

About the Study

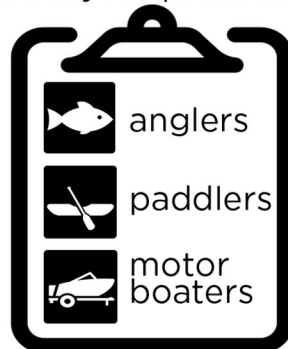
-  Comparative Research
-  Market Research
-  4 Months On-the-Ground Fieldwork
-  Strategy Sessions with Stakeholders

Survey of Water Recreators

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

1,700

Survey Respondents



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



Michael D. Crane, AICP
Founder/Principal
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Next Steps

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

For more information and to view the full report:

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Finding the Water Tourism Opportunities in Clackamas County

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



Clackamas County's Water Tourism

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

Quality Experiences






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

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

Economic Potential

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

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

1.5 mil visitors

284,000 overnight stays




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

Recommendations from the Study

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



Physical Improvements

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



Increase Campsites

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



Improve the Experience

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

Create Packages

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



Coordination of Community

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

Develop the "Urban-River Interface"

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



Put Clackamas County on the Map

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

Promote the Experience

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



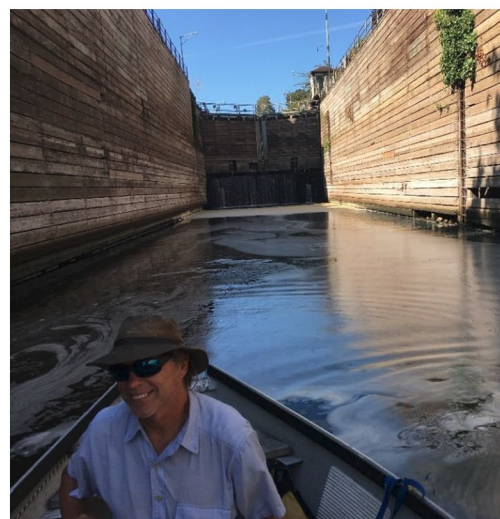
Building on a Strong Foundation

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

WILLAMETTE RIVER



Water Trail



Willamette Falls & the Locks

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