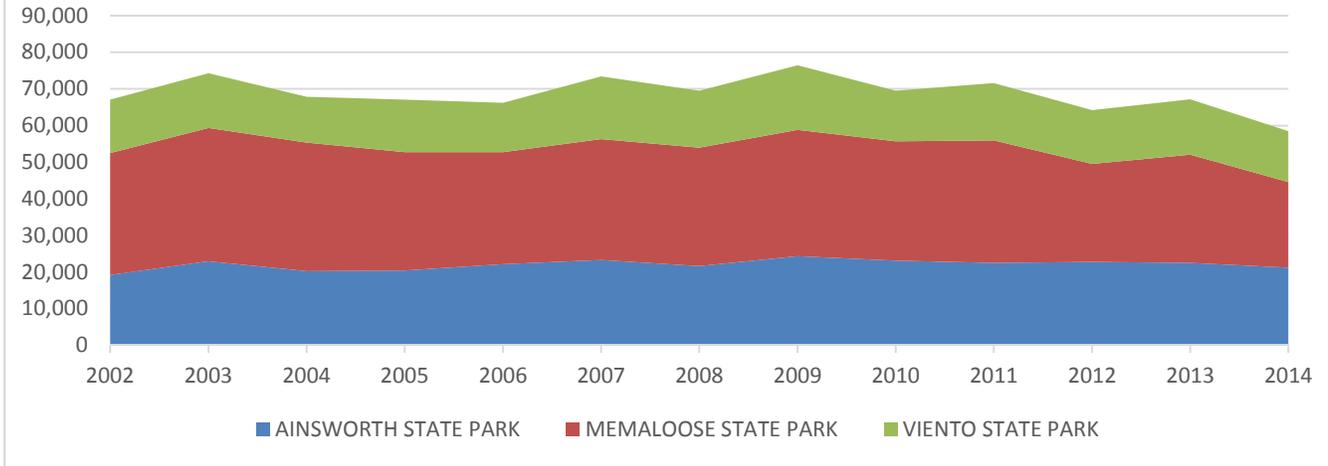
Day use levels at Oregon State Parks in the Gorge have surged past pre-recession levels. Annual Visitation in 2014 is highest at the following parks:

- Crown Point State Scenic Corridor
- Rooster Rock State Park
- Guy Talbot State Park
- Portland Women's Forum State Park

These four parks have been mainstays in list of top destinations within the State Park system. Koberg Beach State Recreation Site was also among the top five, until a precipitous decline in visitation starting in 2011. Several other parts also experienced sharp declines in 2011 visitation, but many have since rebounded.

Overnight use at Oregon State Park campgrounds has declined since 2002, a pattern that is consistent across the state park system. This is particularly true at Memaloose State Park.

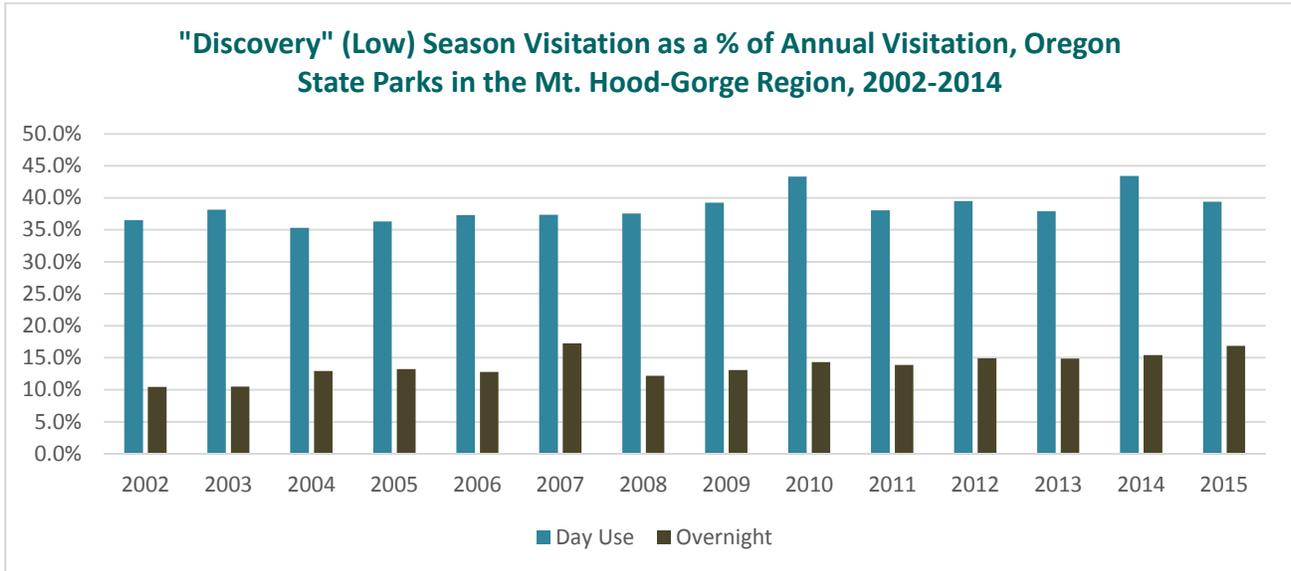
Annual Overnight State Park Visitation, Oregon Side of Mt. Hood-Gorge region, by Calendar Year, 2002-2014



Source: Oregon State Parks and Recreation Department

The following chart shows how much state park utilization occurs in the off-season, or “Discovery Season” in Oregon State Park terminology. The closer the bar is to 50%, the more even the usage across seasons. While high season will always attract more visitors, **regional visitation in the low season is growing faster than in the high season**: this is shown by the general trend of increased off-season visitation as a percentage of total visitation, particularly for day use visitors. Further success in shifting visitation away from the high season is a strategy for reducing congestion.

"Discovery" (Low) Season Visitation as a % of Annual Visitation, Oregon State Parks in the Mt. Hood-Gorge Region, 2002-2014



Source: Oregon State Parks and Recreation Department

* Note that seasons are calendar year for prime time, fiscal year for low season

IV. Tourism Planning, Development and Management

This section includes relevant data and project descriptions for issues identified through a stakeholder survey and Gorge Studio steering committee discussions.

- Destination management and marketing capacity
- Addressing congestion and preserving environmental assets
- Integrating cultural heritage
- Capitalizing on visionary projects underway
- Developing and connecting product experiences

A. Destination Development and Marketing

In Travel Oregon's Regional Destination Marketing Organization (RDMO) network, the Oregon side of the Columbia River Gorge is marketed as the [Mt Hood-Columbia River Gorge Region](#), and housed at the Clackamas County Tourism and Cultural Affairs Office. The Washington side is marketed through the [Columbia River Gorge Visitors Association](#), which is housed in the Skamania County Chamber of Commerce. CRGVA's marketing and membership extends to businesses on both sides of the river throughout the Gorge. Because of differences in geography associated with "The Gorge" as well as the lack of a funded state tourism agency in Washington, the branding of the area is inconsistent. **As of the beginning of the Gorge Tourism Studio, marketing entities have decided to formally coordinate their efforts under the umbrella of the Columbia River Gorge Visitors Association.**

At the same time, the leadership capacity across the public and private sector is quite sophisticated, because every public body, business and organization must understand how to deal with the complexity associated with operating under the overlay of National Scenic Area. This ability to work through conflict and compromise is an asset for future projects.

The public lands management capacity for this destination could be a limiting factor in terms of marketing strategy. According to the Visitor Use Report for the Columbia Gorge National Scenic Area, over two million people annually visit the two National Forests in the NSA, which is the highest density per acre of any National Forest in the Pacific Northwest. According to Stan Hinatsu of the Mt. Hood National Forest, **the concentrated level of visitation in the Forest makes the National Scenic Area more like a National Park and in terms of destination development and management.** Yet the level of staffing and budget for land management is not commensurate, as described in the 2014 Interagency Management Team report.

It is widely recognized that the Gorge already has an abundance of visitors and a strong reputation as a unique, high quality destination. One major marketing challenge is to encourage visitors to explore the area beyond the "beaten path" in terms of activities, location within the Gorge and season, without driving visitation into sensitive or congested areas. A second marketing challenge is to convert day trippers to overnight visitors, when a large percentage of visitors can easily make multiple day trips from the nearby Portland/Vancouver metropolitan area.

B. Addressing congestion and preserving environmental assets

By all measures in the visitation data, the Gorge is a popular destination for visitors. According to a recently released analysis of 2015 Instagram geo-data for the most photographed places in each state, the Gorge's Multnomah Falls tops the list for Oregon. And, as noted earlier, National Geographic has lauded the region as a world-class sustainable tourism destination, starting in 2009.

The introduction to the [1991 Management Plan for the Columbia Gorge National Scenic Area](#) acknowledges **congestion and crowding as real threats to the region's long term economic health, environmental quality and livability**. Tourism-related aspects of the plan include:

- Drawing people east
- Fostering small scale accommodations, trails, river access points and resource-based recreation throughout the rural areas
- Utilizing public and privately owned resources for resource-based recreation
- Blending development into the landscape, and not on prime agricultural land
- Developing alternative forms of transportation to and around the region
- Restoration of the Historic Columbia River Highway for recreation access
- Supporting with a system of recreational user fees

The **final report from the 2008 Columbia Gorge Future Forum, a participatory visioning and planning process, continues to reflect concerns about congestion and crowding**, citing increases in some recreation uses, decreases in others (e.g. hunting), increased conflicts between uses, thefts and vandalism at trailheads, as well as environmental concerns in sensitive areas.

While the terms are often used interchangeably, **congestion refers to the ease of moving around in the region for the purposes of this report. While congestion is a region-wide concern in terms of getting to and around the region, especially by car, there are some specific tourism-related choke points**, such as the parking area at Multnomah Falls and the Historic Columbia River Highway between Ainsworth State Park and Crown Point. Between 2014 and 2015, the Port of Cascade Locks observed a 500% increase in traffic on Bridge of the Gods, most likely linked to the popularity of the book and film "Wild". In 2015, Governor Kate Brown appointed a Community Solutions Team to address the congestion and safety impacts affecting the region's transportation infrastructure. The Appendix includes traffic count trends for the main roads leading to and through the Gorge. **Counter to statewide trends, traffic counts for the east west highways are generally higher in 2014 than in any year since 2006.**

Crowding, as opposed to congestion, refers to site specific conditions, from visitor perceptions of too many people to the cumulative impacts on sensitive environmental areas. National Forest visitors perceive more crowding than visitors to the Gorge Scenic Area as a whole, based on data from the "USDA FY11 Visitor Use Report for National Forests in the Scenic Area" and the "2013 Columbia River Gorge Meta-Analysis Report".

Perceived crowding in the National Forests within the Scenic Area has been growing over the past fifteen years, as captured in the Visitor Use Reports that are released every five years. In 2010, as shown in the table below, most visitors perceived the National Forest as "moderately crowded" in both developed and undeveloped areas.

Perceived Crowding in the National Forest, Columbia Gorge NSA, 2011

Crowding rating (0 = no crowding, 9 = most crowded)	Day use developed	Overnight use developed	Undeveloped	Designative wilderness
FY2006	5.2	5.3	4.7	
FY2011	5.5	5.4	4.8	4.8

2011 Visitor Use Report, National Forest in Columbia Gorge National Scenic Area

It is worth noting that just **thirty percent of developed sites within the National Forest operate at 80%-100% of capacity during the peak summer season.** This means, obviously, that two thirds of the developed sites are not at capacity during the peak season. During the shoulder season, there is also room to accommodate more users: 64% of developed sites operate at 40-70% of capacity

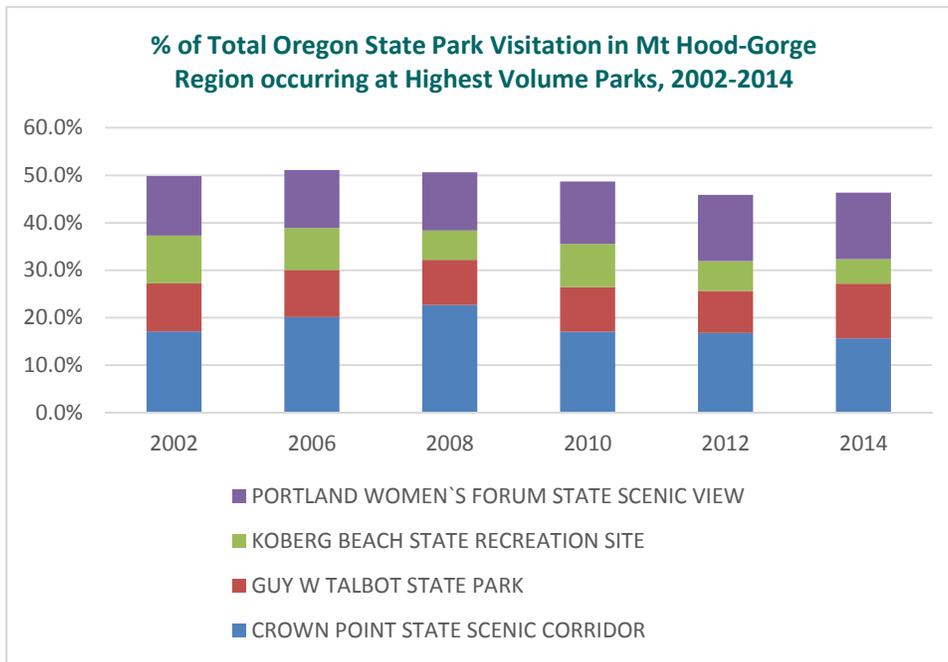
The 2013 “Columbia River Gorge Meta-Analysis Report” divides the National Scenic Area into seven recreation settings (areas), some of which include some National Forest lands. For six settings (which have measurable visitor activity), it includes profiles of visitors and perceptions about crowding. Demographic data about visitors to each sub-area is in the Appendix, but in general the data shows that the “Walls and Falls” sub-region, perceived as most crowded, is also the region with the greatest concentration of overnight visitors and the longest average stays. That said, **visitors don’t perceive any of the sub-regions as unbearably crowded.**

Perceived Crowding by Sub-region, Columbia Gorge NSA, 2011

Sub-region	Perceived crowding on a scale of 1-9 (9 is most crowded)
Columbia River (the river shore on both sides)	3.41
Western Gateway- transition from the urban area, offering views and pastoral landscape	3.20
Walls and Falls- including much of the Historic Columbia River Highway, with historic Civilian Conservation Corp buildings	4.86
Columbia Tributaries- wild and scenic rivers, heritage in the White Salmon, Klickitat area	2.65
Skamania Highlands- mix of pastoral and wild landscape	3.20
Oak Pine Flowers- includes Rowena Plateau. Wildflowers, Native American areas, sunshine	3.44
Celilo Grasslands- larger farms and ranches, mouth of Deschutes River, Celilo	n/a

Columbia River Gorge MetaAnalysis, 2013

State park utilization (Oregon data only available) is highly concentrated. Four locations account for nearly half of all state park visits. Interestingly, the concentration of use in these four locations has diminished since 2008.



Source: Oregon Parks and Recreation Department

Perceived Crowding in Oregon State Parks, Columbia Gorge NSA, 2012

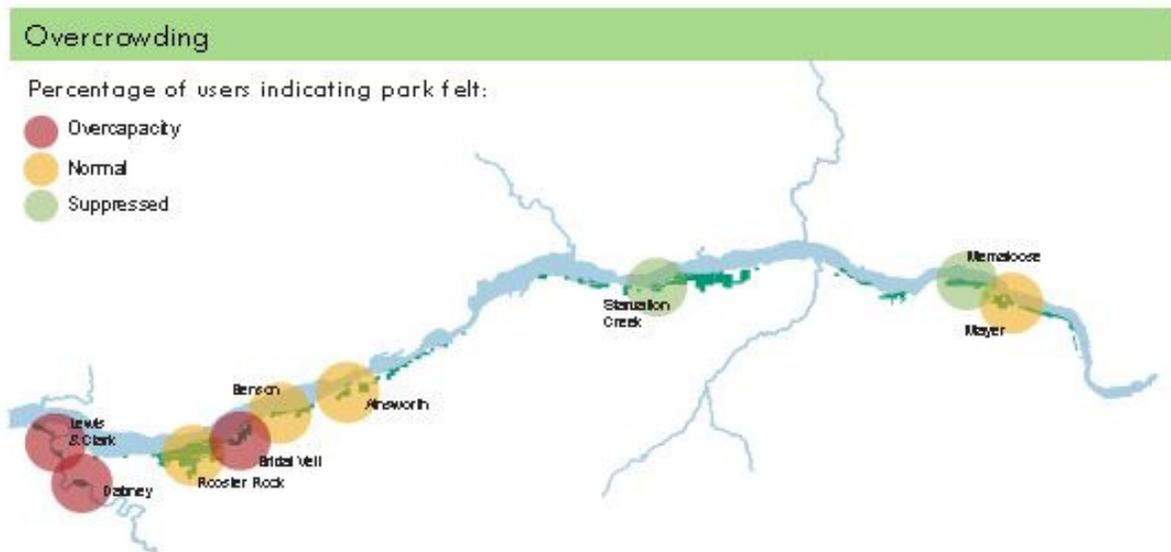


Figure 4.11 Visitor Survey Statistics Informational Graphics (Source: 2012 OPRD Visitor Surveys)

The final six mile stretch of the Historic Columbia River Highway Trail will link to Viento State Park and Starvation Creek State Park, making two low volume destinations more attractive and reachable by multiple transportation modes.

While efforts have been made to disperse visitors away from congested or crowded areas and develop tourism infrastructure that scales well to the predominantly small communities, there are also limits to the capacity of land management agencies to alleviate crowding and its effects. As noted in the Interagency Recreation

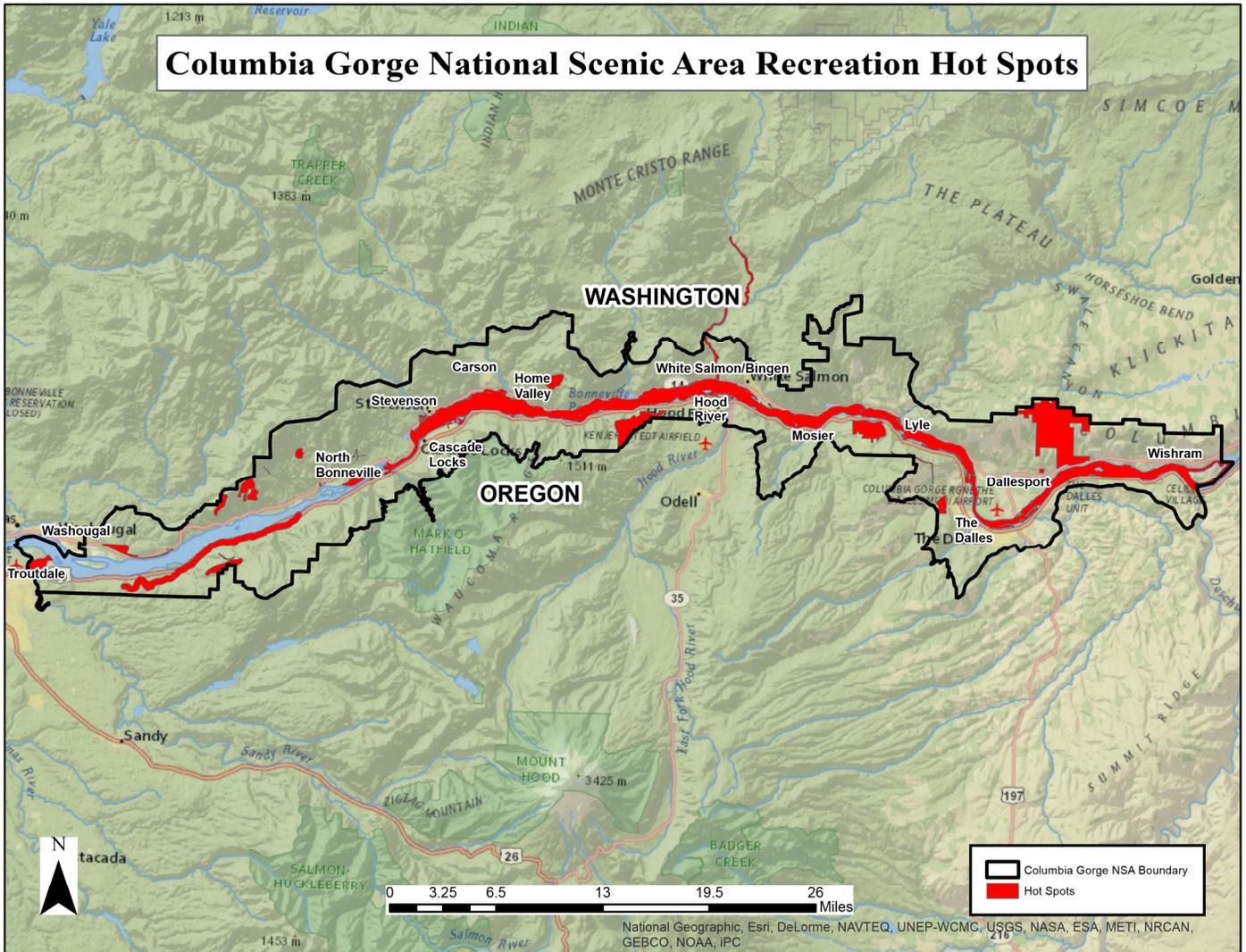
Team’s 2014 “Recreation Report”, “Many fear there is already too much use occurring at the cost of sensitive resources and the user’s experience. The demand for access to Gorge landscapes has increased, while the funding available for recreation planning, management, maintenance and staff support has decreased. On average, resource and public recreation management agencies in the Gorge have lost 20-40% of their staff over the last ten years”, resulting in impacts to adjacent private lands, safety, congestion, user conflicts (e.g. fishing and windsurfing), and cumulative impacts to sensitive areas.”

Land managers from state and federal agencies have mapped **hot spots at risk of degradation** due to overuse or sensitive ecosystems throughout the public lands system. These include both areas that are already developed and actively managed, as well as more remote and unmanaged areas. Not surprisingly, most of the vulnerable areas are on the west end of the Gorge, closer to major population centers. The table below shows the highest priority hot spots. In general, hot spots associated with environmental degradation seems to be more acute than crowding associated with visitors interfering with each other’s enjoyment of the Gorge. The Appendix includes a full list of all hot spots, including additional data for the high priority ones listed below.

Basic Site or Area Information		Short Description of Issues - user conflicts; impacts to adjacent natural, cultural & scenic resources; unwanted or unmanaged use; conflicts w/adjacent land ownerships; unauthorized facilities; etc.	Manager's Perception of WHY there is an Issue at this location/site.	Potential for future legitimate use at this location/site.
Site or Area Name	State			
Archer Mt	WA	Unauthorized user developed trail to access Archer Mt. Unauthorized access to DNR Natural Area	User groups desire to access top of Archer Mt and implement the Washougal to Stevenson trail. Dramatic views and wildflowers.	Very desirable hike with views and proximity to urban area. Significant concerns with introduction of noxious weeds and impacts to Natural Area.
Aldrich Mt-Carpenter Lake	WA	Unauthorized user trail development along old road beds. Soil erosion. Historic use.	User groups desire for more trails access to Aldrich Mt. and shorter access to PCT and Table Mt. Dramatic views.	Very desirable hike with views and proximity to urban area. Trailhead location and access may be an issue.
Sandy River Delta	OR	Overcrowded, however not an issue with users. Conflict with resources - impacts to riparian zone. Car clouting. Parking & congestion. Dog waste. People management issues related to high use site - enforcement of regulations, injuries	Proximity to the urban area. One of very few off leash dog walking areas in the Portland Metro Area.	NA
Multnomah Falls	OR	Overcrowded, however not an issue with users. Conflict with resources - impacts to riparian zone, and harassment of fish. Car clouting. Parking & congestion. People management issues related to high use site - enforcement of regulations, injuries etc.	Multnomah Falls has been coined as the crown jewel of the Columbia River Gorge.	NA

Post Canyon	OR	Highly impacted in small areas - soil compaction and erosion. Unauthorized trail development and trail construction.	Adjacent to Hood River County Mt bike and OHV trail system.	Currently working with a collaborative group to develop a proposal for future EA. Potential to develop beginner to intermediate mtn. bike trails.
Rowena-Memaloose	OR	Unauthorized user trail system development.	Wildflower viewing in spring and dramatic views. Lack of trails on eastside of the Gorge. Beautiful setting in the spring.	Will likely be a highly desirable trail during spring and fall. Spectacular views. Part of trail system connecting Hood River to The Dalles.
Columbia Falls Natural Area	WA	Illegal trail building, impacts to rare ecosystems and rare species, potential introduction of invasive weeds	Beautiful area that people want to see.	May have potential future use with careful planning away from sensitive areas.
Little White Salmon NFH	WA	Inadequate launch, take out, parking. Conflict with fishermen.	growing popularity, launch difficulties, historic disregard by hatchery staff	funding for launch, take out sites, parking
Little White Salmon NFH	WA	sport-tribal conflict	greed/racism	little without changes in sport fishing regulations
Dabney State Park	OR	safety issues with road side parking	extra river area parking needed	YES
Lewis and Clark/Sandy River	OR	safety issues with road side parking	extra river area parking needed	Yes
Post Canyon(Seneca Fouts)	OR	trail density, illegal trails,	historical trail building use/non-agency involvement; desirable area	YES
Historic Columbia River Highway Waterfall Corridor	OR	congestion, pedestrian safety	growing popularity, lack of useable space	
Beacon Rock TH	WA	Route Grooming, illegal bolting, seasonal closures, lack of parking, user conflict/parking in parking lot, semis using area, blind corner, congestion	Desirable location, lack rock climbing in the area	
Hatchery	WA	congestion, pedestrian safety, dogs off leash	lack of river access, popular activity	Yes
Beacon Rock Lower Picnic Area	WA	congestion, lack of parking, have to actually have to ranger direct parking	Popularity of the site	
Columbia River	OR/WA	Conflict with Tribal Gill Nets with anglers, wind surfers, kite boarders. Anchoring nets on public land.		
Dalles Mt Ranch	WA	Deer hunting in closed area	Lack of awareness, recently acquired land	No Hunting on State Park
Taylor Lakes (out grant)	OR	Sanitation and litter, Law Enforcement Issues	River Front Trail and Lake attracts use	

Source: Columbia River Gorge NSA Interagency Recreation Report background data, courtesy of Mt Hood National Forest



Source: Columbia River Gorge NSA Interagency Recreation Report, 2014

In addition to a set of recommendations related to continued interagency collaboration, the 2014 report recommends a focus on increasing citizen stewardship through education that builds awareness of the impacts of recreation on environmental and cultural resources.

C. Integrating cultural heritage

As noted on page 14 of the visitor profile section, **Oregon visitors seek out activities and experiences related to heritage and culture (historic places, landmarks and historic sites) more frequently than most other activities. Furthermore, this trend is stronger in the Mt Hood/Gorge region than in the state of Oregon as a whole.** It is also worth noting that travelers who are primarily motivated to experience heritage and culture tend to stay longer and spend more at their destination than other tourists (see “Heritage and Cultural Tourism” references in Appendix). The many trails in the region embody epic heritage stories, and the **centennial of the Historic Columbia River Highway in 2016 provides an excellent opportunity to link cultural heritage with a wide range of other visitor experiences within the Gorge.**

There is a good amount of collaborative activity among arts and cultural organizations through the Gorge Arts and Culture Alliance. However, it is perceived more collaboration is needed among heritage museums and resources, including the two interpretive centers that “bookend” the Gorge’s geography: the Columbia Gorge Interpretive Center in Stevenson WA and the Columbia Gorge Discovery Center in The Dalles OR.

Each county and most Tribes in Oregon have had a local Cultural Coalition in place for nearly a decade. Cultural Coalitions exist to expand access to diverse local culture (defined as humanities, heritage and the arts) through grant-making that is funded through the Oregon Cultural Trust. Each Coalition has developed an inventory of cultural assets and resources as the foundation for its grant-making priorities. **Few of the funded organizations or events are promoted to visitors, but there may be opportunity to build stronger connections where appropriate.**

Just as important as promotion of cultural heritage is protection of cultural heritage. There are, for example, spiritually significant sites for local Tribes, such as a natural basalt arch at Catherine’s Creek that has been fenced off, but many more that are not protected. It is not clear if there is a shared understanding of the region’s cultural resources in need of protection.

D. Capitalizing on visionary projects and opportunities to connect product experiences

The Gorge Studio Steering Committee has prioritized “developing and connecting new ‘product’ (experiences) throughout the entire region, particularly focused on three areas: outdoor recreation (including bicycling), culinary/agritourism and cultural heritage” as a goal for its work.

Outdoor recreation:

Two recent studies include insights about what motivates visitors at the core to engage in the types of outdoor recreation that the Gorge excels in offering.

The 2011 Visitor Survey of National Forest visitors in the National Scenic Area reveals that **while the Gorge is close to the Portland/Vancouver metropolitan area and is characterized by world-class scenery, neither of these are the main reason that visitors choose the Gorge. Rather, they see the Gorge as a “good place to do the outdoor activities I enjoy.”** This means visitors are motivated to visit for specific activities, and may be amenable to alternate locations for these activities, whether they be less-utilized locations within the Gorge (dispersing demand) or different, perhaps far flung regions.

Since so many visitors to the Gorge are from within a fifty mile radius of home, it is also important to understand what motivates these in-state residents to visit the area. According to the SCORP, the primary motivation for state park users is “to have fun, and to be in the outdoors”. In contrast, the least important motivation (of sixteen choices) is “to experience challenge and excitement”, which is perhaps surprising given the Gorge’s association with extreme sports . . . but then again, there are only a small number of people who enjoy such risk! The attachment to activity vs. location suggests that close-by visitors may also be amenable to

“enjoying the outdoors” in a wider range of less crowded locations within the Gorge, as long as they are not too hard or time-consuming to reach.

Trails:

Part of the work of developing and connecting new products and experiences in the Gorge is to support and link what one report has called a “dizzying” array of trail projects already under development. **Existing and developing trails projects are both destinations in themselves, and mechanisms for building itineraries and dispersing demand.** Trails include:

Driving Trails:

- Ice Age Floods National Geological Trail (2009) from Montana west to the Willamette Valley- first geological trail in the nation
- Lewis and Clark National Historic Trail- from Illinois to Oregon, through 11 states
- Oregon National Historic Trail- from Missouri to Oregon, through nine states
- Hood River County Fruit Loop- this premier agritourism destination was launched in 1992.
- Fire and Ice Scenic Loop- Gorge and Mt. Saint Helens

Multi-modal trails (primarily hiking and biking)

- Pacific Crest National Scenic Trail- extends from the Mexican to Canadian borders, crosses into Washington at the Bridge of the Gods
- [Historic Columbia River Highway River Highway State Trail Connection Project](#)- Today, 62 of the original 73 miles of HCRH are open to travel by car or by foot and bike.
- [Gorge Towns to Trails](#)- for hiking, linking trails with communities with a goal to encourage hikers to “leave an economic footprint behind” by patronizing businesses in the region’s communities. 60% of the trails already exist, and in the initial focus areas (Hood River to The Dalles, Washougal to Stevenson, and Lyle, 90% of the trails are complete. Work continues to connect existing trails into loops. This project builds upon an earlier Chinook Trail concept, spearheaded by the Vancouver-based Chinook Trails Association.
- Infinity Loop- in early planning stages, a series of figure 8 loops centered on Portland that allow visitors to hike or bike as far west as Astoria and as far east as Mount Hood. In the Gorge, the trail would align with the Historic Columbia River Highway.
- [Cascade Locks Trail Plan](#) currently underway to develop and connect multi-modal trails from the city into surrounding areas
- The Columbia River itself is a trail; a two part water trail. [The Northwest Discovery Water Trail](#) connects to the Columbia River in the eastern part of the state via the Snake River, and includes the Gorge part of the Columbia River to the Bonneville Dam. The [Lower Columbia River Water Trail](#) picks up the river from the Bonneville Dam west to the Pacific Ocean.

Most of the longer trails are on land managed by the federal government (total of 218 miles on National Forest Land), with shorter trails in state parks. A new Oregon Trails Plan is due to be completed in Dec 2015, and will include reference to many of these projects.

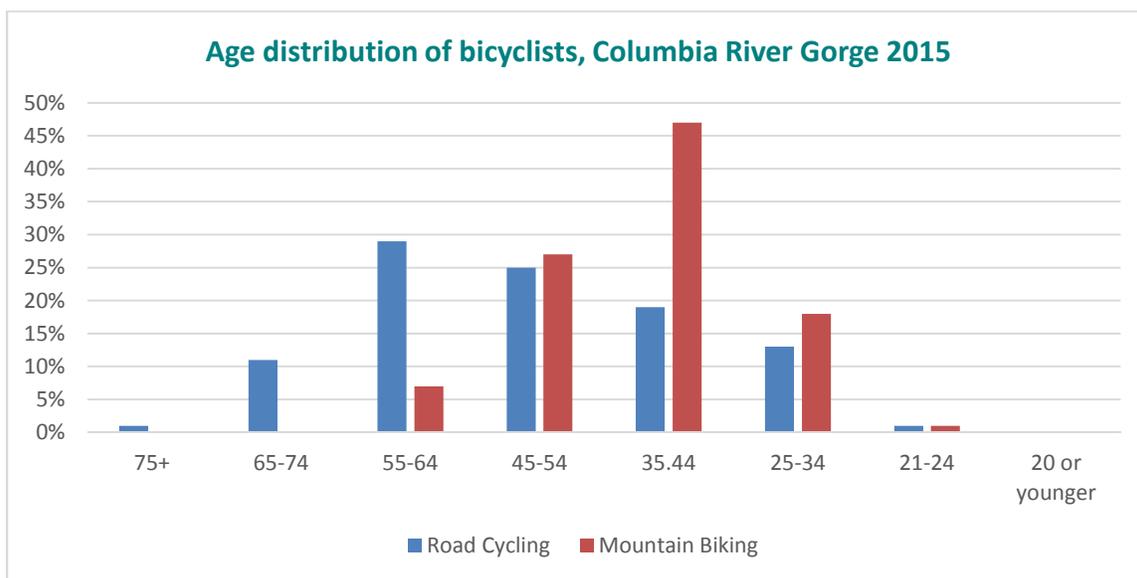
Bicycling:

According to Oregon’s Statewide Comprehensive Outdoor Recreation Plan (SCORP), while cycling is perceived as a new activity, its advocates have a long history in the Gorge. The Historic Columbia River Highway first developed out of the “Good Roads” movement, a coordinated effort by cyclists to develop scenic, well maintained roads for their rides. This **heritage is something that could be featured in interpretive products and services for bicyclists.**

The Historic Columbia River Highway Trail Connection project, envisioned in the 1994 SCORP plan has increased interest in cycling. Once complete, it will constitute a world class destination for road cyclists. Most sections between the John B. Yeon Scenic Corridor and the Hatfield East Trailhead in Mosier will be car free, and this 30 miles of paved trail reserved only for hikers and bicyclists will traverse one of most scenic stretches of river in the nation. According to the 2014 Columbia River Gorge Bicycle Recreation Economic Impact Forecast, comparable trails have user growth rates are often over 10% annually. This makes **bicycling a fundamental target market for new products and experiences in the region.**

Based on a large survey of bicyclists who already visit the Gorge, the Economic Impact Forecast contains detailed information about both mountain bikers and road cyclists.

- Predominant type of recreation is day trips- day road rides and mountain bike rides
- Overnight trips often multi-purpose- **two thirds indicated that bike riding was the primary reason for visiting the Gorge**
- 35% cycle year round, with mountain bikers more likely to cycle in fall and winter
- Most made more than one day trip a year
- Few beginners, mostly advanced and competitive
- Road cyclists are concentrated in the Troutdale area, Corbett, Mosier and The Dalles; mountain bikers are concentrated in Hood River
- Road cyclists are older on average than mountain bikers, and **80% of all cyclists in the Gorge are male!**



Source: Columbia River Gorge Bicycle Recreation: Economic Impact Forecast, 2014

During 230,000 trips in 2013, bicyclists in the Columbia River Gorge spent \$21 million dollars in the local economy. This yielded 270 full and part time jobs, \$5.7 million in employment earnings, and \$900,000 in state and local tax receipts. More than half (58%) of all spending was in the City of Hood River.

The Economic Impact Forecast also divides the Columbia Gorge, including the HCRH Trail Connection Project into five sections, and projects how utilization patterns will change once the segments are connected.

- Troutdale to Crown Point
- Crown Point to Cascade Locks
- Cascade locks to Hood River
- Hood River to The Dalles
- Highway 14 on the Washington side of the Gorge

Two thirds of all bicyclists surveyed indicated that they will increase their time in the Gorge once the Wyeth to Starvation Creek project between Cascade Locks and Hood River is completed. More than three quarters of road cyclists will do the same when the Mitchell Point tunnel is constructed and the HCRH trail is completed to Hood River. **This will add \$6.3 million in local spending, 82 full or part time jobs, \$1.7 million in earnings, and \$270,000 in state and local taxes per year.**

Agritourism and Culinary Tourism:

In terms of **agritourism**, there is already a base of assets, most notably the Hood River Fruit Loop. As noted earlier in this report, the Gorge also has its over 40 vineyards/wineries and its own “Columbia Gorge” American Viticulture area. This has led to the development of new vineyards, wineries and wine tourism that could be further connected with visitor itineraries. Inside city limits, there has similarly been a marked increase in cideries, breweries and brewpubs. A highly visible “Gorge Grown” brand, and a resident population attuned to supporting a strong local food system, help to support a network of small farmers and ranchers who can supplement their income with agritourism. There are, however, **three main challenges to the growth of agritourism** that are particular to the Gorge. The first challenge will be to ensure an available skilled **workforce for culinary and hospitality jobs**. The second challenge is that the most typical visitor to this region, the **Portland day tripper**, has access to incredible local food and beverage even closer to home than the Gorge. Converting these travelers to overnight visitors who will want to add agritourism attractions and local dining will require creative packaging. The third main challenge, particularly on the Oregon side, is to address **political and regulatory fear of unbridled development** on agricultural lands.

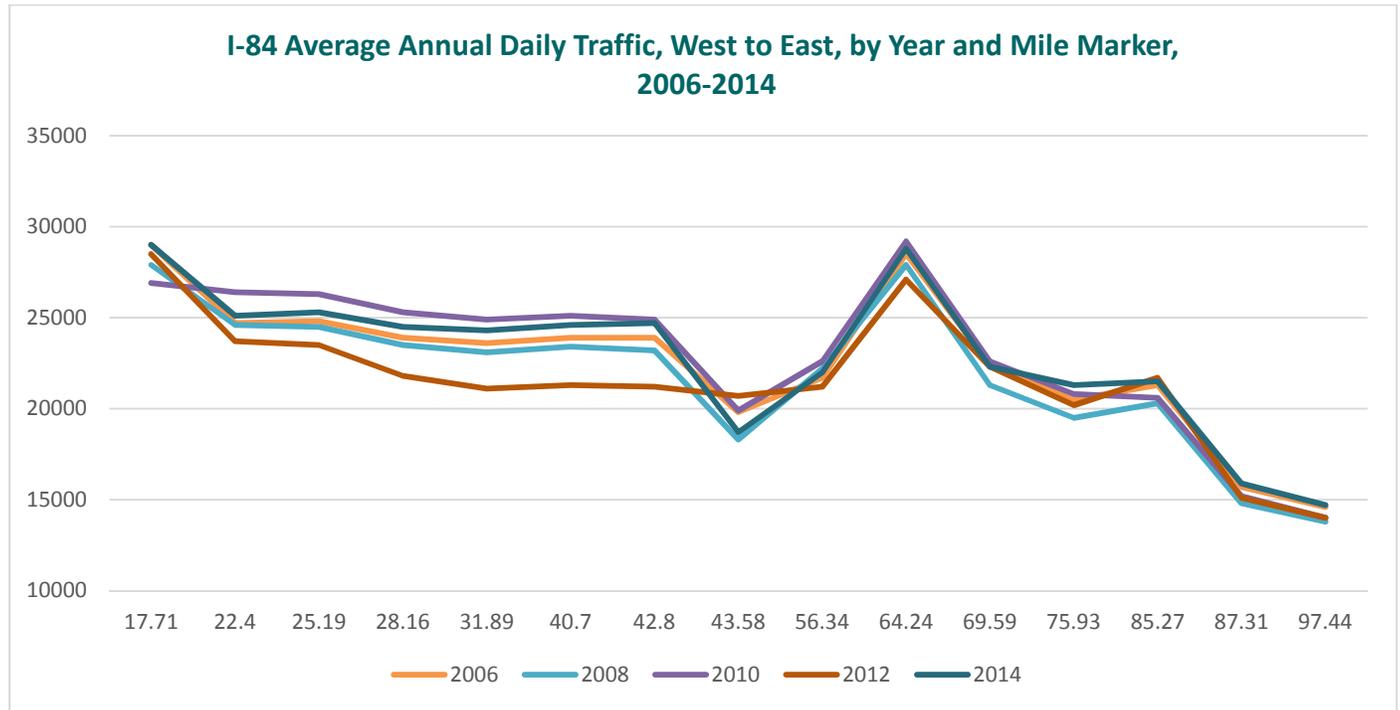
River:

Finally, the Columbia River, the namesake of the Gorge, is a constrained asset in terms of an asset for visitors. Access is blocked on both sides by the railroad and/or highways. State park beaches directly on the river’s few access points are over-utilized, and overnight camping facilities are limited. The river and its tributaries are also host to a variety of potentially conflicting uses, from subsistence fishing by local Tribes to river cruises, windsurfing, rafting, camping, and more. It seems that **the river itself is a perfect archetype for the opportunities and challenges associated with tourism in the Gorge; an awesomely scenic yet fragile resource in high demand for both the most traditional and most modern of activities.**

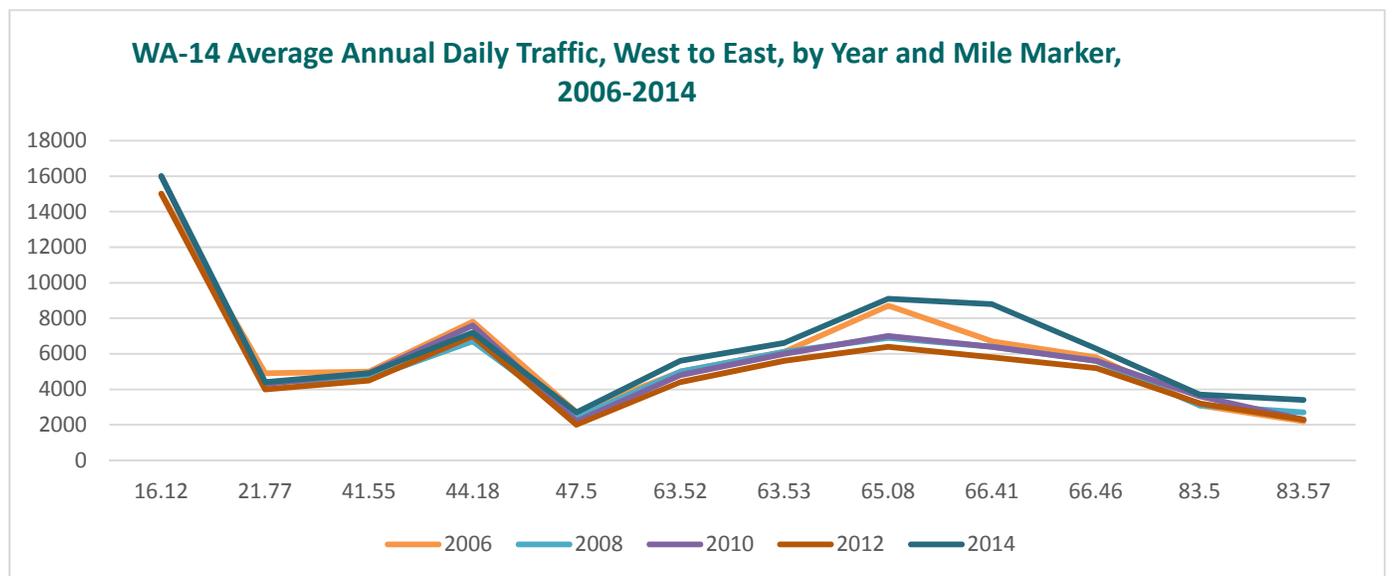
V. Appendix: Additional Regional and County Data

A. Transportation data

The following charts show traffic counts for the main roads used by visitors in the region, by mile marker. Following each table is a list of the mile marker locations, selected either because they are located at significant tourism attractions, or because they are places where volumes significantly rise or fall.



Source: Oregon Dept. of Transportation



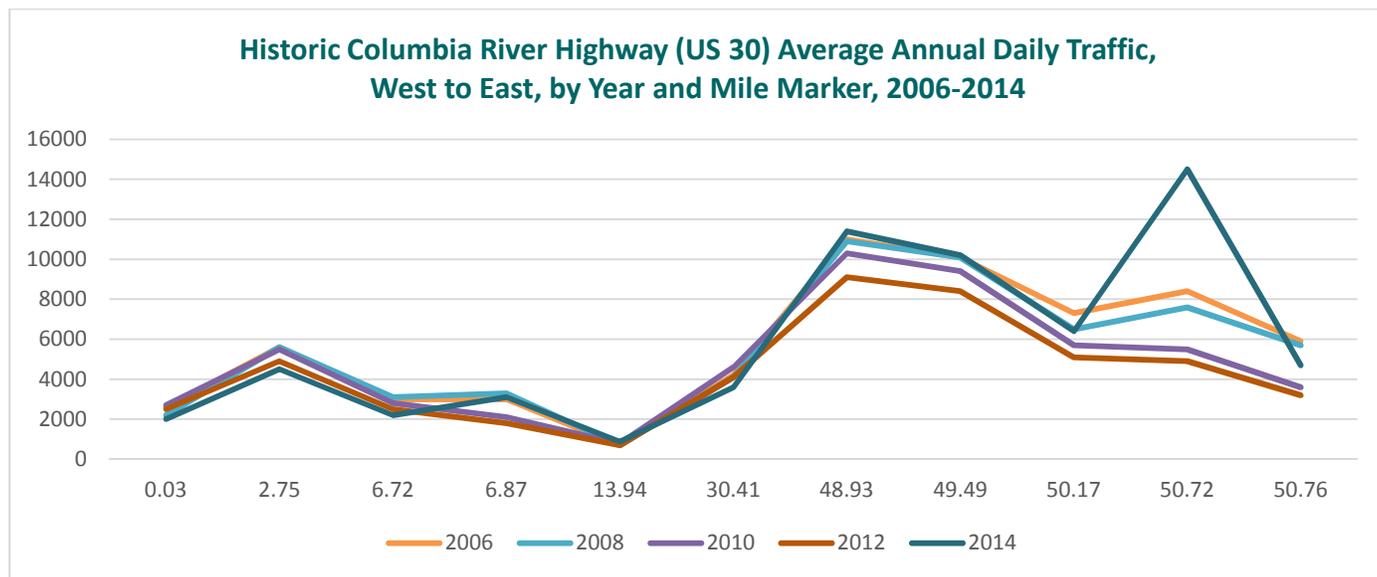
Source: WA Dept. of Transportation

In contrast to the general trend toward lower traffic counts on many highways, last year was among the busiest since 2006 on both sides of the Columbia River. Volumes on the Washington side are approximately half of the Oregon side in the immediate metropolitan area, and the counts diverge to a much lower percentage on the Oregon side as one travels eastward.

Key to Mile Markers

Interstate 84, Oregon		State Highway 14, Washington	
Mile marker	Location	Mile Marker	Location
17.71	.4 miles west of Sandy River, Troutdale	16.12	After junction Washougal River Rd
22.4	.3 miles east of Corbett	21.77	Entrance Skamania County
25.19	.2 miles east of Rooster Rock State Park	41.5	Before junction to Bridge of Gods
28.16	.3 miles east of Bridal Veil	44.18	After junction Seymour Rd
31.89	.5 miles east of Multnomah Falls	47.5	After junction Sprague Landing Rd
40.7	.2 miles west of Bonneville Dam	63.52	Before junction WA141 Spur
42.8	.5 miles west of West Cascade Locks	63.53	After junction WA141 Spur
43.58	.2 miles east of West Cascade Locks	65.08	After junction Hood River Bridge
56.34	.3 miles east of Viento	66.41	Before junction WA141
64.24	.2 miles west of Hood River Bridge	66.66	After junction WA141
69.59	.2 miles west of Mosier	83.5	Before junction US97
75.93	.72 miles west of Rowena	83.57	After junction US97
85.27	.24 miles west of Brewery Grade		
87.31	.3 miles west of US97		
97.44	.3 miles east of US97		

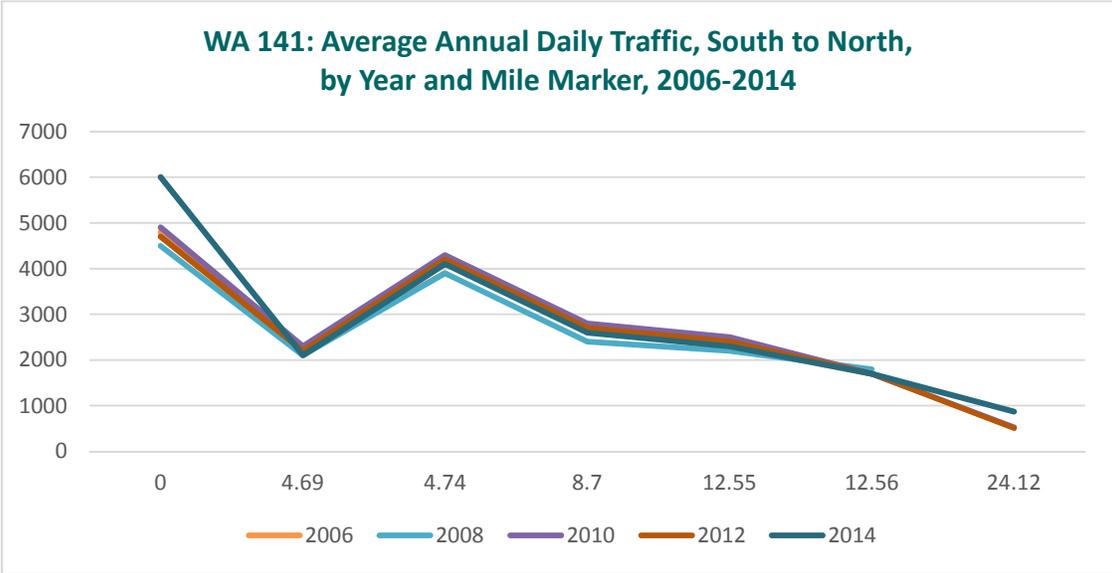
For the Historic Columbia River Highway, 2014 traffic counts east of Viento State Park are higher than past years. Given the recent construction work on the western part of the Highway, it is not surprising to see a dip in traffic counts in the popular waterfall corridor.



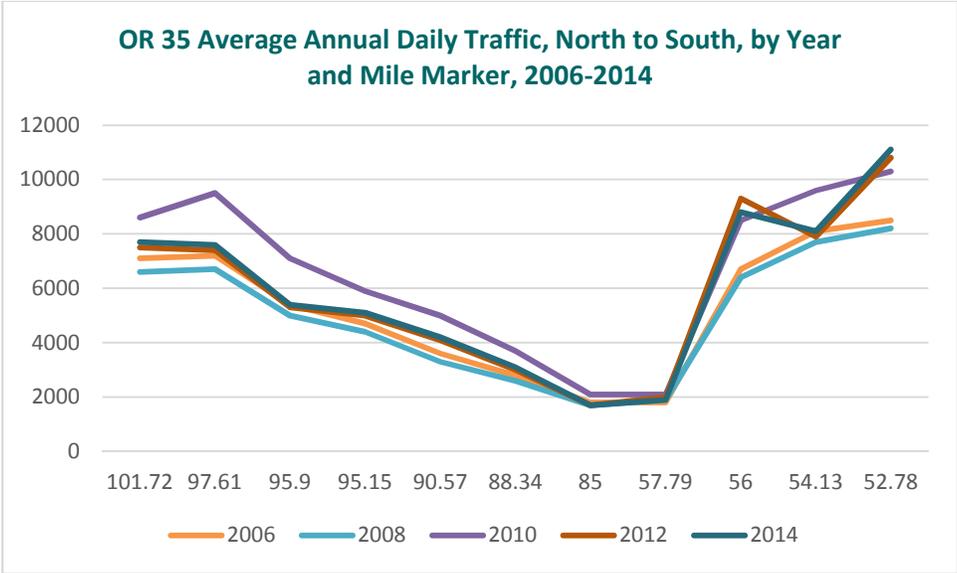
Source: Oregon Dept. of Transportation

Finally, the two north-south routes connecting tourism destinations in the region are OR Highway 35 between Hood River and Government Camp at Mt. Hood, and WA Highway 141 between Bingen with Trout Lake at Mt. Adams. Given that these north to south roads do not connect directly with the metro area, there is

significantly less volume of traffic, except at Mt. Hood which can also be reached from the Portland/Vancouver area by other routes.



Source: WA Dept. of Transportation: Note missing data for some locations 2006-2008



Source: Oregon Dept. of Transportation

Key to Mile Markers for HCRH and North-South Highways

Historic Columbia River Highway		OR 35, Hood River to Government Camp		WA 141, Bingen to Trout Lake	
Milepost	Location	Milepost	Location	Milepost	Location
.03	Sandy River Bridge	101.72	.1 mile south of US 30	0	Junction with WA 14
2.75	.2 miles east of SE Stark	97.61	.2 miles north of Dethman Ridge Dr.	4.69	East of junction with WA 141 spur
6.72	.05 west of NE Corbett Hill Rd	95.9	.1 mile north of Neal Creek Rd	4.74	West of junction with WA141 spur
6.87	.13 east of NE Corbett Hill Rd	95.15	.1 mile south of Odell Highway	8.70	White Salmon River Bridge
13.94	.01 miles west of Bridal Veil State Park	90.57	.2 miles north of Miller Rd	12.55	Before junction with Glenwood Hwy
30.41	.02 miles SW of ramp to Bridge of Gods	88.34	.07 miles north of Hood River Hwy	12.56	After junction with Glenwood Hwy
48.93	.05 miles east of Columbia River Hwy	85	.2 miles south of Hood River Hwy	24.12	After junction with Park Rd
49.49	.05 miles east of Wasco St (Hood River)	57.79	.02 miles east of US26		
50.17	.05 miles east of 13 th St.	56	.5 miles west of US 26		
50.72	.02 miles west of 2 nd St	54.13	.1 mile west of Timberline Hwy		
50.76	.02 miles east of 2 nd St ramp to I-84	52.78	.1 mile west of road to Government Camp		

B. Selected Market and Economic Impact Information for Key Niche Markets-

Bicycle Tourism

- Oregon completed a comprehensive statewide study of the economic impact of bicycle tourism in 2012: <http://industry.traveloregon.com/research/archive/the-economic-significance-of-bicycle-related-travel-in-oregon-2012-dean-runyan-associates/> as well as a 2014 study of the [projected economic impact of bicycle tourism on the Historic Columbia River Highway](#) when improvements are complete.
- A [1999 economic impact study of Maine's bicycle tourism](#) concluded that the state's 2 million bicycle tourists contributed \$66.8 million in direct and indirect economic benefits. This amounts to expenses, or an average of \$34 per person. The vast majority of visitors were day trip cyclists, who averaged \$25/day if from out of state and \$4/day if in-state. However, the 2% of bicyclists on guided tours (self-guided or guided) accounted for 17% of the economic benefits, spending \$55 and \$115 per day respectively. This underscores the importance of developing value-added services and overnight lodging to the bicycle tourism mix in order to generate economic benefits.
- A [2004 study of the economic impact of bicycle tourism in the outer Banks of North Carolina](#) in the Outer Banks of North Carolina concluded that each visitor who reported bicycling while in the region spent \$88, which, for 680,000 visitors adds up to \$60 million per year. Bicycle tourism at this scale also generated 1,400 jobs, or 1 job for every 486 bicycle-related visits.
- In [Quebec, a 2005 study](#) found that bicycle tourists spent \$83/day on average, which was 24% higher per day than the overall average for tourist spending.
- A [2010 study of the economic impact of Wisconsin's bicycle tourism](#) estimated the average daily expenditures of different types of bicyclists. Trail riders generated the smallest economic impact (\$17.99 in daily expenses if a resident, \$33.95 if a non-resident) and riders on multi-day tours generated the highest economic impact (\$80.84 per day)
- A [2009 study of the economic impact of a multi-day championship cycle cross event in Bend, Oregon](#) found that the contestant/traveling party expenditures per person per day averaged \$72.80 per day. The total contestant related travel spending was \$847,000. Non-contestants (vendors, spectators, etc.)

generated another \$228,576 in expenditures, so the total economic impact of a single 3 day event was \$1.08 million. 86% of visitors came from outside Oregon, which is a much higher percentage than the 60% average for all Bend's tourism. Surprisingly, when visitors were asked about their interest in moving or buying real estate in Bend as a result of their visit, 10% answered "definitely yes", suggesting a potential longer term multiplier effect on the local economy.

- Another [2010 study of the economic impact of a specific bicycle event](#) in Menomonie, Wisconsin found that *spectators* for the professional road race each spent an average of \$47 on refreshments, souvenirs.
- A new study of the [economic impact of mountain bicycling events in Oregon](#) documented the how two 3 day events (held in July and again in August) in rural Oakridge pumped \$1.2 million into the local economy.

Nature Based Recreation

- The national Outdoor Industry Association commissions an annual [Active Outdoor Recreation Economy Report](#) (2013) as well as other specialty reports such as a [Special Report on Paddlesports](#) in 2009.
- A [2014 national study on Outdoor Recreation](#) profiles market and activity trends by age group.

Heritage and Cultural Tourism

- A [2006 study by the Oregon Arts Commission](#) cites a 2003 national study finding that cultural and heritage tourists spend more than other travelers (\$623 vs. \$457), are more likely to spend \$1,000, are more likely to stay in a hotel, motel or B and B, and take longer trips.
- [Nebraska's 2011 Heritage Tourism Plan](#) cites even more recent research finding that 78% of adult leisure travelers in the United States are considered "heritage traveler." They are more likely to take part on a wide variety of activities when they travel: 17% participate in four or more activities, as compared with 5% of all travelers. Baby boomers make up one of the strongest heritage tourism markets.

Agritourism

- The [most recent and comprehensive study on the economic impact of agritourism](#) was completed in 2009 in California. Results: 43% of small farms earned at least \$25,000 in supplemental income from their agritourism activities. However, these include wineries, so the results need further analysis.
- [Colorado explicitly links agritourism and heritage tourism development](#), and has recently completed implementation of its first strategic plan toward this end.
- In 2010, [Travel Oregon commissioned a market study connected with its "Oregon Bounty"](#) promotional plan featuring Oregon products and especially Oregon food products. As such, its findings relate to agritourism and culinary tourism. Key findings include:
 - Over 55% of surveyed visitors participated in at least one culinary-related activity (including touring wineries, breweries, wine trails and farmers markets, attending wine and culinary festivals, sampling local foods and taking cooking classes).
 - Those aged 35-64 (GenX and Baby Boomers) were more likely to participate in such activities
 - Higher income people were also more likely to participate
 - Food products were the Oregon product with the highest visitor awareness, followed by forest products
 - Oregon visitors spend an average of \$142 on local food products per visit.
 - 42% said the opportunity to buy local food products made them more likely to visit again in the future

- In 2014, Oregon convened a statewide working group to advise on agritourism development goals. Travel Oregon has already begun implementing several recommendations, including an economic impact analysis. The [working group home page](#) has links to many agritourism resources, including the initial recommendations.

C. Additional Regional Data for Mt. Hood-Gorge Region

Average Daily Visitor Expenses, per person, Oregon and Mt. Hood-Gorge region, 2011

	State average overnight, OR	Mt Hood/Gorge overnight	State average day trippers, OR	Mt Hood/Gorge day trippers estimate*
Lodging	\$ 62	\$ 38		
Restaurant food and beverage	\$ 40	\$ 29	\$ 16	\$ 11
Transportation at destination	\$ 27	\$ 16	\$ 9	\$ 5
Retail	\$ 24	\$ 14	\$ 19	\$ 17
Recreation, sightseeing and entertainment	\$ 14	\$ 11	\$ 8	\$ 5
Total	\$ 167	\$ 108	\$ 52	\$ 38

Source: Longwoods International for Travel Oregon. * Regional day tripper expense estimate applies region's overnight spending as a percentage of statewide overnight spending to statewide data on day tripper expense.

Demographics of Visitors to the Columbia Gorge NSA, by Subregion, 2011

	Perceived crowding (Scale of 9, higher = more crowded)	29 years and younger	30-59 years old	60 or older	More than \$100K household income	Children in group	People per vehicle
Columbia River	3.41	13.5%	63.6%	22.9%	No data	No data	No data
Western Gateway	3.20	28.5%	59.9%	11.6%	19.7%	8.2%	1.52
Walls and falls	4.86	28.2%	58.9%	12.9%	20.7%	23.0%	2.80
Columbia tributaries	2.65	28.6%	66.2%	5.2%	15.4%	86.9%	2.8
Skamania Highlands	3.20	18.6%	70.3%	12.1%	12.1%	20.0%	2.03
Oak Pine Flowers	3.44	14.8%	66.1%	19%	19.2%	9.7%	2.47
Celilo grasslands	n/a						

Columbia River Gorge MetaAnalysis, 2013

Trip Characteristics of Visitors to the Columbia Gorge NSA, by Subregion, 2011

	Day Trip	Overnight Trip	% of Overnight Trips 3 days or more	Miles traveled to reach CRG destination
Columbia River	97.8%	2.2%	30.7%	242
Western Gateway	96.9%	3.1%	60%	51
Walls and falls	56.6%	43.4%	78.4%	771
Columbia tributaries	65.7%	34.3%	30.7%	108
Skamania Highlands	96.7%	3.3%	50%	208
Oak Pine Flowers	84.0%	16.0%	75.2%	237
Celilo grasslands				

Columbia River Gorge MetaAnalysis, 2013

Public Lands Hot Spots at Risk for Overuse and Congestion, 2014

Site or Area Name	State	Agency	Recreation Activity Type(s)	Period of Use	Degree of Issue
Cape Horn	WA	FS	Hiking	year round	Low
Ozone Climbing Wall	WA	FS/WSDOT	Rock Climbing	March-Oct	Moderate
Prindle Mt	WA	FS/DNR	Hiking	year round	Moderate
Archer Mt	WA	FS/DNR	Hiking	year round	High
High Valley	WA	FS/DNR	Hiking & ATV	year round	Moderate

Woodard Cr	WA	FS	Hiking	year round	Low
Beaver Pond	WA	FS	Camping/Day Use	June-Oct	Low
Aldrich Mt-Carpenter Lake	WA	FS	Hiking	year round	High
Wind River Hot Springs	WA	FS/Private	Bathing	June-Oct	Moderate
Wind Mt	WA	FS/Private	Hiking	year round	Moderate
Frog Lake	WA	FS	Camping/Day Use	June-Oct	Low
Collins Slide Area	WA	FS	Hiking/Mt Bike/OHV	year round	Low
Coyote Wall Climbing Wall	WA	FS	Rock Climbing	March-June	Low
Catherine Cr. Wall Climbing Walls	WA	FS	Rock Climbing	March-June	Low
Klickitat Spit	WA	FS/Private/WSDOT	Kite Boarding/Wind Surfing	March-Oct	Moderate
Klickitat River Park - River Mi 1	WA	FS/County	Camping/Day Use	May-Sept.	Moderate
Dalles Mt Road Property	WA	FS/Private	Hiking	Feb-May	Low
Sandy River Delta	OR	FS	Hiking/Equestrian/ Dog Walking/ mountain biking	year round	High
Corbett Area Trails	OR	FS/Private	Equestrian	year round	Low

Palmer Mill	OR	FS	Hiking/Equestrian	year round	Moderate
Devils Rest Area	OR	FS	Hiking	year round	Moderate
Rat Cave/Mist Falls Climbing Wall	OR	FS	Rock Climbing	March-Oct	Low
Multnomah Falls	OR	FS	Sightseeing/Hiking	year round	High
Cascade Locks Mt Bike Proposal	OR	FS	Mt biking/equestrian/hiking	year round	Moderate
Hole in the Wall Falls Climbing Wall	OR	FS/State Park	Rock Climbing	March-Oct	Low
Post Canyon	OR	FS/County/State Park	Mt biking/equestrian/hiking/OHV	March-Oct	High
Rowena-Memaloose	OR	FS/State Park/Private	Hiking	Feb-June	High
7 Mile Hill	OR	FS/Private	Hiking	Feb-June	Moderate
Chenoweth Table	OR	FS/Private	Hiking/Mt Bike/equestrian/OHV	Feb-June	Moderate
Bonneville Fish Hatchery	OR	ODFW	Tours	May-Sept	Moderate
Columbia Falls Natural Area	WA	DNR	Rogue hiking trails, some built in sensitive areas.	Mostly May-Sept.	High

Stiegerwald Wildlife Refuge	WA	USFWS	Trailhead with ADA outhouse, kiosk, gate, entry sign, and 2 3/4 mile trail with interpretive art	April - October	Low
Little White Salmon NFH	WA	USFWS	kayaking	Year Around	High
Little White Salmon NFH	WA	USFWS	Tribal Platform Fishing	April-Aug	High
Spring Creek NFH		USFWS	windsurfing, paddle board, kite board (on FWS/COE land, not State Parks)	April-Oct	Low
Home Valley Wetland	WA	USACE	undetermined		low
Mayer-Squally Pt	OR	OPRD	kiteboarding	June-Aug	MED
Crown Pt	OR	OPRD	base jumping	year round	MED
Crown Pt	OR	OPRD	observation/party	year round	
Dabney State Park	OR	OPRD	illegal roadside parking	May-Sept	High
Lewis and Clark/Sandy River	OR	OPRD	illegal roadside parking	May-Sept	High
Post Canyon(Senecca Fouts)	OR	OPRD	mountain biking /trail building	year round	High
Historic Columbia River Highway Waterfall Corridor	OR	OPRD/FS/ODT	driving for pleasure, sight seeing	year round	High
Beacon Rock TH	WA	WPRC	Rock Climbing	year round	High
Hatchery	WA	WPRC	Windsurfing	year round	High
Beacon Rock Lower Picnic Area	WA	WPRC	Hiking	Apr-Sep	High
Columbia River	OR/WA		Fishing, windsurfing, kite boarding, boating	year round	High
Dalles Mt Ranch	WA	WPRC	Hunting	year round	High
Duncan Cr Falls	WA	DNR/FS	Hiking	year round	Low
Hamilton Natural Area	WA	USACE	Day Use & Fishing	year	MED

				round	
Taylor Lakes (out grant0)	OR	USACE	Day Use, Fishing, Hiking & Biking	year round	High
Washougal Oaks	WA	DNR	Hiking	year round	Low
Lower White Salmon	WA	Private	White Water Boating	year round	MED

Source: Columbia River Gorge NSA Interagency Recreation Report background data, courtesy of Mt Hood National Forest

D. Gorge Tourism Studio Steering Committee Members

First Name	Last Name	Organization	Title
Heidi	Beierle	Clackamas County Tourism Council	Destination Development Lead
Kim	Bennett	Washington Tourism Alliance	Board Member
Becky	Brun	Gorge Owned / Weinstein PR / Hood River City Council / Hood River County Visitors Council	Independent Writer, Editor and PR Consultant / Board Member
Arlene	Burns	City of Mosier	Mayor
Rene'	Carroll	City of Washougal	Tourism Contractor
Terry	Cullen	Columbia River Gorge Commission	Principal Planner
Lisa	Farquharson	The Dalles Area Chamber of Commerce	President/CEO
Kathy	Fitzpatrick	City Manager	City of Mosier, Oregon
Maria	Foley	Mt. Adams Chamber of Commerce	Executive Director
Mike	Glover	Hood River County Chamber of Commerce	Executive Director
Kevin	Gorman	Friends of the Columbia Gorge	Executive Director
Kate	Hart	Columbia Gorge Winegrowers Association	Executive Coordinator
Stan	Hinatsu	U.S. Forest Service	Recreation Program Manager, Columbia River Gorge National Scenic Area
Amanda	Hoey	Mid-Columbia Economic Development District	Executive Director
Holly	Howell	Port of Cascade Locks	Marketing & Development Manager
Andreua	Knight-Gaige	The Dalles Area Chamber of Commerce	Tourism Coordinator
Steve	Kruger	Oregon State Parks and Recreation	Park Manager, East Gorge
Maui	Meyer	Hood River County / Rural Development Initiatives	Commissioner / Board Member
Sofia	Urrutia-Lopez	Tourism Coordinator	City of Cascade Locks, Oregon
Mary	Pellegrini	Old Parkdale Inn Bed & Breakfast	Owner
Casey	Roeder	Columbia River Gorge Visitor Association / Skamania County Chamber of Commerce	President
Karen	Schaaf	West Columbia Gorge Chamber of Commerce	Board Member
Kate	Sinner	Regional Solutions Coordinator	Office of the Governor
Michele	Spatz	Mid-Columbia Economic Development District	Project/Mobility Manager
Kristen	Stallman	Oregon Dept. of Transportation / Region 1	Columbia River Gorge National Scenic Area Coordinator
Renee	Tkach	Friends of the Columbia Gorge / CRGVA	Gorge Towns to Trails Project Manager / Board Member