

WATER-BASED TOURISM IN CLACKAMAS COUNTY



FINAL PRESENTATION
FEBRUARY 14TH 2018



STRUCTURE OF STUDY

CHAPTER 2: THE WATER
INVENTORY OF WATER ASSETS



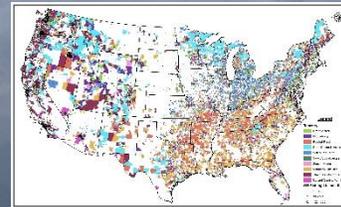
CHAPTER 3: THE PEOPLE:
CURRENT USERS



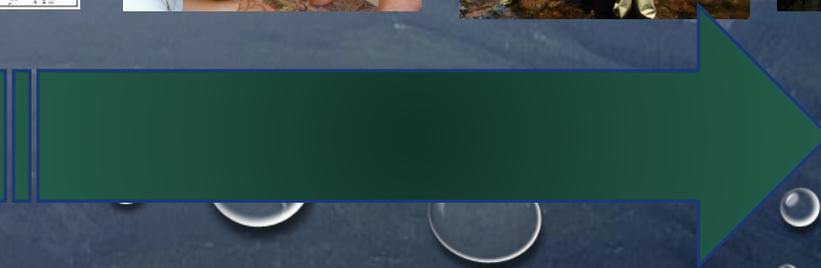
CHAPTER 4: THE MARKET
UNTAPPED POTENTIAL



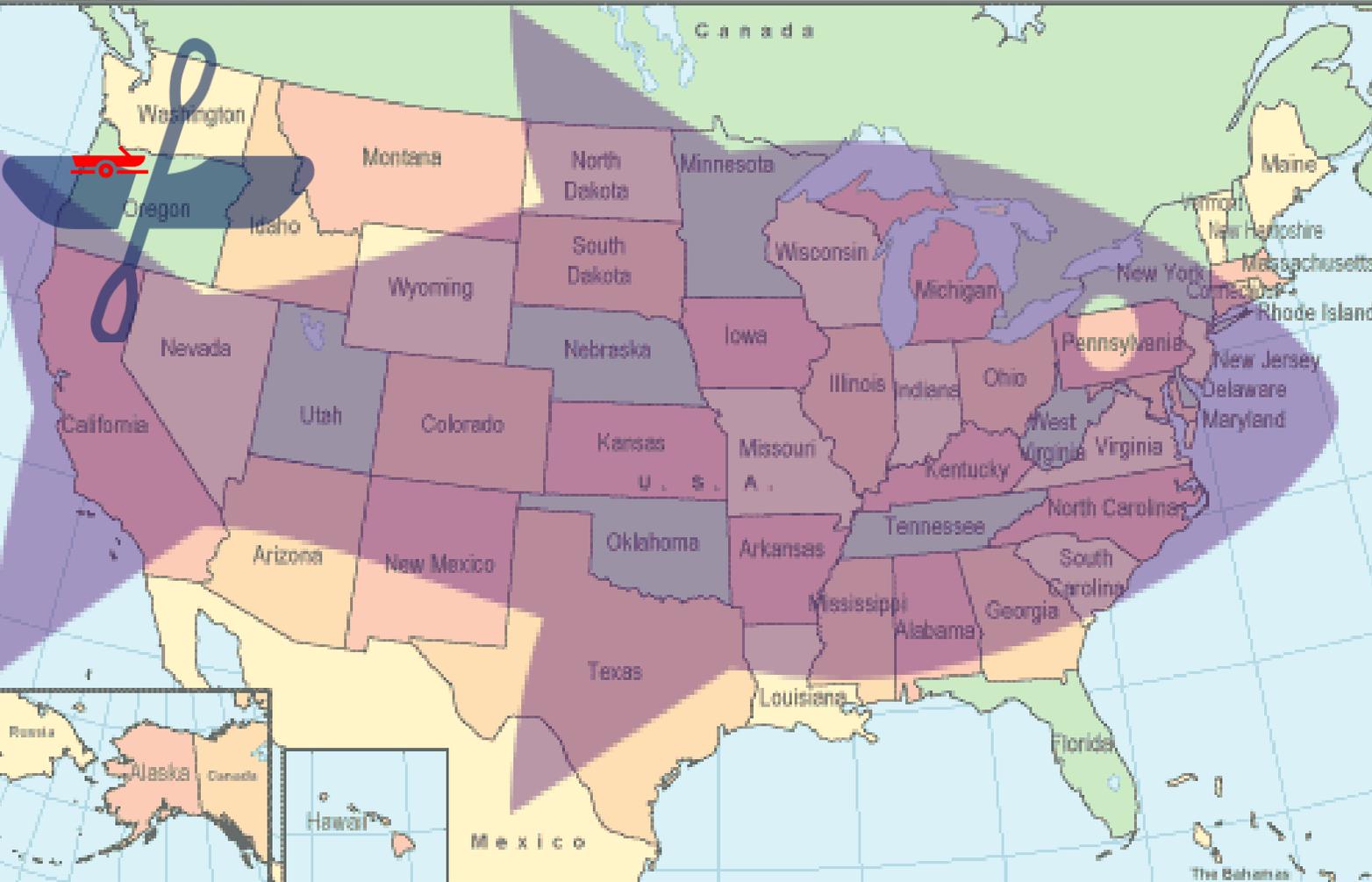
CHAPTER 5: THE OPPORTUNITIES
CONCLUSIONS & RECOMMENDATIONS



CHAPTER 6: THE WAY FORWARD
STRATEGIES & IMPLEMENTATION ACTIONS



WATER RECREATION MARKET SIZE: DEPENDS ON THE MARKET



Market Size by In-State vs. Out-of-State

	Oregon Resident	Non-Oregon Resident
	77%	23%
	98%	2%
	75%	25%

Only the anglers are a national market for Oregon

OVERNIGHT STAY ESTIMATIONS GENERATED BY WATER-BASED RECREATION

STATEWIDE

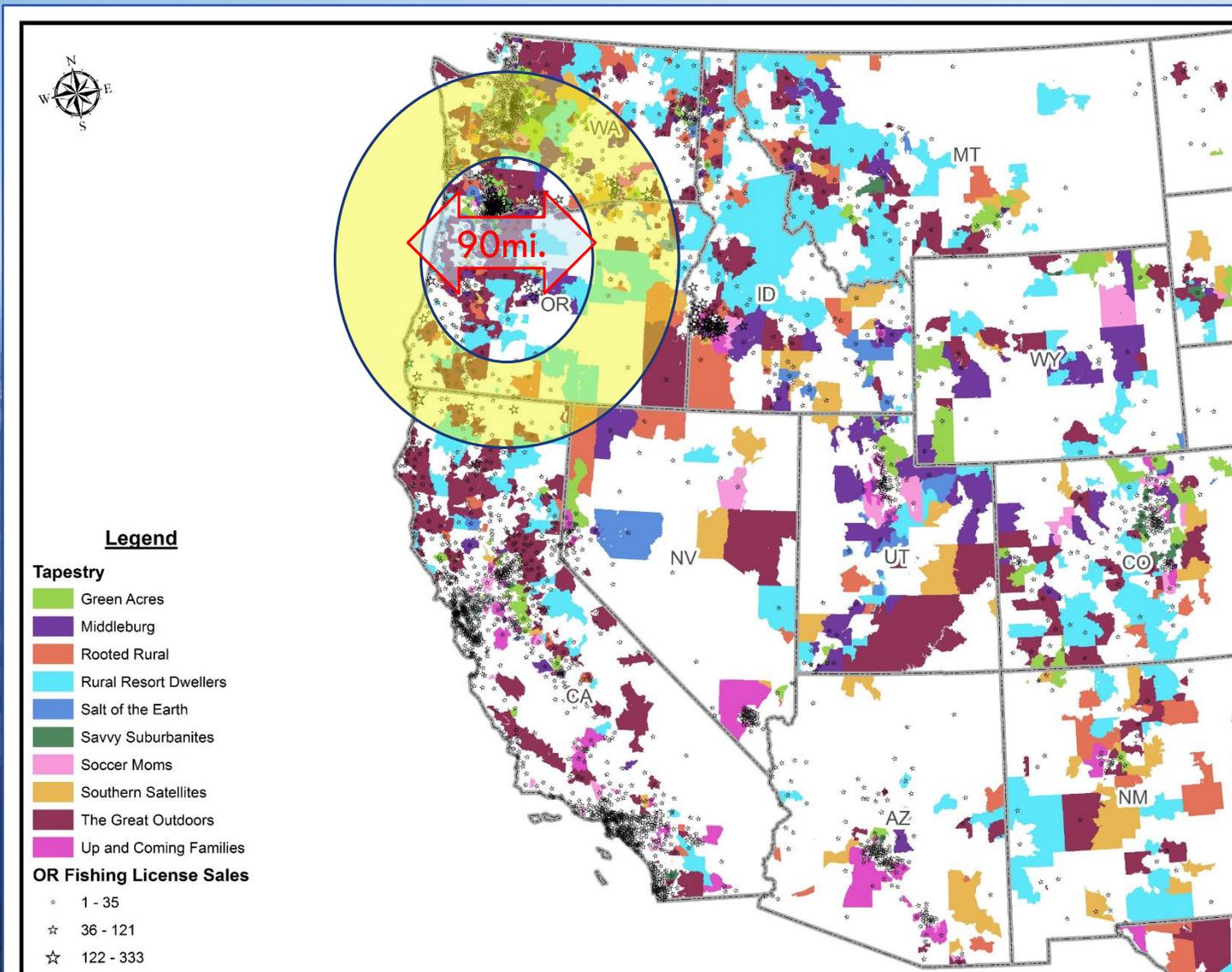
Anglers produce 86% of all water based tourism overnight stays
Clackamas Co. 2% of total

	N-Pop	Total Overnight Stays	% of Total
	847,219	10,269,250	85.5%
	174,808	1,489,867	12.4%
	19,842	239,197	1.9%

Accommodation by Type

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

PADDLER MARKET POTENTIAL FOR CLACKAMAS COUNTY



Beyond 90 Miles but less than 500

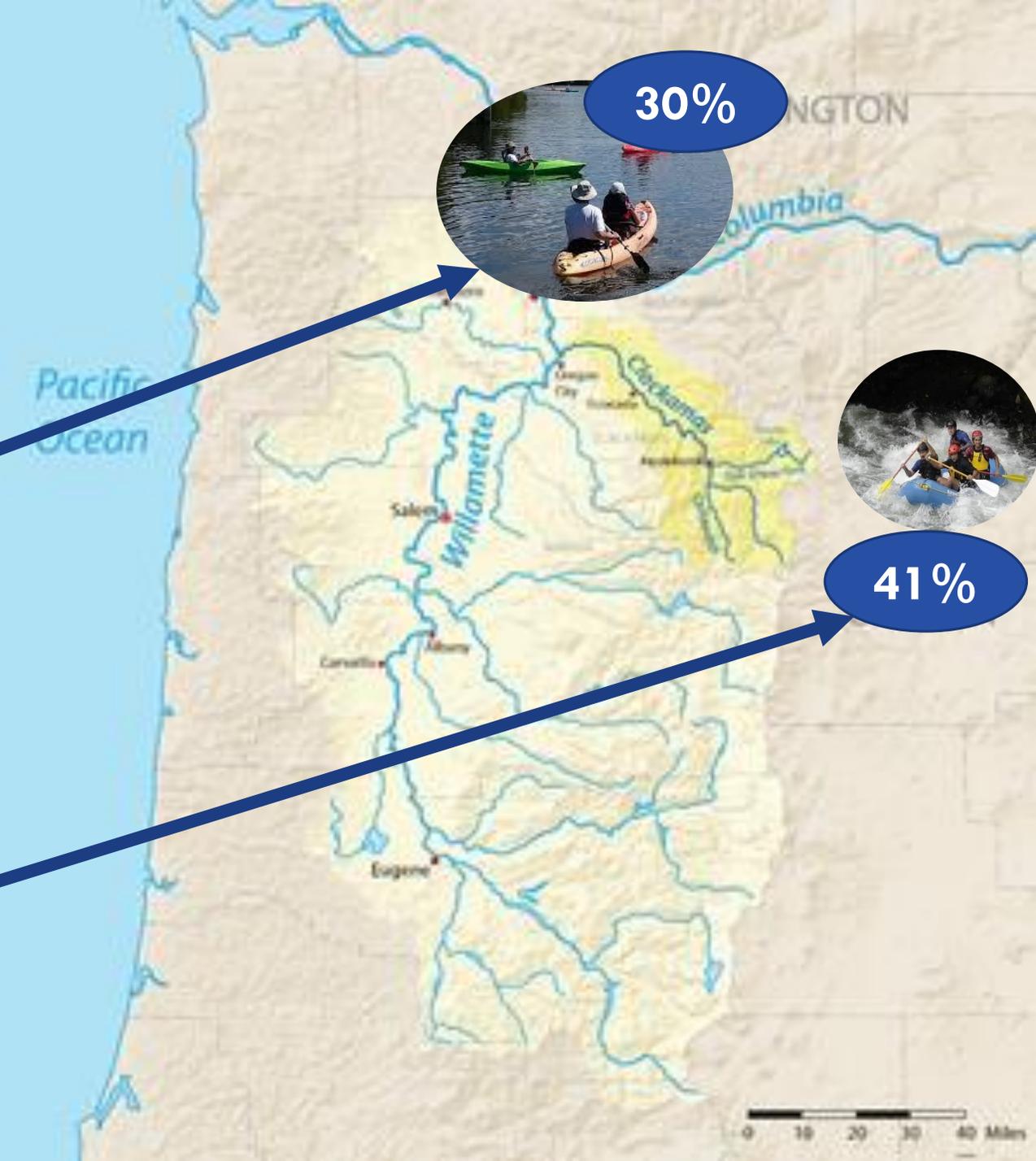
Less than 90 they are not staying overnight

Beyond 500 they are coming for multiple reasons

Single sport marketing message would not be effective beyond 500 miles

PADDLER MARKET POTENTIAL FOR CLACKAMAS COUNTY

- Largest Flatwater market in Oregon is the Columbia River. Multnomah County attracts 30% of the State for flatwater paddlers
- Clackamas County attracts 8.7%
- Largest Whitewater Market is Deschutes attracting 41% of the State
- Clackamas Attracts 9%



WILLAMETTE FALLS LOCKS

ESTIMATED ANNUAL LOCKAGE

Lower Bound Estimate
3,391



Final Estimate
15,708

Upper Bound Estimate
32,574

ESTIMATED ANNUAL REVENUE FROM RECREATIONAL BOATING

Lower Bound Estimate
\$162,870

Upper Bound Estimate
\$304,305

OREGON VS. NATIONAL ANGLING PROPORTIONAL SHARE

State	Non-Resident Anglers	% of USA	Non-Resident Angler Days	% of USA
Alaska	327,418	5%	1,287,096	2%
Wisconsin	336,753	5%	6,707,662	12%
Florida	1,197,279	17%	9,543,924	17%
Oregon	264,424	4%	1,262,784	2%
California	97,967	1%	486,605	1%
Washington	102,562	1%	341,327	1%
Idaho	208,418	3%	3,341,667	6%
Wyoming	193,076	3%	3,331,254	6%

Oregon attracts 4% of the national visiting anglers but only 2% of the nation's visiting angler/days.

Oregon is the only state west of Colorado that has a negative proportional share.

Oregon has untapped potential .

1.2million more non-resident anglers days to break even

Why is Wyoming and Idaho attracting twice as many anglers as their proportional share?

Source: 2011 National Survey of Fishing, Hunting and Wildlife-Associated Recreation. U.S. Fish and Wildlife Service.

OREGON VS. NATIONAL ANGLING SPENDING

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

Oregon ranks 7th among the top ten non-resident expenditures

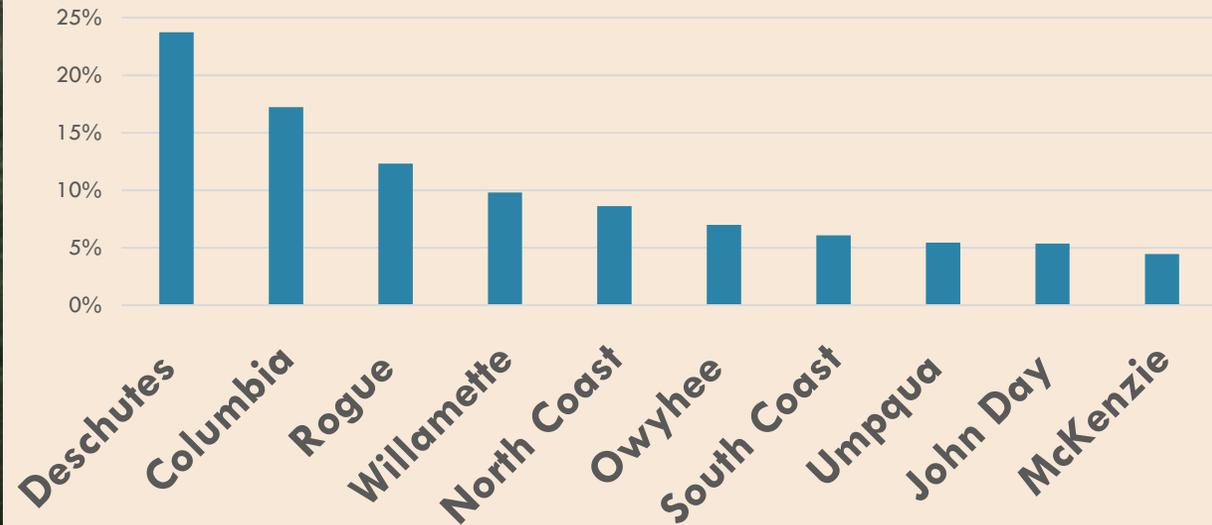
Generating more revenue from fishing than their neighbors

those who do come to Oregon are willing to spend a disproportionately higher amount of money to do so.

It is NOT a Quality Issue

MOST VISITED WATERBODIES

Oregon's Favorite Waterbodies



No Clackamas Co. Waterbodies are in top 10

Only 15% of the market visits Clackamas County water frequently

26% Have never been to, or don't even know where, Clackamas County is

The Deschutes is visited 4 times more frequently than the Clackamas.

Quality of recreation experience is excellent in Clackamas County

WHY IS THE MARKET STAYING AWAY FROM CLACKAMAS COUNTY?

90% of respondents say that Clackamas waterbodies are “as good” as their favorite.

Majority of Respondents have no negative perceptions on the Quality of the recreation experience, on the environment

Interviews with guides shows it is not a quality issue

Market behaviors of neighboring county shows its not a quality issue

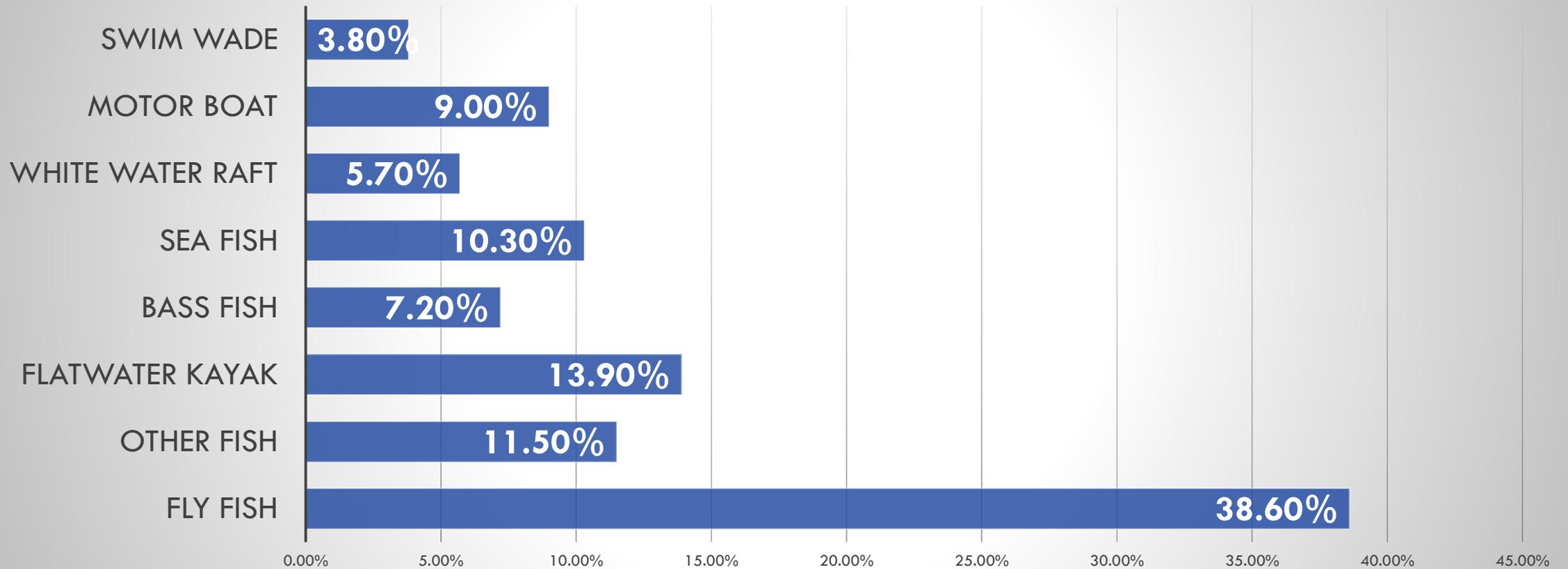
Professional observation shows its not a quality issue

In this Age of Information this is not an Information issue

There is a reason but no good reason

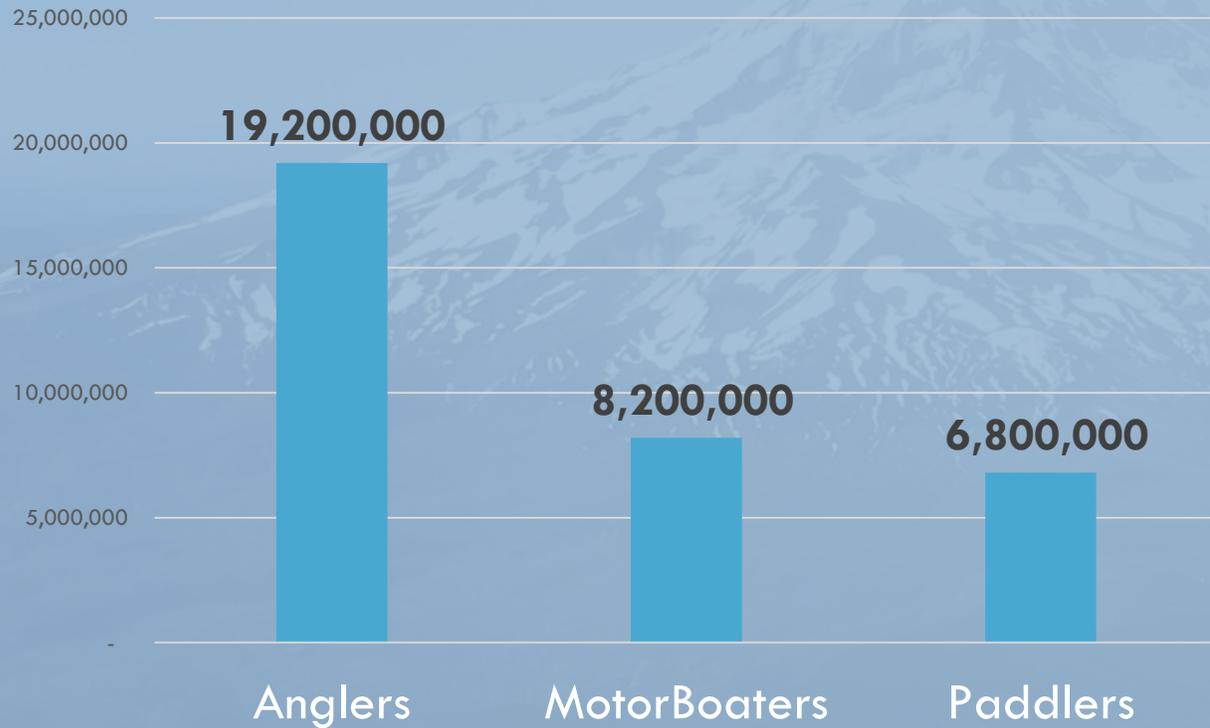
OREGON'S FAVORITE WATER BASED RECREATION ACTIVITY

Fig. 1: Favorite Water Sport

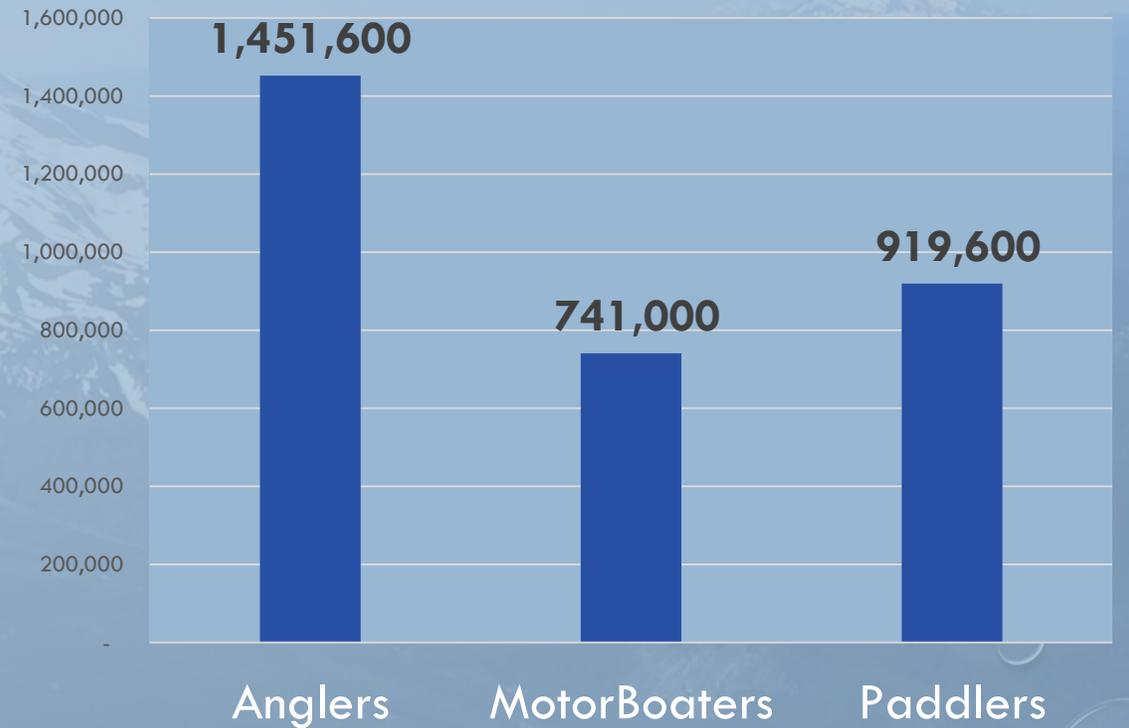


STATEWIDE OUTDOOR RECREATION SURVEY (SCORP)

User Occasions

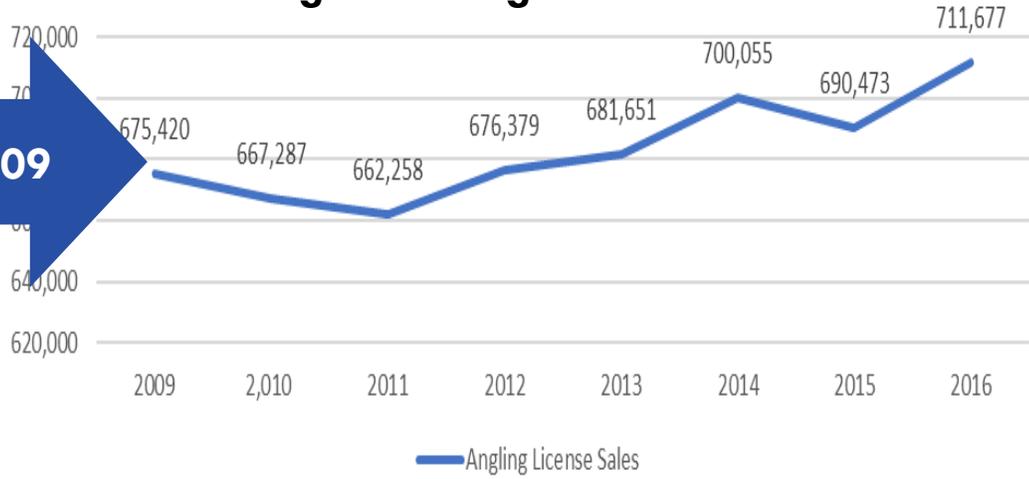


Participation



THE FUTURE OF THE ANGLER MARKET

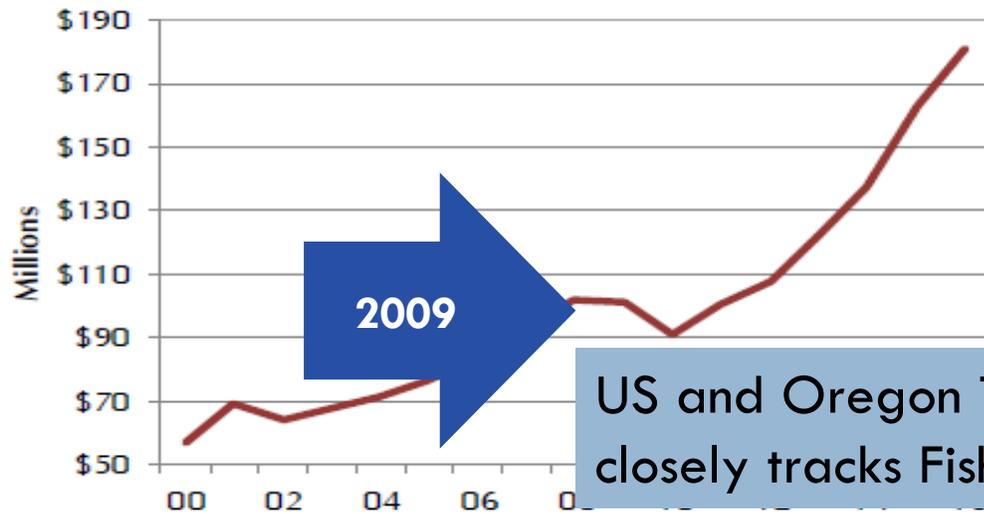
Oregon Fishing License Sales



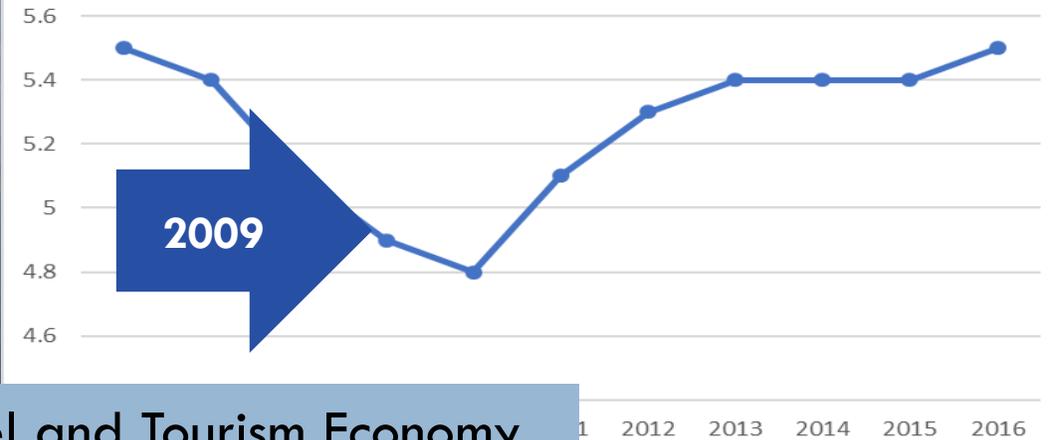
National Participation in Fishing



Oregon Local Lodging Tax Receipts



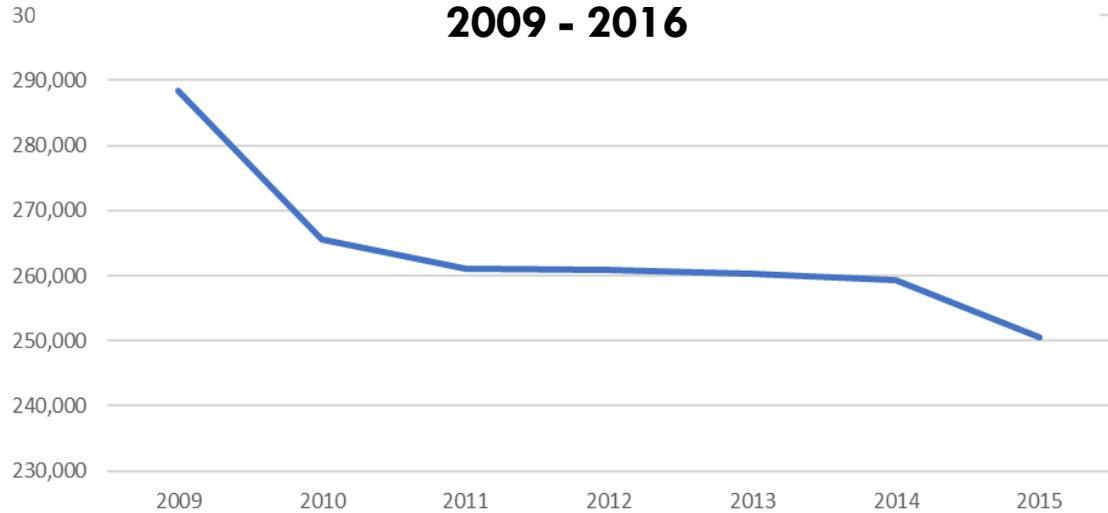
US Travel and Tourism Employment



US and Oregon Travel and Tourism Economy closely tracks Fishing License Sales

THE FUTURE OF THE ANGLER MARKET = NON RESIDENTS

**Oregon Total Resident Annual Fishing License Sales
2009 - 2016**

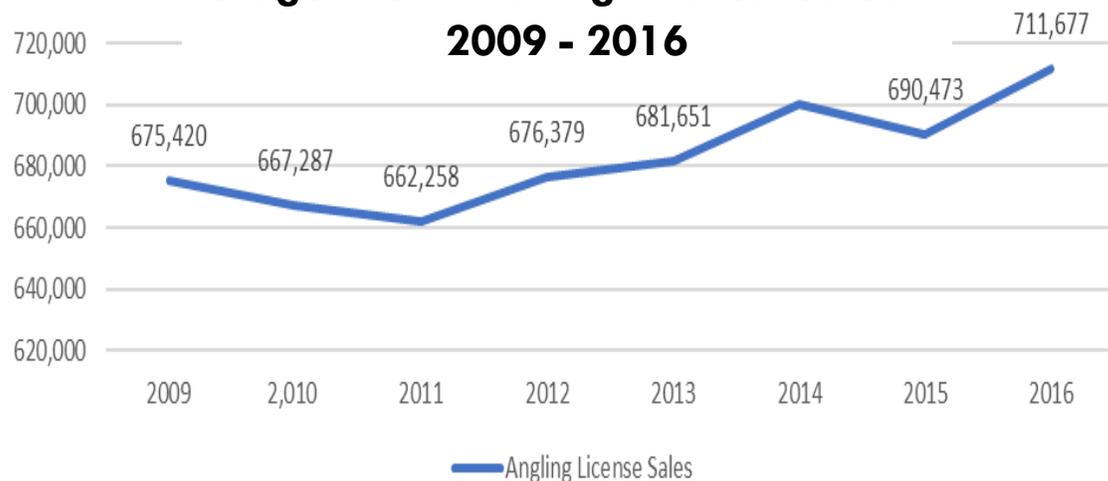


Resident Annual fishing licenses purchases are NOT a good indicator of interest or participation because they are not purchased annually

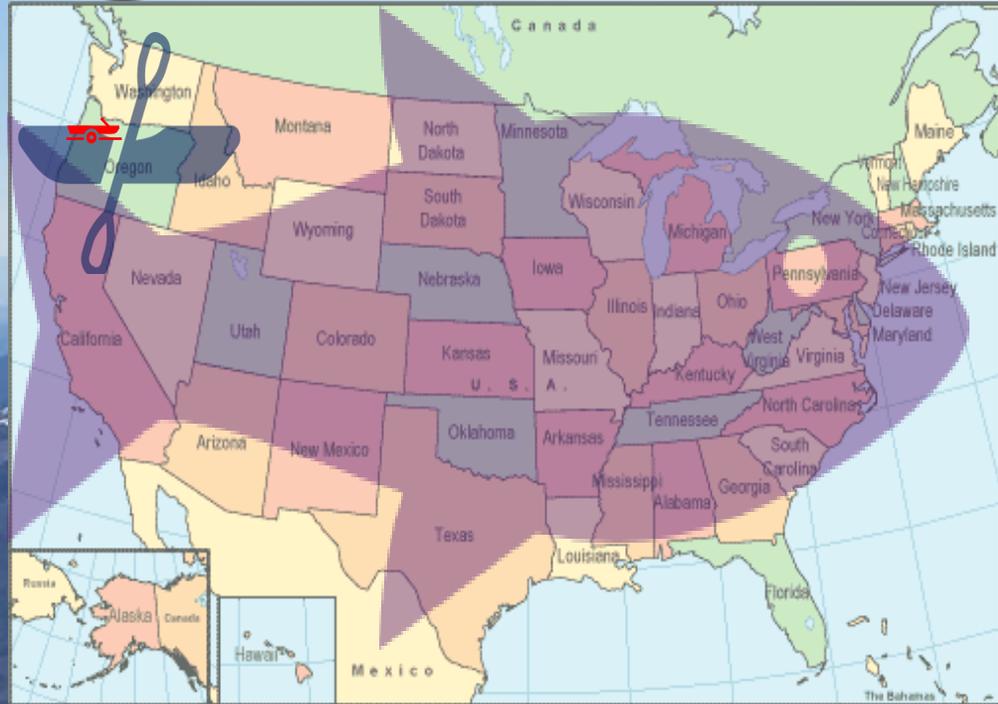
Daily Fishing licenses purchases are good indicators for non-residents demand

Increase in total fishing licenses sales is due to non-resident purchases

**Oregon Total Fishing License Sales
2009 - 2016**



SUMMARY OF FINDINGS



- Fishing is King in Oregon
- Anglers are the Largest Market and Largest untapped Market
- Anglers produce vast majority of overnight stays, and stay in hotels more often
- Paddlers and motor boaters are key in creating new products, generating a “buzz” and getting visitors to “linger longer”
- Clackamas County products are as good or better than competing locations
- Facilities are good, some can be improve
- Mostly market avoids CC due to lack of awareness

CHAPTER 5: THE OPPORTUNITIES

Recommendation Groups

32 total recommendations in 5 categories

Physical
Improvements



Putting Clackamas
"On the Map"



Improving the
Experience



Community
Involvement



Institutional &
Organizational



FIRST, WHAT ARE YOU DOING RIGHT

Comprehensive Marketing and Branding

Water Trail Information and Maps

**Camping Services at certain parks
(providing good examples)**

Recent Physical Improvements

Boones Ferry

Hebb Park

Riverside Park

Milwaukie Waterfront

Molalla River Corridor

Length of Stay Policy County parks

Barton Park Camping Standards

PGE Campgrounds and Management

Planned expansions

Oregon City

West Linn

Greenway Trails



RECOMMENDATIONS: PHYSICAL IMPROVEMENTS

Molalla River Corridor

Upgrades at Wagon Wheel Park



Increase Camping in Corridor



Improve River Safety





RECOMMENDATIONS: PHYSICAL IMPROVEMENTS

Sandy River Corridor

Provide Access at RM38
(Salmon River)



Improvements, Parking
and Access at Sandy
River Park



Improve day Use Area
& Access at Marmot



Create Day Use Area
Sandy River Park



Upgrade Ed LaTourette
Park



Upgrade Camping
Facilities at Dodge Park



Provide camping at Ed
LaTourette Park





RECOMMENDATIONS: PHYSICAL IMPROVEMENTS

Willamette River

Wilsonville Memorial Park Improve day Use Area & Access



Improve Boat Ramp at Molalla River SP Canby



Provide camping at Molalla River SP Canby



Hiking Trails connecting Canby with the River



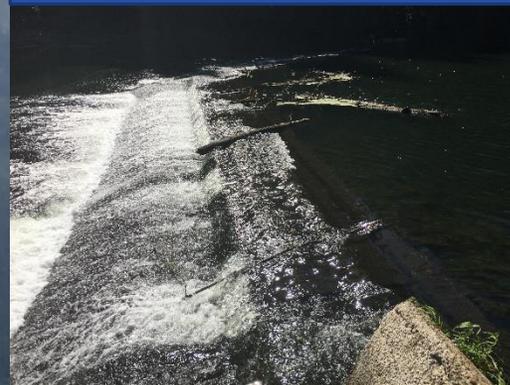
Connect West Linn Downtown with Willamette Park



Provide Camping at Willamette Park, West Linn



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





RECOMMENDATIONS: PHYSICAL IMPROVEMENTS

Willamette River

Provide Public Viewing access for water ski club, West Linn



Upgrade Clackamette Park, Oregon City



Multiple Improvements at Willamette River Greenway



Gladstone Riverwalk



Primitive Camping Trail from Wilsonville to Milwaukie



Car Top boat portage at West Linn Paper



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



Pedestrian improvements Riverfront Park, Milwaukie





RECOMMENDATIONS: PHYSICAL IMPROVEMENTS

Upper Clackamas River

Parking and Facility Improvements at Put-Ins



Expanding Camping facilities near Timothy Lake



Expanding Camping facilities near Estacada City



Connect Milo McIver SP to Estacada City





RECOMMENDATIONS: PHYSICAL IMPROVEMENTS

Lower Clackamas River

Improve Feldhiemer
Boat Launch



Promote Mass Transit/
Bus Stop at Carver Park



Physical Improvements



LEGEND

- NAVIGATION HAZARDS**
- 18 Rock shoals: Opposite Milwaukie, left side, very dangerous reef downriver from Elk Rock Island; marked by three unlighted buoys (numbers 8, 10 and 10-A).
 - 23 Rock shoals: Right side of channel, opposite Cedar Island.
 - 27 Willamette Falls: Unpassable 41-foot-high falls; beware of shallows downriver; use locks (left side) for passage.
 - 30 Rock shoals: Multiple rocky shoals and ledges, both sides vicinity of Rock Island.



Maps are generally accurate, but do not display all navigational hazards, including impassable channels, in-water obstructions or rapids. Boaters beware: river conditions change frequently.

PRIMITIVE CAMPING RIVER TRAIL WILSONVILLE TO MILWAUKIE



Modify existing Willamette River Guide to include new primitive camping sites accessible only by boat.

Many potential locations
Helps to "Linger Longer"

“On the Map”



RECOMMENDATIONS: PUT CLACKAMAS COUNTY “ON THE MAP”

A focused and strategic media campaign to raise awareness and to make Clackamas, Willamette, and Sandy Rivers household names

- Fly Fishing Blogs**
- Sports Journals**
- Web Sites**
- Travel journals**
- Newspapers**
- Television**
- Social media campaigns**



"On the Map"

RECOMMENDATIONS:

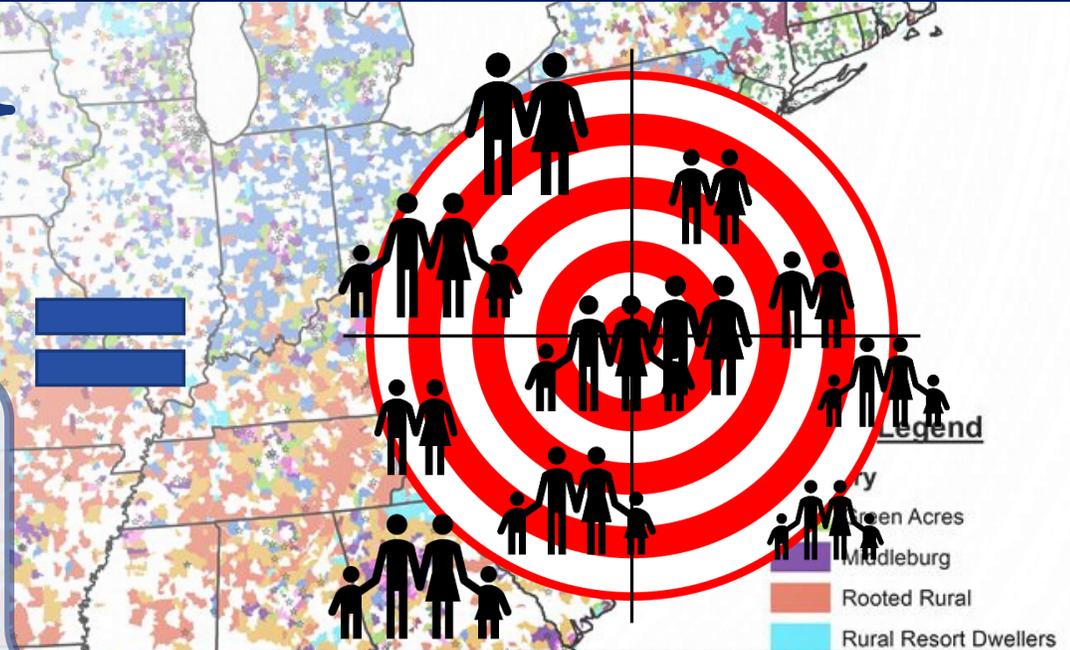
PUT CLACKAMAS COUNTY "ON THE MAP"



Empty Nester Marketing Campaign



STRATEGIC TARGET MARKETING IN HIGH POTENTIAL ZIP CODES



Family Oriented Marketing Campaign



Target: Double current annual water-based tourism overnight stays from 284K to 568k

“On the Map”



CLACKAMAS COUNTY’S UNTAPPED MARKET WHO ARE THEY AND WHERE ARE THEY?

**STRATEGIC TARGET MARKETING IN HIGH
POTENTIAL ZIP CODES**



**EMPTY NESTER
TARGET MARKETS**

Green Acres

**Rural Resort
Dwellers**

Savvy Suburbanites

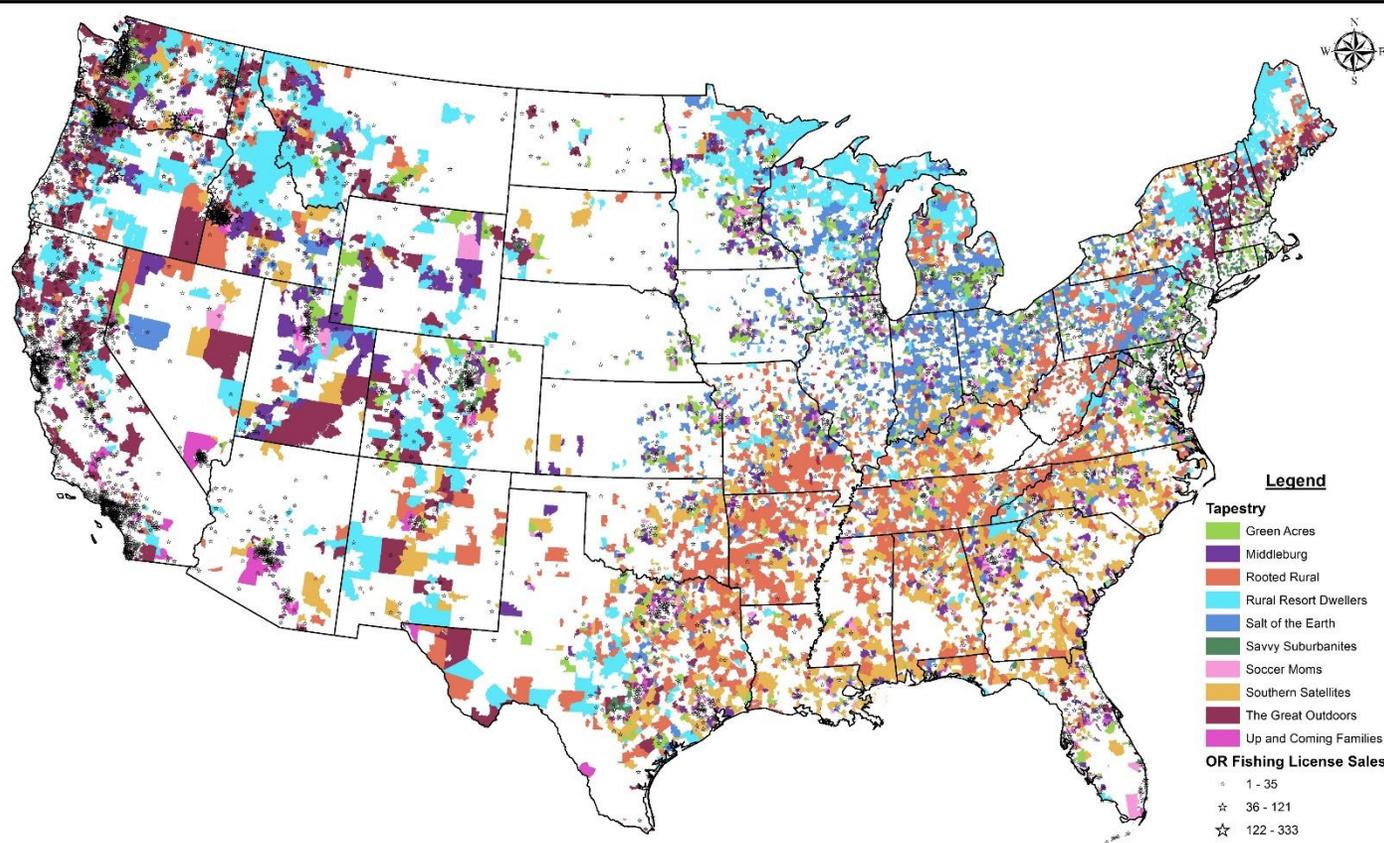


**FAMILY ORIENTED
TARGET MARKETS**

Middleburg

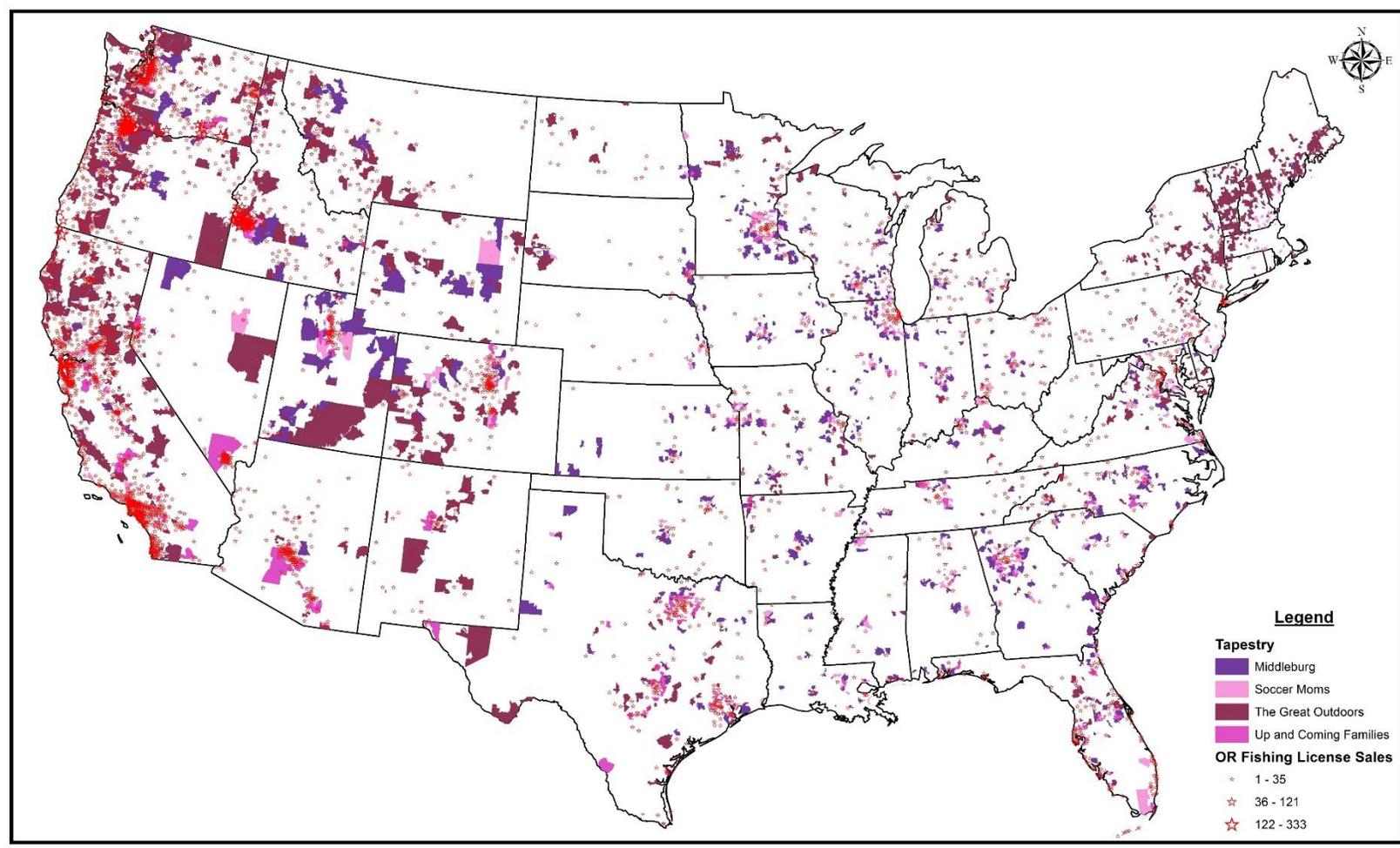
**The Great Outdoors
Up and Coming
Families**

Soccer Moms



EXAMPLE

FAMILY ORIENTED TARGET MARKET WHO ARE THEY AND WHERE ARE THEY?



Soccer Mom Families

Family Size: 2.9

Median Age: 36.3

HH Income: 84k

Rec Spend Index: 145

Homeownership 86%

Value: \$226k



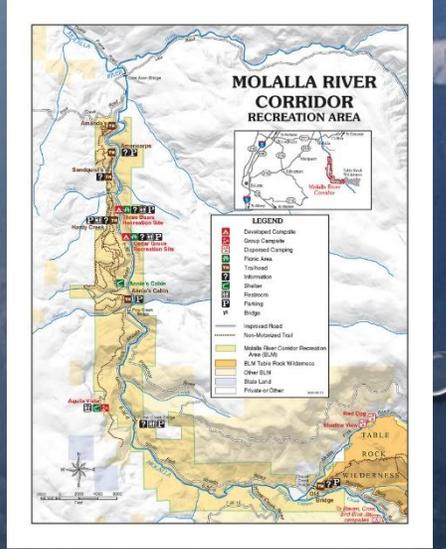
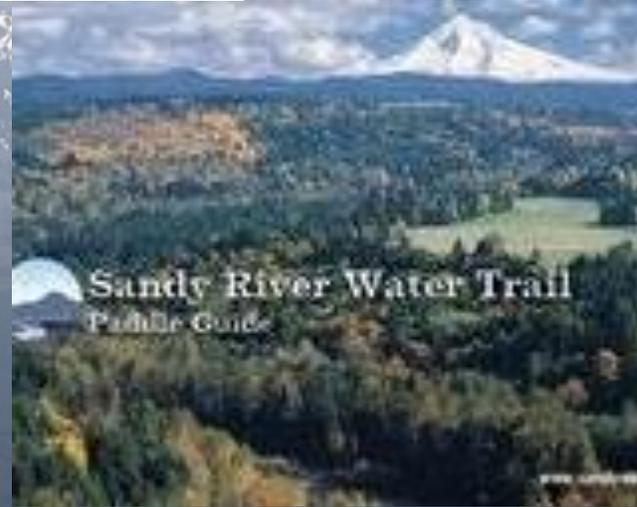
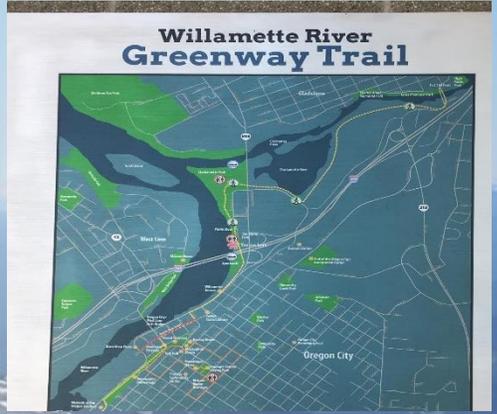
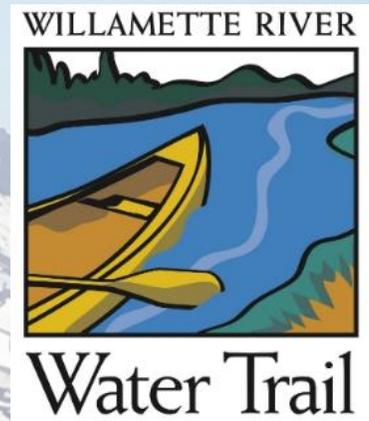
“On the Map”



RECOMMENDATIONS: PUT CLACKAMAS COUNTY “ON THE MAP”

CLACKAMAS RIVER WATER TRAIL MAP AND USER INFORMATION

- FOLLOW YOUR EXCELLENT EXAMPLES
- THESE ARE ABOVE NATIONAL STANDARDS



“On the Map”



RECOMMENDATIONS: PUT CLACKAMAS COUNTY “ON THE MAP”

GOAL: CREATE OREGON’S LARGEST RIVER CELEBRATION

Objectives:

- 1) Attract Oregonians from all corners of the State
- 2) Use the river as a means to celebrate the founding of Oregon
- 3) Celebrate the “importance” of the Willamette River to Oregon
 - Environmental Importance
 - Industrial Importance
 - Recreational Importance
 - Cultural Importance

"On the Map"



RECOMMENDATIONS FOR EVENTS

CREATE OREGON'S LARGEST RIVER CELEBRATION

Events:

Cultural Demonstration
Industrial Tours
Natural History tours
Fishing Competitions
Dragon Boat Racing
Water Ski Competitions
Music and Nightly events

Key partners

Tribal Nations
Historical Societies & Museums
Environmental Organizations
Sports Clubs
All levels of Gov't
Corporate Sponsors



"On the Map"



RECOMMENDATIONS FOR EVENTS **HOLD ANNUAL FISHING TOURNAMENTS**

Elite Fly Fishing Tournament



Bass Masters Tournament



Work with local fishing guides and shops to create unique niche in fishing tournaments.

The possibilities are endless

“On the Map”



RECOMMENDATIONS: DEVELOP FISHING PACKAGES WITH LODGING BUSINESS

Target: Empty Nester Angler Market



Marketable
Lodging/Fishing
Package

RECOMMENDATIONS:



Improving The Fishing Experience



Expand Fishing
Tour Products



Low End Tours
Less Intimidating,
Less Expensive



Family Friendly
Fishing Tours and
Packages



Promote the
Experience not
the Kill

RECOMMENDATIONS: IMPROVING THE FISHING EXPERIENCE



Create Family Friendly Fishing Tours and Packages

- **Nature History Tours**
- **Kayak / Fishing**
- **River diving**
- **Boat trips**
- **Beginner Lessons**
- **Affordable Equipment**





ATTRACTING ANGLERS TO OREGON REQUIRES KNOWING THEIR MOTIVATIONS AND OBSTACLES

WHY PEOPLE DON'T GO FISHING

1. TIME: SHIFT IN PRIORITIES ; FAMILY OBLIGATIONS ; INDOOR ELECTRONIC ACTIVITIES
2. HEALTH. AGING OF THE ANGLER POPULATION
3. FISHING EXPERIENCE: DEGRADED EXPERIENCE; LESS FISH, MORE REGULATIONS, MUNDANE

WHY PEOPLE GO FISHING

1. SPEND TIME WITH FAMILY
2. RELAX
3. IMPROVE SKILLS AND GET SOME EXERCISE



ATTRACTING ANGLERS TO OREGON

THE CHALLENGE

1. TIME: SHIFT IN PRIORITIES ; FAMILY OBLIGATIONS ; INDOOR ELECTRONIC ACTIVITIES
2. HEALTH. AGING OF THE ANGLER POPULATION
3. FISHING EXPERIENCE: DEGRADED EXPERIENCE; LESS FISH, MORE REGULATIONS, MUNDANE

THE SOLUTION

1. TELEVISION AND ELECTRIC MEDIA CAN BE USED TO ATTRACT ANGLERS PACKAGES TAILORED TO THE ENTIRE FAMILY INCLUDING WOMEN AND CHILDREN
2. INCREASE CONVENIENCE FOR FISHING; INCREASE YOUTH PARTICIPATION.(@ 5YRS OLD)
3. INNOVATING NEW AND FRESH ANGLING EXPERIENCES AND ENSURING FISHERIES MANAGEMENT IS FISHING FRIENDLY.

RECOMMENDATIONS: IMPROVING THE FISHING EXPERIENCE

Expand Fishing Tourism Choice

Nature Photography

family a fun learning experience

motivation for groups to do this will be to spend time together

basic techniques of nature photography such as framing, exposure, light, and composition

Simple equipment : cell phones or point and click cameras



RECOMMENDATIONS: IMPROVING THE FISHING EXPERIENCE



Expand Fishing Tourism Choice



River Diving
Snorkeling or Scuba

Examples:
Crystal River, FL
French Broad River, NC

An Oregon business may be the first in the Western United States

RECOMMENDATIONS: IMPROVING THE FISHING EXPERIENCE

Expand Fishing Tourism Choice

Explore Niche Markets

- Elder Hostel Seminars
- Kayak Fishing
- Mobility Impaired trips
- Inner City Youth

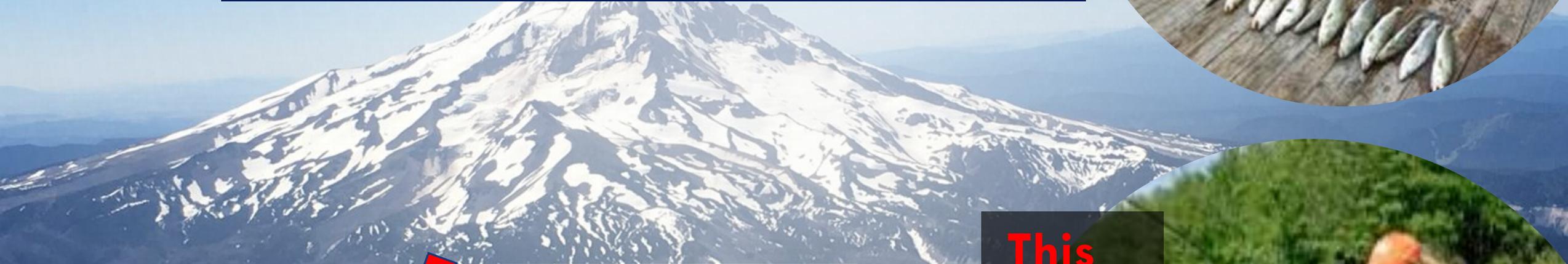


Improving the Experience



REBRAND FISHING "PROMOTE THE EXPERIENCE NOT THE KILL"

Not This



CORE MOTIVATION

- SPEND TIME WITH FAMILY
- RELAX
- IMPROVE SKILLS AND GET SOME EXERCISE



MARKETING MESSAGE



This



Improving the Experience



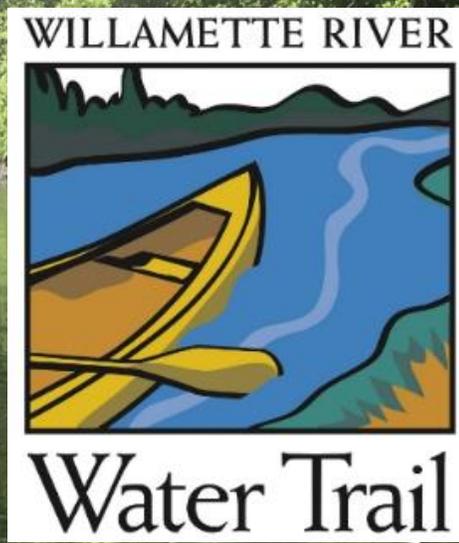
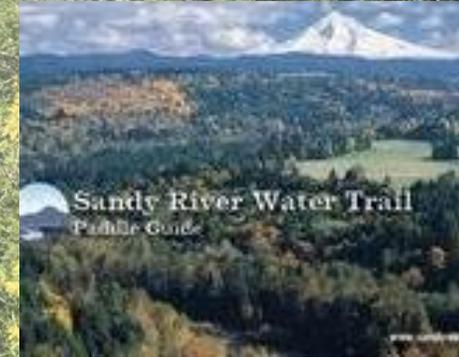
REBRAND FLATWATER PADDLING

“MOVE FROM INFORMATION TO INSPIRATION”



Maps don't make a water trail, memories do

“Information does not lead to action”



RECOMMENDATIONS FOR COMMUNITY INVOLVEMENT WATER TOURISM WORKSHOPS



**Municipalities hold the Key to
Water Tourism Promotion**

**Provide Workshop to advise
Municipalities on how to leverage
water assets for local economic
development, environmental
protection, and social good**

**Build ownership and buy in for local
water recreation improvement
projects.**



RECOMMENDATIONS FOR MUNICIPALITIES – WATER TOURISM WORKSHOPS

Community
Involvement



Initial Ideas

Estacada

Connect Downtown
Estacada with Milo
McIver SP

Expand on Upper
Clackamas River
Festival to include
town based activities

West Linn

Camping at Burnert
Landing

Willamette Falls
Strategic Plan

Oregon City

Clackamette Park

Promote the Urban
River Interface

Molalla

Find long-term
Management of River
Corridor

Expand camping
Connect town with
river

RECOMMENDATIONS FOR MUNICIPALITIES – WATER TOURISM WORKSHOPS



Initial Ideas

Sandy

Sandy River Park
Access and Day use
area

Local Business
Promotion
“Sandy@Sandy”

The Villages

New Access to Sandy
at Salmon River

River trails

Canby

Connect city with
Mollala River State
Park

Riverfront trails

Milwaukie

Urban River Interface

River Festival

RECOMMENDATIONS FOR MUNICIPALITIES – WATER TOURISM WORKSHOPS



Initial Ideas

Wilsonville

Upgrades to
Waterfront Park

Lake Oswego

Promote Riverfront
development

Gladstone

Upgrades to Dahl
Park



ORGANIZATIONAL AND INSTITUTIONAL RECOMMENDATIONS

Improve Tourism Data Collection, Information, and Analysis



Institutional &
Organizational



ORGANIZATIONAL AND INSTITUTIONAL RECOMMENDATIONS

Molalla River Management Structure





ORGANIZATIONAL AND INSTITUTIONAL RECOMMENDATIONS

Conduct Regional Competitiveness Analysis for Angling

Why is Wyoming and Idaho attracting twice as many anglers as their proportional share?

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

Institutional &
Organizational



ORGANIZATIONAL AND INSTITUTIONAL RECOMMENDATIONS

Interagency Water Resources Council for Clackamas County



Federal
River
Managers

Water-
based
Tourism in
Clackamas
County

County
Gov't

Municipal

State
Gov't

NUTSHELL

- CLACKAMAS COUNTY HAS EXCELLENT WATER-RESOURCES BUT A LARGE MAJORITY OF THE WATER RECREATION MARKET GOES ELSEWHERE
- THERE IS **NO GOOD REASON** THAT CLACKAMAS COUNTY DOESN'T HAVE MORE WATER RECREATION VISITORS
- FISHING IS KING IN OREGON, THE FUTURE OF WATER BASED RECREATION IS IN FISHING
- BEST OPPORTUNITY FOR GENERATING OUT OF STATE DOLLARS FROM WATER TOURISMS IS THROUGH FISHING THAT INCLUDES A WIDER DIVERSITY OF FISHING EXPERIENCES, APPEALING TO A WIDER MARKET
- PADDLERS AND MOTORIZED BOATERS ARE MOST VALUABLE IN GENERATING LOCAL SUPPORT AND INCREASING RECREATION QUALITY
- KEY TO INCREASING WATER-BASED TOURISM IN CLACKAMAS COUNTY IS AT:
 - **THE LOCAL LEVEL** WITH EVENTS, FESTIVALS; MORE TOURISM PRODUCTS; IMPROVING ACCESS WITH SOME INFRASTRUCTURE;
 - **COUNTY LEVEL** THROUGH NATIONAL AND REGIONAL MARKETING: PUTTING CLACKAMAS "ON THE MAP" AND MOVING FROM "INFORMATION TO INSPIRATION"
 - **STATE LEVEL** THROUGH FISHING FRIENDLY POLICIES, PLANNING AND PROMOTION

Thank you

WATER-BASED TOURISM IN CLACKAMAS COUNTY

OREGON'S
**MT. HOOD
TERRITORY**
explorers welcome

FINAL PRESENTATION

FEBRUARY 14TH 2018

CA Crane Associates, Inc.
Sustainable Economic Development

Burlington, Vermont